

List of Changes to TSM from 6.5 to 6.6

General enhancements

- Added L&H price file import routine
 - Use the L&H command line parameter: tsm.exe lhimport.
Tsm.exe lhautoimport for the scheduling of the import routine.
- New Help Desk Job Cards Module
- Added new Setup - Invoices option to synchronise invoice number with Job number
 - Will automatically assign next invoice number if job number already used as an invoice #
- Added Remote Support option to Utilities Menu
 - When requested by TSM Support staff, select this option to allow TSM Support staff to dial in to your computer to view your screen.
- Added Replicate button to POS invoices
- Update button added to many of the Codes within TSM so that a CodeID can be changed without needing to delete the code.
- Added BAR128 function to TSM for Code 128 barcodes.
 - BAR128(string,"cType") wher ctype is:
 - cType: "AT" -> convert text to bar code 128 subset A
 - cType: "AU" -> convert text to bar code 128 subset A, UCC/EAN
 - cType: "BT" -> convert text to bar code 128 subset B
 - cType: "BU" -> convert text to bar code 128 subset B, UCC/EAN
 - cType: "CT" -> convert text to bar code 128 subset C
 - cType: "CU" -> convert text to bar code 128 subset C, UCC/EAN
- Setting a minimum fee on a priority code now automatically sets the Enforce minimum fee check box on Job Cards when the Priority code is selected.
- New Security option to restrict adding orders for completed jobs
- New security option to restrict receiving ordered parts against completed jobs
- New Setup Job Cards 3 option to set status code on selecting Unbillable job invoice
- Added a new Utilities - Audit Trail option to display TSM audit trails.
 - At this stage, a limited subset of functions are being audited but this will be expanded considerably in future releases
- New Labour Type Code Setup option to set a labour type to automatically set the No Print on invoice option
 - You can now automatically select certain labour types not to print on an invoice in case you forget.
- New Labour Codes Setup option to add the additional hourly cost to the cost multiplier

- This allows you to have an additional hourly cost added to the employee cost regardless whether it is normal or over time
- Text boxes now have a new Right Mouse click menu similar to memo fields
 - You can now copy, cut, paste, spell check etc. from any text field.
- Implemented TSM Email Client
 - We had a number of instances where Exchange server was causing problems when TSM sent emails to it. In addition, users complained about Outlooks habit of asking you to wait and click YES before sending an email. As such, we have implemented an optional email client directly into TSM.
 - New Setup option on the Miscellaneous Setup tab to enter your mail server information and also to select whether TSM should use its own email client or a Mime compliant mail client (such as Outlook).
 - GoldMine Link Setup has been changed to just indicate whether TSM should use the GM client rather than select GM or MIME. If not selected, the settings in the Setup (above) are used.
- Pop up job due alerts no longer time out after 20 seconds but will now wait for you to press the button.
- Added default printers to user options screen
 - Users can now configure their own report printers even if they do not have the security to go into the TSM Setup screen.
- Updating TSM with a new version now keeps 9 copies of previous backups in case of problems encountered.
- Quotes can now be completed
 - This provides a convenient method of closing off a quote
- Any documents placed in the PDFARCHIVE\O_99999 directory with 99999 represents the PO number will automatically link to the linked documents tab of the Purchase Order
- Labour types for Prepaid Time can now be used for standard non-prepaid time
- New Setup - Invoices option to lock the invoice total once created
 - Any changes to the job card will not affect the invoice total.
 - However, printing invoices that have changed details will give an invoice total that does not add up to the sum of its contents
- New Job Card Security option to allow for Adding / Editing Parts Used
 - You can now let people edit jobs but disallow them from updating parts used on a job
- Added additional detailed information to the Cash Receipts display screen
- Invoice security changed so that Job Card Invoice security option enables / disables rights to both create and print invoices.

- Printing of invoices was previously a security function of Debtors reports and allowing printing of invoices allowed full access to all debtor reports.
- Added Web View to Right Click Memo field menu option
 - When expanding memo fields such as Service Requested or work performed, you now have the choice to display it as plain text or formatted HTML.
 - This is useful if you have sourced the service requested from an email
- New Setup - Job Cards 3 option to archive quotes
 - If set, the quote will be archived as a linked document against the job when the quote is converted from a quote to a job
- Added new labour type additional hourly cost which is applied to the base employee hourly cost
 - This gives you the ability to negotiate a base hourly cost for each employee plus an additionally hourly cost based on labour type
 - If set, overtime cost multipliers are disabled.
- New Job Card 2 Setup option to calculate Escalation from job due date or estimated completion date
- Setting a labour type cost multiplier to zero now applies zero hourly cost to the time entry (before it was always the employee hourly cost)
- TraSer is no longer a registrable option (it is included with the standard package)
- Added "UOM" and "MANUF" fields to order detail table in order for TraSer links to bring in these values when item is created for the first time.
- New Option to make Job Card Other field compulsory
 - Added a new Setup Option to enable / disable this option

Contact Maintenance

- New Customer option to enforce order number
 - Do not enforce
 - Enforce when saving a job
 - Enforce when completing a job
 - Enforce when completing a job and warn when saving a job
- New customer field called Site Customer.
 - Identifies a contact record as a site customer
 - New check box on Contact search to look up site customers only. This allows you to filter out all entries that are not sites.
 - Warning message comes up if you manually enter a site customer as a billing customer on a job card
- Added Inactive to Customer Status
- Melway and Sydway Map References added to "Customer Maintenance" screen.

- New Contact Maintenance button will appear if either of these files exist to extract the map reference out of Melways or Sydways
- You need to have Sydway.dbf and/or Melway.dbf for this feature to be available.
- Added Credit total to Contact Maintenance screen
- Contact History - Invoices tab now displays the last payment type
- New Contact Security option to make the Contact internet password visible or masked
- Added new Default Employee Group to Contact Maintenance
 - Employee Group on job card is updated if Job Customer changes and job customer has a default employee group
 - Job Employee ID list will change to reflect the select job employee group
- Added a Print button to Contact Maintenance to print the default contact report for the selected contact record
- New Job note field in Contact Maintenance
 - Copy note check box removed
 - Any note in the Job note will automatically pass over to the job card service requested
- Added a visual Customer Status indicator to the top of the Contacts Maintenance screen
- Added a new field to Contact Maintenance - Default Job Customer Reference
 - Any value entered here will automatically be placed into the Customer Reference field on any job cards created for this contact.
 - Provides the ability to easily pass a searchable value specific to each customer to a job card.
- Added Supplier invoices to Customer History tab

Employee Maintenance

- Added linked documents to Employee Maintenance
- New Employee Maintenance checkbox to indicate whether popups should appear when the selected employee is logged into TSM
- New Employee Postcode functionality. You can assign Employees to a range of Post Codes and then select the employee for a job according to the job Site Postcode.
 - New Employee maintenance screen post code tab to assign an employee to a range of post codes
 - Right mouse click on Employee ID in a Job card when the job site has a post code will check if there are any employees assigned to the Site Post Code.
 - If any employees are found then you will be asked whether you want to select one of them.

- If yes, then you will be presented with a list of employees assigned to tie Site Post Code and can select one to assign as the job card employee ID
- Employee Insurance
 - Added Insurance expiry date and description to Activity tab
 - Warning message if adding an employee to a with expired insurance to a job
- Added supervisor to Employee Maintenance

Enhancements to TSM Palm

- New TSMPalm Setup2 page options:
 - Require time entry to complete
 - If selected, you must enter at least one time sheet entry on a job card before you can complete it on TSMPalm
 - Ensures that you do not accidentally complete a job in the field without adding any time
 - Confirm No Parts before complete
 - If selected, you must tick the new Check Box on the TSMPalm job card before completing a job that has no parts
 - Helps to ensure that parts are not left off job cards by mistake
- New TSM Palm option to not send Work Performed to the Palm PDA
 - This will enable you to merge new work performed entries into your TSM Work performed
 - Any changes to Work Performed in TSM will not be overwritten in TSM if changes are made on the Palm PDA
- Signatures in TSM Palm now synchronise back to TSM - Yay!
 - Added Signatures to Stages and variations screens
 - TSM Palm and TSM Remote now populate the signatures against stages and Variations for Contract jobs
- Palm interface speed improvements on HotSync
 - You can now select not to send code fields such as Job Type, Status and others to the Palm each time you synchronise as this information does not change often. This should speed up the hot sync process.
- Palm parts used quantity now set to 1 if the quantity is zero.
 - TSM Palm was otherwise posting a zero quantity in TSM.
- Added a "sent to PDA" date/time field to job cards and assignments.
 - TSM Remote users can now see when the job was actually sent to the PDA by the TSM Remote server.
- TSM Palm
 - Added Model to Equipment screen. Screenlayout updated.
- TSM Palm Setup now has a new option to restrict assignments to job linked assignments only
 - This enables you to ignore personal and holiday based assignments which are not linked to jobs

Job Card Enhancements

- Job Card Dispatch screen now includes new options:
 - Do not print parts
 - Print parts ordered and received against the job for a specific date or all dates
 - Print parts used on the job
 - Print equipment on the job
- Job Card duplicate order number and duplicate reference number check only now occurs for jobs with similar Customer, Billing or Site ID's.
- Added Last Job Date to full job cards for Customer, Billing Customer, Site and equipment
 - Equipment shows last job date for ProductID / Serial # combination
- Job Card delivery docket button now optionally prints out any items received on the job for the nominated dispatch date.
- Add options to Service Job replication for
 - Copying original job number to "booknumber",
 - including a) allocated quoted parts, b) un-allocated quoted parts
- Added Bin number display to Job Card parts used screen
- New Setup Job Cards 3 option to choose whether customer discounts should appear in the job card parts used description.
 - Some customers prefer not to know how little discount you are actually giving them
- Added Delivery Docket button to Job Card invoice screen
- Added a 2nd Other field to Job Cards
 - field can be specified as free text or selected from a drop down list. - New Setup option in Jobcards 1
- Double click on the "Job #" label on the job card will refresh the job screen.
- Prepaid Incident button on Job Cards now shows how many Prepaid Incidents are left
- We now store the cost price of parts, labour and expenses in the job card at time of invoicing.
 - This might be useful to work out your profitability at time of invoice excluding any changes since you invoiced
- Job date changes by changing directly on a job card or via changing a linked primary assignment are now audit trailed on the job card
- Made Quantity the first field to enter when adding parts
 - Seems more logical to do it this way
- Added Compulsory Job Type to Job Cards Setup screen
- Added 2 new columns to Assignment grid
 - Completed Date / Time
 - Whether assignment has had a time sheet entry raised against it
- Pressing the Maintain button from a job card now warns you if the item rate has expired as well as the contract expiry

- New Setup Invoices option to stop creation of Job Card invoices if any unapproved time is found
- Prepaid time button in job card renamed to Incidents
 - List only displays a list of prepaid incidents, ignoring any other prepaid time types
- Added new Setup Invoices option to default automatic invoice rounding on or off
- Billing customer notes are now copied to Job Service Requested if the Copy Note check box is ticked
- Time sheets now allow negative billing hours
- New Setup - Invoices option to save a snapshot of the invoice at the point it is created
 - Invoice PDF will be linked automatically to the Linked Documents tab of a job card
- Entering the completed date on a job card now does the same action as pressing the Completed button
- Time Sheet expenses now applied to Cost Centres
 - New Contract Job Cost Centre setup for each time sheet expense
 - Contract Job Summaries now include expenses under their own cost centres
- Time Sheet expenses now included as a new cost in Job Cards
 - Job Card profitability on the Invoices tab now includes expenses
 - Profitability reports not yet updated
- Added a warranty period to Equipment warranty page in Job Cards
 - Converted existing warranty period to a separate period value and a period type (i.e. 2 Months)

Point Of Sales Invoice Enhancements

- Job Card duplicate order number and duplicate reference number check only now occurs for jobs with similar Customer, Billing or Site ID's.
- Added Purchase order buttons to POS invoice
- Added Delivery docket button to POS invoices
- New Setup Invoices option to automatically round POS invoices
 - You can now decide not to automatically round regular invoices but automatically round POS invoices
- POS Invoices now copies invoice comment to Service Requested

Enhanced Goldmine Support:

- Added support for dbase versions of Goldmine
- GoldMine Customer Search no longer requires GoldMine to be open to work
- Speed improvement in GoldMine Link
- GoldMine link now copies Serial Number into Job History note.
- New option in GoldMine link to set activity code for Quotes

Enhanced ACT! Support

- Added Phone prefix to TSM ACT! Setup screen
 - Phone numbers no longer blank out when sent to ACT!
- New option in ACT! link to link phone number to TSM home or work phone

Enhanced Search engine

- Added in Begins With or Contains on Search screens
- Job History and Customer ID popup now sort jobs in descending order (newest first)
- Customer History Job Cards & Invoices now sort newest to oldest
- Job Card history button now displays history in a similar format to the search screens. The older Browse format is no longer available.
- Fast Text Search for Product Description
- New Job Card search field in top right corner
 - Job number is no longer editable - use new search field
 - Incomplete - still needs work done to remember previous value and integration with Search button
- Most Search screens now remember their last sort value
- Added Text Search option to Parts Used screen
 - You can now select parts used by their description
- Added Select Colour checkbox to the Job Card search screen
 - Individual users can choose to display or hide Job Status colours
 - Have had some reports that displaying colours slows down the job card search screen on some computers
- Time Sheet screen now lets you search by Reference
- Added search for job cards by site suburb
- Added Department column to Customer search screen
- Added Model column to Parts search screen.
- Added Model column to Maintenance Equipment search screens
- Contact search now displays contact name in company column if no company name entered.

Data entry improvements

- Added Bulk Add Items button to Job Cards parts used
- New Quick Schedules option in Maintenance module
 - Lists all sites and allows quick access to adding / updating schedules from all sites in one screen
 - Significantly speeds up the time taken to update multiple schedules
- Automatic lookup of Supplier Part #, Barcode and Alternate part number now implemented in Job Cards parts used
- New Setup - Miscellaneous option to set default security group for new employees

- Adding an employee will now default the security level to the new employee security group
- If TSM does not find the part number entered on an Order Detail, TSM will now look up that part number in the Supplier part # or Barcode # or Alternate parts list and if found, ask you if you would like to use the TSM part number associated.
 - So for example, Part 100 has a supplier part number X100, entering X100 as the order details part number would find no TSM parts matching but would find Supplier part X100 and would then ask you if you would like to use part 100 instead
- You can now link an already existing time sheet entry to prepaid time
 - Previously you could only link a time sheet entry to PrePaid time when you originally added it into TSM.
 - To previously relink it to a prepaid time entry if you made a mistake and forgot to do so required you to delete the time entry and reenter it
- Added Allowance to Time Batch entry screen
- Batch Time Sheets now warn of a time overlap
- New check box on Time Sheet entry to adjust for lunch
 - If ticked, will add a negative time sheet entry for lunch break
 - You will be warned if time sheet times do not fully overlap lunch hours
 - New Setup - Job Cards 2 option to set up lunch start / finish times as well as lunch labour type
 - This is useful when you want to log that you worked from 9am - 5pm but do not want to break the time into pre lunch, lunch and post lunch time sheet entries
 - By creating a lunch entry, you effectively get 8 hours worked plus -0.5 hours for lunch totalling 7.5 hours worked for job costing purposes
- You can now type a directory into the Linked Documents path and launch a directory browser
 - You can not select a directory from the Directory Browse button
- Added Employee Group to Full Job Card
 - You can now assign a job to an employee Group if you do not know which specific employee to assign it to
 - Job Card Search and report filters now allow selection by Employee Group
 - Job Centre filters now include Employee Group
- Added ability to enter a single piece of equipment onto a job via Quick Jobs
- New Job Card Parts Used data entry screen layout
 - Added an effective markup % / \$ indicator and Discount \$ to Parts Used entry screen
 - You can now see what markup and discount was applied to previously entered parts used on jobs without having to calculate it in your head

- Added new Price / cost values inclusive of tax
 - You can add in prices inc tax and it will calculate the ex tax prices for you
- New Setup Job Cards 3 option to have TSM automatically recalculate the Estimated End Date.
 - Default is for this to be disabled.
- TSM screens that are wider or taller than the actual screen resolution will now resize down to fit into the screen resolution
 - this solves the problem of running TSM on a high resolution monitor with large screens then moving to a lower resolution monitor which would hide parts of screens off the viewable area
- Purchase Order Reference is now automatically placed into the Supplier Invoice Reference when created
- New Setup Job Cards 1 option for default Job Card Duration for new jobs
- New Setup option on General page to NOT resize fonts when resizing screens.
 - This allows you to get bigger screens but see more text as the fonts remain small.
- Added Spellchecking to memo fields
 - Right Click Menu on memo fields such as service requested, work performed etc now includes a new Spell Check option
 - You will require MS Word installed for this to work
- Contact Site Notes now go to the job Service Requested if the Copy Note check box is ticked.
- Time sheet entry no longer warns you if the date of the time sheet entered is prior to the job logged date. It does however still warn you if the date is in the future.
- You can no longer enter the Time Sheet hours worked if both start and finish time are entered as it recalculates when saving anyway
- Changes to Cash Receipts entry screen
 - Cash Receipts screen now has a new Auto Apply button which is available when no amounts have been applied and will automatically take the cheque amount and apply it from the top to each positive outstanding invoice
 - Cash Receipts screen now has a new Clear Selections button available when an amount has been applied to any invoice and will clear out all applied amounts
 - Apply button has been changed to a checkbox to provide an additional visible indicator that an amount has been applied.
- Cash Receipts entry screen now lets you search for a Billing Customer ID by Invoice #
- Assigning a job date for a Saturday or Sunday when you do not work on those days now gives you a pop-up warning.
- Added Approve button to Time sheets screen to approve the displayed time sheets.

- Option only available when the Unapproved option is selected.
- Added a warning to Time Sheet and Parts Used entry screen when job is already invoiced

Visual Scheduler / Job Centre / Assignments improvements

- Deleting an assignment that is part of a recurring group will only delete from the date of the selected assignment forward.
- Assignments now gives a visual indicator if a time sheet has been created
- 3 new Setup options to turn on or off overlap warning for Time, Assignments and Jobs
- Added a new checkbox to Time Sheets module to exclude time sheet entries for jobs that have an incident linked.
- Added "Customer Cost Centre" to filter options on Job Center.
- Creating a recurring assignment will now ignore weekends based on the Priority Code settings
- Adjusting an assignment that is part of a recurring group will ask if you want to adjust all the other open assignments in the recurring group
- Added Job Card location to Visual Scheduler screen
- Job Center will now repeat a job once for each invoice raised against that job (Contract Jobs) if the Sort by invoice option is selected
 - If any other sort order is selected, only the first invoice entered will show against the job
- Deleting an assignment from Visual Scheduler now displays additional confirmation information
- Job Centre colours now show white text if background colour is red, blue or black
- Changes to Visual Scheduler layout to optimise the display to show more of information within working hours
 - Visual Scheduler defaults to start at the office start hours.
 - New option to adjust the row height from 100% - 200% of normal height.
- New Visual Scheduler option to select an employee group
 - New selection next to the Employee Selection search button
 - It is now even easier to select employee groups to view schedules for.
- Added No Future Assignments as a new option in the Job Centre Options page.
 - Easily filter those jobs that do not have any more assignments from today forward.
- New Visual Scheduler Right click option to Set assignment as the Primary job assignment
- Visual Scheduler assignments can now optionally be dragged from the top or left bar.
 - New Setup - Miscellaneous option to Set the Visual Scheduler Drag mode to be by left or top bar

- If dragged from the left bar, top bar can be used for resizing
- Added Job Invoice number to Job Centre column selection
 - Contract jobs which can have multiple invoices will only show the first invoice for the entire contract job, not for specific stages / variations
- Added a new Personal check box to Assignment maintenance
 - New option on Visual Scheduler to ignore personal assignments
 - New option on TSM Palm to not send personal assignments to the PDA
- New Job Type Colour Selection
 - New Setup Misc option to show colours on Job Centre and Visual Scheduler by Status colours or Job Type colours
- Added Job Type as an option for 1st line of Visual Scheduler display - Setup - Miscellaneous
- New Visual Scheduler Right Click option to set assignment colour
 - Provides a quick way of assigning a colour to an assignment.
 - Assignment colours override colours calculated from Job Card Status
- Added Alert Due date to Job Centre
- Job Centre layout changed to add most options to a separate options page
 - Screen layout was getting a bit cluttered
- Added new Job Centre option to select Primary Job Employee
- Added new Job Centre sort order of Order Number
- You can now create time sheets directly from Assignments in the Visual Scheduler Right Click menu
 - Saves much time.
- You can now view Jobs in the Job Centre that do not have any assignments at all
 - 4th option added to Assignment Pull down (3rd down in the top right corner of the screen)
 - Unassigned
- Added Job Due Date column to Job Centre
- New Setup Option to automatically create linked primary assignments
 - Changes existing functionality so that linked assignments are not necessarily automatically created for new jobs that have a job time
- Added Site Suburb sort order to Job Centre Job Card display
- Added a new Assignment Security option to add assignments linked to completed jobs
- Added Job company name to Assignment Maintenance screen
- New Setup - Miscellaneous option to configure the Site ID as the first line in the Visual Scheduler
- Added Job Type filter to Visual Scheduler screen
- Added first equipment part number, description and serial number to Job Centre

- This will only display the details of the first piece of equipment entered if multiple equipment items have been added to a job card
- Added Stage and Variation total hours to Job Centre column selection

Reporting enhancements

- Added Posted date to Job Cards Parts Used report filter criteria
- Added Stage # to Job Card Contract reports filters
- Pressing Ctrl+C while rendering a long report will cancel the report
- Added Dept and Location to Cash Receipts
 - Added Dept and Location to Cash receipts reports
- Added new Purchase Orders Supplier Invoice Search
 - Select the Supplier Invoice tab and then press the Search button at the top of the screen
- New TSM Report output engine implemented
 - Tsm previewer is now internal to TSM and no longer uses Acrobat. PDFViewer.EXE is no longer used.
 - Print to File option now has additional options
 - Text Report - Produces an unformatted text file report in the same layout as the regular report
 - Ascii - Same as Previous - Ascii data file of the primary TSM table. The file extension is now CSV
 - Excel - Producess a formatted Excel spread sheet
 - PDF - Produces a PDF file - No longer uses the Amyuni PDF engine. The TSM printer is no longer required.
 - Word Document - Produces a fully formatted MS Word document that can be then be easily incorporated into proposals
 - Rich Text - Similar to Word document
 - HTML - Produces a fully formatted HTML output file that can be incorporated into an email or web site
 - XML - Produces XML formatted output
- Added invoice due date to invoice report filter screens
- Added Inventory Asset Account to Product Report filters
- Added Other 2 to Job Cards report filters
- Add Job Card Payment Type to time sheet report filters
- Product inventory and Maintenance Equipment transfers now sorted by newest date first
- Added End of This Month to Report Date Criteria
- Added Current Contracts to Maintenance Report Filters
- Added Location filter to Parts Reorder screen
- Added filter option to PO Reports for supplier customer type
- Added new Job card date filter option for the Beginning of this month.
- Added Estimated End Date to Product - Parts Used report filters
- Report scheduler email address width increased to 250 characters allowing multiple comma separated email addresses to be entered
- Added 1st,2nd,3rd,4th,Last day of the week option to Schedule Periods

- You can now for example, schedule for the 2nd Tuesday of each month, quarter etc.
- Maintenance Schedules reports now show the User Fields for selection from the Maintenance Report screen.
 - This allows you to filter schedules by user fields from maintenance contracts such as a particular contract type.
- Added Maintenance Contract Start and Renew dates to Job Card report filters
- Added new All Users checkbox to My Reports to display scheduled reports for all users.
 - Only available if you are a Supervisor
 - Makes it easy to check and make adjustments to the scheduled reports of all users
- Added a new Setup - Miscellaneous option to determine whether the Report Scheduler should use the TSM Email client or Mime Email Client (Outlook)
 - Although you might use Outlook as your email client, problems can arise with scheduled reports that need to be emailed out of business hours (such as requiring the YES button to be pressed). As such, you can now specify whether the the Report Scheduler should use the Email client specified for all general emails or us the TSM email client.
 - If using the TSM Email client, no entries will be seen in the Outbox of your email program.
- Added deposit number to Cash receipts screen and report filters
- Parts used reports now let you select Onhand < 0 as a filter option
- Added Maintenance Contract # to Time Sheet Reports filters
- Added new Job Count by Employee Report
- Contract Job Cost Summary report now includes item with zero cost
- Equipment now prints first on invoices
- Added Created Date to Customer Report filters
- Added 2 new Report Date selections
 - Beginning 12 Months Ago - Assuming current date 20th March 2005, then report date is 1st March 2004
 - End of 12 Months From Now - Assuming current date 20th March 2005, then report date is 31st March 2006
- Added Equipment Installed Date to Maintenance Reports
- You can now reference assignment information from within Time Sheet reports
- Added Customer Default Labour Type to Job Card Reports selection screen
- Added a Billable filter to Job Centre & Job Card report filters
- Added 2 new Product Stock Take by Location reports
- Added a new Job Card Summary profitability report sorted by department
- Added new PO Items report sorted and totalled by Product ID

- Added 2 new Supplier Invoice Reports
 - Supplier Invoices Totalled by Supplier - all supplier invoices sorted by supplier with totals on break of supplier
 - Supplier Invoices Totals by Supplier - Totals only, no details
- Minor improvements in Contract Job Invoice layout
- Added a new Job Card summary report including the Cost of Goods Sold
- Added a new Contact Labour Rates report to Contact Summary reports
- Report Pre / Post methods now supports report not printed from the Reports menu
- Added invoice total to Debtor Reports filters
- Added Job number to Time Sheet screen filters selection.
- Added Contract Start Date to Maintenance reports filters
- Parts Used report now can be sorted by job number
- Report Scheduler within TSM renamed to My Reports.
 - You can now configure reports as you wish but TSM will no longer run the report schedule from the My Reports Screen
 - Starting TSM with the REPORTS or REPPROC command line parameter now schedules reports for all users, not just the logged in user. No user ID or password is required.
- New Maintenance Contract option to select a next schedule date range from Schedule reports.
 - This provides the ability to print a forward list of schedules even if the next schedule date is outside of the date range entered
 - eg print the schedule list for next year even though the next schedule date is still in this year.
- Added new columns to the Job Card Performance Statistics report calculating only during work hours (8 hour day excluding weekends) rather than a 24 hour day including weekends.
- New Time Sheet report option to automatically approve matching time sheet entries

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Improved accounting post integration

- Added default Income Account to labour type code maintenance so that labour can be automatically posted to the correct GL account.
- Able to set up a different tax code for purchasing than for parts used
 - Added Purchase Tax code to Product Maintenance
 - Added Purchase Tax Code to Utilities - General
 - If no purchase tax code is configured, will fall back to general tax code as it did previously
- Modified ABM Account Posting to use "Country Name" from the setup if the customer/supplier record does not have a value in "country" field.
- Modified QB post to include "Sales Analysis" for Freight on Purchase Order the same way as order details for "Class Tracking".
- Added Invoice Lock Date to Invoice Setup Screen

- You can not create an invoice with a date earlier than the date specified.
- Added capability to post an override sales account for contract job invoices when entered.
 - This changes affects both QB-Aus and ABM
- You can now add a non-invoice linked cash receipt
 - You might receive a deposit for a job that has not yet been entered into TSM.
 - Allow QB Actpost to post non-invoiced payments.
- Removed the "Both" option from Contact Maintenance
 - We were having too many issues linking to Accounting programs that do not allow the same customer id to be Both a customer and a supplier so now you are either a customer or a supplier but not both.
 - Existing contacts that are marked both will remain as such but should be reassigned to either a customer or a supplier
- QB Supplier Invoice posting mode. Previously due to older QB version restrictions tax codes for order items were not passed from TSM to QB and QB would apply the tax code on that item from its item list. This was causing some user to end up with tax on some items in QB where they have selected a zero rate tax code in TSM. Users are now allowed to override the tax code at the supplier invoice level without changing the item tax code in the QB item list. Keep in mind that at the PO level every item will get a tax code whether from PO or from product table. Therefore, if the tax code at the order item level is forced to be blank rather than a tax code with zero rate, it will still use the tax code from QB item.
- Modified ABM link to assume the addresses are always entered via pop-up address edit screen and therefore always get the City, State and postcode from the last line and a comma separates the city and the state.
- If you enable the new Lock Invoice facility, any new parts or labour added to an invoiced job will have a zero sell price
 - This helps to keep the sum of the invoice details in balance with the invoice total.
 - You can however overwrite this and put in a sell price if you really want to, although the invoice total will not change
- New Held option for invoices. You can now place invoices on hold and stop them from posting to the accounting package.
 - Added new Held check box to Job Cards Invoice page and Contract Jobs Invoice page.
 - Can mark an invoice as being on hold by ticking the check box and unhold it by unticking.
 - Can not mark an invoice on hold if it has already been posted to the accounting program
 - New Debtor Reports Filter option and checkbox to include Held invoices.

- Held invoices are excluded from Debtor reports by default
- Accounting post - MYOB (old), QB-Aus, QB-USA, Sybiz and ABM will not process invoice on hold.
- Added "Sales Analysis" to Purchase Orders.
 - Synchronised "Sales Analysis" of PO to "Class" in Accounts Payable from QB link. This allows purchases to be assigned to different GL accounts by class in QB
 - If Sales Analysis of a PO item linked to a job is left blank, it will dynamically look up and use the Sales Analysis code of the job card parts used or the job it is linked to (if no sales analysis code on the parts used) during the processing of that Supplier invoice in ActPost.
- Added a new phone mapping options for QB ActPost to map Phone and AltPhone of QB to TSM work or home phone.
 - Note that QB supplied link utility does not support Mobile Phone numbers for AUS/NZ/UK/CA yet.
- For QB ActPost "Class" tracking ("Sales Analysis" in TSM) extended to cover labour as well. This will assume the first "Sales Analysis" assigned to time entry will be true for all time entries as we haven't got detail time entries yet.
- Tax rate increased to 3 decimal places
- Add a new functionality to ABM ActPost customer update method. It now synchronises ABM customer "Hold Invoice" with TSM "Account Status".
 - Also if customer account status indicates "HOLD" then ActPost "Invoice Add" will give an error status indicating this situation.
- For QB Aus "customer" and "supplier" update added functionality to re-query the edit sequence a second time when it receives error message # 3200, that indicates the record being updated by another user in QuickBooks and refusing to update via TSM ActPost.
- Modified cash receipts to stop processing payment and/or cash receipts <= \$0.00 as QB does not allow processing of these values. The customer credit still goes to QB via "CreditMemo" transaction but user need to apply this credit to specified invoice manually in QB.
- Added Supplier and Supplier Invoice links for Sybiz Accounting Interface
- Add a new option to ActPost setup to allow users to select posting of parts with a \$0.00 for inventory and ledger updating when the invoice is set to "Quoted Parts" posting.
- Modified QB link to pass rate for invoice item details even when the rate is zero.
 - This change was due to QB inserting the item rate from its own item list when the rate is not passed and hence override the TSM invoice total.
- QuickBooks interface now optionally passes Debtor invoices Cost Of Goods Sold to QB from both Job Card and Contract Job invoices

- New QB Setup option to enable or disable this facility
- New ActPost Setup option to stop Customer, Supplier and Item synchronisation. Select the NONE option.
- New ActPost Setup option to set a default Credit limit for customer created in QB
- New ActPost button to set the credit for all active customers in QB to the default credit limit (for those below the credit limit entered)

Improved SMS functionality

- Added Employee Group SMS button on Job Cards
- New Setup - Job Cards 4 option to set status code for sent SMS messages.
- New Setup 2 option to Strip Carriage Returns from SMS messages
- New Setup 2 option to break SMS messages into 160 character blocks
- SMS messages sent are now copied the Job Card audit trail note

Enhancements to Contract Jobs

- Added Orders buttons to Job Cards Stages screen
- New option to restrict receiving orders for closed stages
- Completing a stage will now warn you when saving that outstanding order items exist
- Ordering Quoted parts for contract jobs now has an option to order quoted parts for all stages on the contract job
- Added Bill hours to contract job Stages time grid
- Variations Approved status is now a button.
 - Press the button to approve the Variation
 - Blank out the approved date to un approve
- Contract Jobs Assignments page now shows assignments from all stages / variations on the Contract Job
- Contract job stages / variations now include a work performed field
 - You can now describe what you did in the stage / variation
- Contract Job Summary page Parts / Sell Analysis renamed to Profitability Analysis
 - Accumulated costs on summary page now include Expenses from time sheets as costs
- Time Sheet Expenses (Tolls, food etc) now accumulate as actual costs against a Contract Job.
- Retention invoices can now include a manually entered comment
- Contract Job time sheets now permit the entry of billable hours
 - Allows for accurate estimation of accumulated sell price based on billable hours rather than worked hours.
- TSM Now warns you when ordering an item for a completed stage or variation
- Added a new Command Line Parameter to recall deleted Stages on contract jobs

- TSM RECALLS Job#,Stage# ie TSM RECALLS 60452,2 will recall Stage 2 on Job 60452
- You can now add parts / labour to unapproved variations however you are given visual warnings that it is unapproved
- Contract Job Stages now show additional Variation cost information
- Added option in contract jobs for parts / labour prices to include tax
 - New Check box on Job Logging screen
 - Prices only include tax while adding . editing parts / labour
- Contract Job Invoices now automatically calculate stage allocations based on % completed.
- Added start time to contract job Job Logging screen
- Contract Jobs can now be completed with confirmation if incomplete stages are found. Note: Stages will not be completed

Maintenance enhancements

- Added "Revision" and "Version" to "Equipment" page of job card.
- Adding equipment to a maintenance contract now automatically populates the warranty period
- Added in new Setup option to automatically set Billing Customer when selecting equipment on a job from the Maintenance button.
 - TSM would normally automatically set the Customer ID, Billing ID and Site ID on a job to match the site the equipment was selected from.
 - It is sometimes undesirable to reset the Billing Customer as you might wish to bill to a specific company.
 - Un-Setting this option will stop TSM from automatically replacing the Billing ID on the job. the Customer ID and Site ID will still be replaced to match the site the equipment was selected from.
- New Quick Schedules option in Maintenance module
 - Lists all sites and allows quick access to adding / updating schedules from all sites in one screen
 - Significantly speeds up the time taken to update multiple schedules
- New Schedule Wizard added to Maintenance Schedules screen
 - Quickly add schedules to the selected site
 - Save your favourite list of schedules for reuse later
- Maintenance Contracts Changes
 - Added a disabled checkbox to Schedules to stop them from appearing in the Create Cards screen.
 - Added a disabled checkbox to Maintenance Contract to stop all schedules from appearing in the Create Cards screen.
 - Added Disabled filter to Maintenance / Schedules report filters
 - Added New checkbox to Make Cards screen to display all or only selected schedules
- Added Last day of the Month to schedule Period options

- Multiple combined schedules now update the job name with the schedule description of each schedule.
- Adding a Scheduled job to a Contract Job now automatically creates an assignment if TSM is configured to do so
- New Setup - Maintenance option to clear out the default Swapout site
 - Useful if you accidentally set the swapout site
- New TSM Job Equipment Comments field
 - The comments field that is linked to equipment is now copied to the Job Card equipment comment field (new field on the Job Card Equipment tab)
 - Job Card Equipment tab layout changed to allow for new field. There are now 3 tabs and comments appears on the 2nd tab
 - upon job completion, any equipment comment changes made on the job card are copied back to the maintenance contract equipment they originated from
 - This allows the ability to see current comments and also a history of comments.
 - New Setup - Maintenance option to enable this functionality
- New Setup - Maintenance option for compulsory equipment installed date
- Billing Customer address is now visible in Contact Maintenance if a Billing Customer ID is entered.
- Added "Other" field to Maintenance Schedules.
 - Other field copies any value entered against the Schedule into the Other field on the Job Card created from the Cards option in Maintenance.
- Maintenance Contract Equipment page now displays the total number of pieces of equipment logged at the Site
 - This makes it easy to see how many items of equipment are included in the site.
- You can now add new equipment to a linked Maintenance Contract in Job Cards
 - Previously you could only create a new contract. Any new equipment would ask you to create another contract
- Maintenance Schedules reports now remember the Schedule Date range and it is now a date selection like report filters (beginning last month, end last month etc)
 - This enables this report to be scheduled properly in the report scheduler.
- Transferring / copying Maintenance items between sites now has an option to take the Schedules as well
- Scheduled Maintenance Reference now passes over to Job Card
- New Maintenance Setup option to automatically assign a Maintenance number when creating new Maintenance records
 - Set this new setup option value to zero to disable automatic maintenance numbers

- Added Schedule name to Process Schedules screen
- Added new Setup Maintenance option to copy schedule service requested to the work performed field for Auto Invoice and Auto Complete jobs
 - This allows you to set a job / invoice comment for automatically created jobs
- Added default Job Card department to Scheduled Maintenance Schedule Type Setup screen
 - Any jobs created will use the Schedule Type department if entered
- New option to reset all Schedule Type period and next schedule date based on current Schedule Type period
 - Schedule Type codes maintenance has a new Reset button
 - All active (non-expired) schedules will have their period reset to the current Schedule Type period
 - Optionally, the next schedule date can be reset from the last schedule date plus the new period.
- Added Auto Complete flag to Schedules to automatically complete the job / stage created by the Schedule
- Added auto Invoice option to Contract Job linked Schedules
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Enhancements to Products Module

- New Product Maintenance Field - Lead time (Days)
 - Adding a PO item now automatically calculates the ETA from the order date plus the product lead time
- Added in Setup - Inventory - System Default price break grid
- Put a setup option for product label printing. The default is "None".
- Introduction of Trade Price Markup
 - New option in Setup - Inventory to set whether sell price markup is based on cost or trade price. Even if trade price is selected, cost will be used if trade is zero.
 - Changing this option in Setup - Inventory will recalculate the sell prices for all products that have a markup % set for them.
 - Selecting Trade price as the markup will restrict the price break calculations to be based on quantity and not cost.
- Add tax code for purchasing parts
- Product Price Breaks
 - New Tab in Product Maintenance - Prices. Moved all price related information to this tab.
 - New tab in Product Type maintenance for price breaks
 - Added new Price break grid
 - Can lookup price breaks by range of cost price or quantity
 - If a price break is found, the price can be calculated by a markup or by a specific price 1-5
 - For example, if a break is found, you could markup the cost by say, 30% or set the price specifically to price 5

- If you have not set any price breaks for the selected product, TSM will look up the Product Type to see if it has a price break set.
- Added new Promotional Price code to Product Maintenance
 - Setting this for an individual part will temporarily force this price to use the selected price code 1-5 regardless of the system default or customer specific price code.
 - Set this to zero to disable for this Product ID
 - This is very useful to provide a special price for the item without losing the original price. for example use Price code 5 for special prices and then enable or disable this on a part by part basis as required.
- Product Reorder function will now allow you to show parts that do not have a default supplier
 - New Check Box on top to include parts without a supplier
 - You must still select a supplier for it to reorder the parts
- You can now edit the job number on Parts Used maintenance from the Main Menu.
 - This allows you to effectively move a part from one job to another
 - Be aware that moving parts from or to invoiced jobs will not repost any changes to the accounting packages
- New Orders button on Product Maintenance next to On Order Qty to display a report of all items on order for the selected Product ID
- Added Barcode number to Product Maintenance, search and reports
- Added Common Items checkbox to Product Maintenance and Product Search screen
 - Only shows common items, useful to restrict the number of items displayed.
- TSM Product Import facility now audit trails inventory adjustments if you import onhand quantities
- Add a product Category in products called Accessories.
 - Modify Product search and Product reports to include Accessories
- Update button on Product Maintenance now creates a Product Audit Trail
- Added Option to setup - Inventory to set the Product Bin/Location field to be a free form entry or a List Box
- Product screen reorder point and level now no longer is visible if multi-location inventory control is enabled
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Purchase Orders enhancements

- Added Original non-discounted purchase cost to PO Receipts screen
 - Displays the original cost you estimated the PO would cost, rather than the actual cost entered
- Added View Job button to PO Details screen

- Select a PO detail with a job number and press the new View Job button and the corresponding job card will be displayed
- New PO Setup option to update Product sell price for non-markup prices upon PO Receipt
 - There is already an option to recalculate sell prices for marked up items but items without a percentage markup were not being updated
 - TSM will now optionally update the Product sell price with the non-discounted sell price on a PO using one of the following price codes:
 - For job linked item, Price code of job billing customer will be used
 - For non-job linked item (Stock order), price 1 will be used
- Added PO Prefix to PO Setup Screen
 - All automatically generated PO number will now have the prefix entered here.
 - Leave prefix blank to work as it did before without a prefix
 - Manually entered PO numbers will now prompt with the Prefix
- Deleting a Purchase order item linked to an invoiced job now gives a warning
- Adding a Supplier Invoice to an order now defaults the Supplier ID to the PO Bill To ID.
- PO Receipt for Summarised purchase orders now put the item description into a parts used note rather than the parts used description
 - Added Parts Used note to Job Cards parts used screen
 - This is useful so that you can still see that audit trail of all activity with the summarised PO receipt but not print this on the invoice to the customer.
- Entering a job card number on a Purchase Order now defaults the PO department to the job card department
- New Setup - Purchase Orders option for default department when adding a Purchase Order
- PO Order number search now sorts numeric characters numerically rather than alphabetically
 - This means that 999 will sort before 1000 which sorts before A123
- New Setup PO option to configure the PO Email subject
- New PO Receipt screen option to print labels for Job Linked order items
- PO fields Ordered Date, Printed Date, Authorised Date and Required Date are all now Date / Time fields
 - You can identify when a job was ordered down to the hour and minute.
- You can now double click the Job Card number on the PO screen to display that job card

- Added Sort order by Product ID or Entry Order to PO Items / Receipts screen
- PO Receipts screen now sorted in Product ID order
- New Setup - Purchases Orders option to Purchase at Fixed or Last cost.
 - No longer able to order at average cost as this does not make sense.
- Added Employee ID to Parts Ordered screen
- Purchase Order Site Address button now includes the Company name in the Delivery Address.
- New Setup - Purchase Orders option to warn if adding an order item that does not have a job number
 - Provides visible warning in case you have forgotten to link a PO to a job which could upset job costings
 - Only warns you when adding the PO item, not when editing
- Purchase order details now allow you to edit the inventory location after saving the order detail
 - On hand quantities for the original location will be reversed and applied to the new location selected
- Receiving Purchase Orders against Invoiced job now gives you the option of cancelling the receipt
- Added ability to edit the Received Date on a Purchase Order
- Receiving Summarised Purchase Orders for Contract Jobs now puts one summarised entry per Cost Centre
- Made the "Exp. Acc." field on "Supplier Invoice" page of "Purchase Order" screen invisible if the supplier invoice is linked to a purchase order.
- Added a new ETA field to order details
 - PO Items Ordered screen updated with new field
 - PO Items report has a new filter and sort order for ETA date.
- New PO Setup option for compulsory Department code
- Purchase Orders screen now has Linked Documents
- New Purchase Order region field
 - New region field added to Purchase Order
 - New region field added to Supplier Invoices
 - Supplier invoices generated from a Purchase Order will inherit the PO region
 - New PO Setup option for compulsory region
 - New Code Setup for region
- New Security option to prevent removal / editing of items from a purchase order after they have been received
 - Add new option to security screen and apply to all security groups
 - Modify Purchase Orders screen to prevent delete button of received items



- Modify Order detail entry screen to prevent deleting / saving entries if received