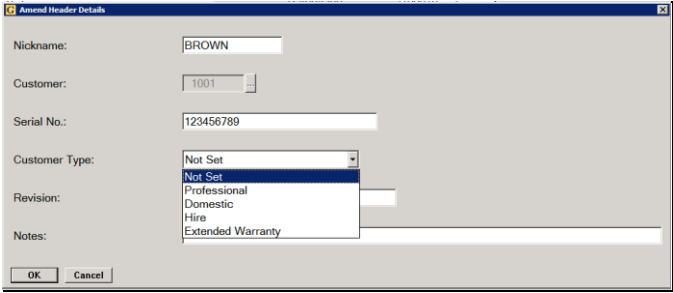


# Gold 7.21 Release Notes

January – March 2020

Area	Category	Description	Q/F	Ref
Communications	Stihl	<b>Stihl Product Registration</b> A new customer type has been added to the options. MEW - Extended Warranty	Feature	4707
Communications	Stihl	<b>Stihl Product Registration</b> A change has been made to ensure that the correct customer address is sent to Stihl. If the delivery address for the sale is blank, then the customer details will be taken from the advice header. This covers the scenario where the customer details are entered manually against a cash sale account.	Quality	5007
Communications	Stihl	<b>Stihl Product Registration</b> An issue where not all processes were run when running the batch has been resolved to ensure that all relevant sales are sent to Stihl.	Quality	5010
Communications	Stihl	<b>Stihl Product Registration</b> A new option has been added to Parts Control, Enquiry, Serial Number Enquiry to allow the “Customer Type” sent to Stihl for product registration to be viewed.  If the type is “Not Set” then it is possible to select a type from this screen and the item can then be re-sent to Stihl.	Feature	4226
				
Communications	Ibcos Goldlink	<b>External Order Allocation</b> The External Order Allocation program has been enhanced to have a new Dealer status “Firm Order Allocated”	Feature	5150

		<p>This new option will not immediately allocate stock.</p> <p>The External Order Allocation will allow the user to see all part requirements for the advice and select to either allocate or order stock and where the stock is allocated the user will get the Serial Number selection screen, as they would in a normal POS advice.</p> <p>Where partial availability exists, it will present the “Order All/Order Remainder” function and then, depending on the selection, split the line to sold and order and when sold offer up the serial number selection.</p>		
Communications	Ibcos Goldlink	<p><b>FTP Goldlink</b> When setting the system to create new customer accounts, a number of issues were addressed.</p> <ol style="list-style-type: none"> <li>1. New accounts were being created without checking for duplicates.</li> <li>2. The account number allocated to a new account was not in the invoice type range.</li> <li>3. Depot defaults were not applied to the new account correctly.</li> </ol>	Quality	4108
Parts Control	Purchasing	<p><b>Invoice Confirmation</b> An error occurring when posting an import invoice has been resolved.</p>	Quality	5152
Workshop	Workshop	<p><b>Workshop Entry</b> The file used to record the workshop audit trail entries (M_AUDIT) has been extended to a terabyte file to allow for more room when taking copy companies.</p>	Quality	5158
Workshop	Workshop	<p><b>Invoice Recall</b> When creating a workshop job, the Vat Code for labour was being incorrectly set to 0 if a customer was set as Apply Vat No. Then, when a credit was created against the same job, the Vat Code was being set as 9.</p> <p>This resulted in an incorrect EU Sales/Purchase rate which therefore was not included in Box 8 of the VAT return.</p>	Quality	4577
Workshop	Warranty	<p><b>Receipt</b> A new option has been added to allow adjustments</p>	Feature	3847

		<p>made for warranty loss/gain on labour to adjust the hours as well as the value.</p> <p>A new company control file option allows this to be set.</p> <p>Workshop – General          “Write Warranty Labour Loss” has been changed from No/Yes to:          * No          * Value          * Value &amp; Hours</p> <p>Setting this to “Value &amp; Hours” will make the Labour Efficiency report more accurate.</p>		
Wholegood	Posting	<p><b>Invoice &amp; Self Bill</b>          On creating a self bill invoice for a wholegood purchased from the EU, vat code selected changes to zero rated and therefore not treated as an EU purchase for MTD.          The vat from the company control file was being used rather than the vat code from the customer account.</p>	Quality	4579
Wholegood	Posting	<p><b>Invoice &amp; Self Bill</b>          An error which occurred when multiple attempts to credit an invoice with a large number of lines were made has been resolved.</p>	Quality	4586
Wholegood	Enquiry	<p><b>Wholegood Enquiry</b>          An option has been added to allow the paid status of a sales invoice to be seen via the Wholegood Audit.</p> <p>This change was made as a result of a request to <a href="mailto:ideas@ibcos.co.uk">ideas@ibcos.co.uk</a></p>	Feature	2594
Sales Ledger	Action	<p><b>Customer Enquiry</b>          The profit value for Wholegoods was reported incorrectly due to a error in the way credit notes were being handled.</p>	Quality	4184
Purchase Ledger	Action	<p><b>Supplier Enquiry</b>          When selecting to view an order for another depot a warning will be displayed before the showing the order details to correct an issue where the details for an order at another depot could not be viewed via Supplier Enquiry.</p>	Quality	5088
Nominal Ledger	Additional Facilities	<p><b>Create/Amend Budgets</b></p>	Quality	4676

		When importing budgets from a .csv file, any negative values were imported with an equal sign '=' instead of a minus sign.		
Nominal Ledger	Reports	<b>Sales / Purchase List by Country</b> An error which occurred when exporting the report to Excel from Windows Gold has been resolved.	Quality	4675
Nominal Ledger	Reports	<b>Ledger Audit Report</b> A minor change to the report options where it was not possible to enter past the report number field when Range was selected.	Quality	3215
Housekeeping	System Utilities	<b>Company File Update</b> The company file update was producing an error when run from Windows Gold.	Quality	5217
<b>Manufacturer Integrations</b>				
<b>JCB iMHC</b>		<p>This integration provides a Job Request Portal which brings in instant notifications directly from Livelink. This includes both service and critical health alerts.</p> <p>These job requests can then be reviewed, and jobs created in Gold where required, without the need to rekey machine or customer information.</p> <p>Gold will also send information relating to jobs scheduled for engineers directly to eDynamix to create a machine healthcheck.</p> <p>Follow up jobs and information is then sent back from eDynamix to the Job Request Portal so that additional jobs can be created in Gold as required.</p> <p>This integration is going into pilot testing with v7.21</p>		
<b>AGCO Warranty Changes</b>		<p>Some improvements have been made to the AGCO Warranty process in Gold to enhance the user experience.</p> <p>Date Defaults - Failure Date now defaults to "Date First Worked On" Repair Date now defaults to "Date Last Worked On" Date Part Fitted now defaults to "Repair Date"</p> <p>The headings from Gold service from the Job Instructions/Story will now automatically populate the correct tab for Symptoms/Diagnosis/Repair</p> <p>Further changes will be made to the AGCO warranty system later in the year in line with changes AGCO have made to their systems.</p>		

<p><b>John Deere SvAP</b></p>	<p>This module provides a facility to send job alerts from within John Deere SvAP system to the Job Request module in the Gold Portal.</p> <p>Wholegoods are matched from the data sent from SvAP and customer contact information is presented on screen.</p> <p>This then allows you to customise the job alert sent from SvAP, in a web portal screen. The portal will then create a workshop job, update the scheduler and send the job to the engineer if required.</p>
<p><b>CNH eBilling</b></p>	<p>This module downloads electronic PDF documents for parts invoices and credit notes from CNH. This gives you the ability within the invoice confirmation program to automatically match to the purchase orders or returns.</p> <p>Invoices and credits can be processed automatically and posted if all quantities and prices match. Alternatively, you can view each invoice and update the purchase ledger individually if preferred. A docstore is required for this integration.</p>
<p><b>CLAAS eBilling</b></p>	<p>This module processes electronic parts invoices and credit notes emailed from CLAAS and allows the invoice confirmation program to automatically match to the purchase orders or returns.</p> <p>Invoices and credits can be processed automatically and posted if all quantities and prices match. Alternatively, you can view each invoice and update the purchase ledger individually if preferred. A docstore is required for this integration.</p>
<p><b>Kramp eBilling</b></p>	<p>This module downloads electronic information only for parts invoices and credit notes from Kramp. This gives you the ability within the invoice confirmation program to automatically match to the purchase orders or returns.</p> <p>Invoices and credits can be processed automatically and posted if all quantities and prices match. Alternatively, you can view each invoice and update the purchase ledger individually if preferred. Currently in pilot phase.</p>

## New Features/Updates to Gold Service

### Quality Updates

Area	Description	Ref
Portal	<p><b>Job numbers duplicating between companies</b></p> <p>An issue was occurring where workshop jobs were crossing over between companies and appearing in the wrong company view.</p>	GOLD-4338
Portal	<p><b>Colour change function</b></p> <p>The Mobile App icon was not visible against an Engineer in scheduler despite their Gold Service licence being switched on against the Engineers personnel security file. This resulted in means the colour change function against the task not working.</p>	GOLD-4924
Portal	<p><b>Job story visible in Gold but not in the Portal</b></p> <p>There was an issue with the story entered in the Mobile App were visible in Gold but not in the Portal.</p>	GOLD-5081

### New Features

Feature	Description
New look to the Job Screen on the Portal	<p>We have listened to our customers feedback and given the Job Screen in the Portal a brand-new look and feel to improve the user experience. We have removed the separate tabs of 'In Progress' and 'Logged for Checking' to enable you to easily see all jobs on one page.</p> <p>This new feature will not be visible to users immediately but will be available soon. Please note – this feature does not work with Internet Explorer.</p>
Multiple Authorisation within the Portal	<p>We have developed a new feature which will enable more than one person to check and authorise a job before it is invoiced. The functionality can be configured to suit your individual processes for multiple authorisation.</p> <p>This new feature will not be visible to users immediately but will be available soon. Please note – this feature does not work with Internet Explorer</p>