

Gold 7.22 Release Notes

April - June 2020

Area	Category	Description	Q/F	Ref
Sales Ledger	Action	Customer Enquiry Based on a request made via ideas@ibcos.co.uk the customer Fax Number displayed in the header section of the account enquiry has been replaced with the account email address. The fax number can still be seen on the Options tab or via Customer Maintenance.	Feature	4337
Sales Ledger	Transactions	Cash Posting When posting a base currency receipt for a foreign currency customer, if a part payment was entered with a write off the resulting postings were out of balance.	Quality	5583
Sales Ledger	Transactions	Cash Posting When posting a receipt for a foreign currency customer, if the value was left unallocated the value posted for the base currency was out of balance.	Quality	5092
Sales Ledger	Action	Month End Update When calculating the inactivity option for accounts based on the number of months inactive to set stop flag, invoice and statement to accounts were not being considered resulting in some accounts being set as on stop incorrectly.	Quality	3268
Sales Ledger	Action	Month End Update The aging of customer balances was not being calculated correctly for systems set to age sales transactions by "Due Date". This related to transactions posted where the due date was in the following month.	Quality	5394
Nominal Ledger	Reports	VAT Return The Making tax digital module has now been enhanced to comply even more stringently with HMRC fraud prevention requirements. In addition to this, when submitting the VAT return in Classic Gold, the HMRC Government gateway website will now be opened directly for you in the internet browser that is used for the online Gold	Feature	4981

		<p>manuals. You will still receive your email with a link to the HMRC Government Gateway.</p> <p>For Windows Gold the method is unchanged and you will continue to get the email sent to your email address as normal.</p>		
Purchase Ledger	Action	<p>Supplier Maintenance The field for Company Registration Number on the CIS tab has been enabled for all accounts not just subcontractor accounts so the company registration number can be recorded.</p> <p>Based on a request made via ideas@ibcos.co.uk</p>	Feature	3843
Parts Control	Purchasing	<p>Invoice Confirmation A windows size issue that was causing a crash for some users has been resolved.</p>	Quality	5310
Parts Control	Stock Enquiry	<p>Point of Sale When recalling an existing advice that has any deposit activity on it a warning will be displayed to make the user aware of this.</p> <p>This has been done to prevent the situation where a deposit has been taken but then all parts removed from the advice which then leaves the advice locked.</p> <p>Based on a request made via ideas@ibcos.co.uk</p>	Feature	4877
Parts Control	Stock Enquiry	<p>Point of Sale When creating an emergency order in point of sale or from a workshop job, if the order is for CNH the order type file will be checked to determine the CNH Order Type, this is taken from the Export Code held for the order type.</p> <p>If there is no Export Code set for the order type, the CNH order type will be set to U for Unit Down if the order is raised immediately or N for Normal if not.</p>	Feature	5015
Parts Control	Sales/Labels/Counter Pad	<p>Part/Customer Sales Analysis For sites where the serial number parts option is not licenced, this report was failing to run.</p>	Quality	5734
Parts Control	Purchasing	<p>Price Update When a price update was run from Windows Gold and the prefix set to Update both cost and retail price after price update, the routine was setting existing order prices to zero.</p>	Quality	5898 / 5996

Workshop	Action	Workshop Entry An issue where when a serial number part was deleted from a job for another depot, the transfer of the part was not completed correctly resulting in the serial numbers not matching with the free stock quantity. In addition to this a clearer warning message has been added to alert the user that the job is for a different depot and stock will be transferred.	Quality	5017 / 5636 / 5499
Workshop	Action	Workshop Entry An issue occurred where, when a memo part was deleted from a job for another depot the system was attempting to transfer stock. Stock should not be transferred in the case of memo parts and this has now been corrected.	Quality	5500
Wholegoods	Reports	Wholegood Sales Analysis A new option has been added to the Wholegood Sales Analysis to allow selection of New Only, Used Only or All Wholegoods. The default is New Only.	Feature	3890
Workshop	Action	Parts / WSJ Invoice Recall When examining an invoice in invoice recall a field has been added to the header tab to show the labour discount percentage applied to the job. Change implemented based on a request made via ideas@ibcos.co.uk	Feature	4910
System	General	Licence Expiry Warnings The two week licence expiry warning has been changed so that it will only be displayed for super users rather than all users. The one week warning will still be displayed for all users.	Quality	3897
System Management	Utilities	Batch Queue Maintenance An error that occurred when setting up a new batch report in windows Gold has been resolved.	Quality	4467
System Management	Utilities	Generate ODBC Catalogue After generating the ODBC catalogue, it was not possible to access the TIM "Timeclock" table via ODBC.	Quality	3271
Communications	Goldlink	External Order Allocation The External Order Allocation program was not updating the Work in Progress values on the stock file correctly when allocating stock to Goldlink orders.	Quality	5643

Housekeeping	System Utilities	Company Copy/Delete When using the option to Size All or Verify All the routine was causing an error.	Quality	5378
Housekeeping	System Utilities	Company Copy/Delete The Copy Company program was reporting some missing files as critical files and marking companies unsafe where this was not appropriate. Some manufacturer specific and other non-critical files have now been correctly marked so as not to cause critical errors.	Quality	4680
<h2 style="color: #D4AF37;">Manufacturer Integrations</h2>				
John Deere	Okta Data Security – Warranty Following the security changes earlier in the year relating to Parts and JD Point, the links from Gold to the John Deere Warranty system will move over to the new security system from the end of August.			
John Deere	SvAP This module provides a facility to send job alerts from within John Deere SvAP system to the Job Request module in the Gold Portal. The module has been enhanced to enable the flow of updated workshop jobs to SvAP, which include: <ul style="list-style-type: none"> • Job started (added parts or labour) • Job Completion (Gold Service app or manual status change) • Job Invoiced (invoiced job) During which the relevant information is updated in SvAP alleviating the need to update the work order in SvAP This integration is in final pilot testing phase.			
AGCO e-Commerce	The AGCO e-Commerce system is going into testing phase with a pilot dealer and a small selection of their customers. This online shop allows customers of the dealer to locate parts required, check stock availability and place orders on the website. These orders are sent directly to the dealers' Gold system for fulfilment.			

New Features - Gold Service

App / Portal	Description	Reference
Portal	<p>Filter 'Time Approval' by Scheduler Department</p> <p>When using the Time Approval screen in the Portal, we have made it easier for customers who have 2 or more technicians approving engineers time by allowing those technicians to filter by Scheduler Departments.</p>	GOLD-2116
Portal	<p>Show job instructions from Gold in the Portal</p> <p>In the Portal, in the job tab of the job, we have added the Job Instructions from Gold.</p>	GOLD-4474
Portal	<p>Make adding time for an engineer easier in the Portal</p> <p>In the Time Approval screen of the portal, we have made it easier for users to add hours for engineers by using the 'Add Hours' button at the top right-hand side of the screen. Users can now manually enter the details into this screen instead of having to use the drop-down menus and calendar selections.</p>	GOLD-5415
Portal	<p>Multi Authorisation</p> <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. On the Portal you will see the 'jobs' page as well as a new page called 'Jobs New View'. We will run both pages in conjunction with each other to allow users to get used to the new feature. More information can be found in the instruction manuals located on the customer portal.</p>	GOLD-2088
Both	<p>Checklists</p> <p>Our new checklist feature allows you to create and assign checklists to a job, and have the engineer complete them in the Gold Service Mobile App. This information is then fed back to the Gold Service Portal.</p> <p>It is currently in the Early Adopter testing phase, which is due to be complete by August / early September 2020. At this time, a new Gold release will be available to Gold Service 2.0 users only as it is a Gold Service 2.0 feature.</p> <p>Ahead of this, we are aiming to release v2.3.0 of the Gold Service Mobile App mid-August. With this App release, engineers will be able to see a new tab called 'Checklists', but they won't be able to do anything with it until the Gold release is done. More information on the Checklist feature can be found on the Gold Service Landing Page on the Customer Portal.</p>	GOLD-2092

Quality Updates - Gold Service

App / Portal	Description	Reference
Portal	<p>Job Search default date In job search page on the portal, when the user searched for a job using the job search function, the date was defaulting to yesterday's date. This has been amended so that the default date will show as 'today's' date.</p>	GOLD-3507
Portal	<p>Password box on Engineers page in the Portal In the Engineers screen on the Portal, there was a password box that was redundant. This has now been removed.</p>	GOLD-5258
Portal	<p>Negative figures in Mileage and Clock hours In the Portal, the Mileage box and Clock Hours box allowed you to enter negative figures which was not deemed a valid entry. This has been amended so you can no longer enter a negative value.</p>	GOLD-5321
Portal	<p>Filter function in Engineer Screen on Portal not working In the Engineers page of the Portal, when the user tried to use the drop-down function to filter on a depot, it didn't work. Sometimes an error message would appear which said: 'no items to show'. This has now been fixed.</p>	GOLD-5666
Portal	<p>Job Search depot filter doesn't work In the Job Search tab of the Portal, the depot filter function would not offer any depot options to select. This has now been fixed so that all relevant filter options are returned.</p>	GOLD-5814
Portal	<p>Documents number icon not visible In the job screen of the portal, the documents number icon which displays how many outstanding documents require approval was not visible until the user clicked on the documents tab. This has been fixed.</p>	GOLD-5892
Portal	<p>Remember me function of the Portal not working In the log in screen of the Portal, if the user ticked the 'remember me' box, the portal should save the username and the depot selections that the user last used. This was not working but has now been fixed.</p>	GOLD-5907
Portal	<p>Time Approval not splitting the timeclock rates correctly on an 'Hours per Day' time base There was an issue whereby the Time Approval was not splitting the Timeclock Rates Correctly on an 'Hours per Day' Time Base in the Portal. This has now been fixed.</p>	GOLD-5918
Both	<p>Times Duplicated / Overlapped in the Portal and App There was an issue whereby some duplicated and simultaneous times were appearing in the Time Approval screen in the Portal as well as the Day Summary screen of the App. This issue has been rectified.</p>	GOLD-5216

App / Portal	Description	Reference
App	<p>Copy and paste information from the job story Engineers found they were unable to copy and paste information from the job story into the notes section of their phone in Gold Service 2.0 – something they could do in Gold Service 1.</p>	SA-1341
App	<p>Week Summary screen is not showing approved time On the Week Summary screen in the App, the green times were not updating as the logged time was amended and approved in the portal.</p>	SA-1413
App	<p>Syncing issues when engineers logged out and back into the App There were issues with the data syncing from the cloud when logging out and back into the App.</p>	SA-1536
App	<p>Invoiced jobs displaying in the 'In Progress' tab on the App Invoiced jobs, as well as incorrect jobs, were displaying in the 'In Progress' tab on the App in Gold Service 2.0, despite having been invoiced in Gold.</p>	SA-1546
App	<p>Comments and final remarks were not reaching Gold or the portal Engineers comments, customised job story information and final remarks were not reaching the Portal when the engineer marked the job as completed. The problem occurred because of a timing issue between an update to the job story and the completion of a job, and unfortunately only occurred sporadically.</p> <p>To prevent this issue from occurring, we have had to stop the engineers being able to edit the customised job story during job completion. This section is now read only during both screens of the job completion workflow.</p>	SA-1550
App	<p>The Home Screen would get stuck between the 'Tomorrow' and 'In Progress' tabs When scrolling between tabs on the home screen in Gold Service 2.0, the screen would get stuck between the 'Today' screen and the 'In Progress' screen.</p>	SA-1551