WinNetStar Release Notes

August 2020

WinNet×Star Advanced Enterprise System

RELEASE NOTES
General / Accounting
Corrected an issue where the Sales Tax Detail report was displaying Non-Taxable Sale when the Amount was Taxable but Sales Tax Rounded to Zero.
Corrected an issue that was keeping users from keying in multiple comma separated system ID's when searching for Wholegoods.
Copy to New function has been added to Item Receipt/Bills.
Corrected an issue with Units in Cost being incorrect if Item Receipt/Bill saved in location where part is not in location database.
Corrected an issue with Units in Cost when the part existed in all locations resulting in a copy to other locations.
Added a "Contains" type search when selecting a Supplier on a Purchase Order or Item Receipt/Bill.
Corrected an issue with the Supplier Reference and Detail Memo from a Wholegood Journal not displaying in the Transaction Detail report.
Added a new Email option from POS documents. This feature requires that Outlook be installed on the user's workstation. Selecting the new menu option produces a pop-up with a lookup of the Customers Email addresses and a drop down for Email Templates from a new support list found at Company > Enterprise Support Lists > Email Templates. Using this feature will auto create a PDF attachment of the document to the email and the respective service document. In addition, a CRM Event is auto-created documenting that the email was sent which also includes an attachment for the PDF.
Add Header Memo column to Customer Receipt upper grid and populate lower grid header and Detail Memo for Deposit documents.
Corrected a display issue on Pay Sales Tax and added a new menu option for users that wish to print the remittance advice from the Payment Document when creating the payment.

Corrected a display issue in the AP Aging Report where the Supplier Reference ID not populating. Additionally, corrected the column to display “Supplier” instead of “Customer.”
Fixed a display issue in the Customer Document Register with an incorrect amount displaying for credit Service Documents.
Updated Payroll Form 941 Q2 2020.
Added a pre-fetch filter for the Document Number to the CRM Events list.
Added a new Alert Type to send an Email to a Customer when the last ordered part has been received.
User can now include multiple General Ledger lines with references to the same WG ID on an IR/Bill document when using the Floor Plan option in the header of the document.
Added a Default Payment option to the Customer Master. This can be set on the Details tab of the Customer Master.
Fixed an issue where changing the Statement Ending Date caused the Beginning Balance to revert to $0.00 on the Reconciliation.
The system now allows user to input a 0% interest rate when creating a Note Receivable.
Added Stock Class, Supplier Order Number and Export Date to the Purchase Order Detail report.
Fixed the display issue where Inactive Employees were showing in the Assigned To drop down on CRM Events.
Added an option when generating the Profit and Loss report to display "Percentage of Gross Profit".

Added Right mouse click option to the Equipment Owned tab of the Customer Master to perform the Kubota Model Determination. This can also be found on the Wholegoods tab on POS Documents.
Corrected an issue where the Customer Statement was not being generated for Consolidated Statements if the Master account has no activity.
Corrected an issue when manually adding a Credit Card token in the Customer Master did not populate the customer Name and Address.
Corrected an issue where the WG Transfer document was accumulating wrong amounts when the WG had amounts in various accounts.
Fixed a layout issue on the Time Slip list reverting to the Default layout on every Fetch.
Corrected numerous issues in our French Language version.
The system now logs all users' application errors to the database for reporting purposes. Navigate to Reports > Other > Application Error Log.
Added the ability to print the transaction details on notes receivable. Right mouse-click on the header of the Transaction Details tab of the Note Receivable master to see the menu item to Print Grid.
Added an option to email the Remittance Advice from a saved payment document.
The header memo for Journal Entries and WG Journals now displays on the AP Aging.
Added the memo column to View Acct Transactions on WG POS docs.
Added right mouse-click "Print Document" feature to Customer Sales Report.

Corrected an issue when the Settle to GL Option is used and the user is selecting an account referenced to WG's where the system was fetching the entire list of WG’s in certain circumstances.
Corrected an issue where the time slip list was not listing the correct times and when time slip was opened it was bringing up a different time slip ID.
Added detail memo column to AP Aging.
Added a New Permission to Add - Edit GL Line Types on IR.
Users now have the ability to change the Supplier on an approved PO by clicking on the Edit Approved PO menu option.
Added 3 New Columns to Customer Master Document Register to display Paid Date, Settled to Account, Days to Pay.
Two goldfish are in a tank. One says to the other, "do you know how to drive this thing?"
The A/R Aging will no longer open grouped by Supplier.
The Financial Tab of the Customer Master has been renamed, A/R Aging. The Document Register that was displayed in the bottom portion of that tab has now been moved to its own new tab titled, Document Register. The new A/R Aging tab includes new functionality allowing the user to make collection notes about a specific invoice. Users can also view the customer notebook from this tab as well as the customer’s A/R history. Customer A/R Metrics for Average Balance, Highest Balance, and Average Days to Pay can be calculated as well. To add a collection note to an invoice, right mouse-click on that invoice in the A/R aging grid. ***The A/R Metrics feature will not work on older versions of Microsoft SQL Server. Please contact RIMSS Support for more details.
Corrected an issue where, in certain circumstances, the accounting for an invoice could become out of balance when the Customer Type was Internal.

Users can now manually type in an email address in the Send Email feature on point-of-sale documents.
Ship To address now populates on Sales Tax Detail Report.
Corrected an issue where the Wholegood serial number did not carry over to GL transaction detail if imported to an IR from PO.
Added two new check boxes on the Ship To Address pop-up to copy the ship to address to the Business Address and the Bill to Address.
Added Created by and Created Date/Time to the header of the Purchase Order document.
P&L reports that include the option to display % of Revenue or % of Gross Profit will now calculate those percentages based on the respective totals when broken out by Location or Department.
The Caller ID Name field of the Customer Console will now search for Customer System ID in addition to name and Reference ID.
Corrected an issue where, in certain circumstances, a ChargeItPro Refund of SO deposit created a charge instead of a refund.
Users can now adjust the layout of the CRM Event to increase / decrease the size of the Notes area.
The date drop-down is now editable in Customer Console New Event.
Corrected an issue where deleting a Sales Tax Payable GL line off of an Item Receipt was not updating the Sales Tax Detail Report in certain circumstances.
Where did the software developer go? I don't know, he ransomware!
Inventory
Added a new check box to the header of the Inventory Master List that, when selected, will perform an Exact match search on the part number, rather than the default Contains Type search.

Users can now uncheck the Promo Order box in the header of an approved PO using the Edit Approved PO menu option.
Added column to the suggested stock order to display Qty on Promo Order.
Corrected an issue when manually creating a Purchase Order where assigning 1 line to a different originating location will change the originating location on additional lines.
Corrected an issue where users were seeing duplicate CC pre-auths on the pop-up.
To whoever stole my copy of Microsoft Office, I will find you. You have my Word!
Corrected an issue where manually updated Pre-Auth amounts were authorizing the wrong amount.
Corrected the issue where vendor number prints on the core return even when turned off in the preferences.
There is a new sub-menu option under the Options menu on the IR/Bill document to Update Unit Cost from Kubota Invoice – see related help document attached.
Added the Dealer Purchase Order and Dealer Order Number to the Kubota Invoice Download.
Added a total of the Mfg List to the Suggested Stock Order.
Added pre-fetch filters to the Kubota Invoice Download in Inventory > Utilities > Kubota > Invoice Download.
Corrected an issue with Suggested Stock Order Purchase Order creation when lines are manually added where the transfer status of a line was incorrectly removed from the document.
Changed the Special Stock Order Month Selection to Grid of Actual Month-Years.
Corrected an issue on Inventory Transfer Request Concurrency - Changing Qty on SO while Dispatch Request is open.

Added menu option "Kubota Parts Order Status" inquiry to Purchase Order and Purchase Order List.
Corrected an issue where users were able to create a Transfer Dispatch from an IR when Item Master did not exist in receiving location.
Added the same "exact match" option to Repair Orders that currently exists on Parts POS documents.
Corrected an issue where Sales Orders were displaying zero in the Qty, Back Order and Qty Sold field after an edit to the linked IR.
When users are adding a Misc Charge to a point-of-sale document and that Misc Charge has been set up as a percentage, the system will now produce a pop-up of the detail lines of the document grid to allow the user to select the lines to use in applying the percentage.
Corrected an issue where Qty Committed was incorrect after IR was voided.
Corrected issues associated with the right mouse-click Replace Item option on Item Receipt documents.
Added the ability to Import Parts from Excel® to an Item Picklist.
Drop-ships received but not invoiced will now show Committed.
Added a Company Preference to Suppress POS Document Print after Public CC Pre-Auth.
Added 2 New Fields to F9 Show Customer Info on POS Document - Tax Status and Default Payment Method.
The part backorder pop-up will now remember the users shipping method selection for subsequent parts on the same document.
The Exact Match option when searching for parts will no longer pull inactive parts.

Added a checkbox to the header of the Purchase Order for “Promo Order”. When checked, this PO will not be considered in the quantity on order for purposes of calculating suggested orders.
The system will now print all Bin Locations on Packing Slip (primary and all secondary).
Corrected an issue with the Special Stock Order related to Package Multiple and Units in Cost.
Added a new Company Preference for Change in Logic in SSO for Items with First Transaction Date during the sales history period. If the option is selected, the system will use the First Transaction Date instead of the user’s selected value when the First Transaction Date falls within the date range for history selected by the user. We recommend that all dealers select this option.
Added a new menu option on the Inventory Item list – Find by Bin. Clicking this menu option will produce a pop-up allowing the user to type in a bin location and find all parts that are associated with that bin, either as a primary bin or secondary. The search works as a “contains type” search by default. Add an * to make it a wild card search. There is an option on the pop-up to then transfer all of those parts to the list. Selecting the transfer option will perform an exact match search of all the parts on the pop-up and populate the list with those items.
Added columns 13-24 and 25-36 previous months sales to SSO grid.
When creating a new Price Book or OEM code, all locations will now default to active.
How did the computer get out of the house? He used Windows.
Service
Users can now manually add K-Warranty labor lines in the Kubota Warranty Claim Form pop-up.
Added Kubota Model Determination to the General tab of the Service Document by right clicking on the WG ID field.
The system will automatically update the In-Service Date for wholegoods when using the Kubota Model Determination.

I ordered a chicken and an egg from Amazon. I'll let you know which comes first.
Performance enhancements on the RO list.
When users perform the Kubota Model Determination function from a Repair Order / Estimate, there is now a right mouse-click option on the list of Campaigns to Create Service Issue that will auto-create a new service issue for each campaign selected.
Added the ability to submit multiple attachments through Kubota K-Warranty.
Added a new sub-menu option to Service Invoice under the main File menu option for Un-Settle Invoice. Selecting this option will void the current document and copy the invoice (along with any related time slips) to a new Repair Order. This function is only available if the document was otherwise eligible for voiding, i.e., not in a closed accounting period, not linked to another document, etc.
Why did Wi-Fi and the computer get married? Because they had a connection.
Wholegoods
Added the ability to calculate the payment based on user input payment terms on the Salesman Worksheet tab of the WG POS documents. Users can also click a button to auto-add the finance details as a note to the detail line of the document for printing purposes.
Corrected an issue where transaction history tab of WG master was not populating correct Customer.
Allow save of WG Journal when the Header amount is zero.
Added a new Wholegood type called Quote. This new type is only allowed on WG Estimates. Also added a right mouse click option to WG Line Types on POS Documents that will allow the user to replace with a new WG Maser or an existing WG Master.
Added a Company Preference to allow future dates on Wholegood POS documents.
Added customer name and salesman to column chooser in the transaction history grid of the Wholegood master.

Corrected an issue where attachments to the Wholegood Master flagged for printing were not printing at point of sale.
Corrected an issue with the Supplier Reference and Detail Memo from a Wholegood Journal not displaying in the Transaction Detail report.
Corrected an issue with the Supplier Reference and Detail Memo from a Wholegood Journal not displaying in the Transaction Detail report.
Added a stand-alone version of the Kubota Model Determination. Navigate to Wholegoods > Utilities > Kubota Model Determination.
Added an option for a user to right mouse click on WG line types to add the unit to a Purchase Order.
Can now Auto-add Miscellaneous Charge line from WG POS documents to Purchase Order.
The K-Warranty Interface/API now uses the last 5 digits in the serial number field of the Wholegood Master. Users can now use this field to store the longer PIN without impacting the functionality within K-Warranty.
When adding a WG to a WG POS Document, users will now see a new pop up displaying any linked WG records with an option to add them all to the document.
Enhanced the Wholegood UDF Filter options.
Corrected issues associated with copying a WG Estimate from one location to another including changing the Salesman and the Created by fields.
Added a new tab to display Attachments when users click on the + on WG Line Types on WG POS Docs.
Performance enhancements on the wholegood list.

Added more tabs to + on WG's List (Cost and WIP).
Thanks for teaching me the meaning of plethora. It means a lot.
Rental
The Company/Location drop-down on the WG Lookup on the Rental Contract will now remember users last selection.
The system will now auto-populate the description field of % Misc Charge Lines on Rental Contract.
Corrected an issue with print routing for Rental Contracts.
The system now includes a pop-up warning when the user selects the Create New WG and Replace on WG POS Documents.
Added a new field to the Wholegood Master for Lease Rental Removed Date. The Wholegood Status Report now includes this removed date in the logic for calculating metrics in that report.
My wife yelled at me, "You haven't listened to one word I've said, have you!?" I thought that was a strange way to start a conversation with me...