What's New – September 2015

This update should be loaded to all server no later than September 30th, 2015

Overview…

1. (New) Max Finkelstein Integration
2. (New) Drag-n-Drop - Move Appointments
3. (New) Drag-n-Drop - Create Additional Appointments
4. (New) Drag-n-Drop – Merge Appointments
5. (New) Option to turn off “tool tips” on Bay Management View
6. (New) Accelerator key to speed logout
7. (New) Setting – “Always” Reset Password on Logout
8. PO Reconciliation now processes negative quantities
9. Corrected Customer Phone# Lookup

#1 – Max Finkelstein Integration Added

For our valued clients in the Northeast, we are pleased to announce the release of an integration with Max Finkelstein wholesale. If you are interested in activating this integration, please contact the HITS Technical Support Center. [1812]

#2 – Drag-n-Drop – Move Appointment

You can now move an existing appointment to a new time and bay by using the left mouse to drag and drop the appointment to the new time and bay. [1788]

#3 – Drag-n-Drop - Create Additional Appointment

For those times when you need to set more than one appointment time and bay for a customer/vehicle, you can now use the CTRL (key) and left mouse to drag and drop a new appointment for the same customer/vehicle to a new time and bay. Start by pressing and holding the CTRL key and clicking the
first time slot on the original appointment on the Bay Management screen. Then drag and drop on the desired time and bay for the second (additional) appointment.

The new appointment will be created as a quote ticket, but can be converted if desired. A comment will be added to the new ticket referencing the original ticket# from which the new appointment ticket was created. There is no limit to the number of additional appointments you can create from the original appointment.

We recommend that this method only be used for blocking the appointment times and bays so that everyone knows that the additional time and bay are allocated. We recommend that all ticket contents and edits be maintained on the original ticket. However, you can make edits to the second ticket and those edits can be easily merged back to the original ticket when the work has been completed using the new drag and drop “merge” function. (See #3 below.) [1789]

#4 – Drag-n-Drop – Merge Appointments

You can now merge two or more appointments for the same customer/vehicle using drag-and-drop. Place the mouse on the first time slot of the ticket you want to merge, typically the second appointment. Hold the CTRL (key) and left mouse, drag the ticket “TO” the ticket you want to retain, and release the CTRL (key) and left mouse. The line items from the “FROM” ticket will be moved to the “TO” ticket and the “FROM” ticket will be deleted.

Typically, you second ticket will be a quote. The original ticket can be a quote or a workorder. However, you really do not have to worry about whether you are merging two quotes, two workorders, or a mix. BPOS will make the determination which ticket# will prevail when the merge is performed. In all cases, workorders prevail over quotes. If two workorders are being merged, the original workorder will be preserved.

BPOS will also make the appropriate adjustments to in-process inventory. For example, if a quote is being merged to a workorder and the quote has a stocking item on it, the Available and In-Process quantities will be adjusted when transferred from the quote to the workorder. [1790]

#5 – Turn Off Appointment Tool Tips

You can toggle the display of the (yellow) tool tips that show information for an appointment to Off/On as needed. Toggling the tool tips OFF can be particularly helpful if you have a lot of appointments scheduled for a day and are trying to use the drag-and-drop functions to create, move, and merge appointments.

The Disable Tool Tips checkbox is located on the Bay Management View at the end of the row of appointment flags. [1800]
#6 – Accelerator Key for Logout

Pressing and holding the CTRL (control) key and pressing the letter “L” will now execute a standard “logout”. [1820]

#7 – Force Password “Reset” Setting

Under Administration → BPOS Global Defaults → Force Password Reset, setting this option to “Yes” will result in the password being cleared whenever a user logs out. This setting is global for all users. [1361]

#8 – PO Reconciliation Now Processes Negative Quantity Line Items

Previously, negative quantity line items on a PO would not reconcile against a Receipt. This has been corrected. [1798]

#9 – Customer Phone# Lookup Corrected.

Previously, when looking up a customer by phone#, only one phone# would be displayed even if the customer has multiple phone numbers. This has been corrected. [1796]

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