CHREOS SERVICE PACK 27

Service pack 27 contains a range of new and altered features.

NOTE:

1. **Debtor invoice, Debtor packing slip and POS temp structures have changed with this release. Therefore all parked transactions must be completed before running Chreos Service Pack 27.**
2. **There have been significant changes to Client orders. If you have Client orders with pre-payments active in your system please contact Wild Software Ltd rather than proceeding with this service pack.**
3. **Because of the extensive changes to Client orders and Debtor packing slips, reports that reference either of these need to be altered. Please contact Wild Software Ltd if you report on either of these features.**
4. **If you use Subscriptions please contact Wild Software Ltd before proceeding with this service pack.**

Features Summary (the highlights)

Client order and packing slips extensively updated.
New support services available.

New & Altered Features

General

1. The first time you run ChreosServer after installing this service pack you will be asked to select a shared directory. This should be an empty directory on the machine containing the company data and running ChreosServer. Chreos will store information sheets and other shared files in this directory.
2. With this service pack comes two substantial changes in the support available for Chreos users.
   - Chreos Information sheets are our answer to the problem of providing good documentation for a product that is constantly being extended and refined. Each sheet focuses on a specific screen and not only gives detailed information on what each part of the screen is for but also provides examples of typical uses, warnings on what to avoid, and tips and tricks on special features. Initially four sheets have been released and over 100 more are in various stages of production. Detailed information on how to access them is provided as a download on the same web page as this service pack. It is called "How to receive and use Information Sheets". Please download and read this sheet.
   - SupportByEmail is a new service. Within Chreos at "Help | Email support" messages can be constructed and sent to us simply by providing a subject line and a memo with your question or comment. You will immediately get a response at your normal email address (as specified on the above screen) and a more detailed response will follow shortly thereafter. Our initial aim is to respond to all requests within 1 day and to have an initial response time average of 6 hours. This service is appropriate for the sort of issues that do not need an immediate response because critical processes are not affected. The attraction for us is that all e-mails will come though one central point and

be stored together. The new system we have developed means that all correspondence with you on a particular issue is retained together so whoever deals with it at a particular point in time has a full overview of the issues raised.
- In order to use either of these services you need to configure Chreos' Internet settings. Detailed information on how to do this is provided as a download on the same web page as this service pack. It is called "How to receive and use Information Sheets". Please download and read this sheet.
- These two services are part of what is provided with the subscription to Chreos service packs. In order to use them you have to be licensed to receive current service packs.

3. Search by Transaction Number ("File | General") – Now also searches client and supplier order numbers.

Clients

1. A number of changes have been made to the right hand tabbed pages on "Client | Client management".
   - The right-hand 'Transactions' tab page has been renamed as 'Activities'.
   - On this page select to view 'Financials', ' Packing slips' or 'Orders'. These replace the separate tab pages for 'Transactions', 'Packing slips' and 'Orders'.
   - On the 'Financials' view of the 'Activities' page an 'All' radio button has been added to the group at the bottom that allows you to view all of the transactions for the selected client. Changing the client will change this back to the 'Current' radio button.
   - Packing slips and Orders can now have options of 'Current open' (still some processing to be done), 'Current closed' (processing was completed this period) and 'Completed' (processing was completed in a previous period). Note that this is necessary because packing slips and orders are now stored historically.
2. The left-hand 'Transactions' tab page on "Client | Client management" has been renamed to 'Documents'.
3. The Interface for Debtor invoice entry has been revised.
   - You can now enter, and switch between entries for Debtor invoice, Order or Packing slip. This is achieved via a combo that offers the three options. The radio group that used to exist on the left of the screen and gave choices between Invoice and Packing slip has gone and entry fields have been moved left to fill the gap. This screen can now be accessed from "Clients | Invoice", "Clients | Packing slip", and "Clients | Orders".
   - The maximum size of a client supplied Order # has been expanded from 10 characters to 16 characters.
   - The current, 1, 2 and 3 period balances are now displayed instead of the balance owing.
   - When searching for a Client using the 'Sortcode' field it now accepts a space as part of the search entry. This means you can now do searches like 'The Comp'.
   - The space on the top right changes between the three transactions. For Packing slips it allows determination of whether prices show for the specific

packing slip. For Orders, the delivery instructions from the old entry form have been included.

4. Some extra "drilling" is available on the 'Documents' page of "Clients | Client management". Select an order that has been converted to an invoice or packing slip. Double click on one of the item lines and it will take you to the next document. If it has been converted to both, click on the "X" in the "I" (Invoiced) column to go straight to invoice details. Double clicking on a packing slip line will take you to the invoice if it has been invoiced.
5. The ability to manage Client order numbers and packing slip numbers has been added to the 'Documents' page of "Maintenance | Setup".
6. With Client orders being merged with Debtor invoices, "Clients | Enquiry" has been added as a separate screen.
7. A print client orders screen similar to that for packing slips and invoices has been added and is available from "Print | Transactions | Packing slips"
8. "Clients | View client enquiry" has been updated so that the text description of what is required can be edited by clicking in the memo area and typing.
9. "Clients | Convert | Packing slip(s) to invoice" has been altered.
   - Whole packing slips, or individual lines within a packing slip can now be removed from the packing slip and either returned to stock or placed on order.
   - When you delete a line within a packing slip it asks how many of the line item are to be returned to stock. If the line has a quantity of 5 and you delete 3 then 3 will be returned to stock and the 2 will remain on the packing slip.
   - You can now choose to have the invoice number the same as the packing slip number that it is being converted from. This is set up on the 'Documents' page of "Maintenance | Setup". Effectively, the number is allocated from the set of invoice numbers when the packing slip is created so if a packing slip is subsequently cancelled in its entirety then the invoice number will not be used.
10. A new form for converting Orders to Packing slips and Invoices, and cancelling orders has been added. It can be accessed from "Clients | Convert | Order(s) to packing slip" and "Clients | Convert | Order(s) to invoice". Within the form there is a wide range of information about the order and the availability of stock to fill it. Detailed information on using it is contained in information sheets that will be published in early January.
11. An internal Client orders report is now available.
12. On the 'Client Invoices' page of "Maintenance | Printing setup" the option of linking in a customised report for previewing orders has been added.
13. Pages for Client packing slips and Client orders have been added to "Maintenance | Printing setup". This provides the ability to link in customised reports for previewing and printing in the same way as can be done for Debtor invoices.

POS

1. Payments using 'Our token' can now be cancelled by re-entering the token number of the one to be cancelled in the same transaction.
2. When searching for a Client using the 'Sortcode' field it now accepts a space as part of the search entry. This means you can now do searches like 'The Comp'.

Stock

1. A text item can now be identified and linked in on the ‘Stock linking’ page of “Stock | Stock table maintenance”. Note that the identified item should have an item type that is non-diminishing. So far it is being used in the message lines added to an invoice when it is converted from packing slip, when a debtor invoice is automatically credited, and in converting a Job to an invoice if needed. It will be added to other situations as they are identified.
2. Extensive changes have been made to Stocktake with the introduction of two new (alternative) processes. If you go to do a stocktake before the information sheets are published please contact Lydia (Lydia@wildsoft.co.nz) for an advance copy.

Creditors

1. The ability to manage Creditor order numbers and packing slip numbers has been added to the ‘Documents’ page of “Maintenance | Setup”.

General Ledger

1. A [Toggle accs] button has been added to “General Ledger | Account linking” and to the ‘Item type’ page of “Stock | Stock table maintenance”. This makes selecting and reading GL accounts easier by toggling them between Account name and Account code.

Server

1. A “File | TCP IP Settings” menu item has been added under to Chreos Server. This allows the user to specify the IP address for Chreos to use if multiple IPs exist. This supersedes (but does not replace) the existing I=xxx.xxx.xxx.xxx command line parameter.
2. An ‘About’ screen has been added to the Server under “Help | About”. This is very similar to the ‘About’ screen in ChreosClient.
3. An additional option has been added to Backup that gives you the option of having the backup validated. This provides additional checking to make sure that the backup has been successful. By default it is active. If used it will slow down the process slightly.