WinNetStar Release Notes

October 13, 2013 (updated October 25, 2013)

RELEASE NOTES
General
Added two more columns for comparative data to the Profit and Loss Report.
Added a column for Last Modified By to the Undeposited Funds pop up displayed when creating a new Deposit document.
Added a user preference to Not Group Core Returns on Point of Sale Documents. To select this option, navigate to Company>Company Preferences and click on the Inventory Tab.
Added a new report of Customer Notes displaying a list of all notes included in the Customer Master. To access this new report navigate to Customer>Find>Customer Notes.
The Time Slip list no longer auto sizes to Best Fit All Columns with each Fetch.
Added additional French language conversion for certain descriptions on the Customer Statement.
Added a column for Inactive to the Customer Sales Report and the Customer Line Item Detail Report. This will display the inactive/active status of the customer master record for the associated customer on the document.
The Financial Tab of the Customer Master now displays the complete detailed aging for the respective customer instead of just the totals by aging category. Users can select an "as of date" and retrieve the detail list of documents outstanding as of that date. Double click on a line to open the document in a separate tab.
Users can now right mouse click on a line on a Purchase Order to select a new option to Duplicate This Line. Selecting this option will create a new line on the PO matching the selected line. If the line type is GL and the account is a Referenced Account, the appropriate Reference lookup will appear.
Corrected an issue associated with selecting a Customer on Repair Order and WG Point of Sale Documents when using the arrow down option and hitting the Enter Key to select the Customer.
Added a Pre-Fetch Filter option to the Sales Tax Detail Report to "Include Unpaid Items Only". Selecting this option with a date range of "All" should provide a detail that matches your Sales Tax Payable Account.

Users now have an option to Resubmit Fleet Charge Transactions. To utilize this feature navigate to File>View Fleet Charge Transactions and right mouse click on the invoice you would like to resubmit.

CRM

Users can now change the Customer on a CRM Opportunity if there are no Events linked to that Opportunity.

Corrected an issue on the Save and Close of CRM documents when validation errors exist.

Inventory

Added a flag to the Lost Sale Reasons to "Exclude in SSO Calculations". When selecting this option, the system will ignore those lost sale quantities in computing sales history when the SSO option is selected to include Lost Sales.

The Price Level drop down displayed when selecting the F9 key on point of sale documents is now permission based. Users will be required to have permission to "Change Customer Price Level" in order to edit this field.

Users will now see a pop up warning if they are adding an inventory item to a purchase order when the item is already on the document.

The Purchase Order Export feature now includes an option formatted for Polaris.

Added a User Preference to automatically show a Quantity Pop Up on point of sale documents after adding a line to a document. This option is tied to each individual user and can be set by navigating to File>Manage Users and Roles and double clicking on the user.

Wholegoods

The restrictions applied to the lookup of Wholegoods when selecting an account Referenced to Wholegoods have been changed to become more flexible for those users who wish to record transactions for the same Wholegood into more than one Revenue or COGS type account. The following table illustrates the new WG lookup rules based on the Account Class. Class 1 accounts are Assets, Class 2 are Liabilities, Class 3 are Equity. Class 4 – 8 are Profit and Loss Accounts. So reading the table below, if the user is attempting to enter a transaction to an Account Class 1 account that is referenced to Wholegoods, the Sales Type will be limited to "Sales", the Sales Status will exclude any that are "Sold", the lookup will only display those WG's that have an asset account set up in the WG Master that matches the Account selected by the user and finally, the lookup will only display those WG's that are assigned to the Company / Location currently logged into.

Acct Class	Sales Type	Sales Status	Acct Must Match Master	Company / Location
1	Sales Only	All but Sold	Yes	Only the Company Logged Into
2	Sales Only	All	Yes	Only the Company Logged Into
All Classes except 1 and 2	Sales Only	All	No	No Restrictions

Service Invoices that were settled using the Settle to GL option using a WG referenced account will now show up in the Transaction History section of the WG Master.

Service

Users now see a pop up warning message if the miles or hours entered on the Repair Order are less than those recorded in the associated WG Master.

Added columns for QOH and AFS to the Item Tab of the Repair Order / Estimate.

Added the In Service Date to the General Tab of the Repair Order / Estimate. This will display the In Service Date from the WG Master and can be edited resulting in an update to the WG Master.

Corrected a display issue on the Service Labor report related to the Settled Status of a Repair Order.

Users can now edit the Last Performed fields on the Preventative Maintenance tab of the WG Master.

Miles and Hours have been added to the Service Labor Report.

Added the ability to copy an inventory item number from the Item Tab on the Repair Order.

Rental

Added a column for "Previously Billed" to the printed Rental Invoice.

Added a warning to the Rental Invoicing process if the contract does not include a Rental Period.

Corrected an issue on the Rental Contract where the invoice was not reflecting changes made on the Rates tab.

Added an option to print the following data elements on the Rental Invoice:
    Date In, Date Out, Change
    Miles In, Miles Out, Change
    Hours In, Hours Out, Change
    Other In, Other Out, Change
To select these options, navigate to Company>Company Preferences and click on the Rental Tab.

Users can now Delete Attachments on Rental Contracts.

The Columns for "Lease Charge" and "Lease Charge Description" on the Wholegood Sales Report have been enhanced to include Rental Charge and Rental Charge Description.

Added a drop down box to the Rental Contract for Billing Frequency. Contact Customer Support for assistance in populating this drop down with your required Billing Frequencies. Added two columns to the Rental Contract List for Billing Frequency and Wholegoods. The Wholegoods column will list each Wholegood System ID and Stock Number included on the contract.

Added columns to the Customer Line Item Detail Report for Date Out, Date In, Miles Out, Miles In, Hours Out, Hours In, Other Out, Other In. These fields are persisted with the creation of each Rental Invoice based on the values from the Usage Tab of the Rental Contract at the time the Invoice is created. By filtering this report to the specific document type of Rental Invoice, user can now see utilization data for Rental Units.

Payroll

Iowa payroll tax has been added to the payroll module.

Lease
Added a new Lease Estimate Document.
Added columns to the Customer Line Item Detail Report for Prior Miles, Current Miles, Miles Change, Prior Hours, Current Hours, and Hours Change (as well as all of these fields for the other Lease Variables). These values are populated for Lease Invoices based on the data input by the user at the time the Invoice is created. This report can now be used to calculate total mileage and hours billed for each Lease Unit for any requested time frame.
Added a column to the Lease Contract list for Billing Frequency.