

Admin

The event of adding, changing or removing a bank account number from a supplier account is now recorded in the Audit Trail under the Admin Menu / Other / View Audit Trail. The audit trail also records when the change happens in the individual supplier payment screen. The events record the user ID, the date and time, the change that happened and the bank account numbers before and after, as well as details of the payment in the case of the last example.

#13641

Invoices

When using the Credit/Recharge Invoices utility based on an invoice previously sent through EDI no longer marks the new Invoice and/or Credit Note as already sent as well. **#13318**

The ability to select the Usage Type of a Customer Item has been added to the software. There are three system reserved options (Commercial, Institutional and Residential) which cannot be edited or deleted, however new options can be added from Admin / Settings / Customer Items / Manage Customer Items Usage Types. **#13612**

The screenshot shows a software window titled "Manage Customer Items" with a sub-header "Rotary Mower 20\" Cut - (Amber Thompson)". The window contains a form with various fields and a sidebar with navigation options.

| Field | Value |
|-------------------|---|
| Customer Account | 1002 |
| Amber Thompson | |
| Master Item Link | ** Not Selected ** |
| ID | 6510 |
| Customer ID | |
| Staff Member | |
| Description | Rotary Mower 20\" Cut |
| Purchased/Started | 25/01/2022 |
| Type | Outdoor Equipment |
| Serial Number | 4875935 |
| Customer Contact | ** None ** |
| Warranty Type | Lawn Mower 2 Year Warranty (On Site/Lab |
| Usage Type | ** Not Selected ** |

The sidebar on the left includes the following options: Details, Add. Info. 1, Add. Info. 2, Notes, Documents, Warranty, Servicing, Images, and History.

At the bottom of the window, there are "Save" and "Exit" buttons.

Customers

The Customer Management Screen has been updated to show a customer in Stop Credit with a more vivid red highlight tone when the record is selected. **#13678**

| Primary Search Account to Search for | | Secondary Search Filtered Search | | |
|---|----------|---|---------|-----------------------|
| <input type="text"/> | | <input type="text"/> | | |
| | | <input type="checkbox"/> Include Inactive | | |
| Account ▲ | Sort Key | Name | Balance | Address Line 1 |
| 1000 | SMITHA | Alice Smith | 5624.66 | 154 Cashel Street |
| 1001 | ANDERSA | Allan Anderson | 0.00 | 157 Main North Road |
| 1002 | THOMPSA | Amber Thompson | 1325.00 | 160 High Street |
| 1003 | HILLA | Andrea Hill | 7497.77 | 163 Lower Ave |
| 1004 | HILLSA | Andrew Hills | 253.00 | 166 Brick Place |
| 1005 | SWIFTA | Angus Swift | 1378.85 | 169 Anderson Bay Road |
| 1006 | BANDERA | Anthony Bander | 0.00 | 172 Hilltop Drive |
| 1007 | CONNERB | Barry Connors | 0.00 | 175 Longreach Ave |
| 1008 | DAVIDSB | Belinda Davidson | 0.00 | 178 Blenheim Road |

A new default under Admin / Defaults / Manage Customer Defaults has been added to prompt for the email address of a customer when creating a new customer account. If the customer does not have an email address, this can be indicated on the prompt. The information entered will be automatically populated on the main email address field of the Details tab of the new customer account. **#13647**

Manage Customer Defaults

Preferences

Required Fields

Invoices

Invoice Fields

☒ Automatic Account Numbering
Next Account #

☒ Automatic Sort Key creation
☒ Prompt for Email when creating account
☐ Include Title in Individuals' Account Names

Default Overdue Interest Rate
 %

Create Customer Account

Please enter the Customers Email Address

☐ Customer does not have an Email Address

Continue

Cancel

Fixed Assets

An error occurring when opening the Fixed Assets Adjustment screen without after opening and then closing any management screen has been corrected. **#13669**

Products

The ability to display only items with quantities on hand has been added to the Products Management Screen and to Product Lookup screen. The default preference can be set per user under their Staff ID log in. **#13649**

Purchase Orders

The “Auto Order based on Min Max” option in Purchase Orders now allows to select a range of items to be included in the order. If no items within the range meet the criteria of Min/Max auto order, a message advises "There are no items requiring reorder in the range selected."

#13622

Quotes

A problem on quotes and invoices allowing change of mark up, margin, discount and rate on Buildup lines has been corrected. Any changes to rate, discount, markup, must be done inside of the build up screen using either the F11 function or editing each component line instead.

#13656

Suppliers

SPROCKIT ONLY A change made by Stihl that saw the Supplier Digital Import of WebSale invoices after 27/11/2021 not add correctly as been rectified. Invoices up to 27/11/2021 will continue to deduct the web fee from the unit rate on the digital invoice. From 28/11/2021 the web fee is expected to already be deducted. **#13681**

SPROCKIT ONLY An issue stopping downloaded Digital Stihl Invoices from being imported into the Digital Supplier Invoices screen for processing has been resolved. **#12900**