
Application	Chreos 3
Service Pack	39
Requirements	Service Pack 38 (SP38)
Warnings	All users of Chreos plug-ins (including Apparel) should check with Chreos support before installing this service pack.
	New license numbers must be obtained for ALL companies supported by your system before attempting to install this Service pack.

Important

- Any stock takes in progress **MUST** be completed **BEFORE** installing this Service Pack.
- Due to minor file format changes to some temporary files any parked transactions must be processed **BEFORE** installing this Service Pack.
- The licensing system has been enhanced to allow for the growth of Chreos. Due to this change all companies will require a new license number. This number will be emailed to qualifying companies shortly after the release of this service pack. Please do **not** try to install this service pack before that as Chreos will become unlicensed and unusable. If you do not receive a license number please contact Chreos support.

Main points

- Resizing of screens.
- Find clients by searching on phone numbers or addresses.
- GL structure and reporting.
- POS cash rounding.
- Price book module.
- Extensive upgrading of Apparel.
- New license numbers.
- New backup and data management functionality.

Creditors

- “Creditor Search” now displays the number of creditors found at the bottom right of the screen.

- “Creditor Search” now allows searches on phone, email, postal & delivery address. These searches are all ‘containing’ searches. This means that they will return results where only part of the text is found. Phone number search looks through all phone numbers (Day, A/H, Cell, Fax). If any of these contain the search string the creditor will be returned. “Phone” may only be searched once. For example, you can’t find all creditors who have a ‘2’ in their number then search those results for those with “345”.
- The “Creditor details” page of “Creditor management” now has space to store a tax registration number for each creditor, i.e. GST # or VAT #.
- In “Inwards goods” the “Pricing” tab now totals the previous item costs for an item and displays it. This is always the total of the last known costs even if the item’s costing is set to “Average cost price”.
- Kiwi Bank account numbers are now correctly verified.

Clients

- Client orders can now be edited from the “Client order” entry screen. This process is similar to converting an order to packing slip or to invoice. Simply select the client, ‘Edit order’ from the “Activity” combo, and choose an order to edit. Change any details and save. The existing order details will change to those just entered. The edited order will be assigned a new (Chreos) ‘Order #’ and the previous number it had will cease to exist.
- When using the conversion processes in the Client Order / Invoice / Packing slip screens the user may now double click an item in the selection list instead of clicking the convert button.
- “Client Search” now displays the number of clients found at the bottom right of the screen.
- “Client Search” now allows searches on phone, email, postal & delivery address. These searches are all “containing” searches. This means that they will return results where only part of the text is found. Phone number search looks through all phone numbers (Day, A/H, Cell, Fax). If any of these contain the search string the client will be returned. “Phone” may only be searched once. For example, you can’t find all clients who have a “2’ in their number then search those results for those with “345”.
- Emailing to client profiles now supports HTML emails. HTML emails allow alignment, font type and style to be specified. HTML emails are used by many (but not all) email clients. HTML is the default email format now but if you want to send a plain text email (supported by all email clients) simply un-tick the ‘Send text as HTML (may not display correctly in some email clients)’ check box.
- The “Client enquiry” screen may now be filtered to show all enquiries about a specific item.

Inventory

- The “Stock | Adjust Stock | Move stock between regions” screen now allows items to be searched for by either version of an ISBN number if the item is a book. The source location is now displayed in the destination grid at the bottom of this screen.
- “Item Search” now displays the number of items found at the bottom right of the screen.
- When editing a recipe in “Build of Materials” (BOM) users can now use the <+> and <-> keys on the keyboard to increase and decrease the quantity of items. Previously this had to be done by clicking the [+] and [-] buttons with the mouse.
- “Adjust stock | Single Items” no longer displays item details before an item has been selected.
- Printing is now possible from “Stock | Adjust stock | Move items between regions” screen. Reports may be linked in printing setup to this screen and used to print listings of the items to be moved.
- The “Move items between regions” screen now features parking. Files can be parked by pressing F9 and un-parked using F10.
- The “Print | Transactions | Client Orders” screen now shows the current printed / emailed status of each order.

Price book

- A new Price book import wizard is available under “Stock | Load price book data”. This screen makes it simple to import stock data in CSV format from one or more suppliers. A document detailing the source file is available for wholesalers who wish to ensure their data can be imported in to Chreos.
- The option of setting all Price book loaded data to mixed case has been added to “Maintenance | Setup | System | Stock | General”. Setting this will change ItemName, Make & Maker fields to mixed case if the supplier has supplied it in all upper or all lower case. The data is changed as it is initially loaded.
- Several buttons have been added the far right of the “Stock | Price book | Import” screen that is used for actually adding stock records to Chreos. These buttons are positioned beside fields that can have the Price book data immediately added to Chreos and selected for this new item.

General Ledger

- “Account Search” now displays the number of accounts found at the bottom right of the screen.
- When working in the “Account order” page of “General Ledger management”, accounts may now be moved by drag and drop.

- Also on this page there is no longer a limit to the number of levels of grouping that may be specified. As usual only summary accounts may be 'parents' to other accounts. If you want to take the levels of grouping beyond 1 then you need to first talk to Chreos Support about appropriate reports to use with your new structure.
- General ledger accounts now have report settings. These can be used to configure how each account prints on reports. These only currently have an effect on a new group of GL reports soon to be released. There is a default for each account type (user definable) and all new accounts added will have the same settings as the default.
- When defining an account a new tick box called "Non-parent summation" is available that determines if an account is to sum to another account that it is not grouped with. An example of the use of this would be to have the Gross profit in the P&L summing to a Gross profit account on the balance sheet. These accounts are shown as Bold and Italic in the account order tree. Existing GL reports are not designed to work with this feature.
- Historic summation details are now updated when the account structure is changed. This is also maintained when doing running Data management.
- The performance of banking has been improved. Transactions now process much faster, although reports may still take some time.

Terminal Services

- When configuring companies local directories may now be set to network directories so long as the directory referenced is present on the machine begin configured. For example if a user has a F: drive that points to c:\My_Work\ on their machine, they can use F as their local directory. This will make installation and configuration easier on Terminal Services machines.

ChreosServer

- The activities associated with the first two ticks in the "Data management" process have been rewritten to improve performance and stability.
- Backups no longer require all users to log out of the system. This resolves an issue where users wanted to backup but frequently had users logged on. A side effect of this change is that more free HDD space is now required during backups. This is about double the size of the company data.
- When attempting to run Data management while users are logged on, users are sent a message asking them to log off. This message is resent every couple of minutes. Previously if a user is away from their desk a large number of message windows would appear and the user would have to close them all. Chreos now will not display the same message multiple times.
- Chreos Server now features a 'Quick database refresh' option. This is similar in functionality to the second tick in 'Data management', it updates the index files for database tables. Index files that are not regularly

updated can cause data to not show in some Crystal reports. The advantage of a 'Quick database refresh' is that it can be run while users are still logged on to Chreos. It will update indexes on all tables that are not in use at the instant it runs. This can be accessed by right clicking on a company, or from the "Companies" menu.

System

- A "Tools | Screen sizing" screen has been added to allow users to determine the default sizing for Chreos screens. This means users of larger screens and/or higher resolutions can make screens larger and easier to read.
- Most screens may now be resized. These screens grow or shrink to fit the new window size.
- 800 x 600 resolution users can now run Chreos without having the Windows start bar hidden by resizing the default to make room for it.
- Item searches for codes that are ISBN barcodes now work for both versions of the code.
- Installing advanced reports that include a special .ppf file is now easier. Previously the user had to remember to select a .ppf file when installing each report. Now any .ppf file with the same name as a report will automatically be selected if present.
- When using reports, the true/false combos that appear when reports need parameters now show a visual 'clue' to make tabbing easier.
- The appearance of the "Maintenance | Advanced access | Change password" screen has been enhanced.
- Practice companies can now be installed quickly on client computers by simply selecting "File | Install practice company". This will locate the practice company already configured on the Chreos Server machine and set it up in the available companies list on the current computer. The practice company has to have previously been installed on Chreos Server.
- When configuring a company, the screen that appears to select the data path now includes a [Network] button that allows users to easily browse the network. Clicking [Ok] selects the current network drive.
- A number of new and exciting modules and licensing options are available now. Unfortunately to allow these new options the Chreos license numbering system has had to be expanded. The new license is much more flexible. A new license number will be issued to all registered users and must be available before installing this service pack. After running this service pack you will be unregistered and will need to re-register using the license number provided.
- Transaction searching has been improved. Invoices are now searched by Order number as well as Invoice number, and multiple results are displayed.
- While Chreos may still run on Windows 95 machines, Wild Software Ltd no longer officially supports Chreos on this operating system. This means

Chreos is not tested on Windows 95 before release and any problems related to Windows 95 may not be fixed. This decision was made so that Chreos can take advantage of features available in newer operating systems that do not exist in Windows 95. It is worth noting that Microsoft itself has not supported Windows 95 for a number of years.

- If a warning screen or message is displayed while Chreos is not currently visible (i.e. you are in your email) the Chreos Icon on your task bar will now flash on the start bar to alert the user.

POS module

- In “Maintenance | Setup | System”, the selector for ‘Duplicate items are combined’ has been moved to the POS page from the Stock page.
- POS rounding has been added. This allows POS purchases to be rounded in a manner acceptable to the user. This is highly configurable and may be set up in the POS section of “Maintenance | Setup | System”.
- Standard POS receipts now show any rounding applied to a sale.
- The ‘sale complete’ screen has been expanded to include much fuller transaction details.

Apparel overlay

- The Apparel module has been further integrated into the standard Chreos product. Because of the popularity of the Apparel plug-in, Apparel is now considered a module. This change of status brings a number of benefits including:
 - there is no longer a separate service pack download for Apparel users;
 - Apparel performs much faster;
 - problems with tabbing have been resolved.
- The Apparel module menu items have changed. The following Apparel screens can now be triggered from the ‘standard’ Chreos menu items: “Debtor Invoice”, “Packing slip”, “Client order”, “Supplier Order”, and “Summary Inwards goods”. This can be configured in “Maintenance | Setup | Local computer | Apparel”. By setting ‘Apparel’, the Apparel screen will open instead of the standard Chreos screen.
- The “Range management” and “Style management” screens are now located under the “Stock | Apparel” sub menu.
- The Apparel setup screen is opened from the “Maintenance | Setup | Apparel” menu item.
- The Apparel “Stock take” screen is now opened from “Stock | Stock take | By Region”.
- When the Apparel system is set up for user pricing a tick box to turn custom pricing on or off now appears beside the price entry area in “Invoice”, “Packing Slip” and “Order” screens. This allows users to choose, on a style by style basis, whether they want the system to calculate

the price of goods or to use a fixed price that they enter. To the right of this box the standard price of the style is displayed.

- The “Style management” screen now allows an entire style to be deleted. All stock items related to the style will also be removed from the system. Only styles with no items in use may be deleted.
- Ranges can no longer be edited at all if they are already in use. Delete any styles that are using the selected range before editing.
- Range element codes and names must now be unique. This prevents confusion between two different elements with the same name.
- When editing a style, Chreos now detects if changes will result in some existing style items no longer being part of the style. The user is warned that these items will be deleted and may choose to continue.
- Apparel style items can no longer be deleted in “Stock | Adjust stock | Single items”. This prevents data corruption and maintains system integrity.
- The key commands to delete an item in “Order”, “Invoice” and “Packing slip” have been changed from just pressing the <Delete> key to pressing <Ctrl> and . This is to bring apparel into line with other Chreos screens.
- The “Pricing” tab page in “Style management” has been renamed to “Costs” to more correctly reflect its functionality.
- Client orders can now be edited from the standard ordering screen. This process is similar to converting an order to packing slip or to invoice. See details about editing Client orders in the Client section of this document.

This information sheet is a support document related to the use of Chreos 3 from Wild Software Ltd only. It does not in any way constitute, nor is it intended to constitute or be used as, accounting or legal advice. Because Chreos 3 is subject to a process of continuous improvement Wild Software Ltd can not guarantee that the user's version of Chreos 3 will be identical to the one described herein.

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