

RIMSS, INC.

WinNetStar Release Notes

January 2024
(versions 1524 to 1555)



RELEASE NOTES

General

Added a new feature to flag a customer as “On Hold”. Selecting this option for a customer will produce a pop-up at point of sale when the customer is selected. This pop-up will indicate that the customer is on hold and requires a user with permission to continue the transaction. To select this option for a customer, navigate to the Details tab of the Customer Master where there is a new section titled “Customer on Hold”. Check the boxes for the point-of-sale documents you would like to include. The new permission related to this feature is titled “Override Customer On Hold on POS Forms”. Users who have this permission will see the pop-up when the customer is selected but will be able to click on an Override option if they wish to continue. Users who do not have this permission will see the same pop-up, but it will include fields for a username and password for someone with this permission to enter their credentials and override the hold if needed.

Performance enhancements were made to the Customer Line Item Detail Report, the Wholegood List and the Customer Console.

Corrected an issue where the Supplier name was incorrectly displaying in the Customer Name field for certain transactions in the Wholegood Transaction History.

Email address is now required when creating or editing a WNS user.

Updated the Remit To Address on CNH credit card invoices.

Updated print layout for 2023 1099's.

Added a new feature to auto add a miscellaneous charge line to comply with Colorado's mandated delivery fee. You must create a new miscellaneous charge for each location with the short name “CO Delivery Fee” similar to the screenshot below. The GL Account to Credit should be a current liability account you wish to use that will accumulate the amounts due to the State of Colorado.

The screenshot shows a software dialog box titled "Add-Edit Misc. Charge Items". It contains several input fields and checkboxes. The "Short Name" field is filled with "CO Delivery Fee". The "GL Account to Credit" dropdown is set to "OTHER LIABILITIES (SAT-2-27000-01)". The "Tax Type" dropdown is set to "N - Never Taxable". There is a checked checkbox for "Do Not Update Sales Tax Detail". The "Amount" field is set to "\$0.27". The "Cost Parameters" section includes a "Capture Cost" checkbox (unchecked), a "Cost" field set to "\$0.00", a "Revenue Account" dropdown, a "Margin" field set to "0.00%", and a "Supplier" dropdown. At the bottom, there are three checked checkboxes: "Apply To POS Invoice", "Apply To Service Invoice", and "Apply To Wholegood Invoice".

This miscellaneous charge will be auto added to any taxable Parts and Wholegoods point-of-sale documents where the Ship to Box is checked and the ship to state is Colorado. If no tax is charged on the transaction, this fee is not required and will not be added. If you have not created the miscellaneous charge, the system will produce a pop-up suggesting that you get this done but will allow you to continue with the completion of the transaction.

Service documents are not included in this new feature. You will need to manually add this miscellaneous charge to any service documents that meet the requirement.

For more information on the Colorado Delivery Fee please visit: <https://tax.colorado.gov/retail-delivery-fee>

Inventory

Added a new method to find a Sales Order more quickly. Navigate to Inventory>Find>Sales Order Light for a scaled down version of the existing Sales Order List. This scaled down version includes fewer data elements and will therefore retrieve a list of documents more quickly than the original list. The original list still exists and can be used as more of a reporting tool. Performance enhancements have also been made to the original list.

Added an integration with UPS WorldShip. Users can now send customer's name and shipping address from a Sales Order to UPS WorldShip when installed on the same workstation. In addition, shipping charges and tracking number can be sent from UPS WorldShip back to the sales order to be added as a miscellaneous charge line item. This integration requires a detailed set up and configuration for each workstation. Please contact customer support for assistance.

PLEASE NOTE: There is a Set-up/Configuration Fee and a Monthly Software Fee associated with this integration.

Added a new settlement method to the Invoice document titled "Add to Wholegood". Selecting this option will produce a lookup of wholegoods for a user to select and capitalize the dollar amount of the invoice to the cost of the wholegood selected. This is only allowed on Sales type wholegoods. If the wholegood has not been sold, the amount of the invoice will be applied to the inventory account linked to the wholegood master. If the wholegood has been sold, the amount will be applied to the cost of goods sold account linked to the wholegood master. There is a permission tied to this feature titled "Settle Repair Order / Invoice to Wholegood".

Added the following data fields to the Picklist header, which also display as columns on the Picklist list:

Last Document Type – displays the last document type created from the picklist.

Last Document Date – displays the date of the last document created from the picklist.

Transfer From and To – displays the transfer from and to locations for suggested inventory transfers coming from Kubota’s Smart Supply.

File Type – displays the file type coming from Kubota’s Smart Supply.

Added a new feature to auto-create an Inventory Transfer Dispatch Document from picklists generated from a Kubota Smart Supply suggested transfer. To use this feature, open the picklist and click on the Create menu option where you will find the new option “Inventory Transfer Dispatch”.

When exporting a purchase order to Kubota, the system will now save the PO as an “Approved PO”.

Service

Corrected an issue where warranty service issues could be created without a warranty customer.

Payroll

Added new logic to comply with the state of Alabama’s new overtime requirements for withholding.

Updated printing layout for 2023 W2 forms.