

# Management System Release Notes

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v16b4.x

## Overview

The management system update release that you are about to install is full of exciting enhancements and features! Please take a few moments to carefully read the following release notes. This will familiarize you with the additional features and system changes that are included in this software release.

This document is categorized by system area with the feature and/or enhancement listed beneath the category header.

**\*\*It is imperative that you monitor the Personnel/Access area for each personnel entry after the update is complete. There are changes to access options in this area. You will need to make sure that access boxes are checked or unchecked to continue a user's access or to eliminate a user's access.\*\***

Below you will find educational opportunities and the proper channels to use if you have any questions regarding this management system update.

### Educational Opportunities

Newly posted documents explaining new system features can be found on the eDocuments area in your Client Login Zone. Look for the first category column "Current Update Release Information".

Newly posted videos explaining new system features can be found under the "Software Releases" area on the eTutorials web page in your Client Login Zone. ***\*Note: A new bundling video is found directly at the bundle area in the software! Click the "web help" button at the bundle screen to see how to use the new feature!\****

eCourses are available on a topic basis by clicking the "Register for eCourses (Topic Specific)" button at the Announcements page in the Client Login Zone.

### Feature Requests (Suggestions)

If you have an idea for a system function, feature or expansion of an existing feature, please submit it on our website at the Support page. [www.pacific-solutions.com/feature-request.html](http://www.pacific-solutions.com/feature-request.html). If you are wondering whether your management system can or cannot perform a function, please inquire to support *BEFORE* submitting a feature request. Please remember that the Feature Request form is not the proper channel to submit a support request. See the next section for how to contact support for system process assistance.

### Inquiries

All software update questions, concerns and educational inquiries need to be sent to [support@pacific-solutions.com](mailto:support@pacific-solutions.com) either by email or phone: 800.201.6509.

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## *Redesigned System Modules*

*The following areas of the management software have been completely redesigned. These modules, although existing previously, are significantly different. All of these modules now have new layouts, new tools and new processes to learn.*

### Bundles

Bundling has been completely rewritten to provide a more practical approach to building bundles. The new screen provides the ability to place materials and labor separately into different bundles even if they are cohabitating on the same line. The new screen makes it easier to modify bundles once created. You will see more lines at a time in an expanded view for selection of bundle numbers. **There is a “web help” button for the video explaining the new process located directly in the bundle area.**

### Upgrade Bundles

This area has been rewritten to match the new tools available in the regular bundle area.

### Kits

Users can now select from the list of product kits directly from the product kit list (established in admin) while building the proposal. Clicking the “kit” arrow at the right end of the line will initiate the new sub screen when a kit can be selected. Inside the new kit interface, you will also have options to eliminate kit items prior to bringing the kit into the proposal. Use the “add/remove” button next to lines to remove the lines from the kit. Lines highlighted in red are the lines that will not pull over from the kit into the proposal.

Building kits has currently been executed in the Admin area for some time now. Small enhancements have been made along the way since its first inception. Previous enhancements to the Product Kit area can be attained in previous release notes.

When building kits, you may now use the down arrow button to insert a new line into the kit when building the kit in Admin. Kits no longer need to live in the product catalog.

### Hourly Labor Matrix Tab

The tab at the installer work order labeled “Hrly Lbr Mtrx” has had a few items removed. The ability to delete existing lines and the ability to create new lines has been removed from this area. Users will need to process hourly labor matrix activities from the “Payroll” area through the main navigator. All entries, deletions and modifications will need to be performed in the “Post Hourly Labor” area of “Payroll”. If you have not been using the “Payroll” area to process hourly labor, you will need to familiarize yourself with this area. Please watch the video on Hourly Labor Matrix in the client login area.

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## Email

The new email plugin was introduced last year. However, since many users will be updating from older versions, we've included Email again in this release notes as a redesigned system module. There are new setup features that utilize the new email capabilities. The new email will no longer use the Outlook Integration Plugin. The new email gives users the ability to send email regardless of the email client. Users are able to use SMTP client settings. Please read the edocuments in your client login zone regarding Email Settings.

## ***New System Features***

*The following areas of the management software are brand new, making their debut in this release. This includes features, reports and administration items.*

### Job Audit Tool

Quote/proposal will display a new button on the top tool bar labeled "Audit Tool". This feature will provide you a way to audit the proposal/quote prior to transferring it to a sale/order and presenting to the client. The audit window displays a list of criteria that must be completed before transferring can take place. The audit screen shows the number of occurrences and the status (red and green checkmarks; green = ok) of each criterion. The screen includes an audit button per criterion that will isolate the lines in the quote/proposal that pertain to that specific criterion. This new audit tool screen has a print option as well on on-screen viewing. The red "R" next to lines indicates that these criteria are required before the next step can take place. The document may not transfer until the required (red "R") items are audited.

The Job Audit Tool window will activate during the transfer process (proposal to sales order and sales order to invoice) to alert you to the status before completing the transfer process.

This feature may be deactivated per user in each user's access level tab at Personnel/Access in Admin.

### AP Credit to PO

While the ability to create a credit in AP is long standing, the ability to relate certain credits back to the original PO number is completely new. You may now create a credit voucher in AP, link it to the original PO# and process the credit for the quantity being returned to the vendor. This new process also has a simpler way of including a restocking fee for posting to a specific GL account. This new process corrects the inventory count immediately to show the reduction in sellable and on hand quantities. Most all credits can now be associated with its original PO number.

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## Reports

*Labor Sold by Labor Type (Written) Report:* This report can be run by a date range and a store location. This report displays a summary report level first showing each labor type sold (on written sales/orders), the total sold, the total cost, the total profit and the overall gross profit margin. This report also has a detail level under each magnifying glass next to each labor type. The detail of each labor type displays the labor description id# and the labor descriptions along with specific quantity totals as well as sell, cost, profit and gpm. Each level of this report has the ability to hide profits. This report may also be exported.

## *Enhanced System Modules*

*The following areas of the management system are long standing features and modules. The following enhancements have been made to them however, users will continue to see layouts, processes and tools that were there before. These enhancements are subtle and add increased functionality to each area.*

## Change Orders

A link button has been added to the change order header in proposals/quotes that will take you back to the job that created the pending change order. The button is a grey > graphic to the right of the "Pending Change Order" header.

When creating a new change order in JobRunner, the system now asks "Do you want this pending change order to be charge or no charge?". Select an option before proceeding to the change order creation screen. When selecting "no charge", the system identifies the "no charge" in the header title of the change order. There is an additional new change order status in JobRunner. The new status is "accepted not approved". This new status represents change orders that have been accepted and transferred to an order but have not yet been approved by the client. Using the yellow "up" arrow to the far right of the change order will move it from "Accepted Not Approved" to "Approved". The down yellow arrow in the Approved area will move the change order back to the "Accepted and Not Approved" area. There are now three areas to store change orders on the order's Change Order Tab; Approved, Accepted Not Approved and Pending.

Users may now manually alter the displaying change order numbers on change orders to match client's change order number sequences. You can enter your internal display numbers into the "Alt CO#" field. You may also now exclude internal change orders and no charge change orders from the change order history report. Zero charge change orders will also be eliminated from the AIA billing worksheet in JobRunner systems.

Should you need to mark an existing pending change order as "no charge" and it was not marked as such during the creation, you can mark this manually. A new checkbox has been added in JobRunner to

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make an existing pending change order, a “No Charge Change Order”. Marking this box will make all the sell prices zero when it is transferred to an Order. Use this checkbox to make a change order not show up in JobRunner’s Change Order History Report. This checkbox is located behind the “Settings” button on the top tool bar on the “Parameters” Tab.

## Pick Tickets

You may now “Stage & Deliver” as one button click. There is a new option at the pick ticket header. The button marked “Stage & Deliver” will stage and deliver the selected items. This eliminates the need to stage as one step and deliver as a separate step.

The Stage Memo and the Delivery Memo fields and the date fields have been modified to automatically include the current date and an auto generated memo. This information can be modified by the user or accepted as-is when finalizing staging and delivering processes. The auto generated memo text will read “Auto Staged by: <user name>” and “Auto Delivered by: <user name>” with the current day’s date.

Hovering over the “Already Delivered” quantity or the “Staged Not Delivered” quantity fields will display a message that shows the stage name of the line.

You may now view the inventory record directly from the pick ticket tab. Each inventory record on the pick ticket shows a “View Inv#” button. Each line also shows a “Clear Stage” button. This button clears the staged materials and places them back into “remaining to stage”. You still need to enter a delivered date during the delivering process.

All Pick Ticket enhancements are available in the Installer Work Order pick ticket.

## Opportunities

*Referred By / Company:* The Opportunity now displays the referred by information from the contact record. When selected at the contact record, the referred by information will retroactively populate all of the opportunities under that contact with the referred by information. IF the referred by information is selected at the opportunity, the referred by information will populate the contact record.

*Pipeline Screen View:* There is a new “export” button available per sales person when the screen is sorted by “sales person”. This export button is available for each sales person and exports only their information. The sort tools at the top of the screen offer the ability to select individual sales person’s name or to “show all”. A sales person can be selected from the drop down list for “Rep”. Columns in the screen that may be modified in the list view are designated with an “\*” in the header name. The header turns blue to indicate which criteria is actively sorting.

The Pipeline graphs may now be displayed in dollars, the number of accounts, both or none. There are new radio button toggles in the blue Pipeline header to switch how the graph information is displayed.

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The overview tab has a field to enter the “Primary Competitor” from the drop down list of competitors.

## Proposals

*Entry Tab:* Marketing Source and Market Sector may now be entered directly at the face of the quote/proposal. There are two new fields below store and entry person; one for Marketing Source and one for Market Sector. These use the drop down list created in admin. You can turn off mandatory selection at the onset of the quote/proposal creation and still use the fields on a job by job basis. These may also be modified after selections have already been made at the onset of the quote/proposal creation.

*Alternates:* Users may now manually alter the printing alternate number. This is helpful to make the alternate numbering sequence match the scope of work. You can see both the system and the user identified alternate number on the Alternates Tab at the master proposal. The Alternate Summary tab shows both the “System Alt#” and the “User Alt#”. To modify the displayed alternate number, click into the “User Alt#” field at the Alternate Summaries Tab and enter.

*Overhead:* Overhead had an improvement that allows the GPM to be set with the GPM tab and maintain an accurate GPM as it considers overhead percent. Overhead will now be shown in the line information on the profits tab instead of in the “more details” profit area. Overhead is included as part of the landed cost.

## Product Catalog

*B2B:* significant improvements and enhancements have been made to the B2B functionality. These enhancements are but not limited to the following

- Dropped product handling specific by color/item
- Archive button at the match screen
- Ability to omit archived records from matching relationships
- Remove Duplicates button on a product record’s Activity Tab
- Product Catalog Audit tool

*Revise Screen:* Users may now revise a group of products and set freight down to the color level in the revise screen.

## Labor Catalog

*List View:* The labor catalog types will now automatically sort in alphabetical order instead of creation order.

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## Orders

*Profits Tab:* The budget columns have been moved to display in between the Entry columns and the Actual columns. When the “Show Budget” button is active, the budget now displays immediately after the Entry columns.

*Status Tab:* The installer work orders area on the status tab now includes the “accept/paid” memo line. This memo line is entered at the work order itself when the accept/paid process is used.

*Inventory Currently Assigned: Allocated Tab:* When you click on the red material allocation letter (red “A”) on the Entry Tab, the system displays the Inventory records that are allocated to the that line. There are two new buttons on this screen: Pick Ticket (has replaced “locate”) and Modify (coming soon). The Pick Ticket button will isolate that specific inventory record on the Pick Ticket and move to the Pick Ticket Tab. The Modify button is an additional feature that will be released soon but is not yet available.

## Inventory

*Reset Life Range:* Inventory as of a date report. when a record is used up, there are 2 dates: birth and death of the item. The lifespan of the record. Resetting this. Sometimes reversing, deleting, adjusting and in constant flux some dates are not captured. This routine re-establishes the birth and death dates for reporting purposes. Record lock, etc. No found set needed. It will run on all records.

*Cost Tab:* The cost tab now displays the estimated/budgeted cost of the item along with the verified/actual cost.

*Receive Inventory Grid:* Users can now see the Remaining balance to receive at the receive inventory grid screen in the inventory module. At the bottom of the “Qan Received” column is a new field for displaying the remaining amount left to be received as you perform the receiving. You may now modify the received date at this bottom section as well. There is a “Received Date” field to the right of the totals field that includes a drop out calendar for modifying the received date.

*Search Screen:* Searching inventory will now only produce results for ACTIVE inventory records. This enhancement automatically eliminates “expired” or “dead” records (records that have zeroed out). You may now only see expired records by searching for inventory number directly or PO# directly at the inventory search screen. There is a new checkbox at the bottom of the search inventory screen called “Include Expired Items”. Using this checkbox in combination with other search options will retrieve active and expired (zeroed out) inventory records.

## Accounts Receivable (AR)

*Invoice Custom Progress Invoice:* The Custom Invoice Progress Billing screen now includes totals at the bottom to show the “Projected Material Invoice” total, the “Projected Labor Invoice” total and the “Projected Total Invoice” amounts prior to creating the AR Invoice. These totals are shown prior to any

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discounts on the job (discount shows on the AR invoice when it is created). These total do however include tax.

*Invoice Tab:* Users can now view the payment “apply date” as well as the “pay date” on each payment made to an invoice.

*Remittance Box:* This has been moved behind the “More Details” button down near the grand totals.

## Accounts Payable (AP)

*Bills Due:* A refresh button has been added at the top of the bills due screen to refresh the list of bills due. This will remove trapped data that may still be showing especially if users are selecting “save” when they exist the bills due area and have processed additional bills.

## Customer Payments

*Active Invoices Tab:* When the system is triggered into a “new” payment scenario, new isolation filters and additional total fields can now be seen. The Job/Order# column and the Customer PO column have a funnel shaped icon next to each invoice. When you click on a funnel icon next to a Job#/PO#, the system isolates all the invoices related to that number in an automatic filter. The Job/Order# filter activates, the Summary Total field totals up the grand totals on only those specific jobs/pos and the Summary Balance totals up the adjusted balance on only those specific jobs/pos. Use the scissors icon next to the filter in the tab’s header to release the filtering criteria and go back to the full list view.

## Admin

*Personnel/Access: Access Levels:* Proposal/Job Destination: Two new checkboxes control how individual users navigate on proposals and jobs. Users may now always land on the profits tab or the entry tab when arriving at a proposal and job. This setting applies to both proposals and jobs at the same time.

**\*\*It is important to review the Access Level Tab of each user to make sure all access to new features or prohibition to new access levels are granted\*\***

*Defaults: Accounting Defaults:* Default Percentage of Overhead: two new setting options for using overhead have been created. The first is to set a global overhead calculated on the total sell of the job (entire record). This feature continues to use the overhead percent field at the bottom of the profits tab. The second option is to set an overhead percentage per line of the job. This option calculates overhead on the cost of the lines and displays per line on the profits tab automatically.

*Admin: Value Lists: Invoice Flags:* Copy and paste your own invoice “stamps” or “flags” to select at the print options of an AR invoice for “past due” etc. Select which invoice flag to use when printing the AR invoice. There is a new selection drop down at the bottom of the print options screen in Invoices AR. The field “Invoice Flag” will display the options created in the Admin area for invoice flags.

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## ***General System Enhancements***

The suite number now appears in the list view and in exports at quote, sale, invoice, workorder and opportunity.

The bank reconciliation screen of past reconciliations now shows a column for the total outstanding transactions.

