

Winter 2012 Build Highlights

New Features

Inter-Site Deliveries

For multi-site businesses, if a part needs to be delivered from one site to another site before the part delivered to the customer, an inter-site delivery can be created. These can only be created from the workorder manager:

- 1) In the workorder manager, highlight and right-click the part you wish to deliver to one of your other sites.
- 2) Click on Create Delivery. A special Inter-Site delivery screen will appear:

The screenshot shows a software window titled "[SimpleScheduleDelivery]: 204 - Pinnacle Professional". It has two main tabs: "Delivery Selector" and "Delivery Details".

The "Delivery Selector" tab contains two tables:

Internal Routes			
Title	Description	Delivery Schedule	Time
WAITING	CUSTOMER WAITING UP...	Mo,Tu,We,Th,Fr	08:00:00
1 WESTEND	Mon-Fri	Mo,Tu,We,Th,Fr	08:00:00
2 EASTEND SOUTHSIDE	Mon-Fri	Mo,Tu,We,Th,Fr	08:00:00
3 VA BEACH	Mon-Fri	Mo,Tu,We,Th,Fr	08:00:00
4 CHARLOTTESVILLE		Mo,Tu,We,Th,Fr	08:00:00
5 NECK NORTHERN		Mo,Tu,We,Th,Fr	13:47:00
7 SOUTH HILL/CREWE		Mo,Tu,We,Th,Fr	08:00:00
8 NORTHERN VAMD		Mo,Tu,We,Th,Fr	08:00:00
9 PRP-00		Mo,Tu,We,Th,Fr	12:00:00
A TOW IN		Mo,Tu,We,Th,Fr	08:00:00
C SOUTHWEST SALEM...		Mo,Tu,We,Th,Fr	08:00:00
Justin test route	Route covers Denver Metr...	Mo,Tu,We,Th,Fr	08:00:00
PRP1	ASA truck to PRP yards	Mo,Tu,We,Th,Fr	09:00:00

External Routes			
Title	Description	Delivery Schedule	Time
A UPS	Mon-Fri	Mo,Tu,We,Th,Fr	08:00:00
B Fed-Ex	Mon-Fri	Mo,Tu,We,Th,Fr	08:00:00
C Freight	Mon-Fri	Mo,Tu,We,Th,Fr	08:00:00
R&L Carriers		Mo,Tu,We,Th,Fr	15:00:00

- 3) Note the **Inter-Site Delivery** option under the **Delivery Details** is selected by default.
- 4) Select the site the part is currently located under **Source Site**
- 5) Select the site the part needs to be delivered to under the **Destination Site**
- 6) Select the route for the part under the **Route Selector** tab, select the day near the bottom of the **Delivery Details** tab.
- 7) Add any notes regarding this delivery to the **Special Notes** field.
- 8) When finished click **OK**.

The delivery will appear in the **Invoice Not Confirmed** tab of the **Confirm Deliveries** screen. A few notes on using this feature:

- The order number will not show in the **Confirm Deliveries** screen. Inter-site deliveries can be identified primarily by the **Customer**, which will be one of the sites in your business.
- There is no indication in the workorder manager that an inter-site delivery has been created.
- Currently there is no history created for inter-site deliveries.
- The system will allow multiple deliveries simultaneously for the same part. As such, here are a few tips to help manage your inter-site deliveries when using this feature:
 - Always type the order number first in the **Special Notes** field.
 - When an inter-site order is identified (via the **Customer**) in **Confirm Deliveries**, immediately highlight it and *confirm* it. You can then use the Current Manifest tab to view the Notes on the delivery and thus keep track of what has a delivery and what does not.
 - Inter-site deliveries can be updated from **Confirm Deliveries** simply by highlighting and right-clicking on the part while it is in the **Invoice Not Confirmed** or the **Confirmed** tabs.
 - If a part ends up with two deliveries, the duplicate can be deleted using **Delivery Maintenance**.
- When the part is delivered to the destination site:
 - If the part will be delivered to the customer from this site, the part should be marked as delivered. The rest of the delivery process should be handled via the shipping option in the order screen.
 - If the part needs to go to yet another site, you can hit the **Reschedule** button to place the part on a route to go to the next site. *Remember the Source Site is the site the part is currently at.*
- When using inter-site deliveries, it may be helpful to select the *final route* when your salespeople create the order.

Split Orders (FS 26535)

Use this option to quickly and easily split a part or parts onto a separate if those parts need to be delivered separately from each other. To split a part to a new workorder,

- 1) go to **File > Split Order** or right-click in the **Items** tab and choose **Split Order**.
- 2) Select the part or parts you wish to split off by placing a checkmark in the box in the **X** column.
- 3) Click **OK**.

Once the new orders are created, they are entirely separate and can be edited accordingly.

S11A User Payment Report (Management > Sales Reports > S11A User Payment Report) (FS 24314)

This report is meant as a supplementary report to the S11 Daily Reconciliation report. The S11A will summarize all the payments received and refunded for a single day *by user*, to aid in troubleshooting discrepancies when counting down tills. The report totals will reconcile with the totals on the second to last page of the S11. As such, the S11A can only be run for a single.

Here's an example of the S11A:

S11A

Actual Systems
 S11A User Payment Report
 For Date 10/5/11

SaleType	Details	Customer	Cash	Check	C.Card	D.Card	Bank	PayPal
User elliott								
COD	Inv 187527	-TRAVIS	0.00	2,112.50	0.00	0.00	0.00	0.00
Cash	Inv 188009	Build Test Customer 092111	1,050.00	0.00	0.00	0.00	0.00	0.00
Cash	Inv 188010	Elliott's Automotive Repair	600.00	0.00	0.00	0.00	0.00	0.00
		elliott Totals	1,650.00	2,112.50	0.00	0.00	0.00	0.00
User guest								
Cash	WO 215414	eBay User: testuser_elliottbuyer	0.00	0.00	0.00	0.00	0.00	698.00
		guest Totals	0.00	0.00	0.00	0.00	0.00	698.00
User richard								
Charge	Inv 187023	gary coleman	0.00	1,080.00	0.00	0.00	0.00	0.00
Charge	Unal	gary coleman	0.00	120.00	0.00	0.00	0.00	0.00
		richard Totals	0.00	1,200.00	0.00	0.00	0.00	0.00
Totals			1,650.00	3,312.50	0.00	0.00	0.00	698.00

Here's the match S11 for the day:

Cash Summary		Subtotal	Total	Credit Card			
Cash Receipts	1650.00			Cash Inv Cr Receipts	0.00		
WO Cash Receipts	0.00			WO Cr Card Receipts	0.00		
COD Cash Receipts	0.00			COD Credit Card Receipts	0.00		
A/R Cash Receipts	0.00			A/R Credit Card Receipts	0.00		
Dep. Cash Receipts	0.00			Dep. Credit Card Receipts	0.00		
Cash Refunds	0.00			Credit Card Refunds	0.00		
WO Cash Refunds	0.00	1650.00	1650.00	WO Cr Card Refunds	0.00	0.00	4962.50
Check Summary				Debit Card Summary			
Invoice Check Receipts	0.00			Cash Inv Dr C Receipts	0.00		
WO Check Receipts	0.00			WO Dr Card Receipts	0.00		
COD Check Receipts	2112.50			COD Debit Card Receipts	0.00		
A/R Check Receipts	1200.00			A/R Debit Card Receipts	0.00		
Dep. Check Receipts	0.00			Dep. Debit Card Receipts	0.00		
Check Refunds	0.00	3312.50	4962.50	Debit Card Refunds	0.00		
WO Cheque Refunds	0.00			WO Dr Card Refunds	0.00	0.00	4962.50
Total	0.00			PayPal Summary			
B/T Summary				Cash PayPal Receipts	0.00		
Invoice B/T Receipts	0.00			WO PayPal Receipts	698.00		
WO B/T Receipts	0.00			COD PayPal Receipts	0.00		
COD B/T Receipts	0.00			A/R PayPal Receipts	0.00		
A/R B/T Receipts	0.00			Deposit PayPal Receipts	0.00		
Dep. B/T Receipts	0.00			PayPal Refunds	0.00		
B/T Refunds	0.00			PayPal WO Refunds	0.00	698.00	5660.50
WO B/T Refunds	0.00	0.00	4962.50	Grand Total			5660.50
Check book refunds not included in this total							

The total Cash on the S11A reconciles with the Total Cash on the S11

Fixes to Existing Features

Accounting

- Fixed an issue where statements would not generate for customers that had the same exact name.
- **New Preference: Don't generate statements for customers who have only an opening balance.** An issue was discovered that statements would not print for customers who only had an **Opening Balance** adjustment outstanding on their account. This has been resolved by the said preference. When *unchecked*, statements will always generate for a customer so long as there is an outstanding transaction on the account (this is the default value). With the preference *checked*, statements will not generate for customers who only have an **Opening Balance** adjustment outstanding.

eBay

- Fixed issues with how delivery addresses were coming across when orders were created for items sold on eBay. The fixes are:
 - Fixed formatting so the address now comes across in the standard US format
 - Fixed issues with parts of the address being cutoff
 - Fixed issues with the Address 2 line not appearing
- The **Check For Sales** option no longer occurs in the **eBay Listing Manager** screen but has conveniently been relocated to the upper left hand corner of the **eBay Sales** control center tab:

Listing ID	Listing Type	Duration	Title	Start Price	Reserve	BIN	Order	Listing Fee	Modified
110092543900	Fixed Pri...	Good Till Ca...	n the title to test the 80 character limit 012...	4294.00	0.00	0.00	215638	0.50	11/07 13...
110093657137	Fixed Pri...	7days	1000025689 000003102 82 GMC 3500...	315.00	0.00	0.00	215636	0.50	11/04 14...
110093545903	Fixed Pri...	10days	93 STORM Starter Motor RELISTED	200.00	0.00	0.00	215601	7.30	11/01 15...
110092680555	Fixed Pri...	Good Till Ca...	2001 MONTERO SPORT Sunvisor	8.00	0.00	0.00	215564	0.50	10/24 14...
110088734332	Fixed Pri...	Good Till Ca...	06 VOLKSWAGEN JETTA Starter Motor	125.00	0.00	0.00	215417	2.00	10/07 10...
110088734307	Fixed Pri...	Good Till Ca...	06 VOLKSWAGEN JETTA Starter Motor	125.00	0.00	0.00	215415	2.00	10/06 16...
110090732032	Fixed Pri...	Good Till Ca...	93 SATURN SATURN S SERIES Transmi...	573.00	0.00	0.00	215414	0.50	10/05 13...
110092765260	Fixed Pri...	7days	1000423101 08 09 ACCORD Transmis...	1080.00	0.00	0.00	215413	0.65	10/05 12...
110092726294	Fixed Pri...	7days	1000420535 TAURUS Wheel 16x4 comp...	75.00	0.00	0.00	215396	1.50	09/29 09...
110089639754	Fixed Pri...	Good Till Ca...	05 06 SATURN VUE Alternator 2.2L, ID 1...	100.00	0.00	0.00	215386	10.40	11/01 15...
110090173100	Fixed Pri...	Good Till Ca...	01 02 03 INFINITI INFINITI QX4 Back Win...	275.00	0.00	0.00	215385	0.50	09/28 14...
110092690474	Fixed Pri...	7days	04 05 SEPRING Wheel	65.00	0.00	0.00	215384	0.50	09/28 14...

General

- (FS 25982) Fixed issues caused by using the **Sales > Logout** option. The items fixed are:
 - Left over javaw.exe process after using this option and closing the login prompt that reappears
 - Login Lease Renewal pop-up messages that would appear after logging in.
- (FS 25698) the email signature was showing up twice when sending emails from Pro. Fixed the issue so that the signature only shows up once.

Inventory and Production

- Fixed an issue when searching for parts with **Modify Parts** using the **Tag/Stock/Location Search** where a part type would default to being selected in the Item type field when the **Select by Group** option was chosen. Issue resolved so a part type is no longer selected by default in this field.
- Improved speed in the following areas:
 - Changing the location of the vehicle
 - Generating the Dismantling Report
 - Printing tags from the Dismantling Report
- Fixed an issue in the **Workorder Manager** where the route on a PO would show in the **Delivery Route** and **Delivery Date** columns. The issue has been fixed so that the **Delivery Route** and **Delivery Date** columns *always* show the delivery route/time from the order. However, if a delivery exists for the PO attached to the order, a (+1) will appear next to the **Delivery Route**. Hover over this field to see the route the PO is on:

The screenshot shows a software interface with a table of work orders. At the top, there are filter controls: 'Filter by Part' (set to 'All Sites'), 'Filter by Delivery', and 'Filter by Salesperson' (set to 'elliott'). There is also a 'waiting payment' checkbox. The table has columns for Stock Number, Ship/Stat/WO/Part Site/Assign/As, Delivery Date, Delivery Route, Dep..., R, and Dat... The following table represents the data shown in the screenshot:

	Stock Nu...	Ship...	Stat...	WO ...	Part Site	Assign...	As...	Delivery Date	Delivery Route	Dep...	R	Dat...
1500	PO#8019	S	B	AS1	AS1			11/25/11 @ 8:00 AM	C Fright	Pick...		11/...
bly												
rator	PO#7930	S	B	AS1	AS1			11/07/11 @ 8:00 AM	B Fed-Ex (+1)	Pick...		
ernator	PO#7931	S	B	AS1	AS1			11/07/11 @ 8:00 AM	A UPS	Pick...		
eel	PO#8035	D	B	AS1	AS1			11/30/11 @ 8:00 AM	3 VA BEACH (+1)	Pick...		
ternator	PO#8024	D	B	AS1	AS1			11/24/11 @ 8:00 AM	2 EASTEND SOUTHSIDE	(11/29/11 @ 8:00 AM)		
ine	PO#7952	D	B	AS1	AS1			11/18/11 @ 8:00 AM	2 EASTEND SOUTHSIDE	Zon...		
ressor	W599	D	W	AS1	AS1			11/18/11 @ 8:00 AM	2 EASTEND SOUTHSIDE	Pick...		
eel	EB007	D	W	AS1	AS1			11/28/11 @ 8:00 AM	1 WESTEND	Pick...		
eel	PO#8034	P	B	AS1	AS1				(+1)	Pick...		
ine	NOF	P	E	AS1	AS1					Zon...		

A callout box with the text "This is the route the PO is on" has two arrows pointing to the 'Delivery Route' cells for PO#8035 and PO#8024. A circle is drawn around the '(+1)' in the 'Delivery Route' column for PO#8034.

- When converting a quote to a workorder, the **Expected Date** would not show properly in the **Workorder Manager**. The issue has been fixed and the **Expected Date** in the **Workorder Manager** will show as set in the order screen.
- Changes to Inventory menu.** As a result from security changes with the 9/21/11 build release, users were locked out of **Inventory > Modify Part** if locked out of the Management menu. This was caused because **Modify Part** also existed under the Management window. As such, we have removed **Modify Part** from the Management menu. Please set security as appropriate.
- Changes to Inventory menu.** We have moved the **Move Part** feature from **Management > Utilites** to the **Inventory** menu. Please set security as appropriate.

Purchase Orders

- Fixed an issue where you could void a PO that had been received and invoiced (which would cause the P10 and the Jim Counts Sales By Screen Suggestion and Payroll report to not report profitability correctly). This has been resolved so that if the PO has been received it cannot be voided. If the PO was received and the part needs to be returned (before ever getting to the customer), simply credit the PO.
- If multiple POs were on a single order, you could only schedule one of the POs for a pickup. This has been fixed so that all POs on a single order can be scheduled for a pickup.

Sales

- Fixed an issue where if the preference **Search: Require a customer to perform a loggable search** was checked true, the customer would need to be manually re-added in the Find Parts screen when searching for parts after using the **Add Part** feature from the order screen.
- Fixed an issue in the order screen where memory usage would slowly build up when the RMA tab was visible.
- Fixed an issue occurring in **Find Parts** when selecting an interchange with the mouse and then hitting [Enter] to perform the search, a checkmark in the **Seq** column next to the interchange that was selected would be leftover. The checkmark now clear no matter the key sequence.
- A severe slowdown would occur if clicking the **Invoice** box multiple times when converting a workorder into an invoice. This has been fixed so multiple clicks do not cause a slowdown.
- Improved search times for bringing up orders in the **Find Orders** screen.
- The **Core** field in the **Price Information** box of the search results screen will now show the core charge based on the following conditions:
 - *If the **Core price is Manual Pricing** is set to zero, the search results screen will show the default core charge (as set under **Management > Utilities > Service Charges**) if default is set to a dollar amount (percentages will show as zero).*
 - *Any non-zero setting in the **Core price field of Manual Pricing** will always display in the search results screen.*

Reports

P10 Purchase Order Profitability

- (FS 26436) Fixed an issue where the vendor would not appear on the P10 report in certain scenarios. The vendor no always appears, save cases when the PO has been cancelled (rare).

S11

- (FS 24358) The user for workorder payments and refunds was not appearing on the printed report or the export to Excel. This has been fixed so that the user receiving the payments now appears on the report.