AUTOMATE2 VERSION 1.5.0

RELEASE LETTER

NEW FEATURES AND ENHANCEMENTS

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OF THE 1.5.0 RELEASE

INTRODUCTION

The 1.5.0 release of AutoMate2 was designed to introduce two new major features to the product.

- The ability to handle multiple rates on contracts

- Insurance Replacement rentals

In addition to these features the release also includes the following:

- Fleet Transaction Inquiry

- Parking Ticket Lookup

- Violation Letter merge with Microsoft Word

- Due Back Inquiry

- Reservation Inquiry

- Upsell on Reservations/Contracts

- Rate Blocking

- Rate Shop Feature

- Period Rates

- Advanced Booking Requirement

- Pick-up and Drop-off day support

- Enhanced Corporate Rentals

- New Check-In Screen

- Enhanced Browsers

- Upgrade Tracking

- Direct Bill Aging Report

The inventory class code screen has been changed to accommodate under-age driver, maximum age driver and minimum age driver prompts. Also included are selections for alternate/upgrade classes. These fields work in the following manner:

- Minimum age driver – The system will warn the CSR if the driver's age is less than the minimum age specified for the car class being rented.

- Maximum age driver – The system will warn the CSR if the driver's age exceeds the maximum age specified for the car class being rented.

- Under age driver – The system will warn the CSR if the driver's age is less than the under age specified for the car class being rented.

- Alternate/upgrade classes – Up to four possible upgrades can be entered for each car class. The lowest available rate for each class entered here will be offered as an upgrade option during the rental process by activating the rate shop feature.

TIME & MILEAGE RATES

New Features on the General Screen:

- Available – The rate will be available to CSRs subject to restrictions

- Unavailable – The rate will be unavailable to CSRs until made available

- Restricted – The rate will not be available using the rate shop feature

- Period Rate – One flat dollar amount for a specified number of days e.g. $160.00

- Period F/Mi – Number of free miles allowed for the period e.g. 400

- Period/Days – Number of days the rate covers e.g. 4

Note: Once the period is exceeded the regular daily rate will be charged

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New Features on the Requirements Screen:

- Booking Start/End Dates – Rate can only be applied to reservations made between these dates

- Departure Start/End Dates – The vehicle must be picked up sometime between these dates

- Free minutes – Amount of overtime that will not be charged for

- Grace minutes – Amount of time allowed before overtime is calculated

- Rate Plan – If used, the rate will only be available to CSRs if they enter a matching rate plan number

- Drop Zone – Rate is only available to drop at locations with an equal or lower drop zone number

- Minimum Advanced Hours – Number of hours prior to pick-up that the reservation must be made to qualify for rate

New features on the restrictions screen:

- Restricted Rate – Check if the rate has time restrictions e.g. min/max # of days

- Min/Max Rental Days – Used to enter the minimum and maximum # of days for this rate

- Max Restricted – If checked, it will charge the fallback rate for the entire rental if renter exceeds maximum # of days

- Day of Week Requirements – Check each valid pick-up day and return day for this rate. Restricts rate from CSRs if pick-up day is not valid

- Fallback Rate – This is the rate that will be charged if the renter violates the restrictions on this rate

New features on the Miscellaneous Screen:

■   Browse Window – The new browse window allows the user to add an unlimited
     number of miscellaneous charges to the rate. Any miscellaneous charges added here
     will be included in the T&M daily rate charge. This feature is intended for setting up
     package rates

INSURANCE REPLACEMENT

Customer Information - Contract Modify

RA#: 900009   Res Number:

Last Name: JONES   First Name: PHIL

Address: 1902 LINCOLN DRIVE

City: STEWARTSVILLE   St: NJ   Zip: 07054   Country: USA

Phone: (908) 555-1212   Soc Sec Number: 123-45-6789

DL#: J92743921347   St: NJ   Exp: 01/25/98   DOB: 01/25/54

Ins Co: Allstate   Policy#: 1234567   Ins. Repl.

Corp Cust: PO Number:

Employer: BLUEBIRD AUTO RENTAL SYSTEMS   Phone: (201) 984-1014   Ext: 2600   More

Local Address: HILTON PARSIPPANY   Phone: (201) 984-6607

Add Drvr   Sales   Notes   Update   Cancel

Enter data or press ESC to end.

- A new Insurance Replacement button has been added to the customer information screen in both reservations and check-out. This is where the renter's insurance claim information is entered

- The "More" button next to the customer name fields has been removed and the renter's social security # added to the main customer screen

8

- The top section of the new screen captures the renter's own vehicle information. The body shop field has an automatic lookup feature (double click or F3 function key) to allow the user to select a record from the corporate customer file. The corporate customer file has been expanded to accommodate insurance companies and body shops as well as corporate accounts. If the record is not on file, the user can create one on the fly by clicking on the "Create" button provided. After entering the details the user is returned to the insurance replacement screen. This same feature applies to the Renter's Insurance Co and Bill To fields

- The middle section refers to the renter's own insurance policy. It captures the renter's insurance company, policy #, expiration date, insurance agent's name and number and who verified the coverage. There are prompts for liability, comprehensive and collision coverage and a flag to indicate if this coverage is transferable to the rental vehicle. The amount of coverage and the renter's deductible can be entered and the renter identified as a claimant or an insured

- The bottom section contains the billing information. A total of four different bill-to customers can be added for each rental. The approved rate and number of days can be entered. These are used for billing purposes at the close of the rental. The system will automatically generate direct bills for each bill to record entered

- The insurance replacement screen has a button on the bottom of it that allows for the entry of pick-up or delivery information

- This information can be viewed by printing the reservation report from the Counter Reports menu. The user has the option to print all open reservations within a specified date range or delivery and pick-up details only

- The Inventory Transaction inquiry screen has been added in the 1.5.0 release. It is used to inquire on vehicle transactions since a specified date

- A user enters a unit # and the start date for the search then clicks the find button

- Vehicle details are displayed above the browse window

- The browse window displays the date/time and location out and in and the rental agreement number

- From this screen the user can access the highlighted contract record, the associated inventory record or the vehicle notes by utilizing the buttons on the bottom of the screen

- Fleet transaction inquiry by date/time/license is used to track parking violations

- From the ticket, type in the date and time the offense occurred and the license plate of the vehicle. Click on the find button and the relevant data will be displayed

- From the buttons at the bottom of the screen the user can access the contract, the inventory record or the renter's information

- The export violation button allows the renter information and ticket number to be exported to a file that can then be used with Microsoft's mail merge feature in Word to prepare and print form letters

Violation Export

Violation Number: 28740912

Date of Violation: 08/15/97

Time of Violation: 10.05

Violation City: Morristown

Amount of Fine: 60.00

○ Clear the output file
● Add to output file

[OK]   [Cancel]

- This is an example of the export violation screen from fleet transaction by date/time/license inquiry program

Mail Merge Helper

Use this checklist to set up a mail merge. Begin by choosing the Create button.

1. Main document
   [Create ▾]

2. Data source
   [Get Data ▾]

3. Merge the data with the document
   [Merge...]

[Cancel]

- The data is then merged with a source document in Microsoft Word

13

- Reservation inquiry can be used to show reservations by location within a specified date range

- The user can select the reservation status and the vehicle class code desired

- Once the prompts at the top of the screen are completed the user clicks on find to display records based on the search criteria

- The records are displayed in pick-up date and time order

- There are two buttons on the bottom of the screen that will allow direct access to either the reservation or the renter details from the inquiry screen

DUE BACK INQUIRY

- The due back inquiry allows the user to view vehicles that are due back by location within a specified date range

- Specific vehicle classes can be selected for the search criteria

- Records are sorted in due back date and time order

- Direct access to the contract record or the renter's details is provided by the buttons on the bottom of the screen

INSURANCE REPLACEMENT EXTENSION INQUIRY

Extension Inquiry

Location: [TEST ▼] Start Date: [08/01/97] End Date: [08/28/97]

Sort By: ⦿ Adjuster
○ Body Shop   [Find]   [Exit]
○ Renter

RA #	Last Name	Date Due	Time	Adjuster	Body Shop
900013	JONES	08/21/97	8.17	CHRIS TWOOMEY	U-Rekum Auto Body
900014	Bouscaren	08/25/97	8.21	JOE BLOW	MIKES A/B1111

Go To: [Ins. Repl.]   [Contract]   [Renter]

Enter data or press ESC to end.

- The extension inquiry screen displays records whose authorizations expire within the date range specified

- Alternate sort by adjuster, body shop or renter is provided

- Direct access to the insurance replacement screen, contract or renter's details is provided by the buttons on the bottom of the screen

- An extension report has been added to the system to supplement this inquiry screen

UPGRADES

16

Sale Information - Check Out

RA#:	Status: Pending	Reserved Class:
Loc Out: TEST	Date: 08/28/97	Time: 15.13
Due Loc: TEST	Date: 09/01/97	Time: 15.13
Product: VEHICLES	Class: COMP	Unit#: 1020 Odom: 2,000
☐ Full Tank Option	Fuel Charge: .00	Fuel Level: 8 / 8ths
Rented As: COMP	Rate Plan:	
Rate Code: REG	REGULAR RATE	☐ Period Rate

	Hourly	Daily	Weekly	Extra/Day	Monthly	Chg/Mile
Rate:	12.00	32.95	197.70	32.95	790.80	0.25
Free Miles:	0	100	700	100	1,500	

☐ CDW   ☐ SLI   ☐ PAC   ☐ PEC   Upgrade: 5.00   Disc%: 0.0

Src Code:	Referral:	Agent:
Pay Type:	CC#:	Exp:
Amount: .00	☐ Paid Deposit Auth#:	More

Rules Options

Charges   Cust   Notes   Update   Cancel

Enter data or press ESC to end.

- A field has been added to the rental sales screen to enter upgrade amounts

- The amount entered in this field will be charged for each day the customer has the car

- To use this feature a new record must be added to the miscellaneous charges file and flagged as an upgrade type code. The charge type should be set to every 24 hours

- A column has been added to the rental agent productivity report to track this data

- The new rate shop feature is embedded in both the reservation and the check-out program

- The screen automatically presents the CSR with all the available rates for the car class chosen based on the rate requirements and restrictions

- If the rate shop feature is checked, the system will offer the lowest three rates available for the car class chosen plus up to four alternate upgrades based on the upgrade path defined in the inventory class file maintenance program

- The rules for any rate can be viewed from the button provided

- The highlighted columns show the dollar difference per day and for the length of rental between the selected rate and all the other rates on the screen

NEW CHARGES SCREEN

AutoMate2 Contract Processing

RA Number: 900013   Status: Open Contract   Class Reserved:

Unit#: 04   License#: Temp

Loc Out: TEST   Date: 08/15/97   Time: 8.17   Odom: 30   8 / 8ths

Loc In: TEST   Date: 08/28/97   Time: 15.33   Odom: 150   5 / 8ths

Days Inc: 0   Miles Inc: 0   Free Miles: 1,400   Miles Driven: 120

| Charge	# Chgd	Rate	Amount
Rate 1 Days	14	15.00	210.00
Discount		0.0	0.00
NET T&M			210.00
FLORIDA STATE SURCHARGE Days	14	4.00	56.00
SALES TAX 1		6.000	12.60
SALES TAX 2		5.000	10.50
TOTAL CHARGES			289.10
Total Deposits			0.00
Total Payments			90.00
BALANCE DUE		---->	199.10
	0.	0.00	0.00

Payments   Recalc   Rules   Options

Sales   Cust   Notes   Update   Cancel

free days included

- The charges screen has been re-designed to accommodate more data on one screen

- Each charge is shown as a separate line item within the browse window

- Optional charges and taxes are edited via the Options screen

- Time & Mileage charges can be edited by double clicking on the item. It will then be moved to the editable area at the bottom of the browse where it can be changed

- The system will allow the user to enter a flat amount of discount now
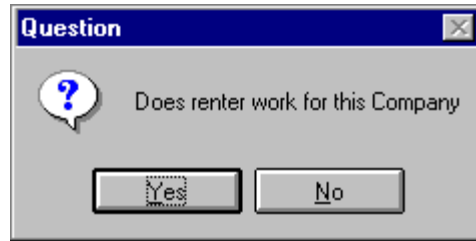
- When a CSR opens a rental they must first choose a corporate customer from the pull down combo-box to utilize the new feature. They will be presented with the above prompt

- If they answer yes, the system will search the renter file for any record that has the company selected defined as the employer
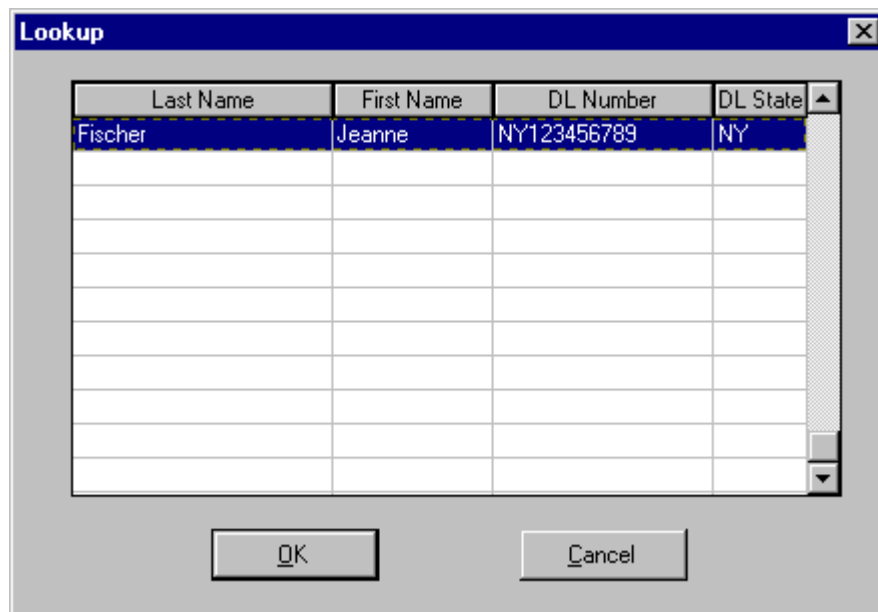
- A browse window with a list of matching renter records will be presented to the CSR. Select the driver record from the browse window and the details will be transferred to the contract

- This will greatly speed up the rental process for corporate customers

The programming staff at Bluebird Auto Rental Systems have worked hard to provide many new features in the 1.5.0 release. We hope you enjoy using it.