

<b>Application</b>	Chreos
<b>Service Pack</b>	42
<b>Requirements</b>	Service Pack 41 (SP41)
<b>Warnings</b>	All users of Chreos plug-ins should check with Chreos support before installing this service pack.

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## Important

- Please note. There are a number of new settings mentioned in this document. Several need to be acted on as soon as the service pack updating process is complete. Please read the document carefully before proceeding. If you need advice or help do not hesitate to contact Wild Software.

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## Main points

- ISBNs for Book sellers. For businesses involved in buying and selling books Chreos no longer defaults to automatically searching for ISBN entries. ISBN10 & ISBN13 sensitivity needs to be enabled on the “Stock | General 2” page of “Maintenance | Setup | System”. See the ‘Inventory’ section of this document for details.
- Searching. A new search method for finding Clients and GL Accounts has been implemented on many screens. This system replaces the existing drop down entry mode and provides much improved search performance. See the ‘General System’ section of this document for details.
- Tracing transactions. Users can now trace backwards through debtor and creditor transactions allowing a user who only knows the Invoice # to find the order or packing slip an invoiced item was entered on. See the ‘Creditor’ and ‘Client’ sections of this document for details.
- Integrated EFTPOS. Chreos now supports integrated EFTPOS removing the need to re-enter Sales amounts on an ETPOS terminal and support a second printer on the counter. See the ‘POS’ section of this document for details.

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## General system

- Improved searching. New Client and GL account search systems replace the previous drop down combos in a number of places. These systems are similar to the ‘Item find’ in the Debtor Invoice / Packing Slip and Ordering screens. Settings for these components can be found on the “General Ledger” and “Clients | General 2” pages of “Maintenance | Setup | System”. These determine the default company wide settings for these components. However the ‘Automatic drop down’ and ‘Search field’

options can be overridden on a machine by machine basis in the “General Ledger” and “Clients” pages of “Maintenance | Setup | Local computer”. Please do not hesitate to contact Wild Software for help with these settings as setting them correctly for your company can have a significant affect of user efficiency.

- New pin # option. The pin number login system (used by system security) now supports user entered and maintained pin numbers in addition to the previous 4 digit system generated pin numbers. The setting for it is on the “Security” page of “Maintenance | Setup | System”. When set in conjunction with activating pin number security at the local machine level (the “Security” page of “Maintenance | Setup | Local computer”) the menu option “Maintenance | Pin number management” becomes available which is where the User entered numbers can be entered and altered.
- Improved information sheet access (1). Chreos uses FTP (via the Internet) to retrieve Information sheets and updates. We have updated the system used to do this to allow for more options. For most users this will have no effect. However, those users with proxy servers or who have had problems downloading sheets in the past may wish to check the options under Maintenance | Setup | System ‘Internet’. There are now options for a user name and password for your proxy. The proxy type combo now has different options and will require changes. You should experiment with these options to determine which system your proxy uses. If your network does not use a proxy server and you continue to be able to access information sheets on the web then no changes are needed.
- Improved information sheet access (2). Information sheets now correctly refresh after downloading. Previously an information sheet freshly downloaded would show as unavailable until the screen was re-opened.
- New data export system. A general export screen has been added under Tools | Export | General. This screen allows for a number of different data items to be exported either as a comma separated file or a tab delimited file. Each export method is shipped separately to Chreos so initially no options will exist. However Wild Software Ltd will be releasing some in the future. If you need to export data please contact us. Note that this system is for exporting complex data. For most purposes the existing SQL system will continue to be the appropriate solution.
- Server protection. Chreos Server now prevents access to the database during Data management activities. In the past the Chreos Client would read the database which could cause problems during the first tick of Data management.
- Saving grids. Many of the data grids in Chreos can be saved to file. The range of formats has been expanded to include TAB separated values. Saving grids now displays a progress bar which is useful when saving large amounts of data.

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## Creditors

- Tracing transactions. The “Documents” page of Creditor Management now shows combinations of ‘O’, ‘P’, ‘I’ and ‘C’ columns. These indicate

the status of each transaction line indicating whether it has come from or gone to Order, Packing Slip or Invoice, or been Cancelled. An 'X' shows in each column where applicable. Double clicking on the 'X' changes the display to the related document. i.e. When viewing an order line with an 'X' in the 'I' column, double clicking the 'X' takes you to the related invoice.

- Preventing duplicate invoices. When checking that a creditors invoice number does not already exist in Chreos, Chreos now also checks parked invoices. If a parked invoice exists for this creditor with the same invoice #, the user is warned. This can help prevent the situation where one user starts and parks a creditor invoice and another user later starts entering the invoice again. Please note that it will not warn if two users are both involved in entering the same invoice at the same time.
- Managing profiles. Creditors continues to share profiles with Clients. These are managed in "Clients | Profile maintenance". This screen now allows profiles to be deleted. Doing so will automatically remove the associations with linked Creditors and Clients.
- Printing purchase history. When viewing the purchases history for a particular creditor, the data can be printed by right clicking the top list. The printout this creates has been tidied up and now also includes summary information. This data can be viewed by using the [Purchase history] button on the "Summary" page of Creditor Management.

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## Clients

- Improved client selection. The client selector in a number of screens has been updated to the new client search system. This greatly improves client search performance in the screen. The following are some of the screens affected with this release.
  - Point of sale.
  - Invoice / Packing Slip / Order entry.
  - View client orders.
  - Debtor receipting.Other screens will be progressively updated. Please let Wild Software know of any other screens that you would like them to give priority to updating.
- Printing sales history. When viewing the sales history for a particular client, the data can be printed by right clicking the top list. The printout this creates has been tidied up and now also includes summary information. This data can be viewed by using the [Sales history] button on the "Summary" page of Client Management.
- Tracing transactions. When viewing Invoice lines in the "Documents" page of Client Management 'O' and 'P' columns now show. These indicate whether the Invoice line has appeared on an Order or Packing slip by showing an 'X' in the column. Double clicking an 'X' will change the display to the Order or Packing slip depending on which column the 'X' is in. Packing slips also now show an 'O' column that allows the user to move back to the order and Packing slip line came from.

- Entering receipts. A new setting on the “Clients | General 2” page of “Maintenance | Setup | System” allows running totals to be shown within Client receipting in two places if the setting is ticked. On the “Batch” page of “Clients | Receipts” it shows the total of the total amount receipted so far and the number of receipts entered beside the target figures. On the “Receipts” page the grid has been updated to show a running total.
- Control the number of pages per invoice. It is now possible to specify the maximum number of lines to include on an invoice or packing slip created from the ‘Order completion’ screen. The number is specified in ‘| Clients | General 2’ page of “Maintenance | Setup | System”. It would be normal to enter a number that is a multiple of the maximum number of lines that can appear on one printout page of your invoice. Eg. If your invoice prints out 21 lines to a page and you never want an invoice to be more than three pages then set this figure to 63.
- Stock bin groups. In Stock Bins the ‘groups’ button allows a number single user bins to be created and associated with an existing single user bin. Once created these bins can be refreshed to match the changes in any of the member bins. Their status can also be toggled (active / inactive). This feature allows the user to quickly create identical bins for different clients.
- Profiles can be deleted. The “Clients | Profile maintenance” screen now allows profiles to be deleted. Doing so will automatically remove the associations with linked Clients and Creditors.
- Negative orders are blocked. Client orders containing negative quantities can no longer be processed. Historically, such orders have caused significant problems with data.
- Order completion updated. When processing Orders into Invoices or Packing slips using the Order completion screen and a number of selected Order lines cannot be processed Chreos now prompts the user with the option of viewing the Order lines that cannot be processed. A list is displayed showing details of each unprocessed line. This list may be printed.

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## Inventory

- Location based stocktake – important notice. Improved performance when processing location based stocktakes. We have also dealt with some recently discovered issues in this process and if you intend doing this sort of stocktake around the 31 March, please make sure you have run the service pack before starting.
- New ISBN functionality – Book sellers PLEASE read. Chreos has always supported a system where books could be stored as Stock items with their ISBN code as in Item code field. If a barcoded ISBN was sought, Chreos recognized this and converted it to a regular ISBN before it attempted to find the item. Hence Chreos has always supports both ISBN10 and the new ISBN13 format. However, with this release Chreos will now search for what is entered, and, if it is not found, converted it to the other format

and search again. This means that Chreos now converts ISBNs in both directions so stock can have either code format in the Item code field. Previously Chreos was constantly ISBN sensitive. However, in order to improve performance for those not dealing with books we have added a setting to turn the ISBN functionality on or off. This setting is on the “Clients | General 2” page of “Maintenance | Setup | System”. Please note that by default this is turned off. If you store books in Chreos you need to turn it on as soon as you have completed upgrading to this service pack.

- Why you can not delete stock. The “Stock | Adjust stock | Single item” screen now has an option to show the possible reasons an item might not be allowed to be deleted. Please consult this when Chreos will not allow you to delete an item and you are not sure why.
- Importing Stocktakes. A new ‘Import data from file’ option is available on the stock entry area of stocktake by region. This allows stocktake data to be entered from a file in csv format. If multiple entries for the same item exist within the import file the user has the option of using the last entry or summing the quantities entered. This will dramatically reduce the amount of data entry associated with stocktakes.
- Adding items to a region during a stocktake. When performing a stocktake by region, items not currently in the region show in bold. Double clicking a bold item now allows the user to immediately add it to the current region. The item is either added in the default location for this region or the user may select a location. When entering a stocktake the user can use this system to configure each new item appropriately or leave the items not in this region and allow Chreos to add them automatically in the final stocktake process.
- Where are goods supplied from? Where Chreos is configured with more than one region users now have the option of which region items by default are supplied from when converting from an Order to an Invoice or Packing slip. The setting for this is on the “Stock | General 2” page of “Maintenance | Setup | System”. The default is that items are supplied from the region the invoice or packing slip is being generated in. By ticking the setting goods are supplied from the Ordered region regardless of where it is being processed.
- Where are goods returned to? Where Chreos is configured with more than one region users now have the option of which region items by default are credited back into when the credit is generated by pressing the [Credit] button on the “Documents” page in Client management. The setting for this is on the “Stock | General 2” page of “Maintenance | Setup | System”. The default is that items are credited back into the region where the credit is being entered. By ticking the setting, goods are credited back into the original region they were invoiced from.
- Avoiding duplicate items. When adding or editing an item changes to the item codes are now checked against existing items when exiting the item code and item code 2 entry points. This means the user does not have to save the entry before being told an item already exists with this code. The user is now also offered the option of automatically canceling the current add/edit and viewing the item with the entered code.

- Stock items can be profiled. Stock profiles work in a similar way to client profiles (except for emailing to them of course!). Stock profiles are created and managed under “Stock | Stock maintenance | Profiles”. Stock profiles also belong to groups. These are also managed on this screen. The Stock management screen now has a “Profiles” tab page on the right that displays (and edits) the profiles that each individual item belongs to. Stock profiles could be used for a number of things including extending the way items are categorized.
- New setting for Specials. When putting stock on special there is an option of allowing other discounts such as the Discount grid and Stock bins to calculate their discounts from the special price. This is used extensively by many wholesalers who store the RRP as their normal price and then offer trade discounts to their retailers. Some clients almost always allow the regular percentage discounts to apply to Specials as well and have asked for the “Can discount” field to be able to default to this. A new setting on the “Stock | General 2” page of “Maintenance | Setup | System” allows this to be set. By default specials do not have the “Can discount” flag ticked but this setting allows you to change that.
- Printing stock history. When viewing the stock history for a particular item, the data can be printed by right clicking the top list. The printout this creates has been tidied up and now also includes summary information. This data can be viewed by using the [Stock history] button on the “Stats” page of Stock Management.

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## POS

- Integrated EFTPOS. Chreos now supports fully integrated EFTPOS. Under this system Chreos sends payment details to the EFTPOS terminal and receives back information about the outcome. This removes the need to manually enter payment information. Initial support is for Direct Payment Solutions (DPS) EFTPOS terminals working over the internet thus doing away with the need to tie up a phone line. Please contact Wild Software for details.
- Power failure recovery. If will a POS transaction is being entered, the computer running Chreos stops abruptly (as in a power outage or by accidentally being turned off), when Chreos restarts the current transaction will automatically be restored and parked. The user is notified that it is available. It can then be unparked and completed providing complete recovery.
- New item searching. By popular request the search performance and functionality has been enhanced by the inclusion of the ‘Item find’ combo used in Debtor Invoice / Packing slip / order entry.
- New client searching. Client search structure has been changed to use a similar system to the “Item find” system. See “Improved client selection” earlier in this document. This radically improves search performance on systems with large numbers of clients.
- Canceling sales. The cancel button in POS now prompts before canceling a POS transaction where either a client has been specified or items have

been selected. This can be disabled by deselecting the 'Prompt for confirmation when canceling transactions' tick box on the "POS "General" page in "Maintenance | Setup | System".

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## Job Management

- Deleting job entries. Job card entries that have not yet been invoiced can now easily be deleted.
- Serial tracked items. The way serial tracked items on job cards can be altered and deleted has been rewritten to make the processes safer.

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## Apparel module

- Improved selection. Clicking the [...] buttons beside color or style selectors while editing a style now bring up the style edit screen displaying the selected style.
- Importing stocktakes. A new [Import data from file] option is available on the stock entry area of apparel stocktake. Please see "New Stocktake data entry mode" in the Inventory section of this document for details.

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