What's new in TSM 6.7?

Reports

* Added Job Type to time sheets reports filters

Allows a timesheet report to be run filtered to timesheets on jobs of a particular Job Type

* Added Sales Person lookup to Debtors Reports filters

* Selecting report button from Parts Used screen now automatically selects the Product Reports Parts Used option

* New Maintenance Pre-Paid time reports

- Able to print all Prepaid times, available, expired and reorder due

- Continue to use Time Sheet prepaid time reports for transaction based reporting

* Added CSV file with a header to "Print to File" option.

* Reports generated from the Reports module now use the new TSM Report viewer

* Added a bank deposit slip to "Cash Receipt" reports.

General

*Added Prepaid time to Customer History

Displays any PrePaid time contracts against Maintenance Records for the customer.

* New option on full job cards and help desk to display current or all time sheet comments on screen

Displays the comments for the selected timesheet only, or the comments for all timesheets on the job.

* Added Email button to Assignments screen
        Will create an email addressed to the employee on the assignment.

* Job Card History button now shows jobs for customers, billing ID and Site

* Postcode Maintenance now includes Country code.
        You can now view postcodes for your region or all regions
        Displays more postcodes in grid

* Product Schedule Rates screen now includes the schedule name that can be preset

* Exploding BOM / Kit items now copy the reference number to each exploded item

* Suburb field is now forced upper case

* Parts Used module can now be filtered by Job Number

* Product module now uses the default tax rate if no tax rate specified

* User defined fields that were pull down lists were not automatically adding values into the list that did not already exit. The field appeared blank.

* Added Service Code to Job Card quick search screen

* The TSM Email Client will now handle multiple email addresses separated by commas or semi colons. This was already working if using the GoldMine or Outlook email client

* Added Mobile phone to Contacts search screen

* The Product Adjustment screen now remembers the From / To inventory locations when moving between products. This makes it easier to move many products from the store into a van

* Added default "Location" combobox for multilocation.

* Added an expression option to the TSM Task Bar

- This enables you to run a TSM expression or user defined function from the TSM Task Bar

* Added Visible expression to User Defined Fields

- Allows an expression to be evaluated to determine whether the user defined field is displayed.

* Added a 3rd option to Product Price Breaks

- You can now set a specific price for a price break.

- For example, the normal price is varies from $40 - $50 depending on your price level but if you order over 10, your price will be $35, regardless of your price level.

* Added Quoted part filter to Parts Used filters

- You can now choose from Exclude Quoted PArts, Quoted parts only or either

New Fields on Job Card forms

* Added Industry to Customer screen

    For further reporting on your customer base. Will be used to synchronise data from this field of Sugar CRM.

* Added Order number to Help Desk screen

* Added Invoice date to Help desk screen so that you can tell if the job has been invoiced

* Added a Print button to linked documents

    - This will use the native application of the document to print it out.

* Contract Job Screens now include additional information to make them more compatible with regular job cards

* Added dimensions to parts used screen

- Added length and width to parts used screen

- Added Unit of Measure to parts used screen

- Added Dimensions multiplier to Unit of Measure codes maintenance screen

- Dimensions multiplier will multiply the length by widteh to calculate the quantity

- eg - if length and width are in millimetres and the quantity is in metres, enter 0.000001 as the multiplier (ie 1000mm x 1500mm = 1.5 metres)

* You can now select a Billing Customer for Contract Job Invoices

- It will default to the Job card billing Customer

New Setup options

* Added Default Assignment Type to Setup – Miscellaneous
        Allows a default to be selected in order to reduce the amount of data entry.

* New Setup General Options
        - Ability to disable resizing a form
        - Stop TSM from loading customised field labels
        -        Both of the above can have a significant impact on the time taken to load a form
        on slow computers or over slow network connections

* Added a setup option to make "Alert Due Date" compulsory.

* New setup Customer option to disable TAPI Dialing buttons

* Added an option for compulsory "Job Name"

- Added Job Card setup option to enabled dimensions on parts used

Speed improvements

* Significant performance improvements navigating in Job Cards with very large equipment lists

* Further performance enhancements in Maintenance Module

* Significant performance improvements navigating in Maintenance Contracts with very large
numbers of equipment records (> 10,000)

Cash Receipts

* Added Amount Tendered and Change Due to Cash Receipts screen

- Makes it easier for POS invoices to calculate the change due

* Added auto calculate receipt total to automatically calculate the receipts total from the sum of
the payments applied

- auto calculate and allow overpayment options values are now remembered from one session to another

Audit Trail/Security

* Changing employee ID on job linked assignments now logs old / new employee in Job Card audit trail

     So you can see the history of who has been responsible for this job.

* Audit Trail now logs users login information plus some additional windows information

* Emailing the PO is now audit trailed. (Both from email button on the PO screen and on the print screen)

* Emailing service invoices is now added to job audit trail.

* Added a security option to restrict deletion of Contract Jobs Stages and Cost Centres.

Maintenance

* Added new option to Schedule Equipment to elect how it is added to the generated job card

     - Equipment - add as a piece of equipment as it did before

     - Part Sell Price - add as a part and use the cost and sell price from the parts database

     - Parts Equipment Rate - add as a part and use the cost from the parts database and the equipment rate as the sell price

* Added Other 3 and Other 4 to Maintenance Site screen

- Other 3 and Other 4 can now be selected for some Maintenance Report filters

* New Setup - Maintenance option to set the number of days forward the Schedule Processor will look in the Cards Option

* You can now automatically schedule the creation of Schedules

- New Startup Option "MAKECARD"

- Starting with this option will automatically open the Maintenance Cards option, select all displayed schedules and process them.

* Added Auto Quote option to Maintenance Schedules

- Will create a quote rather than a regular job card

* Added a new option to Schedules Product List to only show linked products

- This makes it much easier to find which items are linked to a schedule, especially if there are many items on a site

* Added Manufacturer to Maintenance Equipment

Requisitions / Commitments

* Added Job # to Product Reorder screen so that you can reorder for a job or filter requisitions to a particular job #

* Requisition can now be ordered via the Product Reorder module

    - Reordered requisitions are automatically converted into commitments

* Requisitions can now be disabled by a new Inventory Setup option