WinNetStar Release Notes

April 2022

(versions 1418 to 1426)

RELEASE NOTES

General

Added a new "Check OOS" menu item to parts and wholegood point of sale documents. Clicking this menu option will cause the system to produce the no stock pop-up for any line items on the document where the AFS quantities are not sufficient to support the quantity sold.

Added a new feature to our CRM module to produce mass emails.

This email process uses the existing Email Templates feature found by navigating to Company>Enterprise Support Lists>Email Templates. You can create a new email template using the Document Type, Marketing. The template feature has been enhanced for this type of template to allow you to attach a document that will be included in your mass email.

After creating your template(s), navigate to CRM>New>Marketing Mass Email. This will open a blank grid with pre-fetch filters for Customer User Defined Fields. Selecting Fetch will return email addresses that have been saved in your customer master records. The list includes many columns including the first 50 Customer User Defined Fields. It also includes columns to display Last Email Date and Last Email Subject. Use the check box on the left margin to select the emails you would like to include. Click the menu option, Create Outlook Email, to produce a pop-up that will display the email addresses you selected that will be placed in the BCC section of the email. Input a Subject for your email and select a Template from the dropdown. The body of the email will populate based on the Template you select, and is editable at this point in the process. Note the check box on this pop-up to Create CRM Event. If this box is checked, the system will create a new CRM Event for each Customer included in the email using a new Event Type of Mass Email. If the mass email included an attachment, this attachment will be visible from the attachments tab on the new CRM Event created.

Click the Send Email button when you are ready for your email to go out. This process uses the outlook instance running on the local workstation and the email "From" address will reflect that users email address. Accordingly, any replies to the email sent will come back to the sender's email address.

The system is now caching List Layouts for the Customer List, Item Inventory List, and the Wholegoods List.

Enhanced many documents and reports that were not using previously cached data in order to take advantage of the performance enhancements associated with using that cached data.

Cached data is refreshed each time the application is closed and re-opened or when the menu option Refresh Global Lookups is selected. To find this menu option, navigate to File>Manage>Refresh Global Lookups.

Made performance enhancements to the quick add new part feature at point-of-sale.

Wholegoods

Corrected an issue where certain transactions were being filtered out of the Cost and Liability grids on the Cost tab of the WG Master.

Service

Corrected an issue related to opening a closed Repair Order when the WG ID was equal to zero.

Corrected an issue where, in certain circumstances, the system was selecting a different RO than the one clicked on when service tech's were clocking onto Repair Orders.