

# Gold 7.23 Release Notes

July - September 2020

Area	Category	Description	Q/F	Ref
Workshop Control	Workshop Diary	<b>Scheduler</b> When creating a job in the scheduler it was not possible to select Planned Maintenance Repair or Service invoice types.	Quality	5914
Workshop Control	Workshop Diary	<b>Scheduler</b> When creating a job in the scheduler then changing the invoice type the system was not picking the standard story linked to the new invoice type.	Quality	2537
Workshop Control	Action	<b>Workshop Entry</b> When deleting a memo part from a job created at a different depot the warning message that stock will be transferred was displayed as for normal parts. This message does not apply to memo parts and has been removed.	Quality	6115
Workshop Control	Action	<b>Parts/WSJ Invoice Recall</b> When using the F8 Order Number option in invoice recall to change the customer order number only 10 characters could be entered rather than the new 20 character allowance.	Quality	5078
Parts Control	Stock Enquiry	<b>Stock Enquiry</b> When creating a new part record from Stock Enquiry, if the spacebar was used on the Sales Pack Quantity field an error was encountered. This error has been resolved.	Quality	3024
Parts Control	Stock Enquiry	<b>Point of Sale</b> When selecting the option to change the customer/invoice type for an existing advice note the order number field was truncated to 10 characters instead of allowing the new 20 character length field.	Quality	5737
Parts Control	Purchasing	<b>Invoice Confirmation</b> When posting an invoice for a part that has negative stock an out of balance posting was occurring.	Quality	5807 / 5440
Parts Control	Purchasing	<b>Invoice Confirmation</b> When processing an electronic invoice if the document is then forwarded to another Gold user to add comments and approve, when the	Quality	6121

		<p>administrator receives back the document it was not possible to see that it had been approved and no option to see the comments.</p> <p>A function key (F6) has been added to show the associated comments. The label includes a * to indicate if the document carries a comment.</p>		
Wholegoods	Action	<p><b>Invoice &amp; Self Bill</b> After a change of VAT Rate, as has happened in Ireland, invoices raised before the rate change were reprinting with the new rate where they should have remained on the rate that was applied at the time of the invoice.</p>	Quality	6530
System Management	Parts Control	<p><b>Average Price Change Report</b> An error when running the Average Price Change report due to additional transaction types has been resolved.</p>	Quality	6256
Housekeeping	System Utilities	<p><b>Company Copy/Delete</b> If the nominal history file is locked, the system gives an error at the end of the copy company stating record locked but displays "The Above item is temporary, so its absence is acceptable". This is a critical file and as such the copy company will be marked as unsafe in this circumstance.</p>	Quality	4673 / 5091
Housekeeping	System Utilities	<p><b>Company Copy/Delete</b> If the wholegood commission file does not exist in a company, the copy company is marked as unsafe and the file shows as a critical error. This is not a critical file for sites that do not use wholegood commission so will no longer be marked as a critical error.</p>	Quality	5381
Communications	Goldlink	<p><b>External Order Allocation</b> The option to allocate stock to an advice from an order raised by another depot has been added to the External Order Allocation program.</p> <p>Previously only orders from the current depot were available for allocation.</p>	Feature	5754
Communications	CNH	<p><b>Service KPI Report</b> Workshop labour hours/value were missing from the CNH Service KPI extract.</p>	Quality	6494
Communications	Comms	<p><b>Manufacturer Single File Import</b> When attempting to use the manufacturer single file import program an Invalid Channel Identifier error occurred.</p>	Quality	5523

## Manufacturer Integrations

<p><b>Job Request Portal (5286/5917/6568)</b></p>	<p>Some enhancements have been made to the Job Request Portal.</p> <p>The Job Request Portal enables alerts and other information from telematics systems to be received in so that workshop jobs can be created in Gold.</p> <p>Machine clock hours are now picked up from the telematics system and displayed as Current Clock reading on the job request. The readings are updated each time the telematics system is checked for new alerts. This clock reading is then passed through to the workshop job when it is created.</p> <p>Additional fields to show the Warranty End Clock and Extended Warranty End Clock have been added to the job request portal.</p>
<p><b>John Deere SvAP</b></p>	<p>We have added extra functionality to the John Deere SvAP job alerts system.</p> <p>Gold now updates SvAP at key stages of the workshop jobs lifecycle - providing job started, job completion and job invoiced.</p> <p>This completes the workshop job in SvAP, with all relevant information required and closes the work order.</p>
<p><b>Kramp Web Shop (6259)</b></p>	<p>When Kramp updated their webshop the option to import parts from the Kramp basket was lost.</p> <p>A new option "Import CSV from Kramp" has now been added to once again allow a file to be created of parts in the shopping basket which can then be imported into Gold either to a Point of Sale advice note, Cash Till invoice or Stock Order.</p> <p>Please note that this import currently only works for Classic Gold.</p>
<p><b>CNH eParts (4864)</b></p>	<p>CNH are replacing their existing NGPC Dealer Parts Catalog with their new eParts system at the end of the year.</p> <p>The new eParts system will cover all the functionality of the existing NGPC system.</p> <ul style="list-style-type: none"> <li>- Real Time Display of part price and stock information from Gold in the eParts system.</li> <li>- Working List (Picklist) transfer option to transfer the list of parts to be imported into Gold.</li> </ul> <p>We will be working with a pilot site over the next couple of months to ensure that the new system works seamlessly.</p>

	<p>Due to the newer technology used by CNH some dealers will find that their operating systems are not compatible with this new integration and will require updating.</p>
<b>CNH ASOD (2310)</b>	<p>CNH are replacing their existing PRIM II system with their new CNH Agricultural Sell Out Dashboard (ASOD).</p> <p>It remains an inventory management system and the functionality of ASOD is similar to PRIM II.</p> <p>A file is sent on a daily basis from the dealer to CNH through web services. The file contains stock movements (transfers, adjustments, orders and shipments etc), stock level detail and consumption (invoicing).</p> <p>The dealer receives confirmation files daily from CNH. The files contain return information, shipments, order acknowledgement and any errors/anomalies.</p> <p>This is going into pilot with one dealer then will be rolled out by CNH to other dealers to replace PRIM II.</p>
<b>AGCOnet Interface change (6237)</b>	<p>AGCOnet have made a change to the log in credentials, user IDs are now email addresses and the passwords are longer.</p> <p>Gold has been updated to allow for these changes.</p>
<b>Kramp eBilling - now available</b>	<p>This module downloads electronic information for parts delivery notes, invoices and credit notes from Kramp. This gives you the ability within input goods received, to book goods in automatically, as per your deliveries.</p> <p>In addition, the invoice confirmation program can automatically match to the purchase orders or returns. 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.</p> <p>A docstore is required at this time, for this integration.</p>

## New Features and Enhancements - Gold Service

App / Portal	Description	Reference
App / Portal	<p><b>Multi Engineer Feature</b> Our new Multi Engineer feature allows more than one engineer to work on a job at the same time. Each engineer working on the job can submit data to it which will reach the Portal. Managers can use this data to build up the job confirmation.</p> <p>Users will not be able to see this new feature until we release v2.4 of the App, which will be released about 1 month after the release of Gold v7.23.</p> <p>To allow more than one engineer to work on the same job, the job must remain open. Therefore, we have changed the job completion process. Engineers will no longer be able to mark the job as completed from within the App, and jobs will instead be marked as completed by the managers in the Portal.</p> <p>In the App, engineers will see a new colour status when they complete their work on the job and a new comments tab which enables multiple engineers to communicate with each other about that job.</p> <p>In the Portal, a new column called 'Ready To Complete' has been added into the Job View screen, between the In Progress and Logged for Checking Columns. Jobs will appear in this column when all engineers assigned to that job have marked their work as completed on the app. Additional new screens are available to allow Portal users to complete the job.</p> <p>It is imperative that users have upgraded to Gold v7.23 before their engineer's upgrade to v2.4 of the App. If you upgrade the App before Gold, the engineers will have no way of marking a job as completed in the App, and managers will have no way of marking the jobs as completed in the Portal. (Jobs can still be marked as completed in Gold, but the Portal completion process will no longer function properly).</p> <p>You can find more information about this new feature on the Gold Service page on the Customer Portal here: <a href="https://customer.ibcos.co.uk/gold-service-2-0/">https://customer.ibcos.co.uk/gold-service-2-0/</a>, using the links to the Instruction Manuals at the bottom of the page.</p>	N/A
Portal	<p><b>Add search function to the checklist library page</b> You can now search for a checklist in the Checklist Library page on the Portal, by using key words you know are associated to that checklist.</p>	GOLD-5614
Portal	<p><b>Improve the Search Function on the Jobs New View screen</b> We have improved the search function on the Jobs New View screen to allow you to search on the Job Description and Invoice Type using key words.</p>	GOLD-5748
Portal	<p><b>Improve error message relating to parts used on jobs</b> There was an issue with parts used on a job from Van Stock not showing in the job on the Portal or the App. Users would receive an error message which read: 'No current query in data reader / Object reference not set to an instance of an object'.</p>	GOLD-6067

App / Portal	Description	Reference
	We have amended this error message to be more user friendly, and it now reads: 'There was an unexpected error when processing this transaction'.	

## Quality Updates - Gold Service

App / Portal	Description	Reference
Portal	<p><b>Checklists not updating when changing between companies</b></p> <p>When users opened the Checklist Library page in the Portal and then changed companies, the page would not update with checklists associated with that company, and instead still displayed the checklists associated with the previous companies. This has now been fixed so when users change companies on this page, it will reflect the correct checklists.</p>	GOLD-6117
Portal	<p><b>When a manager marks the job as completed in the Portal, the job and all associated tasks in the scheduler should turn Gold</b></p> <p>With the development of the new Multi Engineer feature, we noticed an issue where some of the colours in scheduler were not updating as they should in line with the actions taken on Gold Service.</p>	GOLD-6862
Portal	<p><b>Job Stories created on portal not visible without navigating away from the screen</b></p> <p>Some users were experiencing an issue where data that was amended in the Job Story box on the Job Screen in the Portal was not visible unless they navigated away from the page and opened it again.</p>	GOLD-6921
Portal	<p><b>Error 400 message when updating job after its logged for checking in the Portal</b></p> <p>We have fixed an issue on the Portal where users were seeing an Error 400 message when trying to amend data on a job that had been marked as Logged for Checking.</p>	GOLD-6837
Portal	<p><b>Prevent Users from logging and approving Labour to non-labour posting jobs (such as Van Stock)</b></p> <p>Engineers were able to log Labour and Travel time for non-labour posting jobs (such as Van Stock). This time was then able to be approved in the Portal.</p> <p>We have added some protective measures in place to prevent engineers from being able to log time against these types of jobs, and the workshop from being able to approve this time. There is now a check to see if the invoice type associated to the job allows labour, rejecting the submission and approval of all actions or job activities for jobs that do not.</p>	GOLD-5026
Portal	<p><b>Amended comments are not saving on Checklist when added on Portal</b></p> <p>When users amended the engineer's comments on the checklists, it was not saving the information. Now, all amended comments are saved to the checklist as expected.</p>	GOLD-6161

Portal	<p><b>Alignment on Comments section of Checklists that are assigned to a Job</b> When users amended the engineer's comments on the checklists in the Portal, it was misaligning the text. This has been fixed so that all amended comments line up correctly.</p>	GOLD-6162
Portal	<p><b>Checklists incorrectly defaults configuration settings on Checklist setups</b> The checklists were defaulting to a configuration setting of 'Mandatory' to be completed 'during the job'. The defaults have been amended to the correct settings and now display as 'Non-Mandatory' to be completed 'at the end' of the job.</p>	GOLD-6164
App	<p><b>Jobs assigned to one engineer that are completed by another engineer remains open.</b> There was an issue where jobs assigned to an engineer were searched for and completed by another engineer were still showing as open for the engineer it was assigned to. This has now been fixed so that if another engineer searches for and completes a job assigned to someone else, that job will show as completed to the engineer it is assigned to.</p>	GOLD-6523
App	<p><b>Issue with logging time against van stock jobs.</b> There is an issue where engineers can currently log time against van stock jobs. The release of v2.4 of the App will resolve this problem. Until then, we recommend you remind your engineers not to log time on any van stock jobs, as this information will just be stuck in the cloud on the App and they will only be able to remove it by clearing the cache.</p>	N/A
Portal	<p><b>Issue with Serial Number Changes submitted to the Portal</b> You will have seen from our communications that our new Multi Engineer feature is due for release soon – it will be available in v7.23, but won't be accessible until the release of v2.4 of the App about a month later.  You will see that in between the Gold release of v7.23 and the App release of v2.4, the warning triangle will not appear in the Portal when an engineer submits a new serial number change. We suggest that all engineers who submit a serial number via the App notifies their managers that they have done so.</p>	N/A
App	<p><b>Copy and paste information from the job story</b> 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><b>Week Summary screen is not showing approved time</b> 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><b>Syncing issues when engineers logged out and back into the App</b> There were issues with the data syncing from the cloud when logging out and back into the App.</p>	SA-1536
App	<p><b>Invoiced jobs displaying in the 'In Progress' tab on the App</b></p>	SA-1546

	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.	
App	<p><b>Comments and final remarks were not reaching Gold or the portal</b>            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.            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. If you do need to change the job story, come out of the job completion workflow and go back to the relevant tab to make the updates.</p>	SA-1550
App	<p><b>The Home Screen would get stuck between the 'Tomorrow' and 'In Progress' tabs</b>            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