Gold 7.20 Release Notes

October - December 2019

Area	Category	Description	Q/F	Ref
Parts Control	Stock Enquiry	**POS Advice Lookup** When looking at a list of existing advices the values for the Order column were not displayed correctly.	Quality	858254
Parts Control	Stock Enquiry	**Part Supersession** If a part number is entered that is the top level of the supersession chain and there is no stock of the older parts in the chain the part should be displayed directly.	Quality	853944
Parts Control	Point of Sale	**Point of Sale** Where component parts of a kit had zero or negative stock the vat code applied was the zero rated code instead of the vatable code.	Quality	855201
Parts Control	Purchasing	**Input Goods Received Notes** If the part was created with a sales pack quantity split then the average price was not calculated correctly when the part was received into stock.	Quality	853021
Parts Control	Purchasing	**Invoice Confirmation** The warning that should be displayed when confirming an order for another depot was not being displayed.	Quality	847242
Parts Control	Part Maintenance	**Mass Parts Amendment** When selecting 'All' parts and updating the Lead Time or Commodity Code for those parts, the selected fields were not actually being updated.	Quality	849640 856231
Parts Control	Management Information	**Age of Shelf by Prefix** Prefixes with all zero values have been excluded from this new report.	Quality	823961
Parts Control	Supplier/ Pricing	**Price Update** When prices had been manually set on a POS advice note and the price agreed with the customer, if a price update was applied before the invoice was produce the price was being changed to the new price. To allow for this a new prompt has been added to the Price Update routine.	Feature	852345

		Update manually set POS prices: Yes/No If 'No' is select any POS advice lines where the retail price has been manually changed will not be updated.		
Parts Control	Sales/ Labels	**Parts Barcode Label Production** The field for advice/job number has been made available for xml labels in parts/barcode label production.	Feature	857720
Workshop	Workshop Entry	**Workshop Entry** Where parts were transferred from one workshop to another, the default vat rate on the part was overridden by the company default.	Quality	852474
Workshop	Batched Invoice Print	**Batched Invoice Print** An error that could occur when running the Batched Invoice Print has been resolved.	Quality	852751
Workshop	Batched Invoice Print	**Batched Invoice Print** Where advices notes were created via Goldlink, if the carriage was set as zero price free of charge it was not being printed on the invoice. This has been corrected.	Quality	851200
Workshop	Workshop Diary	**Scheduler** An error that occurred when exiting from the job print screen has been resolved.	Quality	841419
Workshop	Batched Entry	**Split/Construct Parts** An average rounding issue when there was a large change in the cost of a part created via Split/Construct has been resolved.	Quality	856913
Workshop	Reports	**Workshop Days Turnaround** Fields for Date and Time Last Worked on have been added to the Excel output for this report. This change was implemented following a request to ideas@ibcos.co.uk	Feature	847850
Wholegoods	Commission	**Detailed Commission Report** An attempt to divide by zero error caused by an invalid Retail price has been resolved.	Quality	855862
Wholegoods	Commission	**Extract Possible Commission** The commission extract was incorrectly including unsold wholegoods with a blank rep code.	Quality	858814
Wholegoods	Posting	**Invoice Print** When creating a new Vat Margin scheme invoice for a Wholegood, the Vat calculation showing on	Quality	853472

		the Invoice Tab was showing the incorrect calculation. It was using the Retail Price minus Net Stock Value instead of Retail Price minus Trade In Price.		
Wholegoods	Enquiry	**Wholegood Lookup** A new option has been added to the wholegood lookup to check the customer allocation status and therefore list wholegoods allocated to customers. New options are: Include Allocated Stock Exclude Allocated Stock Allocated Stock Only This was implemented as a result of a request to ideas@ibcos.co.uk	Feature	844561
Plant Hire	Enquiry	**Contracts Enquiry** An error that occurred when selecting the Transaction tab for a Contract in Windows Gold has been resolved.	Quality	851072
Plant Hire	Posting	**Time Sheet Input** In Windows Gold when adding timesheet lines, not all fields were bringing up a lookup list of codes when the Enter key was pressed.	Quality	848650
Sales Ledger	Action	**Customer Enquiry** An issue where an error occurred when adding a manual customer payment has been resolved.	Quality	833750
Sales Ledger	Action	**Statement Print** The presence of sub accounts was causing different month sub totals to be printed as compared to the account enquiry.	Quality	844470
Sales Ledger	Action	**Statement Print** When overriding the print settings for a batch of statements it was possible to inadvertently send a batch of statement to a single customer. This has been resolved.	Quality	857504
Sales Ledger	Action	**Statement Print** When selecting to "Verify" the statement run the resulting report did not provide a total for statements to be posted.	Quality	853653
Sales Ledger	Posting	**Cash Posting** A partial payment posted against a foreign customer account was posting out of balance in the nominal ledger.	Quality	851842
Sales Ledger	Action	**Customer Enquiry**	Quality	857781

		When sending a manual SMS text message direct from the customer enquiry routine, if a standard message template (Customer Type) is selected that includes any field containing CMF balance, then when the SMS is sent the balance displayed within the SMS sent is 0.00 This has been changed so that the correct customer balance is included in the message. `		
Nominal Ledger	Enhanced Fixed Assets	**Asset Transfer** When transferring a wholegood back to fixed assets the purchase price and monthly depreciation values were calculated incorrectly.	Quality	849385
Comms	JCB Links	**Machine Health Check** The descriptions for the report were being taken from the first workshop job rather than from the invoice type file. The invoice type file description will now be used if available.	Quality	856150
System Management	System Utilities	**Company File Update** The Company File Update was not running for Archive companies unless the user was logged in as a super user. The routine will now run correctly for all users.	Quality	858731
System	Invoicing	**Invoicing** Change to the wording on invoices with Credit Charge following HMRC inspection. Credit charge invoices were printing the words "discount xxx.xx" where it is a credit charge and not a discount. The wording was only appearing on invoices if company control files>general 1>general Tab>VAT Breakdown Analysis was set to 'left'. Change made to not print the wording if VAT Breakdown Analysis is set to right to work in the same way as left.	Quality	856820
Housekeeping	Parts	**Parts File Integrity Check** The Parts File Integrity check program was stating "Cannot Process – Users Logged In" even when there was only one user logged in to the current company.	Quality	858133

Manufacturer Integrations			
agroparts Connect	An additional improvement has been made to the agroparts Connect interface. When exporting a supplier stock order from Windows Gold the parts can now be loaded directly into the agroparts basket. Classic Gold will continue to email the link to the user.		
Kramp Data Feed	Kramp requested an integration for each dealer to send through a daily feed of information relating to Sales and Inventory from Gold to use in their Dashboard/Analytics tool. Ibcos will set up each Kramp dealer to send a rolling 3 months of data on a daily basis.		
CLAAS Warranty	An integration has been development to provide a mechanism to upload basic warranty claim information to the CLAAS Service Online portal. This is to prevent users having to rekey time consuming information such as the list of parts used on the job and the job story/text.		
AGCO e-Commerce	The AGCO e-Commerce system is currently in testing with a pilot dealer. This allows customers of the dealer to place orders on a website, select from AGCO parts and send the order to the dealers Gold system. Although AGCO fulfil the order at present the dealer is credited with the sale and Gold then sends the invoice to the customer. For cash sales, payment can be taken online using a secure payment method.		
AGCO CPQ	AGCO CPQ Wholegoods is currently in testing with a pilot dealer. This is a configuration portal which will allow end customers to start to configure machines and then work with a dealer to complete the configuration so that an 'order' can be placed. It will suggest a machine that is currently in stock if a close match can be found or else a brand new order can be placed for the customer. Extras such as accessories and extended warranties can also be added.		

New Features/Updates to Gold Service

Bug Fixes

Area	Description	Ref
Portal	**Automated timesheet print** The automated time sheet print was showing a description of 'labour transferred' when no labour had been transferred between jobs. The customer name was also showing 'workshop supervision' instead of the customer name. These issues have now been fixed so that the automated time sheet print pulls accurate information through.	GOLD-4019
Portal	**Multiple time entries** An issue was occurring where the invoice number was not being attached to the ILA record once the job had been invoiced. This meant that when Gold cycled back round and re-used the number, it would pull the historical information through. This issue has now been fixed so that the invoice number is attached to the ILA record once the job has been invoiced and when Gold re-cycles the number it does not pull historical information through.	GOLD-4258
Portal	**Incorrect notification for outstanding gold service job activities** When invoices were being batched, the user would see a notification which said: 'Outstanding gold service job activities – continue'? This notification would appear even when there were no outstanding activities and would occur when multiple start and stop times were held in the data for the same job. This has now been fixed, and the warning notification will not appear unless there are outstanding activities associated to that job.	GOLD-4475
Portal	**Error with the 'Outstanding Gold Service Job Activities – Continue?' notification when batching invoices** When batching invoices, users were seeing a notification on their screen which said 'outstanding Gold Service job activities – continue? This issue was occurring because the Portal was recording the same labour line twice (which was not visible to the user). As a result, the system thought that some of the labour lines had not been authorised. This issue has been resolved so this notification will now only appear when there genuinely is outstanding labour.	GOLD-4475
Portal	**Issues with time margins on labour** Labour values for time logged via Gold Service should be calculated based on labour base in the invoice type and engineer record, and any percentages set against Invoice Type Labour base % Uplift should calculate accordingly. These values were calculating incorrectly. This issue has now been resolved and the values are calculating based on the correct data.	GOLD-4348
Portal	**ILA records not created when recording time and attendance** When time and attendance was logged on the App, it wasn't creating an ILA record. This meant that the labour was not reaching Gold. This issue has been resolved so that ILA records are created, and the labour reaches gold as per the normal process	GOLD-4258
App	**App Crashing** There was an intermittent issue with the bar code scanning function. Occasionally, it would close the app when trying to scan the bar codes. When the job was re-opened, it would show that it had registered the scan. This bug has now been fixed.	SA-1193

Both	**Customisable Job Stories** There was a bug within the Customisable Job Story feature. When you set up a new job in Gold as a customised job, the story box in the App would be editable as expected. The issue occurred when the engineer completed the job. The story they had built up over the course of the job was not pulling through to the job completion screen, and any changes or amendments would overwrite the information that had reached the Portal. This bug has now been fixed so that the story written by the engineer is visible on the job completion screen.	SA-1217

New Features

Gold Service 2.0 will be available during February.

Users of Gold Service 2.0 can take advantage of the following features:

Feature	Description
Dial phone numbers from the App	Users can now dial phone numbers from directly within the App using the information displayed on the customer screen. This reduces the need for the engineer to exit the app to be able to make a phone call.
GPS Stamp Locations in the Portal	Managers can see the precise location of the engineer when they stopped recording time. This information will be visible in the History tab of the job on the Portal.
Add jobs to a favourite folder	Engineers can now mark jobs as 'favourites' in the App which will add them to their favourites folder. This allows the engineer to easily find the jobs they are working on, which may not be visible on their home screens.
Add Images to a job on the App	Engineers can now add images to a job in the App by using existing images from their camera roll, or taking new photos from directly in the App. These images are then sent to the Portal for the managers to approve them.
Parts Feature	Our new Parts Feature allows engineers to mark parts as collected, used and returned on a job in the App, as well as allocate stock from their specific allocation to a job. This information is then fed back to the Portal, where the managers can run stock take reports and audits against the parts used.