WinNetStar Release Notes

July 2019

RELEASE NOTES

General

Added a quick add shortcut field to the header of the Purchase Order and Item Receipt for adding GL type lines to these documents.

Added a new Field Type to the User Defined Fields for "Hyperlink". Selecting this type and then entering an active URL will allow the user to navigate to that site by clicking on the value on their screen.

Added integrated credit card processing with ChargeItPro.

The following columns are now visible in the WG Inventory Report:

New / Used
Asset Account
Liability Account

Customer Statements sent via email will now include the customer name and ID.

Added a column, "Has Attachments," to the Item Receipt / Bill list to display a checkbox if the document has an attachment. The attachments tab on the IR / Bill document will now display the number of attachments.

Item Receipt / Bill documents will now become read only when they include detail lines for sales tax payable and those amounts have been included in a sales tax payment.

Expanded on the CRM module to include a Customer Console screen. The Customer Console can be used to quickly find a customer based on name or phone number. Selecting a customer from the console will then populate the screen with all relevant information in the system about that customer including historical transactions, notes, previous CRM Events, Wholegoods owned, etc. In addition, the Customer Console can be configured to communicate with certain phone systems and will automatically search for the customer based on phone number or name coming in from caller ID and will auto dial your phone when clicking on a customer's phone number in the console.

CRM Events will now pop out into a separate window when opened.

Added Drag / Drop and Copy / Paste functionality to attachments tabs.

Added the following new fields to the header of the CRM Event and as columns on the CRM Event List:
- Title
- Status
- Created By
- Assigned To

Corrected an issue with wholegood custom forms where WG data was missing from the detail lines on the form.

The system change logs now capture changes to the customer credit limit.

Ctrl+Shift+Z has been added as a shortcut to Switch Company / Location.

The Journal Entry document now has a new menu option, Add Wholegood Line Items, allowing the user to do a multi-select of line items from the WG List and more quickly add them to the detail lines of the document.

Corrected various display issues in the French version of the software.

Corrected an issue with customer sales tax overrides on point-of-sale documents when changing back and forth between ship-to and non-ship-to options.

Users will now see COGS type accounts in the Depreciation Expense Account drop-down on Fixed Asset masters.

Undeposited Funds will no longer automatically pop up when the user creates a new Deposit document. Clicking on the View Undeposited Receipts menu option will display this pop-up. Also fixed an issue with printing the data in this pop-up.

Users can now type directly in the name field on all customer search fields instead of having to click on the ellipses to generate the customer lookup. Typing a name or part of a name in one of these fields and hitting the enter key will perform a "Contains Type" search returning any matches for any customers that contain the value entered.

Added a new company preference to require shipping method on point-of-sale documents.

Users can now edit the Liability Account in the header section of Item Receipts from one non accounts payable account to another non accounts payable account after the document has been saved (assuming that it has not become Read Only for some other reason).

Made the following enhancements to the Document Register found in the Customer Master on the Financial Tab:
- Purchase Orders that include a customer order are now included in the list,
- Added columns to the list to display Salesman and Created By,
- The document type "Service Document" has been replaced with Service Estimate, Repair Order or Service Invoice, and
- Added columns for the new UDF fields added to the header section of point-of-sale documents.

Customer Contacts can no longer be deleted. They can be inactivated.

Added new fields to the header of the Note Receivable Master and to the list as follows:

- Cost of Funds
- Selling Price
- Down Payment
- Loan Fees

The sum of selling price and loan fees, less the down payment, will now equal the loan amount. These three fields will now also print on the loan amortization schedule.

Added a new discount column to the Purchase Order document with a new button in the header to easily apply a discount to each line on the PO.

Added a new column to the Purchase Order list to display the number of line items on the PO.

Corrected a display issue with the Balance Sheet Grid View Report that was occurring when the first period included in the report had accounts with zero balances.

Added a prefix and suffix to the Purchase Order Number. The prefix will automatically populate with the 3-digit code for the location in which the PO was created. The suffix is optional and must be set up by the user. The default value for the suffix is blank. If you set up and use the suffix, the PO will print the prefix and the suffix on the printed version of the PO and will transmit this full number to CNH and Kubota when using the order interface. If you do not select a suffix on your PO, the prefix will also be ignored when printing and transmitting to CNH and Kubota. To set up your PO Suffix, navigate to Company>Enterprise Support Lists>PO Suffix and click on the Add New menu option. CNH and Kubota both have a maximum number of characters allowed when transmitting a PO number. Using the prefix and suffix will have an impact on this limit, so please ensure that, if you use this new feature, you have not created a PO number in excess of 13 characters. The prefix will always be the 3-character location code followed by a dash for a total of 4 characters. The suffix will always be preceded by a dash and then the number of characters that you have created (max of 3). Suffixes may be alphanumeric. You can change the current PO number by setting a new "Next PO number" by navigating to Company>Location Profile>General and clicking on the Document #'s tab.

Added a right mouse-click option to the PO list to Receive PO. This option is only available when the PO is Approved and has a status of either Open or Partial. Selecting this new option will auto create an Item Receipt for the selected PO.

Added a new feature to Quick Add Customer Receipt. This feature produces a pop-up to select a customer and input a dollar amount and payment type for customers paying on their account. When saved, this will create an open payment against the customer's accounts receivable account. To find this new feature, navigate to Customer>New>Quick Add Customer Receipt. A new permission has been added for this feature.

Added a new read only Miscellaneous Charge for Payment on Account. Using this new feature will create an open payment against the customer's accounts receivable account. This method will facilitate settling this document using the credit card interface.

The various save menu options for the IR/Bill document have been moved. They can now be found under the File menu option.

Added a new feature to Payment Terms to allow a user to check a box within the payment term maintenance area to Treat as COD. Selecting this box will not allow settlement to the customer account at invoicing.

Point of sale documents now have a new column titled Force Sales Tax. Checking the box in this column will cause the system to calculate sales tax for that line when the tax status of the customer and the item being sold are set up to not charge sales tax.

Performance enhancements have been made to speed up the process of performing a Hard Accounting Close.

Added a tool bar at the bottom of the Purchase Order document so that users can add columns, count lines, etc.

Mobile Apps are now available for Android and iOS devices to include the following:

- Customer Lookup
- Inventory Item (parts) Lookup
- Inventory Item (parts) Count
- Wholegood Lookup
- Wholegood Pick List
- Wholegood Inventory Count
- Time Slip Lookup

Each of these areas are feature rich and take full advantage of your device's other applications such as the phone, voice to text, maps and camera. For pricing information and/or to schedule a demo, please contact Bill Young at 210-202-0342.

What do you call a cow with no legs? Ground beef.

Inventory

Added re-namable fields to the header of the parts point-of-sale documents similar to what currently exists on the Repair Order.

Users can now set up a default inventory adjustment account that will prepopulate the Inventory Adjustment Document. Also added a new permission to allow a user to edit that field on the Inventory Adjustment Document. To select your location specific default account, navigate to Company>Location Profile>General and click on the Location Accounts tab.

The system will now allow only one user at a time to open a Suggested Stock Order Template in order to avoid duplicate orders being created.

Corrected an issue with item serial numbers not printing on point-of-sale documents.

Added a new feature to allow users from point of sale to request a transfer of an inventory item from another location. This will auto produce an Inventory Transfer Dispatch at the requested location.

Added a new permission for allowing a user to apply core credits to a point-of-sale document.

Added a feature to allow Canadian Kubota dealers to electronically transmit parts orders directly from a Purchase Order.

Added the following columns to the Suggested Stock Order list:

Mfg List
Mfg Cost
Mfg Core
Mfg Trade
Mfg Special 1
Mfg Special 2
Mfg Special 3

The import part data feature now includes fields for Category, Group, Class, SKU, UPC and Secondary Identifier.

Corrected an issue with quantity updates for parts when stock orders were being allocated to customer back orders on the Item Receipt.

Users can now see the total of the weight column on point-of-sale documents.

Users will no longer see a pop-up message on Item Receipts when the resulting quantity of the item is zero, and there are dollars remaining for that item.

Added columns to the Item Detail Report to display the new renamable fields in the header of the point-of-sale documents.

Added 3 new columns to the Order Status Report:

Salesman
Business Email
Contact Phone Number

Users can now edit the shipping method in the header of a sales order after the order has been partially shipped.

Added a feature to facilitate ordering inventory items for one location from another location. Users will see two new columns on PO's, Item Receipts, and the Suggested Stock Order for Ordering Location and Originating Location. The Item Receipt has a new menu option to Create Inventory Dispatch. If there are items on the receipt that were ordered for another location, the system will auto create inventory dispatch documents for the related transfers that are needed. Also, added a new field in the location specific Price Book Default for "SSO Location Override". Use this new field when all parts from a particular price book at location 123 need to ordered from location ABC. Those items will then show up in the suggested stock order to be ordered from the pre-selected location.

Corrected an issue with the Customer Line Item Detail Report displaying an incorrect cost and gross profit on core transactions in certain instances.

Added a new menu option to the Item Receipt document to Auto Allocate Stock to Back Orders. This feature is only available prior to the initial save of the document. When selected, the system will automatically allocate the selected (using the check box on the left margin of the grid) stock order receipts to the selected customer orders highlighted in red.

Added a new menu option to the Item Receipt document to Set Qty Recv'd to Zero. This feature is only available prior to the initial save of the document.

Changing the Units in Cost field on the Pricing Tab of the Item Master at one location will now change this value at all locations.

Corrected an issue where the inventory count variance was not displaying correctly when the Ignore Qty Committed option was selected.

Added a new feature to ignore sales history at point of sale. A new column has been added for a check box selection when the user wishes to ignore sales history. There is also a check box in the header section of the document to auto select each line in the grid.

Added a new company preference to Auto Receipt Drop Ships. To select this company wide option, navigate to Company>Company Preferences and click on the Inventory tab. If this preference is selected, drop shipped items will be automatically receipted on a new IR/Bill document when the drop shipped item is invoiced. Because the item must be on an Approved PO before it can be receipted, users will see a pop-up message on sales orders and repair orders stating that invoicing cannot occur until the drop shipped items have been included on an Approved PO. The auto receipt process will only occur if the drop shipped item has not already been manually received allowing the user to receive the item prior to invoicing if needed. Using this feature will eliminate the instances of negative inventory arising from invoicing a drop shipped item that has not yet been received.

Added a new right mouse-click menu option on item lines in the Item Receipt/Bill document to Replace Item Number. This will produce a lookup of your inventory items with an option to search the catalog. Once the replacing item is found, double click to select the replacement. If the item is found in the catalog, the quick add inventory item will allow the user to quickly create a new item master. The original item is then replaced on the Item Receipt with the selected new item, a note is made in the PO that that Item was replaced with the new item number, and any source documents associated with customer orders are updated with the new replacing number with a note added regarding the replacement.

Made numerous performance enhancements to speed up the processing of workflows associated with inventory items including ordering, receiving and selling of those items.

Added a new company preference to Exclude the Display of Core Cost on Item Receipt/Bill. Selecting this option will greatly increase the performance of importing a PO into an Item Receipt. There is no effect on the accounting by selecting this option as this is an informational display only.

Added a new user-maintained Order Priority list that is accessible as a drop down in the back order and drop ship pop-ups seen at point of sale. These priority codes can be used to help the user determine the timing of placing the order as they are visible and can be used for filtering in the Suggested Stock Order screen. To set up and maintain your Order Priority Codes, navigate to Company>Enterprise Support Lists>Customer Order Priority.

Pricing and Stocking Sources can now be copied from one location to another. Select the sources to be copied using the new check box in the left margin and right mouse click on one of lines in the gird to see the new menu option Copy to Other Locations. This will produce a pop-up of your locations. Select the location to copy to using the check box in the left margin and click OK. If a source with the same code exists in the copy to location, it will be updated; if it does not exist, it will be created.

Added a column to the Sales Order to display the Invoice number where the items were sold.

Added a new report to display the status of each line on an Inventory Transfer Dispatch and Receipt. To view this new report, navigate to Reports>Inventory Items>Transfer Dispatch/Receipt Detail.

The Suggested Stock Order will no longer include any customer orders from point-of-sale documents that are opened by a user at the time the suggested order program is run.

Users can no longer edit a back order or drop ship on a point-of-sale document when the item has already been included on a purchase order.

Users can reset the CSPS password on the CSPS Configuration tab. Users will no longer need to log out and back in for the new password to be recognized.

Document numbers for Inventory Sales Orders will now default to the system number of the document instead of the custom numbers previously assigned.

What do you call a sleeping bull? A Bulldozer.

Service

Enhanced the Service Issues pop-up when adding or editing a service issue on a Repair Order/Estimate. The pop-up is now a tabbed form to allow for more room for each section, and the time slip notes area has additional features to facilitate copying those notes to the cause or fix area of the document.

The Streamlined method of technician clock-in no longer displays voided repair order lines.

Corrected an issue with Service Invoices getting out of balance on Internal Line Types when average cost of the part changed after settlement.

Corrected an issue where copying a Service Invoice that was settled with the Settle to WG option was creating an unreferenced WG Inventory account line.

The system will no longer update billed hours with actual hours on the labor tab of repair orders.

Time slips will no longer update estimated hours on Repair Estimates.

After receiving feedback from many users of the Service Calendar, we have made substantial changes to improve functionality and resolve bugs. The most significant change is related to creation of appointments which is now limited to only one resource (service tech) per appointment, and that appointment can now be assigned to a specific service issue within a Repair Order. Because of these changes and the data structure of the appointment now being very different, previously created appointments will not display on your calendar once you receive this software update. *If you would like your previous appointments to display on the new calendar, please contact customer support for options.*

On the General Tab of the Repair Order, users can now perform a right mouse-click on the WG ID field to see a new menu option to "Open Wholegood Master".

Corrected an issue on the document register detail tab of the Repair Order where it was filtering based on the customer AND the WG ID. Users can now see a repair history for the WG ID alone, regardless of who the customer or owner of the unit might have been.

Added a Ship To area in the header section of the Repair Order. Selecting a Ship To Address that has been set up in the Customer Master with an associated Sales Tax Group will change the Sales Tax Group on the document.

Added a column to the Time Slip list to display the Service Issue Type when the task on the time slip is Repair Order/Estimate.

Added the following new permissions related to viewing estimated hourly technician cost:
- Ability to view Tech Cost on the Labor Tab of Repair Order/Estimate
- Ability to Access the Labor Tab on Repair Order/Estimate
- Ability to view Est Hourly Cost, Extended Cost and Profit on the Time Slip List

Also removed all columns from the Find My Timeslips list that displayed information about technician cost and profit.

When using the existing feature to move an existing Service Issue to a new Repair Order, all attachments on the RO are now copied over to the new RO.

Why do cows have hooves instead of feet? Because they lactose.

Wholegoods

Added re-namable fields to the header of the parts point-of-sale documents similar to what currently exists on the Repair Order.

The WG point-of-sale documents are now accessible in the Custom Forms module.

Added new fields to the top right header section of the wholegood master as follows:
- Mfg Cost (user input)
- Estimated PDI Cost (user input)
- Projected Profit (calculated using the existing asking price field)
- Projected Margin % (calculated)
- Projected Markup % (calculated)

Using the existing Asking Price field, users can now input these values to project profit on the sale of the wholegood. These values also now display in a new feature found on WG Estimates and WG Sales Orders as described below.

When using the existing Add Wholegood Line Items on the Purchase Order, the system will now populate the unit cost on the PO with the value from the WG Master for Mfg Cost.

Added new right mouse-click menu options on Wholegood line types on WG Estimates and Sales Orders as follows:
- Open WG Master
- Open WG Notebook
- Show WG Cost/Sales Worksheet – this option will produce a new pop-up with 3 grids. The first grid is editable by the user as a means to document the cost and selling price of the WG. The second grid is a read only display of the current accounting cost of the wholegood and the third grid is a read only display of any work in process (unsettled repair orders). This pop-up also displays the value from two new fields added to the WG Master where users can record the MFG Cost and Estimated PDI.

Corrected an issue with the printing of the header on the second page of Wholegood Invoices.

Added a new column to the IR/Bill document to display the Serial Number from the WG Master when the line type is GL and the account is referenced to a WG.

Added a new right mouse-click menu option on IR/Bill documents to Update WG Serial Numbers. Clicking on this menu option will produce a pop-up of the wholegoods included on the document and the user can add or edit the serial number updating the respective wholegood master.

Added the following columns to the Purchase Order and the IR/Bill documents:
- Make
- Model

Values will display in these columns when the line type is GL and the account is referenced to a wholegood.

The On Order flag in the WG Master is now auto unchecked when the WG is first saved on an Item Receipt document.

Added a new right mouse-click option to the Wholegood List to Add to WG Estimate.

When selecting the option in a Wholegood Master to Copy to New WG Record, the system will now prompt the user for the quantity to be created.

Added three new columns to the WG Inventory Report to display:
- New/Used
- Asset Account
- Age

Added columns to the Customer Line Item Detail Report to display Wholegood Group and Shipping Date.

Users can now see Notes and Attachments related to a WG Master by clicking on the "+" in the left margin of the WG List.

The drop-down for Model in the header section of the WG List now displays the Make and the Model.

Added a new Company Preference to copy the user-defined fields of the WG Master to the new master when using the copy WG function.

Added a column to display Stock Number to the Customer Line Item Detail Report.

Added new fields to the WG Master and columns to the WG List to display Created by and Created Date. This will only display values for WG records created from the date of this release forward.

Added the following columns to the WG point of sale documents:
- Invoice number (displays the invoice number when the line item is sold)
- WG Make – from WG Master
- WG Model – from WG Master
- MSRP – from WG Master

Switched the display order of Company/Location to Location/Company in the wholegood list.

What do you call a cow with no calf? Decaffeinated.

Lease / Rental

Added two new columns to the Rental Utilization Report to display Rental Status and Physical Location.

Added a new column to the Wholegood Status Report to display Company/Location.

Added two new columns to the Lease Contract to allow the user to document Mileage Allowed and Mileage Allowance Period. These two columns are now visible in the Wholegood Status Report including an additional column for Over (Under) Allowance. Matching the date range on the Wholegood Status Report to the contract period for allowed mileage will produce a report of those units that are over or under their allotted amount.

What did the mama cow say to the baby cow? It's pasture bedtime.