

The logo for 'units' features the word in a bold, italicized, black sans-serif font. A curved orange line arches over the top of the letters. A registered trademark symbol (®) is positioned at the top right of the word.

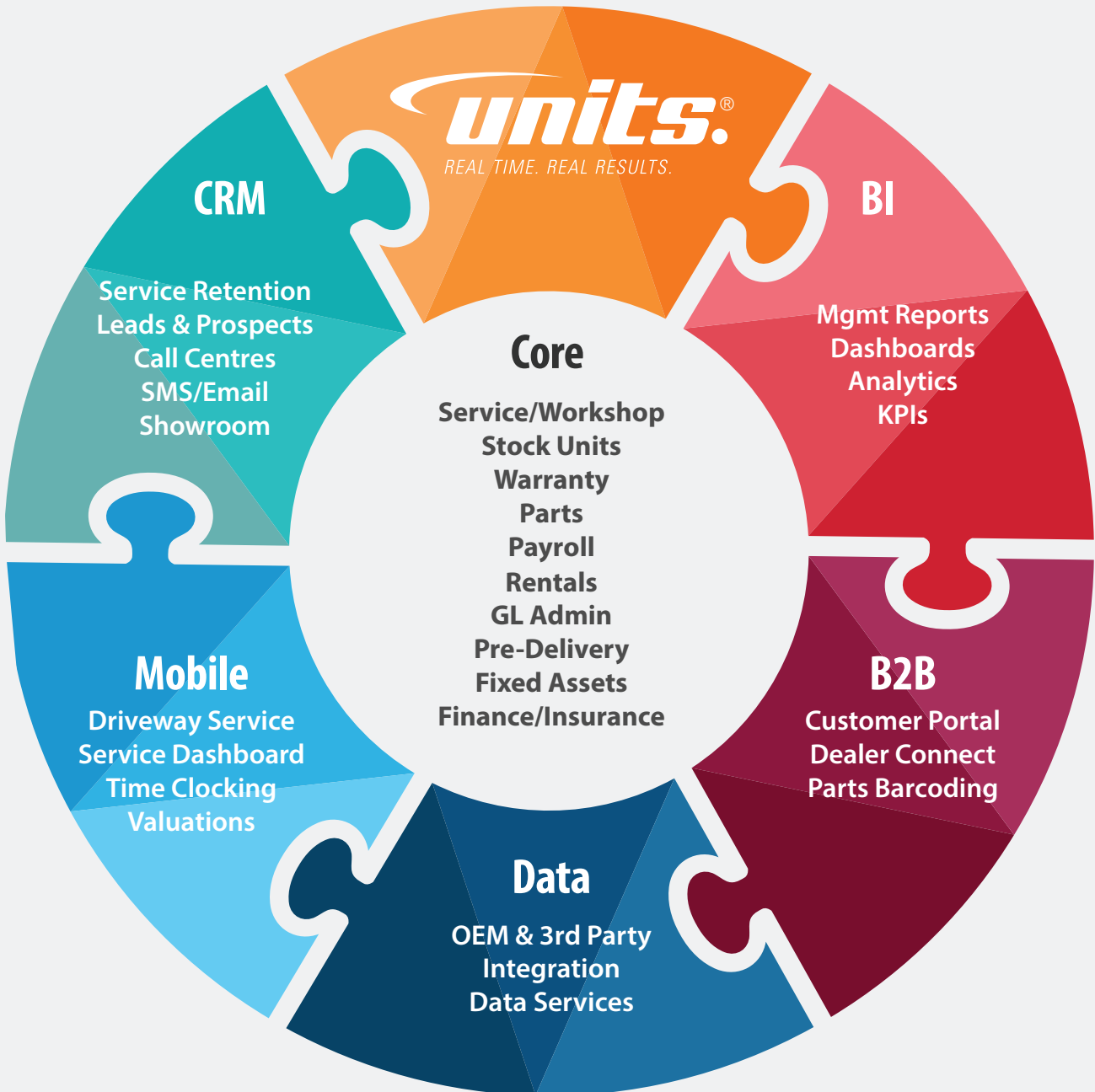
REAL TIME. REAL RESULTS.



Modules in Detail

The UNITS® Dealer Management System

UNITS® is a modern real-time dealer management system that incorporates 'world's best practice' on a Microsoft® Open Server Windows platform. In one comprehensive tool, your business can access a huge range of features with advanced capabilities.



Business Intelligence

Whether through UNITS® Reports or via Dealer Spectrum Dashboard, our real-time BI keeps you on top of your business.

Dealer Spectrum

Dealer Spectrum delivers customised reports in a browser covering UNITS® reports plus:

- KPI reporting
- Trend reporting
- Exception reporting
- 48-hr report-writing service
- Customised presentation
- Flowcharts & process maps
- Alignment to best practice
- Contact de-dupe service

Executive Centre

Financial Summary

- Company
- Branch
- Department
- Export To MS Excel
- Benchmarks

Cash Position

Payroll

Customer Anatomy

Debtor & Creditor

- Debtors
- Stock Unit Debtor
- Creditors

Stock Units

- Vehicle Aging
- Stock Units
- By Sales Person
- By Sold Units Detail
- By Units in Stock Detail
- By Units on Floorplan
- Rentals

Parts

- Parts Department
- Stock Analysis

Workshop

- Overview
- Technician Hours
- Warranty



Cash Management

Reconcile & processes all payments.

Processing

- *Debtor Receipt Entry*
- *Bank Location Transfer*
- *Bank Statement Processing*
- *Cancelled Cheque Entry*
- *Dishonoured Deposit Entry*

Reports

- *Debtor Bank Deposit List*
- *Bank account Reconciliation*
- *Bank Transactions Listing*

Maintenance

- *Bank Location Maintenance*
- *Bank Transaction*



Creditors

Process and pay your creditors through the Creditors module.

Maintenance

- *Creditor Maintenance*
- *Purchase Order Notes*
- *Sublet Purchase Order Number Enquiry*

Processing

- *Creditor Invoice Entry*
- *Creditor Sundry Invoice Entry – (Multiple GST)*
- *Purchase Order Entry – G/L*
- *Sundry Purchase Order Entry*
- *Sundry Purchase Order Maintenance*
- *Non Creditor Payments / Cheques*
- *Cheque Print*
- *Creditor Journal Entry*
- *Creditor Transaction Transfer*

Creditor Payment Processing

- *Creditor Cash Requirement Report*
- *Automatic Payment Release*
- *Release Adjustment*
- *Direct Bank Transfer*
- *Creditor remittance Distribution*
- *Manual Cheque Entry*

Reports

- *Ageing*
- *Cheque Register*
- *Creditor Purchase Control Listing*
- *Creditor Purchase Order Variance Report*
- *Creditor Listing*
- *Cash Requirements Forecast*

Utilities

- *Creditor Merge*
- *Creditor Year End Process*

Debtors

Manage all aspects of your debtors from creation to invoicing and follow-up.

Maintenance Processing

- *Debtor Journal Entry*
- *Sundry Invoicing*
- *Transfer Debtor Transaction*
- *Rental Invoice Entry*
- *Rental invoice Update*
- *Standing Journal Entry*
- *Standing Journal Update*
- *Debtor Bulk Journal Entry*
- *Debtor Sundry Invoicing*
- *Finance Charges List*

Reports

- *Statement Print*
- *Statement List As At*

- *Transaction Listing*
- *Trial Balance*
- *Aged Balance*
- *Debtor Listing*

Utilities

- *Restore Debtor Master From Transactions*
- *Archived Transactions Purge*
- *Month End Process*
- *Capricorn Invoice and Credit Note Extract*
- *Credit Override Administration*
- *Debtor Merge*



Finance & Insurance

Manage your F&I details within UNITS® and/or integrate with 3rd-party solutions.

- *Finance and Insurance Maintenance*
- *Finance and Insurance Integration*
- *Finance Commission Invoice Entry*
- *Finance Commission Reconciliation*
- *Integration to 3rd party Finance Products (E.g. Finance Accelerator, AMS Fusion, DealerCell, etc.)*

Fixed Assets

Run your fixed assets internally in UNITS® with the Fixed Assets module.

Maintenance

- *Consolidate Assets*
- *Depreciation Table Maintenance*
- *Rental Maintenance*
- *Split Asset*

Processing

- *Item Sale*
- *Asset Revaluation*
- *Item Purchase*
- *Month End Process*
- *Stocktake Entry*
- *Transfer Item Between Stock Units and Fixed Asset*

Reports

- *Audit Stock Take*
- *Depreciation Schedule*
- *Fixed Assets HP Commitment Report*
- *Insurance Due*
- *Investment Analysis*
- *Lease Expiry Report*
- *Master List*
- *Monthly Rental Invoices*
- *Service Due Report*
- *Stocktake List*
- *Transaction Listing*

Utilities

- *Load Fixed Assets Starting Balances*
- *Rebuild Master from Transactions*
- *Transaction Maintenance*

General Ledger

Maintenance

- *GL Account Maintenance*
- *Company Maintenance*
- *Branch and Dept Maintenance*
- *Budget Maintenance*
- *Copy Accounts*
- *Employer Maintenance*
- *Sundry Code*

Processing

- *GL Journal Update*
- *Standing Journal Entry*

Utilities

- *GL Rebuild*
- *Year End Reset*
- *Export GL Trial Balance To MS Excel*
- *General Ledger Account Merge Utility*

Factory Reporting

- *Financial Report Maintenance*
- *Financial Report Update*

Reports

- *Trial Balance*
- *Balance Sheet*
- *Gross Profit Analysis*
- *Batch Control Listing*
- *Account Scheduling Report*
- *Daily Audit*
- *Weekly Performance*
- *Performance*
- *Performance Analysis*
- *Posting Enquiry*
- *Posting Enquiry Report*
- *Transaction Listing*
- *BAS Audit*
- *Business Activity Statement*
- *Company Chart Of Accounts*
- *General Ledger Reconciliation Report*
- *GL Balance sheet by Branch*
- *GL Departmental Performance Report*
- *GL Multiple Account Scheduling Listing*
- *Monthly Profit & Loss by Department*

Payroll

Single Touch compliant. Interfaces with other payroll systems like Unipay.

Maintenance

- *Employee Maintenance*
- *Employer Maintenance*
- *Payroll Tax Maintenance*
- *Payroll Transaction Codes Maintenance*
- *Tax Calculator*
- *Tax Rate Maintenance*

Processing

- *Payroll Standing Transaction Maintenance*
- *Pay run Validation Report*
- *Payroll Run*
- *Pay Advices and Pay Envelopes*
- *Direct Banking*
- *Commission and Sundry Payments*

Reports

- *Accrual Evaluation Report*
- *Employee Payroll Detail Listing*
- *Pay history Enquiry*
- *Pay history Report*
- *Payment Summary*
- *Payment Summary Reconciliation Report*
- *Payroll Schedule by Code*
- *Payroll Summary by Month*
- *Payroll Tax Report*
- *Payroll Transaction List*
- *Summary Reconciliation Report*

Utilities

- *Payroll Transaction Import*
- *Payroll Year End Reset*



Service

Everything a busy service department requires, including warranty processing, mobile applications and call centre management.

Service Resource Booking

Maintenance

- *Workshop Vehicle Maintenance*
- *Diary Maintenance*
- *Technician Maintenance*
- *Job Code Maintenance*
- *Job Code Review*
- *Recall Campaign*
- *Service Department Schedule*
- *Purchase Order Number Enquiry*
- *Service Schedule Maintenance*
- *Super Service Code Import – Dealer*

Processing

- *Repair Order Entry*
- *Repair Order Invoicing*
- *Technician Time Recording*
- *Service Credit Note*
- *Service Invoice Reversal*
- *Create RO from Vehicle Quotation*
- *Schedule Labour*
- *Technician Attendance Log*
- *Workshop Daily Time Sheet Input*

Service Reports

- *Workshop Daily Profit Control Report*
- *Outstanding Repair Orders*
- *Repair Order Batch Print*
- *Technician Performance*
- *Sales Summary*
- *Sub-let Profitability*
- *Service Reminder*
- *Job Code Listing*
- *Delay on Job Codes Report*
- *Labour Work in Progress Listing*
- *Productivity Attendance and Efficiency*
- *Scheduled Labour report*
- *Service Advisor Report*
- *Service Job Code Sales Report*
- *Service Recommendation Invoice Report*

Utilities

- *Technician Input/Maintenance*

Loan Cars

- *Loan Car Booking and Allocation*
- *Loan Car Fleet Maintenance*

Warranty

- *Warranty Claims Processing*
- *Reports*
 - » *Warranty Control Status*
 - » *Warranty Received*

Service Dashboard

- *Workshop Loading Control*
- *Tech Attendance View*
- *Loan Car View*
- *Job Type Control*
- *Bay allocation*
- *Technician Attendance*
- *View by Location, Team, Date*
- *Service type*
- *Booked jobs*

OPTIONAL MODULES

Call Centre Manager

- *Generate Service Reminder*
- *Allocate Calls*
- *Record Bookings*
- *Manage privacy settings automatically with opt out*
- *Confirmations updated automatically*
- *Reschedule by email to the dealership (next stage is online web portal)*
- *Update driver/owner data*
- *Measure Productivity*

Technician Mobile Clocking

- *Android, Apple & HTML5*
- *Attendance*
- *Job Clocking*
- *GPS stamp*
- *Supervisor Menu*

Driveway Express

- *Customer Details Update*
- *Image capture*
- *Sign on glass*
- *Upsell*
- *Apple or Android*

Parts

Everything required to order, sell and transfer parts.



Maintenance

- *Stock Item Maintenance*
- *Stock Adjustments and Transfers*
- *Manufacturer Maintenance*
- *Bulk Bin Transfer*
- *Assembly Process*
- *Supersession Maintenance*
- *Alternate Sort Key*
- *Bin Location Transfer*
- *Stocktake Maintenance*

Sales

- *Sales Order and Invoicing*
- *Service Parts Issues Entry*
- *Internal Parts Sale to Vehicle*
- *Credit Note Entry*
- *Serial Number Enquiry*
- *Inter-branch Transfer*

Purchasing

- *Purchase Order Maintenance*
- *Generate Purchase Orders*

- *Stock Item and Order Receipt Entry*
- *Purchase Return Entry*
- *Foreign Order Receipts Entry*

Reports

- *Parts Invoice Register*
- *Stock Status Management*
- *Aged Stock Valuation*
- *Adjustments and Transfers Audit*
- *Dead and Risk Stock Assessment*
- *Customer Sales Summary by Franchise*
- *ABC Ranking Report and Update*
- *Barcode Label Print*
- *Customer Sales Trend Report*
- *Fill Rate and Ran Out*
- *Inter-branch Transfer Outstanding Report*
- *Lost Sales*
- *Outstanding Customer Orders Report*
- *Outstanding Purchase Order*
- *Part Sales Analysis Report*

- *Picking Slip*
- *Purchase Receipts Report*
- *Special Pricing Listing*
- *Status Reclassification*
- *Stock Excess and Shortage*
- *Stock Status Management as at Report*
- *Stock Valuation by Branch*

Manufacturing

- *Parts Manufacturing Process*
- *Part Manufacturing Repair Order Invoicing*

Pricing

- *Price Review Utility*
- *Special Price*
- *Franchise Rules Maintenance*
- *Generic Parts Price Update*
- *Parts Price Level Maintenance*
- *Parts Price Level Value Update*
- *Price Update from Staging*

Utilities

- *Group Stock Item Maintenance*
- *Parts Deletion Utility*
- *Parts Merge Utility*
- *Parts Right Down Utility*
- *Rebuild Parts Master from Transaction*

Stocktake

- *Stocktake Maintenance*

Suggested Reordering

- *Suggested Reorder – Creation*
- *Suggested Reorder Maintenance*

- *Activity Code Maintenance*
- *Multistore Processing*
- *Status Reclassification*
- *Suggested Reorder Report*
- *Suggested Reorder Report Format Maintenance*

OPTIONAL MODULES

Barcoding

- *Receipting of inventory*
- *Allocation to customer order*
- *Allocation to workshop order*
- *Bin location*
- *Parts listing*
- *Bin changes*
- *Stocktakes*

Customer Portal

- *Accounts*
- *Vehicles*
- *Parts*
- *Marketing*
- *Service*

Dealer Connect

- *Vehicle Ordering*
- *Visibility of Vehicle Inventory*
- *Visibility of Parts Inventory*
- *Parts ordering*
- *Warranty claims*



Showroom

Nurture leads through the road-to-a-sale and create contacts.

Reception Call Manager

Sales Desk

Salespersons Task List

Test Drive

Prospect Maintenance

Customer Anatomy

Stock Unit Status Enquiry

Reports

- » *Salesperson Budget/Profit Report*
- » *Marketing Activity Integrity Report*
- » *Marketing Campaign Analysis*
- » *Sales Prospect Activity Report*
- » *Prospect Summary Report*
- » *Salesperson summary Report*

» *Vehicle Sales Delivery Report*

» *Salesperson Commission Report*

» *Road To A Sale Report*

Classification Maintenance

Create RO from Vehicle Order

My Deal

Showroom Customer Delivery Management

Vehicle Appraisal

View Noticeboard

OPTIONAL MODULE

UNITS Web Lead Management



Marketing

Foster engagement with your prospects and existing customers.



Maintenance

- Prospect Maintenance
- Program and Event
- Classification
- RTF Editor
- Prospect Locator

Transactions

- Run Marketing Program
- Ad Hoc Marketing Extraction

Reports

- Salespersons Task List
- Follow Up Viewer
- Marketing Activity Integrity Analysis
- Prospect Summary Report
- Sales Prospect Activity Report

Utilities

- Import RTF Data Source Definition
- Marketing History

CRM

- Call Processing
- Maintenance
 - » Call Enquiry

- » Follow Up Maintenance
- » Program Maintenance
- » Responsibility Maintenance
- Report
 - » CSI Graph
 - » CSI Trend Report
 - » Follow Up Report
 - » Program Analysis
 - » Responsibility Analysis

OPTIONAL MODULE

Engage

- Targeted marketing
- SMS / email / letter / tasklist
- All departments
- Customisable
- HTML email
- CCM Integration
- Data Extract
- Monitor results with DS Dashboard

Contacts

Contact Maintenance
Change Contact Case

Contact Account Class Update
Contact Doc Distrib. Maintenance
Locate Duplicate Contacts

3rd Party Integration & Factory Programs

Our factory programs are extensive and cover every major manufacturer. In addition to OEM integration, UNITS[®] offers many third-party integrations ranging from flat files to real-time bi-directional Webservices APIs, including:

Redbook/Glasses Guide
SMS/Intellimessaging
Appraisal Solutions
Capricorn - Caplink
Results Direct
Dataminer
DealerCell
Vital CRM
Upstream
Carsales
PAREX
Xtime
PPSR



Stock Units

Process and manage new, used and demo unit stock.

Maintenance

- *Stock Unit Maintenance*
- *Cost Adjustment*
- *Stock Unit Debtors Maintenance*
- *Model Maintenance*
- *Accessory and Charge*
- *Vehicle Quote Header/Trailer Maintenance*
- *Model Maintenance*
- *Model Maintenance Bulk Update*

Transactions

- *New Unit Receipt*
- *Used Unit Purchase*
- *Multiple Unit Sales Entry*
- *Stock Unit Swap*
- *Foreign Vehicle Receipt*
- *Vehicle Selling Price Indicator*

Reports

- *Valuation Report – Detail*
- *Valuation Report – Summary*
- *Floor Plan Listing*
- *Vehicle Sales Delivery*
- *Stock Unit Debtors Report*
- *Cost Adjustments*
- *Outstanding Appraisals*
- *Salesperson Commission*
- *Salesperson Summary Report*
- *Buyer Profitability*

- *Units Aging Analysis*
- *Transactions*
- *Salesperson Budget/Profit Report*
- *Statutory Forms*

Utilities

- *Rebuild Stock Cost*
- *Extract Vehicle Data for Carsales*
- *Extract Vehicle Data for Trade Desk*
- *Vehicle Data to Website*
- *Vehicle Valuation*
- *New Unit Receipt*
- *Used Unit Purchase*
- *Multiple Unit Sales Entry*
- *Stock Unit Swap*
- *Foreign Vehicle Receipt*
- *Vehicle Selling Price Indicator*
- *New Unit Receipt*
- *Used Unit Purchase*
- *Multiple Unit Sales Entry*
- *Stock Unit Swap*
- *Foreign Vehicle Receipt*
- *Vehicle Selling Price Indicator*
- *WebTrader Manufacturer Franchise Definition Maintenance*

Police Book

- *Incomplete Police Book Entry Report*
- *Police Book Enquiry*
- *Statutory Dealer Maintenance*



System Maintenance

Configuration options to suit all common setup requirements.

Utilities

- *Advice Customer Messaging*
- *Branch Config Maintenance*
- *Change Background*
- *Country Maintenance*
- *Credit Override Administration*
- *Document Reprint*
- *Exchange Rate maintenance*
- *Favourites*
- *Franchise Maintenance*
- *FTP Download*
- *FTP File Upload*
- *Post Code Maintenance*
- *Query*

- *Salesperson Maintenance*
- *Suggestion Box*
- *Sysconfig Maintenance*
- *SysCalendar Maintenance*
- *System Audit Report*
- *System Object Register Maintenance*
- *Type Code Maintenance*

Integration Tables

- *Global Integration*
- *Bank*
- *Parts*
- *Workshop*
- *Vehicle*
- *Fixed Assets*



Customised Reports

UNITS® comes with many reports which can be customised to your needs. Here are some examples.

Attendance Report
Dashboard
No Bin Location Report
Outstanding Cash Sales
Rolling Stocktake Report
Technician Mobile Clocking
List Assets Audit Stocktake Report



auto.it

POWERFUL DEALER MANAGEMENT SYSTEMS

For more information, reach out to us today.

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