

RIMSS, INC.

WinNetStar Release Notes

April 2022

(versions 1351 to 1417)



RELEASE NOTES

General

Corrected an issue where, in certain circumstances, the automatic shop supplies miscellaneous charge was not populating on the Sales Tax Detail report.

Corrected an issue where the Sales Tax Detail report was displaying the wrong due date for sales tax on certain repair orders.

Attachments added to sales orders will now continue to display on the sales order after the document has been converted to invoice.

Corrected an issue where Customer Statements were producing the wrong results if the user was filtering the statement list prior to producing the statements.

The quick-add new customer functionality previously only seen in the Customer Console has been rolled out to all of the POS documents.

Corrected several display issues related to our French version.

Inventory

Added a new menu option on the Item Metrics Report to “Create Parts Return PO”. Users can now create a filtered list of parts to return, using a combination of filters such as Months w/No Sale, Return Indicator and AFS quantity. Clicking this new menu option will then create a new Purchase Order with negative quantities equal to the AFS quantity from the report. In order for this new process to work the following requirements must be met:

1. All AFS quantities must be greater than zero.
2. The number of lines on the report cannot exceed 500.

The user’s last layout is now saved on the GL Account lookup when selecting a GL account on Journal Entries.

Wholegoods

Added a new column to the IR/Bill document grid to display the amount of floor plan liability allocated to each WG line item when using this document to receive and record the cost of your new WG’s. Users can edit this column to allocate the floor plan liability amount to whichever WG lines they wish.

The WG serial number can now be copied from the WG tab of the customer console and all POS documents.

Added a new feature allowing for transfer of a WG from one Company to another Company (the previous WG Transfer only allowed transfers from one location to another location within the same company).

This new function is found by performing a right-click on an eligible WG line on the WG list and is specifically designed to handle the use case where WG ordering is done at one corporation for all corporations in a multi-corporation environment. Once the WG's are received, some of them need to be transferred to the selling corporation. Prior to this new feature, the user had to create one WG master for ordering and receiving at one corporation and then create a second new WG master for the corporation it was being transferred to. The user would then create JE's at each corporation to reflect the transfer in the accounting records. This new process simply eliminates the need to create the second new WG master and auto creates the JE's for the user.

To be eligible for transfer, the WG must meet the following conditions:

1. There can be no GL entries other than to the Inventory and Liability accounts referenced in the WG Master.
2. The WG cannot be included on any sales documents.
3. The WG cannot be included in the rental fleet.
4. The WG cannot be on an unsettled Repair Order.
5. The WG cannot be included on a Lease or Rental Contract.
6. The WG cannot be linked to another WG.
7. You must be logged into the Company/Location assigned to the WG.

To use this new feature, you will need to create a new GL account for each Company that is referenced to wholegoods. This new account will be used to record the intercompany receivable / payable associated with these transfers when the recorded cost of the WG is different than the floor plan liability associated with it.

Service

Added a feature to require a valid WG ID (other than zero) to a repair order prior to changing the completion status to Closed.

When doing an Op Code lookup from the labor tab of a repair order, the model number from the WG on the repair order will now auto-populate in the model field of the lookup.

Added a new column to the Service Issue tab of the repair order for Completion Status. This value defaults to Open and has an option for Closed. Closing the service issue will remove that service issue from the clock in process for service technicians. Users may open and close a service issue using this new feature as long as the repair order is editable. Setting the overall completion status on the general tab to closed will close each service issue status. The ability for a service tech to set this status to closed will be added to the clock out process on mobile apps in a future release. To see this new column, you may need to right-click the column header row and select the Restore Layout menu option.

Rental

Added a new Rental Calendar. Navigate to Rental>Find>Rental Calendar. Your rental units for all locations will display on the left margin of the calendar. Right-click on a day to create a new appointment for a particular unit. Select a customer, start and end time for the reservation. Right-clicks on an existing appointment will provide a menu option to Create/Go To Rental Contact. Selecting this option will create a pop-up of a new rental contact with the customer and WG pre-populated. Once the rental contract is saved, the appointment description on the calendar will display the contract number. Subsequent selections of the Create/Go To Rental Contract menu option will then open the underlying rental contact as a separate tab. Because rental contracts created outside of the calendar do not display on the calendar, it is recommended that all rentals are initiated from the Rental Calendar if you plan to use this new feature.

Lease

Added a new Company Preference to omit the document lock on the New Recurring Lease Invoice screen. Selecting this option will allow multiple users to concurrently create Lease Invoices. Please note that when selecting this option, you must inform your users to refrain from simultaneously creating invoices for the same lease.

Manufacturer Interfaces

Added new functionality to accept customer tax status codes from KCom. All KCom orders will be taxable regardless of the customer's tax status in WinNetStar unless a valid tax exemption code is received with the KCom order. **ALL KUBOTA DEALERS UTILIZING KCOM** will need to map the codes received from KCom to one of the corresponding tax status options for customers by navigating to Company>Sales Tax>KCom Customer Tax Status. This mapping only needs to be done on those states where you have nexus. The tax status used for each KCom order is now displayed in a new field on WG POS documents titled "Tax Status Override" and can be seen in the middle of your POS document when hitting the F9 key to Show Customer Information.

A new checkbox has been added to miscellaneous charges titled "API Shipping". **ALL KUBOTA DEALERS UTILIZING KCOM** must check this box for the miscellaneous charge they wish to use for shipping charges related to KCom orders. Only one miscellaneous charge can be selected, and this must be done for each location.

The Kubota Model Determination integration with Kubota to validate model and serial number and return outstanding Campaigns will now run automatically each night for your Kubota wholegoods and save the results to your database. These results can be viewed in a new report found by navigating to Wholegoods>Utilities>Kubota Model Determination Report. This report has two tabs. The Campaigns tab displays all of the Campaigns by model number. The Kubota Wholegoods tab will list each of your Kubota Wholegoods with a Comments column displaying the results of the model validation process. The comments column will display "Verified" when the model number and serial number have been validated. Double-click a line to open the respective WG Master to correct any issues displayed in the Comments column.

Added the following new features to the Kubota Invoice Download tab:

- Added a pre-fetch filter for Invoice Type
- Added a new button to “Auto Attach Invoice PDF” (used for WG Invoices only)
- Added a right-click option to the line items to “Attach Kubota Invoice to WG Master”
- Added a new checkbox column to display when the PDF has already been attached

The auto-attach process will only work when the Kubota Order number has already been populated in the WG master, and there is only one WG with that order number and only one invoice for that order number. In all other instances, the user would use the right-click option which will produce a WG lookup for the user to select which WG to use for the attachment. When using the right-click option, the system will also auto open the Kubota WG Invoice on a new browser tab for viewing to aid you in selecting the correct WG master.

During the attachment process, the system will also update the serial number, the model number and the due date in the respective WG Master with data from the line the user performed the right-click. You should, therefore, perform the right-click on the line that includes the serial number, when applicable.

NOTE: It is highly recommended that you use your pre-fetch filter to find WG Invoices only and select a date range to limit the number of invoices on your screen when performing this function. Performance will be greatly enhanced.