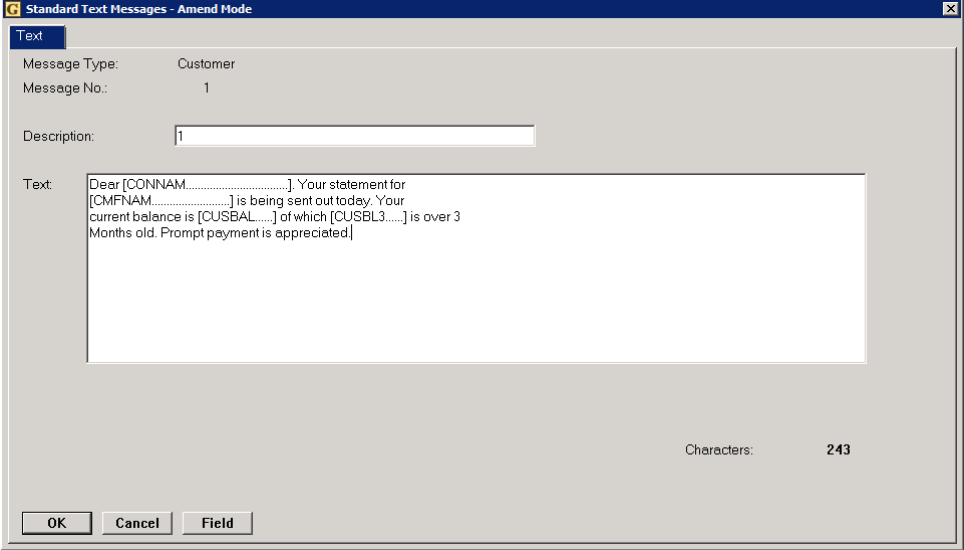


## Gold 7.7 Software Enhancements

September 2015 – January 2016

Mth	Ref	Module	Description
Sep	1-5115	Parts Control	<b>Point of Sale</b> The over credit limit tracking record is now written for advices that were started when the customer was within their limit but finished over the credit limit.
Nov	1-3585	Parts Control	<b>Point of Sale</b> An option for "Despatch & Invoice" has been added for selection for customers set to "Select at POS". This option prints an advice note then offers to print an invoice.
Feb	1-5409 800755 800756	Parts Control	<b>Memo/Carriage Parts</b> The way in which Gold handles Memo or Carriage parts, particularly where multiple invoices are raised due to parts on order has been re-vamped to make the process work better.
Dec	1-5275	Parts Control	<b>Part Maintenance</b> If a catalogue part number that exists only in the catalogue is entered into part maintenance an option is displayed to swap out to the catalogue maintenance program to amend. If this is refused then the option to create the part as a standard part is then offered.
Jan	1-3700	Parts Control	<b>Part Maintenance</b> The Retail Uplift Percentage has been changed to allow 2 decimal places.
Sep	1-4671	Parts Control	<b>Invoice Confirmation</b> The Main Invoice & GRN option now includes the enhancement to allow manual override of the allocation where a partial delivery is received with multiple customer allocations.
Sep	1-5146	Parts Control	<b>Uplift Part Prices</b> This program has an additional warning added if all prefixes are selected to help prevent accidental errors.
Oct	1-5456	Parts Control	<b>Goods Received</b> The SOP Allocation report now includes the fitter number from the related workshop job(s).
Jan	1-5531	Parts Control	<b>Stock Check Report</b> A new option has been added to exclude the Alternative Bin Location from the print if it is not used. If excluded the report can use the full width of the paper allowing a larger and clearer font size.
Jan	1-5594	Parts Control	<b>Stock Valuation Report</b> When exporting the report to Excel, supplier codes 1 – 4 are also exported.
Oct	1-3712	Parts Control	<b>Parts Barcode Label Production</b> Multiple prefixes may now be entered as can a Promotion Code range.
Oct	1-3815	Parts Control	<b>Price Update</b> The price update now includes an option to update purchase order prices.
Oct	1-5478	Parts Control	<b>Part/Customer Sales Analysis</b> The Summary option was not including discount values.
Oct	1-4150 /1-3798	Workshop	<b>Budgets</b> Budget information has been extended to allow a number of hours budget to be set as well as (or instead of) a labour value. Budget warnings are now issued on a line by line basis as parts/labour is entered so if a job was not over budget when first recalled the password will be prompted for if parts or labour put the job over the budget warning parameter set.

Nov	1-5308	Workshop	<b>Wholegood Create</b> When creating a history wholegood from Workshop Entry a new warning is displayed if a duplicated serial number is entered i.e. there is already a history wholegood record with the same serial number.
Jan	1-5203	Workshop	<b>Insurance Jobs</b> The invoice and journal made to the customer account are now automatically allocated to leave just the remaining balance on the invoice for the customer to pay.
Oct	1-4726	Workshop	<b>Workshop Entry</b> A tracking record is now written if the customer credit limit password is entered on a job, previous this only worked for Point of Sale.
Nov	1-4647	Workshop	<b>Workshop Entry</b> If the invoice type is changed for a job and recalculate "Yes" is selected, prices and VAT will be recalculated for every line not just where there was a price change.
Jan	1-5430	Workshop	<b>Workshop Entry</b> A tracking record is now written to the workshop job when a picking list is printed.
Jan	1-2056	Workshop	<b>Scheduler</b> When creating a job in Workshop Entry and using status change to select a fitter number the associated record creating in the Scheduler will now show as unassigned for the chosen fitter.
Dec	1-5491	Workshop	<b>Labour Utilisation</b> When exporting the report to Excel, the utilisation percentage is now included.
Jan	1-4845	Plant	<b>Equipment Enquiry</b> An option has been added to the Details tab, Contract option for Contract/History list to hyperlink out to the Contract.
Dec	1-5277	Wholegoods	<b>Wholegood Purchase Report</b> An option has been added to print wholegoods where the Actual Cost is lower than the Estimated.
Dec	1-3334	Wholegoods	<b>Wholegood Stock No. List</b> Delivery date has been added to the report with an option to select a delivery date range.
Jan	1-5453	Wholegoods	<b>Wholegood Invoice &amp; Self Bill</b> It is now possible to print the Self Bill Number on the main invoice by entering #SELFBILL# into the Invoice Comment, for example enter in Self Bill No #SELFBILL#.
Jan	800180	Wholegoods	<b>XML Label Print</b> New fields have been made available to the XML Label Print, registration number, registration date, depot, location, order number, wholegood group and the new/used flag.
Dec	1-5406	Wholegoods	<b>Cost Posting</b> Supplier reference numbers entered are now check against both live and history transactions and a warning displayed if the reference has been previously used.

Dec	1-5195/ 1-5210	Planned Maintenance	<p><b>Contract Summary Report</b> The Series start and end dates have been added to the report. An additional prompt for Contract Expiry Dates has also been added to list contracts due to expire.</p>
Sep	1-3212/ 1-4372/ 1-5757	Sales	<p><b>Merge Two Sales Accounts</b> The program has been enhanced to show the progress of the merge as it is carried out. Duplicate account number entry has also been prevented. Associated Parts Audit records are also now merged to show the new account.</p>
Oct	1-4758	Sales	<p><b>Customer Account Maintenance</b> The Default Zero VAT rate held on the customer account now works for Country Code Ireland.</p>
Dec	1-5245	Sales	<p><b>Transactions – Cash Posting</b> The Original Account column is now displayed within the cash posting program as it is in Customer Enquiry identify the sub account that individual invoices were for.</p>
Sep	1-5465	Sales	<p><b>Statement Print</b> An option has been added to send a text message to customers receiving a statement. New fields have been added to the standard Customer text messages to allow financial information such as the current outstanding balance and aging so these can be included in the message.</p>  <p>The statement options include a field to enter the message number and a field for the contact to send the message to.</p>
Dec	1-5781	Sales	<p><b>Address Labels</b> An option to exclude the customer account number has been added.</p>
Oct	1-5591	Sales	<p><b>Customer/Prospect List</b> When Exporting the report to Excel additional columns have been added for customer stats information such as Average Days to Pay, Average Amount Paid and Total Uninvoiced.</p>
Oct	1-3545	Sales	<p><b>Debt Letter</b> A tracking record is now written when a debt letter is declined.</p>
Jan	1-5607	Sales	<p><b>Customer Enquiry</b> On the Links tab Workshop Jobs In Progress now shows a separate value for Warranty jobs in progress.</p>
Jan	1-5477	Sales	<p><b>Automatic Cash Allocation</b> The program was not working when run by Cash Drawer number.</p>

Oct	1-5180	CRM	<b>Extract Mailshot</b> The serial item extract now includes serial items sold on a Serial Number Repair invoice type.
Sep	1-4358	Nominal	<b>Intra EC Trade Statistics</b> The option to export the report to Excel has been added.
Dec	1-3559	Nominal	<b>Ledger Audit</b> A new option has been added to the ledger audit report to produce a report for the entire current financial year (i.e. current and previous months in one report).
Nov	1-5545	Nominal	<b>Accumulated Asset Report</b> The option to export the report to Excel has been added.
Sep	1-4554	System	<b>Invoice Type File</b> The VAT Rate description is now shown on screen on the VAT tab (this tab is only applicable to Irish sites).
Dec	1-5463	System	<b>Invoice Type File</b> An option has been added to add a standard instruction comment to workshop invoice types. The standard instruction is then added automatically to workshop jobs created for the invoice type.
Sep	1-4180	System	<b>ODBC</b> The User Access Log file has been made available to ODBC.
Nov	1-5358	System	<b>Export to Excel</b> A new option has been added to the Personnel Security File to export to Excel in plain text without any colours or styles applied.
Dec	1-5897	System	<b>Company Control File – Purge Parameters</b> A new purge parameter has been added for IDT Orders. These used to purge with the Purchase Orders but can now have a different number of months retention set.
Dec	1-5841	System	<b>Retrieve Files from EXP</b> Gold stores exported files in the EXP directory. These are files such as Bacs transfers. Occasionally is necessary to retrieve a file from this directory and re-export it. This program will locate file and use the standard file transfer details to transfer the file again. For example to the /tmp directory on a specified computer.
Feb	1-5740/ 1-5985/ 1-5265	System	<b>Windows Gold</b> Improvements have been made to the Windows Gold menu including better handling of wide screen, improvements to font to prevent pixelisation and missing title bars and fields from some screens.
Dec	1-4590	System	<b>Promotional Discounts</b> Additional fields for Parts Description and Special Price have been added to the parts list screen.

Nov

1-5482

System

### System Audit

A system audit has been added to the Utilities menu.

This lists any changes made including records inserted, amended or deleted.

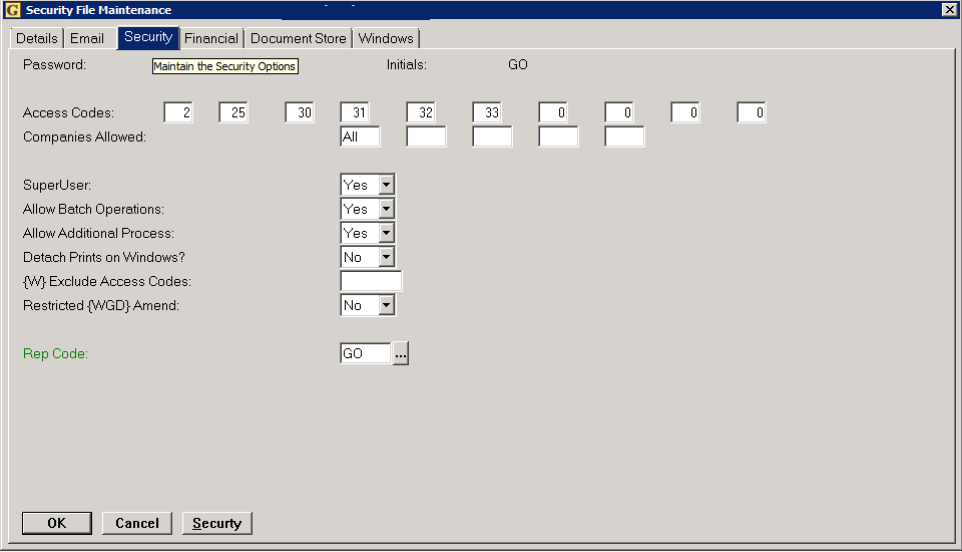
For example where a new customer has been created or an existing customer deleted or where any changes have been made to records such as changing the name or any other detail on a customer account.

Areas currently reported are

- Customer
- Supplier
- Nominal
- Wholegood Live
- Wholegood History
- Equipment (Plant)

File	Action	Record ID	Field	Old Data	New Data	Date	Time	User	Tno
Customer	Amend	1211	CMF_INV_EMAIL	1 per Email	1 per Email	15/10/2015	09:28	CM	254
Customer	Amend	1200	CMF_INV_EMAIL	1 per Email	1 per Email	29/10/2015	11:03	CM	254
Customer	Amend	1202	CMF_NAME	Mr T.Furber	T. Furber & Co	29/10/2015	11:33	CM	254
Customer	Amend	1508	CMF_PAY_GIVEN	0	30	29/09/2015	10:12	CM	254
Customer	Amend	1508	CMF_PAY_GIVEN	30	0	09/11/2015	16:40	CM	254
Customer	Amend	1508	CMF_SC_FROM	Invoice date	Sales month end date	29/09/2015	10:12	CM	254
Customer	Amend	1508	CMF_SC_FROM	Sales month end date	Invoice date	09/11/2015	16:40	CM	254
Customer	Amend	8000	CMF_SEND_INV	Post	Email	12/10/2015	14:48	CM	265
Customer	Amend	1211	CMF_SEND_INV	Post	Email	15/10/2015	09:28	CM	254
Customer	Amend	1200	CMF_SEND_INV	Post	Post	29/10/2015	11:03	CM	254
Customer	Amend	1200	CMF_SEND_MAILSHOT	Post	Email	08/10/2015	09:41	CM	254
Customer	Amend	1200	CMF_SEND_STAT	Post	Email	29/10/2015	11:03	CM	254

The list can be exported to Excel from Windows Gold and if Advanced Lists are in use the "Auto Filter Row" can be used to search for particular entries in the list.

Dec	1-5287	System	<p><b>Personnel Security File</b>  A new flag has been added for "Restricted Wholegood Amend".</p> <p>If set to 'No' then wholegoods added to a workshop job can be amended. If set to 'Yes' wholegoods cannot be amended via Workshop Entry. This option also controls the F8 Create option from the wholegood lookup allowing a History Wholegood to be created.</p> <p>To accommodate this new field the screen has had to be redesigned with the Security tab split into 2 tabs.</p> <p>The new Financial tab controls the cost display and other financial information to allow extra room on the Security tab.</p> 
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