WinNetStar Release Notes

April 2017

RELEASE NOTES

General

Added a new user interface to the Customer Receipt document that provides for more streamlined processing. The new interface does not use the Drag and Drop method of applying credits. Instead, the user selects the credits they wish to use and clicks a button in the header to Apply Credits. The system will take the oldest credit and apply it to the oldest debit until all selected credits have been applied.

In addition, Discounts and Write-Offs are now columns in the grid. These amounts can be input by a user in these new columns instead of having to perform a right mouse click to add a new discount or write-off line.

The new interface also allows for the processing of multiple customers at one time. If you have created customer groups for consolidated statement purposes, all of the transactions from the customers in that group will now be brought into a new Customer Receipt document when any one of the customers in the group is selected. You will now be able to apply one payment received from a headquarters location to multiple customers in the group and/or use a credit from one customer to offset a debit from another customer in the group.

If you would like to have customers grouped for Customer Receipt processing but wish for them to continue to receive separate statements, there is now a new check box in the header section of the Statement Consolidation tab of the Customer Master to allow for this. Create a customer group, check the new box for Customer Receipt Only and the customers in the group will continue to get separate statements but all of their transactions will come into the Customer Receipt document.

The Pay Supplier Statement process has a new column titled Amount Paid. Users can now edit this column to partially pay a bill or partially use a credit from a supplier.

Added a new Profit and Loss by Location report. Navigate to Reports>Financial to see this new menu option.

Made several enhancements to our Dashboard feature as follows:

Added a Preview Widget button to the setup area to allow you to preview in a pop-up before assigning to a user.
Added 6 new widgets displaying service related data.
Added a widget ID to each widget on the dashboard and on the maintenance list to assist admin set up.
Increased the number of available dashboard tabs from 5 to 10.

Added a new tab to the IR/Bill document to allow users to schedule payments out into the future. When receiving a parts order that has payment terms over several months, you can now set up those payments with their respective due dates.

Added columns to document lists to display the email address set up in the customer master for those customers who are set up to receive an email copy of invoices at time of settlement.

Added two new columns to the Customer List to display Available Credit and Available Credit %.

Corrected inconsistencies in the Profit and Loss Report vs. the Profit and Loss Grid View Report.

Added a select all option to the eligible core pop-up on parts and service point-of-sale documents.

Misc. Charges pop-up on point-of-sale documents will now save the users last layout view and filters.

Added columns to the IR/Bill List to display Allocation Amount, Allocation Memo, and Allocation Description.

Added Bill to Address 2 column to the Customer Sales Report and the CNH Customer Sales History Report.

Corrected an issue where the 1099 Misc selection was printing in the wrong field on the printed 1099.

Corrected an issue with the ATD Report timing out.

Corrected French display in various POS documents.

Added an Amount Paid column to Pay Supplier Statement.

Corrected a display issue where IR/Bill documents from a different company were displaying in Pay Supplier Statement.

Added async process to the Sales Tax Detail report.

Inventory

Added 3 new columns to the Inventory Item Detail Report as follows:

Extended Replacement Cost – replacement cost from the item master times quantity.
RC Gross Profit – revenue minus extended replacement cost.
RC GP – gross profit percentage based on replacement cost.

Corrected an issue on inventory transfers where in certain instances the Units in Cost feature was calculating incorrect quantities.

Added a new feature to allow users to update data elements within the item master by selecting one or many items from a list to update in one batch instead of opening each item master individually. Data elements subject to this mass update procedure include the following:

Active / Inactive   Stock Class
Pricing Source   BSL Override Qty
Stocking Source   BRP Override Qty
Accounting Source

Navigate to Inventory>Utilities>Mass Updates.

Please contact RIMSS Support to discuss this option.

When users enter a selling price for a part that is less than the average cost or the replacement cost of the item, the line will highlight yellow.

Corrected an issue where cores were not grouping on sales documents in certain circumstances.

Corrected issues with permissions related to viewing and editing sales orders and invoices.

Service

Added a new Company Preference for Streamlined Technician Clock In. If this option is selected, service technicians will see only those jobs where they are currently assigned on a Repair Order or Estimate and will not be required to select an Operation Code since that would have been selected when the tech was assigned initially. In addition, this method has the added benefit of displaying the actual hours already incurred by that tech compared to the standard and/or estimated hours for the job so that they can see how much time is left to complete the job within those guidelines.

This would be the preferred option for service shops that are assigning the technician to a labor line on a repair order prior to the technician clocking into the job. To select this preference, navigate to Company>Company Preferences and click on the Service tab.

Added a New Permission for ability to edit the initiation date on Repair Orders.

Added the following columns to the Time Slip list:

Bill Rate - The rate associated with the labor line on the RO
Rate Code Type - Hourly or Fixed
Cost per Hour - from the employee master
Extended Billing - Bill Rate times hours from time slip (already on the list) (unless fixed, then just the fixed amount)
Extended Cost - Cost times hours
Profit - Extended Billing minus Extended Cost

These values will only populate for lines that have the task name equal to Repair Order/Estimate.

Also added a new pre-fetch filter check box to display Unbilled RO Time Slips Only.

Users will now see warning messages when closing or settling repair orders if the selling quantity of an item is zero.

Users are no longer restricted from copying an RO in a closed accounting month.

Sales Tax Expiration Date now prints on Service Invoices.

Changed the way page breaks work when printing a repair order / invoice to better utilize paper.

Tab order has been changed to a more logical flow on the Repair Order General tab.

Added columns to the Service Labor Report to display Stock Number and Serial Number.

Corrected an issue where the printed memo on sales orders was not saving in certain circumstances.

Corrected an issue with exporting the General Ledger.

Selecting the option to suppress detail on printing of Repair Orders will now also suppress the optional summary totals that print at the bottom of the repair order.

Corrected an issue with dates and times updating between Service Calendar and Repair Order in certain circumstances.

Corrected an issue with labor discounts not showing up on repair orders created from the service scheduling feature.

Corrected an issue where the service appointments calendar was duplicating appointments in certain circumstances.

Corrected an issue with Back Orders on Repair Orders when the Complaint line is moved to a new Repair Order.

Rental

Corrected an issue where the system was erroneously displaying Document Modified errors on rental contracts.

Corrected an issue where rental due date was not recalculating correctly in certain use cases.

Wholegood master miles and hours now update when initially input on the rental contract.

Added a feature on the insurance tab of the customer master to set a primary and secondary insurance. Use a right mouse click on the customer master insurance list to select or de-select the primary or secondary insurance. If set, these values will auto populate when selecting the customer on a rental contract.

Payroll

Corrected an Issue with the calculation of PTO remaining.

Updated Form 941 for 2017.

Corrected an issue with the calculation of Virginia State Withholding.

Updated Form 940 for 2016.

Corrected an issue with the calculation of Secondary Withholding.

Added Nebraska Payroll taxes.

Notes Receivable

Corrected an issue where customer statements were displaying the incorrect beginning balance in certain instances.

Added a new column to the Notes Receivable List to display the Current Portion of the note balance.

Save and New now works on the Note Receipt document.

The system will no longer display negative accrued interest amounts.

Corrected some issues with the sort order of transactions displayed on customer statements.