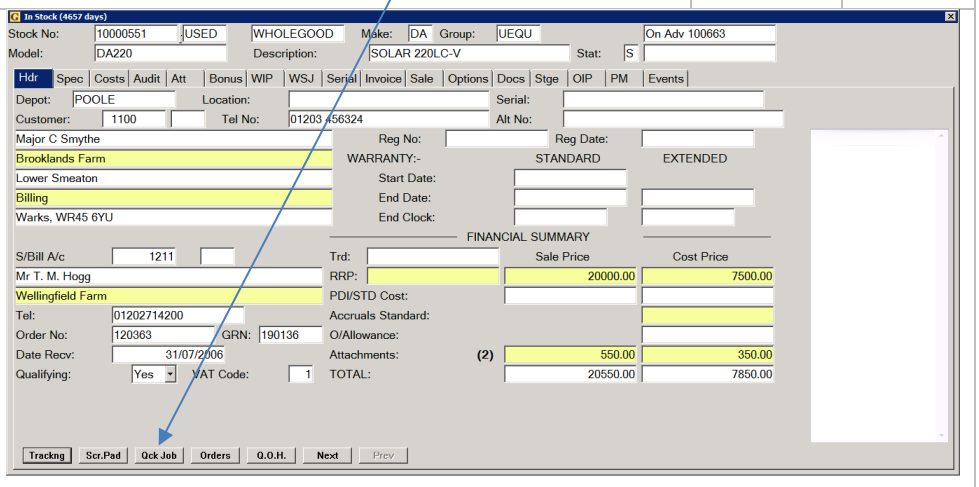
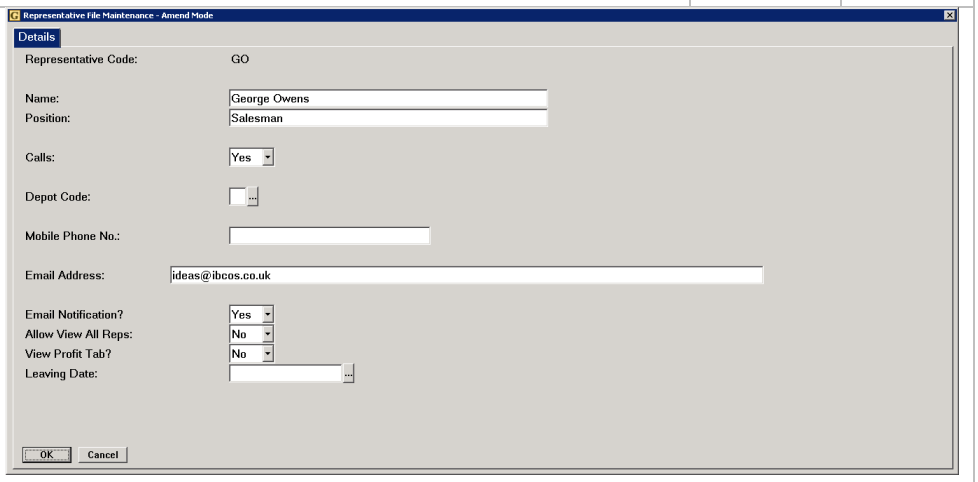
Gold 7.18 Release Notes

April – June 2019

Area	Category	Description	Q/F	Ref
Parts Control	Stock Enquiry	**Stock Enquiry** Where parts are deleted from advice notes in progress an error “Index is outside the bounds of the array” could occur. This has been resolved.	Quality	845270
Parts Control	Purchasing	**Input Goods Received Notes** Where parts are received for a part that currently has a negative stock holding the postings were incorrect and resulted in a stock to nominal difference until the purchase invoice was posted.	Quality	846382
Parts Control	Purchasing	**Electronic Invoices** A change has been made to ensure that any nominal accrual variance posting is posted correctly and does not leave an out of balance entry.	Quality	845163
Parts Control	Sales/Labels	**Parts Barcode Label Production** When using XML/Zebra labels, the Job/Advice number is now available when creating the label design.	Feature	843555
Parts Control	Stock Check	**Daily Stock Quantity Display** The minimum number of months to retain months can now be 2 rather than 3.	Quality	848730
Parts Control	Cash Till	**Till Sales** When invoicing an account customer in the cash till and selecting to take payment, the resulting invoice was printed with the standard customer terms rather than listing the payment method for the money taken.	Quality	849151
Workshop	Action	**Workshop Entry** A new flag has been added to the invoice type file to show Extended Warranty warning messages when creating a Retail job for a machine that is covered under extended warranty. The flag can be set on the Invoice Type file for all invoice types where a warning is to be displayed.	Feature	844722
Workshop	Action	**Workshop Entry** Delivery/Collection notes could previously only be printed if Standard Comments 9998/9999 had been created.	Quality	846984

		This restriction has been lifted so that the Delivery Note will print even if those comments do not exist. If they are set up they will be printed.		
Workshop	Reports	**Jobs Invoiced This Month** The Summary report option did not handle a job with a status of "Deleted" correctly, causing the report not to be produced.	Quality	844646
Workshop	Reports	**Labour Analysis Report** As a result of customer requests via ideas@ibcos.co.uk additional columns of data have been added to the Excel output of the Labour Analysis Report to show the Adjustment reason code and description where appropriate.	Feature	841142
Workshop	Timeclock	**Automated TimeSheet Print** An issue has been resolved where the labour type for a timeclock line was not displayed correctly on the report, i.e. Labour lines showing as Travel.	Quality	846983
Wholegoods	Enquiry	**Wholegood Enquiry** When creating a new wholegood event in Windows Gold, if the event code was entered manually followed by the Enter key the event was recorded with no user information.	Quality	841882
Wholegoods	Enquiry	**Wholegood Enquiry** A new function "Qck Job" passes the current wholegood number over to the Quick Job Create program in order to create a new job.	Feature	843714
				
Wholegoods	Posting	**Wholegood Amend** When changing the allocated customer for a wholegood, if the wholegood is currently on an active advice a warning is now displayed: "Warning customer allocation changed, Wholegood linked to advice xxxxxx"	Quality	849960

Wholegoods	Posting	**Order Entry** When receiving a wholegood in to stock, if it is allocated to a customer on a Wholegood Advice, an automated email can be sent to the Selling Rep as indicated on the wholegood advice to inform them that it has been received in to stock. The email address is taken from the Representative file and a new field “Email Notification” can be set for reps who wish to receive the email.	Feature	842836
				
Wholegoods	Posting	**Invoice & Self Bill** As a result of a customer request via ideas@ibcos.co.uk that was subsequently approved by the majority of the customer advisory board it is now possible to change the name and address details for the cash sale account when used in Wholegood Invoice & Self Bill. In a similar way to Point of Sale the fields for the wholegood advice are available to edit if a cash sale account is used to record the customer details without the need to set up a new customer account. No cash or money is taken via Invoice & Self Bill. For VAT purposes it is still recommended that new accounts are created for all wholegood sales.	Feature	845463
Wholegoods	Posting	**Invoice & Self Bill** As a result of a customer request via ideas@ibcos.co.uk there is now a new company control file flag to allow Hidden Comment Lines to be printed on Wholegood Advice Notes.	Feature	844266

		The hidden lines are not printed on any other document apart from the Draft Invoice. The Company Control File Wholegoods options have had to be expanded to a new section "Invoice" due to lack of screen space. This new field appears on this new Invoice section.		
Wholegood	Commission	**New Commission Program** Ibcos have developed a new version of the Wholegood Commission Extract program to give greater flexibility to the calculation of commission in relation to internal jobs. The existing commission extract can only include or exclude ALL internal jobs. The new change introduces a maintenance program to set up a table of internal jobs to be exluded from the commission calculation based on specific customer/invoice type combinations and date ranges. This feature is in final testing phase and has now been added to the Wholegood Commission menu. If you are interested in trialling the new commission program please contact the Product Team at product_team@ibcos.co.uk	Feature	836110
Plant Hire	Posting	**Hire Contracts** When multiples of the same part or memo part were added to a contract with different discounts the proforma invoice print did not show the correct discounts.	Quality	847240
Sales Ledger	Action	**Customer Enquiry** When emailing a copy customer invoice, if the customer account number was changed in the print parameters a crash occurred.	Quality	836330
Sales Ledger	Action	**Customer Enquiry** Customer profit screen showing previous years sales in current due to the change from using the customer transaction to using the wholegood cost to calculate profit.	Quality	846680
Sales Ledger	Action	**Account Maintenance** When adding a new customer using the customer defaults set on the Depot Address file, the Area Code was not being populated.	Quality	845881
Sales Ledger	Action	**Month End Update** A change has been made to the sales month end purge stage to clear out any point of sale advice	Quality	845812

		lines that do not have a corresponding advice header.		
Sales Ledger	Action	**Month End Update** If Gold is locked for the month end and outstanding batch invoices are identified, Gold will be unlocked as the month end cannot continue. A user can then address the batch invoices.	Quality	846090
Purchase Ledger	Action	**Supplier Enquiry** An error that occurred when looking at the list of orders for the supplier then using the Next/Prev buttons has been resolved.	Quality	845530
Nominal Ledger	Cash Book	**Transactions Report** Duplicate transactions could be reported on the report if a payment reference is reused. Customer transactions will now be accumulated under one cash book payment reference and date if duplicated.	Quality	844723
Nominal Ledger	Journal	**Standard Journal Posting** If a line of a standard journal posts to VAT outputs or VAT inputs the journal is posted as a VAT journal so that the posting is picked up on the VAT return.	Quality	844640
Nominal Ledger	Additional Facilities	**Nominal Budget List** When importing budgets from a .CSV file, the December budget value was not imported.	Quality	844264
Nominal Ledger	Cash Book	**Transactions Report** When exported to Excel the details for a batch of Receipts were appearing under the Payments column.	Quality	844265
Nominal Ledger	Fixed Assets	**Asset Transfer** When transferring an asset to wholegoods the audit trail record was updated with the asset purchase price rather than the nett book value.	Quality	847091
Nominal Ledger	Fixed Assets	**Enquiry** Assets that have a comment in the scratch pad were producing an error when selected in the enquiry program. This is the original assets program and not the enhanced fixed assets.	Quality	847454
System Management	System Utilities	**General System Maintenance** The default password timeout has been increased from 10 to 30 seconds to allow for systems where the log in screen draws slowly.	Quality	845271

System Management	System Utilities	**User Data Base Maintenance** An error occurred where there were no tables set up for the company.	Quality	850530
System Management	Ledgers / E-billing	**VAT Health Check** An additional check has been added to validate UK VAT registration numbers and report any invalid numbers as advisories. This check has also been introduced to the customer and supplier maintenance programs to produce a warning if an invalid VAT Registration number has been entered.	Feature	849982
System Management	Invoice Type	**Invoice Type Maintenance** When calculating Distribution discount to apply a different discount if parts are ordered on an emergency basis, the system was checking the wrong flag on the invoice type file. “Apply Special Disc/Promos” was being checked instead of “Apply discount/Distribution matrix”. This meant that unless both flags were set to ‘Yes’ the option “If Parts Ordered Over Write Discount” was not being applied.	Quality	849961
System Management	Invoice Type	**Invoice Type Maintenance** In the Invoice Type lookup a new key has been added for F8 “Inc Obs” which will show any hidden invoice types marked obsolete.	Feature	843960
System Management	Wholegoods/ Workshop	**Wholegood Group Maintenance** A new flag has been added to allow a wholegood group code to be marked as Obsolete. Obsolete Group codes will not be visible on the look up lists by default but can be found using the F5 “Inc Obs” function.	Feature	850260
Communication	Internet	**Wholegood Extract/Upload** A new email address has been added the Depot Address file for “Finance Scheme Notification Email”. If this is populated an email will be sent to show the machines sent for finance and any exclusions. If this email has not been set the email address for “Wholegood Email” will be used.	Feature	849383

Manufacturer Integrations		
Kuhn isearch	Ibcos have developed a link to KUHN isearch parts locator. Kuhn isearch is a permanent on-line search tool that enables you to find worldwide, within the KUHN distribution network, a part temporarily unavailable or sold out (or no longer available and no longer produced). With this service, each Kuhn isearch subscriber can directly contact his counterpart (also a Kuhn isearch subscriber) that has the required part in stock. The pilot sites will be testing this link in v7.18 and we would anticipate this being available on general release towards the end of August.	
Stihl Product Registration	Ibcos have created an interface with STIHL B2B to automatically register machines sold. When serial items are sold the dealer then has to register the sale on the Stihl B2B website for warranty. This process can be very time consuming particularly in busy periods. With this service the Stihl serial items sold each day are sent directly to the Stihl B2B website and are automatically registered for the appropriate warranty. The pilot sites will be testing this interface in v7.18 and we would anticipate this being available on general release towards the end of August.	
agroparts Integrations	**Parts Locator** The **agroparts *PartsLocator*** lets you easily and reliably check the availability of a required genuine spare-parts in your region and react quickly if the genuine spare-parts is out of stock at the manufacturer. Your customers benefit from your smooth, uncomplicated and just-in-time service. You can also show your stock to other dealers so that you can reduce your holding of stock that is no longer needed. **Basket** The **agroparts *Basket*** interface enables you to transfer shopping baskets easily and simply between Gold and **agroparts**. This saves a lot of time on a daily basis and avoids mistakes because part numbers that have been searched for or entered do not have to be manually entered again! **Connect** Transfer a shopping basket from Gold directly to **agroparts** Order Management – with just one click!	

	agroparts *Connect* is an extension of **agroparts *Basket***. If this interface is set up, you can transfer a shopping basket to **agroparts** Order Management with just a single click and process your order immediately. You no longer need to log in to www.agroparts.com and manually save and open the shopping basket. This saves you valuable time with every spare parts order! The pilot sites have been testing this in v7.17 and we would anticipate this being available for general release in August.
CLAAS E-Billing	Gold now has the capability to receive electronic invoices from CLAAS into the Gold docstore. This feature receives the invoice, checks against the order in Gold that stock has been received. It then populates all elements in the invoice confirmation program, including supplier invoice number, tax point date, nett and VAT as well as all part lines with quantity invoiced and correct values as per the invoice. The pilot sites will be testing this interface in v7.18

New Features and Enhancements - Gold Service

Type	Details	Ibcos Ref
Portal	Amend the job card printing settings (decrease the standard box sizes and move the signature box to the top of the page)	GOLD-2772
Portal	Change the default option on the drop-down menu in the portal to be labour rather than travel	GOLD-2085
Portal	Enable the user to charge overtime for travel Users can now set a code of 'TRV' in the code section of the company control file, and this will then include it in the over-time calculations. If you don't want to charge overtime for travel, just set your preferred rate in this box instead.	GOLD-2870
Portal	Set labour rate in the portal before approving the activity line Users can now amend the labour rate in the portal before approving the labour line. Users will now see a drop-down box next to each labour line in the time approval screen of the portal. The dropdown box will always default to 'automatic'. This new feature works in conjunction with the current Gold Process which is to set labour rates in Gold using the Time Clock File, the Invoice Type and / or the Engineers' Rate File screens. The approver can use the default 'automatic' option, which will pull the rates through from the Time Clock File in Gold. If no information is set in this screen, it pulls it from the Invoice Type Screen. If none are set in this screen, it pulls it from the Engineer Rate File. Alternatively, the manager can choose to override the automatic default rate by choosing another option from the drop-down list. The descriptions shown in the drop-down list can be set up in the Labour Rates Descriptions screen in Gold. The information set in Gold will determine the options available in the drop-down list on the portal.	GOLD-3720
App	Remove the "Not Present" button on the signature section of the completion screens if a signature has been added The 'Not Present' button is now only displayed if the button hasn't already been pressed, and no signature has been supplied. If a signature has been captured in the app, this button will no longer appear on the screen.	SA-796

Bug Fixes – Gold Service

Type	Details	Ibcos Ref
Portal	Labour lines are not printing out on the job cards	GOLD-2771
Portal	When time is entered into the portal manually it shows as 1 hour out in Gold (due to the clocks changing)	GOLD-3061
Portal	The time approval page fails to load when there is a large volume of job activities	GOLD-3537
Portal	The WIP Details Report is not picking up the Logged date when a job is completed on the app	SA-913
Portal	The day and month are switching themselves around on the portal	GOLD-3687
Portal	The portal fails to load all times for approval when it involves a large volume of data	GOLD-3693
Portal	Wholegood invoices take up to 4 minutes to raise since upgrading to v7.18	GOLD-3735
Portal	Gold Service is not always displaying the correct amount of time in the engineer summary screen	SA-561
Portal	Labour lines not always showing in the portal	SA-715
Portal	The flat rate selected in the app is not allocating to the labour line in the portal	SA-729
App	Unable to log into the app when the iphone screen is in landscape mode	SA-762
App	The 'pull-to-refresh' action on the app is taking a long time	SA-763
App	The travel button is no longer visible on the app	SA-777
App	Daily summary screen travel icon is showing as a spanner rather than a vehicle	SA-782
App	Jobs created with a date but has no time set are not showing on the correct group	SA-792
App	The job tab is not going back to the signature tab when submitting a signature	SA-798
App	Pressing the completion button is not stopping time and allowing the user to exit the job	SA-876
App	Jobs shown on the main screen of the app are not ordered correctly	SA-906
App	The app will not allow me to start normal labour on a job with a flat rate	SA-910
App	Android App crashes when time zone of device is other than GMT+1	SA-915
App	Scanning a barcode is causing the app to crash	SA-941
App	Prevent completion of a repeatable job	SA-458
App	Pressing the blue tick needs to continue to record time	SA-566
App	User is unable to complete a job that has been marked as re-opened in Gold	SA-1074
App	Labour, travel and complete buttons are missing on the app	GOLD-3638