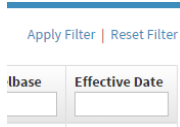


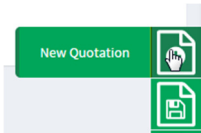
## DQMSWeb – Release Notes (29/10/15)

The following release notes apply to the latest version of DQMSWeb. All amendments below will be available on the live system from Monday 2<sup>nd</sup> November 15.

1. A new filter apply/reset options have now been added to all list pages. This allow more spacing for data columns.



2. You are now able to create a quotation direct from a customer record. This new feature can be access from the green side menu within the customer record. On selection, the system will take you in to the Deal module, open a new quotation and add the customer details to the **Register To** and **Invoice To** fields.



The system will also populate the Business Type, DLVA and Fleet number if they are available.

3. On the quotation and order form, the message “No records found” has been amended to “No PX Vehicles”

4. The contact detail box on the quotation has been amended to better reflect the fields within the container.



5. All header boxes have now been shaded and the font size increase to make each section clearer to read.

Discounts	
Discounts	Value £
Dealer Support	1,797.25
<b>Total discounts</b>	<b>1,797.25</b>

Quotation Comments	
FORDLEASE Q/No 5663196	

Financial Summary			
Sub-Total (inc. discount)	15,903.28	PX Settlement	

6. Wheelbase has now been added to the quotation and order form. This can be found next to Roof Height. Wheelbase has also been added to Step 2 in the vehicle section.

7. The order form has been amended to include Payments due. This will appear next to discounts.

Discounts		Retail £	Payments Due		Retail £
Discount 1	<input type="checkbox"/>	1,500.00	Payment 1	<input type="checkbox"/>	500.00
Discount 2	<input checked="" type="checkbox"/>	1,200.00	Payment 2	<input type="checkbox"/>	250.00
<b>Total discounts</b>		<b>2,700.00</b>	<b>Total Payments</b>		<b>750.00</b>

8. The quotation footer has been adjusted to include the original print date, current print date and Ref:<value>. The Ref will show the estimated net margin on a vehicle as a non-decimalised number.

As an example, if the quotation shows a net margin of £451.45 this Ref value would print as Ref: 45145.

9. The Disc % field has been removed from the FFO screen as it was not required.

10. The calculation model applied to the discounts and payments has been amended. The system will now allow you to apply a discount calculation to any of the six discount or payment lines.

Discounts	Values £
Discount 1 <input type="checkbox"/>	1,500.00
Discount 2 <input checked="" type="checkbox"/>	1,200.00
<input type="checkbox"/>	

If a value is entered in the value box and the calculated by % box is ticked, then, on leaving the value field, DQMSWeb will take the discount value entered and replace with the percentage of the retail vehicle value.

As an example, if the vehicle retail value is £8200.80 and the user enters 2.5 in the value field, on leaving the field, DQMSWeb will replace the 2.5 with £205.02.

11. Construction of the new customer events module has now been started. Over the next couple of weeks, this particular part of the system will see the most change together with the DQMSWeb dashboard.

**Add Contact Event** ✕

<p><b>Contact</b></p> <p>Select Contact <input type="text"/></p> <p><b>Smart Event</b></p> <p><input type="checkbox"/></p> <p><b>Event Date/Time</b></p> <p>30/10/2015 15:47 PM</p> <p><b>Created By</b></p> <p>KJLAdmin</p>	<p><b>Event Type</b></p> <p>Select Event Type <input type="text"/></p> <p><b>Description</b></p> <p><input type="text"/></p> <p><b>Follow up Required</b></p> <p><input type="checkbox"/></p>
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When adding a new contact event, DQMS will prompt the user to complete the following field entries:

- **Contact** – This will be the customer associated contact. A contact record must exist to complete the contact event. If the contact has not been setup, this will need to be administered first under the contacts tab.
- **Event Type** – Defines the type of event. i.e. Telephone call.
- **Smart Event** – This is still in development. When completed, this will allow the user to dial direct from DQMSWeb (subject to phone system), send e-mails and SMS messages through DQMSWeb.
- **Description** – Details of the event that is taking place at this point in time. i.e. “Phone call to customer to discuss current fleet requirements”
- **Event Date/Time** – Date and time of event. Depending on user permissions, this date/time can be manually entered by the user but only up to 24 hours prior to the current date/time.
- **Created By** – User ID of the person creating the event record. Depending on permissions, the value can be amended to other team members.
- **Follow up Required** – If the current event requires a follow up event, the slider should be set to green. This will invoke another section below the current event.

Followup Event

<b>FollowUp Date/Time</b> <input type="text" value="30/10/2015"/>	<b>Contact</b> <input type="text" value="Select Contact"/>
<b>Follow up by</b> <input type="text" value="KJLAdmin"/>	<b>Follow up Action</b> <input type="text"/>
<b>Event Type</b> <input type="text" value="E-mail Sent"/>	

- **Follow up Date** – Set as the preferred future date to make contact with the customer.
- **Follow up By** – User ID of the person creating the event record. Depending on permissions, the value can be amended to other team members.
- **Event Type** - Defines the type of follow up event. i.e. e-mail.
- **Contact** – The person to whom contact should be made with. This will only allow contacts associated with the customer record.
- **Follow up Action** – The purpose of the follow up action. i.e. “e-mail details on latest transit custom.”

If a follow up event is applied, the event will be added to the Dashboard of the user defined under Follow up By.

Finally, the post code look up feature for DQMSWeb is now fully active. A log of post code lookups is registered against the company account.

If you experience any operational issues with this latest release, please e-mail as much detail as possible with screen shots (if applicable) to [support@kjltd.co.uk](mailto:support@kjltd.co.uk). If the issue is of an urgent nature, call the support team on 01268 627111.

The DQMSWeb Team