WinNetStar Release Notes

October 2016

RELEASE NOTES

General

Added a new customizable Dashboard Module to display key metrics and custom reports. To set up a demo and or get information on pricing for this new module, please contact RIMSS Support at 800-766-4642.

The Internal Memo field from the PO now carries over to the related IR Bill document.

Added Ship To Phone Number to point-of-sale documents and their respective lists.

Users can now remove previously saved data from user defined fields set up as Lookup type fields.

Corrected an issue with forms printing where the wrong logo or custom wording was being printed in certain circumstances.

Added a NEW PERMISSION to convert an IR Bill document from an Item Receipt to a Bill.

Added a column to the Transaction Detail Report to display the Supplier Reference from IR Bill documents.

Corrected an issue with Soft Closes not restricting the ability to Void documents.

Unchecking the Ship To box on point-of-sale documents will now remove any existing shipping address from the document.

Added the Supplier System ID to the IR Bill list.

Added a column to the Customer Sales Report to display the Credit Card Settlement Type.

Added columns to the IR Bill list to display Created By and Created Date/Time.

Added additional sorting options when printing an IR Bill document.

Corrected an issue with the display of Remaining PTO in the employee master for those customers using the Payroll Module.

Corrected an issue with credit invoices not printing with customer statements in certain circumstances.

Corrected an issue where the status of the related PO was not updated after the void of an IR Bill document.

The customer account number is now a separate field on the Customer Statement.

Corrected an issue where the Supplier address was incorrectly displaying on checks in certain circumstances.

Asterisks now print to the left on Canadian checks.

Added a NEW PERMISSION for view-only privileges on the Supplier List.

Corrected an issue where the Customer Fax number was incorrectly displaying on the Accounts Receivable Aging.

Added a new feature to capture a reason for voiding a document. Void Reasons can be set up and maintained under Company>Enterprise Support Lists. There is also a new Company Preference to Require Void Reasons.

Added Michigan State Withholding to the Payroll Module.

Corrected Oregon state withholding calculation.

The user interface for accessing data using the Customer Line Item Detail Report has changed to allow for additional options being saved in custom layouts or reports. Instead of the previous option to Save a Layout, users will see an option to Save Query. When selecting this option, the Pre-Fetch Filter options, date range, column layouts and printing options will now be saved with the report.

Added a new feature in the header section of the IR Bill document to allow a user to allocate costs to selected lines on the document. Allocations can be based on pro-rata share of Qty Received, Total Dollars, or Total Weight.

The permission allowing users to drill into account details in the chart of accounts now extends to the ability to drill into the transaction details from the Profit and Loss Grid Report.

Added the Print feature to the Application Events Report.

Supplier System ID now displays on the IR Bill document.

Corrected an issue with PO status being incorrect after deleting credit lines from the associated IR Bill document.

Corrected an issue where users could void Deposit Invoices after the related sales order or repair order had been converted to an invoice.

General - continued
State Tax ID now prints on 1099's.
The Purchase Order Detail Report now includes a column indicating voided documents and the default layout is set to exclude voided lines.
Users can now print voided Invoices and Wholegood Invoices which will include a Void watermark across the document.
Corrected an issue with the ability to add items to a Purchase Order without the required permission.
Added Business Phone and Business Email as Pre-Fetch filters on the Customer List.
Added a feature to the Purchase Order to allow users to hide (collapse) the header information to be able to see more lines in the grid. To hide or un-hide select "Ctrl-F9".
AGCO CC inquiries now use the Bill To zip code instead of the Business zip code.

Inventory
Added a new quick item entry field to the Inventory Transfer document.
Added columns for Category, Group and Class to the Lost Sale Report.
Added a new feature to allow a user to copy an Inventory Item Master from one location to one or all other locations. This new feature can be accessed from the Item List or from an individual Master.
Corrected an issue with Supplier phone numbers not displaying on PO's created from a Suggested Stock Order.
Added a column to the Eligible Core List to display the Service Issue Type for Repair Orders.
After creating PO's from the Suggested Stock Order, the user will now have an option to auto open each of those PO's for viewing or editing on their screen.
Added the ability to update Bin Location when entering inventory count results. To access this new feature, right click on the respective line.

Users now have an option at the time of printing inventory count sheets to include QOH and AFS.

Inventory - continued

Added a NEW PERMISSION to Finalize Inventory Count.

Inventory Transfer Receipts will now update the Last Received Date in the Item Master.

Corrected an issue related to Ignored Sales History being transmitted to manufacturers vendor managed inventory programs.

Added a column to the Item Inventory List to display any Misc. Charges that are linked to the item within the Master.

Inventory Adjustment Documents now record the item number in the Reference field to aid in performing reconciliations.

Added columns for Item, Product, and Group Code from MFG Data tab to Suggested Stock Order.

Estimates, Sales Orders and Invoices now have pricing option out to 3 decimal places. Users can key in the unit price with 3 places past the decimal. The system will calculate the total based off of this price then round the total extended price.

Added a feature allowing importing data from an Excel spreadsheet into an Inventory Adjustment document.

Added a NEW PERMISSION to edit the Units in Cost field in the Item Master. It is recommended that you be selective in granting this permission and ensure that the individuals with permission understand the implications to average cost of the related item when editing this field after transactions have already occurred with that item.

Added a new memo field to the header section of point-of-sale documents that will print in the header section of the form.

Made changes to the layout of the printed versions of point-of-sale documents to help alleviate text wrapping issues.

Added columns to the Repair Order Report and List to display Owning Customer from the Wholegood Master.

Per request from Navistar, the Point-of-sale feature for updating customer pricing will no longer update any pricing on any documents where the total net dollar amount of the transaction results in a credit to the customer.

Added a column to the Inventory Item List to display the data in the Vendor Managed field from the Item Master.

Corrected an issue with the Physical Inventory Count process where quantities were reversed in certain circumstances.

Inventory - continued

Added Address, Phone and Email columns to the Eligible Core List.

Added columns to the Item Detail Report to display the Core Cost, Supplier Reference and Supplier Name.

Added a Promotional Pricing option to import a list of fixed part prices for a specific customer.

Added a new column to the Column Chooser for Purchase Order and Item Receipts labeled Kubota Order Bin Override. This 10 character field will allow the user to override the bin location or POS Document information that is sent using the Kubota Order export. When receiving the part from Kubota, the part label will show this information as opposed to the bin location or POS Document information.

Service

Added a column to the Repair Order Report and the Repair Order List to display the Year of the associated Wholegood and its In Service Date.

Added columns to the Service Issue tab of the Repair Order to display Actual and Billed hours.

Corrected an issue with Repair Orders created from the Calendar that were missing general ledger accounts in certain situations.

Added ability to enter notes to Closed or Settled Repair Orders.

Added a new feature to allow user to copy an existing Repair Estimate/Order or Invoice to a new Repair Estimate.

Added a column to the Open Documents Pop Up to display the Service Issue type of Repair Orders.

Added a Company Preference to display Repair Orders on the Service Appointments Calendar that were not created through the calendar.

The Service Appointments Calendar now displays appointments from other locations.

Added a NEW PERMISSION related to editing the Labor Rate Field of the Repair Order.

Added the following columns to the Customer Line Item Detail Report from Repair Order documents:
- Miles In
- Miles Out
- Initiation Date
- Settlement Date

Service - continued

Added an option at the Service Issues level on Repair Orders to suppress the detail lines when printing the document. When this option is selected, only the subtotal for the respective Service Issue will print.

Added a new settlement option to Repair Orders to be used when performing work on dealer owned inventory. The new option, Add to Wholegood, can be used to add the cost of the repair order to the wholegood inventory account in the wholegood master if the unit is available for sale or on a sales order. If the unit is sold, the system will add the cost to cost of goods sold account in the wholegood master. This option is not available for wholegoods with the Type of Other, and is not available if the general ledger accounts have not been set up in the master. All service issue lines on the Repair Order must be Customer Type or all must be Internal Type. Combinations of these types on the same Repair Order is not allowed for this settlement option.

Added columns to the Repair Order Report as follows:

> Days From Initiation to First Time Slip
> Days From Initiation to Last Time Slip
> Days From First to Last Time Slip
> Days From Last Time Slip to Settlement
> Days From Initiation to Settlement
> Days From First Time Slip to Settlement

For purposes of calculating days, the system ignores the time component. For Time slips, the system uses the clock-in date.

Corrected a Canadian formatting issue on Labor Hours in Repair Orders.

The estimated hours on Repair Estimates will now remain on the Estimate after it is converted to a Repair Order.

The settlement option "Add to Inventory" will now allow the user to use Internal Service Issue types.

Added a button to the labor tab of the Repair Order to "Bill Estimated Hours".

Wholegoods

Added a Quick Add Note feature to the General Tab of the Wholegood Master. This allows the user to add notes to the master without needing to click on the Notes Tab.

Freedom Pay pre-authorizations and signature capture are now available on Wholegood Invoices.

Added a numerical value to the Attachments tab of the Wholegood Master indicating how many attachments are included within that tab.

Added a company preference to include the Wholegood Make and Model from the Wholegood Master prior to the Description in the Description Field of printed point-of-sale documents.

Wholegoods - continued
Added a column to the Wholegood List to display the Sales Order Customer Name.
Corrected an issue with the original print of a Wholegood Invoice displaying "Reprint".
Added a column to the Equipment Owned Tab of the Customer Master to display Sales Price.
Added a Company Preference to include the words "Trade-In" on printed Wholegood point-of-sale documents for each trade-in line.
Added a column to the Wholegood Master list to display linked Fixed Asset records.
Layouts now save on Wholegood Sales Orders.
Corrected an issue related to the ability to void wholegood invoices.
Added a column to the Wholegood Sales Report to display the New/Used field from the Wholegood Master.
Added a new Wash-Out feature to create a link between a series of Wholegood sales that included trade-ins until the final related trade-in is sold. This new Wash-Out ID is displayed in a new column by that name on the Wholegood List. Users will be able to filter based off of this ID to see all related Wholegoods in the chain. Include the Revenue and COGS columns already available on this list, and the total profit or loss on the chain of transactions will be calculated.
Added a column to the Wholegood Sales Report to display the Wholegood Due Date from the Wholegood Master.
Rental
The Qty on the Equipment Tab of the Rental Contract now defaults to 1 when changing the Rental Period on the General Tab.
Rental mileage overage rates can now be set with 4 places past the decimal.
Added an ALL option for Location when searching for a rental unit in Rental Contracts.
Corrected an issue with inactive rental periods printing on rental contracts.

Rental - continued
Area Code now displays on the Operator Information tab of the Rental Contract.

Added 3 columns to the Equipment tab of the Rental Contract:
 	
      WG Master Hours
      WG Master Miles
      Contract Hours Out
      Contract Miles Out

Corrected an issue with Recurring Rental Invoices charging tax on Tax Exempt customers.
Added a new Notes Tab to the Rental Contract.
Serial number now displays on the Customer Line Item Detail Report for Rental Invoices.
Corrected an issue with Hours and Miles not updating the wholegood master.
Added address fields to the Rental Contract for the location of the equipment. This address will now print on the invoice.
Corrected display issues on the Rental Invoice List occurring when more than one contract is included on the invoice.
Added columns to the Recurring Rental Invoice list to display Billing Frequency and Billing Period.
Corrected an issue with the Rental Due date not changing when the Rental Period is edited.
Added a user defined custom rental period option to be used in recurring rental invoicing. Users can now create a rental period for 28 days, 7 days, 14 days, etc.
Added a company preference to turn off the feature that automatically adjusts the quantity on miscellaneous charges when the quantity on the contract or base charge is edited. To select this option, navigate to Company>Company Preferences and click on the Rental Tab.
The Rental Contract now remains on your screen when creating an invoice from the contact.
Lease
Users can now save an attachment to a settled Lease Invoice.