

CASH 2022.1

Release Features

Draft 1.0 – 01/02/2022 - Josh Farrar Josh@mentorbs.com

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Key Features & Enhancements

39006049 - CASH User Interface

Global Search

Entering text or a number in to the 'global search' box in the CASH header will trigger the global search. Any records in CASH whose 'ID' matches the search criteria will be displayed below;

·	CASH 2									
_		ales	Job Cos	ting Site	s Serv	ce & Maint	enance	Invoicing	Purchasing	Stock Cont
╡	1234				ρ					
	Inform	ation								
	Call									
	1234	Site (1234) Tes	t Site						
	Cust	ome	r —							
	1234	Tes	t Custome	er						
	Purc	hase	Order —							
	1234	Com	ipany (1)	Supplier (CASTLE)	Castle Care-	Tech Limi	ited		
	Site									
	1234	Tes	t Site							

Double clicking the result will open that record in CASH.

In the example above I've entered '1234' into the search and I can see that I have Calls, PO's, a Site, and a Customer that match.

For a cleaner look and to provide information about the menu options, the shortcut menu's have moved to within a single button.



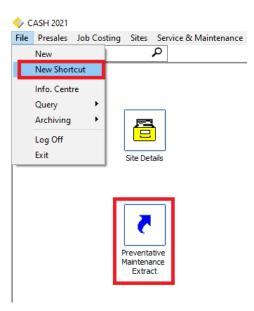
The new menus are available in most areas of CASH where traditionally a shortcut bar was provided.

The main selection forms have been simplified making it easier to see information about an entry prior to selecting it;

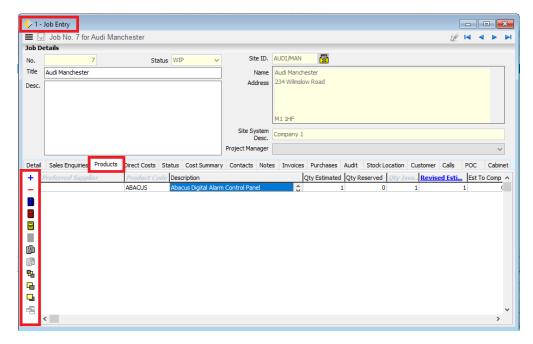
< 1 - Select Site - Sear	ch Name Sequence
ABACUS HOUSE	🎍 ங 🧫 😂 👙 😂 🖙 🎁 🏚 🗄 🖉 🖉 🗦 🛛 🗠 🛛 🔺
Site ID RCP ABAC/HUI	Customer ID 12345 Address Abacus House
Status Live	unit 4 Bradley Road
Search Name ABACUS H	IOUSE
Telephone 01484 544	1463 🔤 🕾
Main System Closed-Cir	cuit Television (CCTV): BS 8418 & BS EN HD2 1GQ
SearchName	Name
ABACUS HOUSE	Abacus House
AUDI MANCHESTER	Audi Manchester
AUDI MANCHESTER-BOM	Audi Manchester
BMW HUDDERSFIELD	BMW Huddersfield
BMW HUDDERSFIELD-BO	M BMW Huddersfield
BMW LEEDS	BMW Leeds
CLASSIC (BEDFORD)	Classic Cars (Beds.) Ltd
CLASSIC (LUTON)	Classic Cars (Luton) Ltd.
DUMMY	Dummy Site
FISHER	Fisher Tiles Ltd.
HSTEST	HSTEST
New Site Delet	e Site Renumber Site Copy Site OK Cancel

Shortcuts

Desktop shortcuts are provided for fast access to any menu option within CASH;



Buttons that are relevant only on the selected tab are now presented on that tab, rather than on the top bar. In addition this makes it quicker to access the buttons speeding up the workflow in these areas;



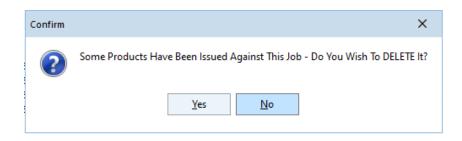
Highlighted Required Fields

In areas of CASH where fields are required, the fields are now highlighted. This example shows the highlighted fields within a Purchase Order goods receipt;

Supplier				Purchase	Order	
Address N N B	Castle Care-Tech Limited Contac		01344 886446 01344 890024	No. Date Delivery Da Supplier Go	04/10/21 2120.00 ate	31
roductCode ISC	Description Engineer 1 - Basic Rate	0	rdered Delivered Outsta	Received N anding ThisDelivery Price	Serial/BatchNo	Dispute

39006269 - Warning message if user attempts to delete a job costing, where parts have been issued

If a user tries to delete a Job Costing you will now be presented with a warning message



39006214 - Call Action Narrative

You can see the history for every call action from within a call without having to go into each action, useful if the call has multiple actions.

Call -> Call Actions -> Narrative

🔷 Call Logging	-		ı x
E 💭 Call No. 180098 for Test Site (Further Action)	<mark>-</mark> U	$ < \rangle$	
Call Type Preventative Maintenance V Remote Maintenance Chargeable? Site ID SITEID			
Waiting ? Reason View Reason Reason Reason View Reason Reason Reason View Reason Reaso	0		
System Type Intruder Alarm: BS4737 Pt. 1,3 & 4 Bill On Maint. ? Telephone 01422329479	8		
Account No. First Time Fix ? S.C Type			
Last Maint. Type Customer Name KeyPlus Security LTD			
Log Assign Action(s) Analyse Admin History Equipment Purchases Purchase Orders Site Cabinet Attachments Linked Job Co	ostings	Linked C	all Actions
Detail Narrative			
Q			
Action: 1 Remarks Directions:			^
Sdfsdsdf Preventative Maintenance : CCTV Notes : Action Taken Generated Following No Access CallAction [180098/3] test			
Action: 2 Remarks Generated From No Access On CallAction [180098/1] Action Taken			
Action: 3 Remarks			÷

You can now use the Copy, Paste and Cut options within a completed calls Cabinet. Previously were disabled when a call action was completed.

Log A	ssign Ac	tion(s)	Analyse	Admin	History	Equipment	Purchases	Purchase Orders	Site Cabinet	Attachments	Linked Job Costing	s Linked Call Actions
(Developr	nent\Cash4V	V\Cabinet\	Site\SITEID			C 🗈	<u>~</u> 49 B	A 🔍 🗶 🖓	🛞 👼			
lame						Size		Item type		Date mod	Ified	
Calls								File folder		02/09/20	21 09:00	

In supplier details you can now use the contacts email address to send your returns if they have a valid email address, if the contact email field is blank it will send it to the supplier.

🔷 1 - Supplier	Details							-	-		×
🔳 🗔 Supp	lier TESTSUP - test supplie	er email						9 2 à	é 14	\triangleleft	\triangleright
Code	TESTSUP	A	ddress	234			Status	Live 🗸			
Name	test supplier email			test supplier			Tel.			œ	2
Search Name	TEST SUP					-	Alt. Tel.			æ	2
Web Address		💰 Pi	ostcode	KY30DH 🖂 😜			Fax				
Contact	joe		ountry				Email	support@mentor			1
Contacts Ter	ms Sub-contractor Analysis	Rank Datai	e Note	e Cabinet					Mailing	r	
Contact List	ins Sub-curreactor Analysis	Contact		5 Cabinet							
Contact No. 0	Contact ^	Title	Mr		Tel	ephone			-	<u>A</u>	dd
1 j		Name	Greg			Tel.			æ	Del	ete
	fichele ireg	Dear Nam	_		Mol				æ		
4 F		Address	258 3	lames street	Fax	¢					
		1			Pag	per					
					Ema		office@outlook	k.com	ž		
		Postcode		hester	Typ	e .			\sim		
			M18 3	380 🔢 🔛 😜							
	~	Remarks								Sa	ve
+ +										Un	do

Create your purchase return then you have the option to select one of the contacts from the drop down list.

	nase Return Entry 1 No. 14 for test su	pplier email						
Supplier Code Name Return Address	TESTSUP test supplier email 234 test supplier KY30DH		Select Supplier Return Address	Contact Tel Fax Acct. Ref. Suppler Returns No.	Contact Michele Greg Paul joe	~	Purchase Retu Stock Location Date	

Now the notifacation of the return will go to the contact email address and not the supppier.

39006318 - Added an erase button to the bill on completion of maintenance tab in site charges

When you have bill on completion of maintenance enabled in site details admin 2, you can select a system to link to a charge on the bill on completion of maintenance tab. Previously you had to click twice to focus on the box to delete the selected system. You had to remove the system link before you can un-tick the site flag for bill on maintenance.

Now there is an erase option.

Site details -> Charges -> Bill On Completion Of Maintenance

min Admi	n2 Admin3	Syste	ems	Charges	Keyholders	URN's	False Ala	rms Not	es Call H	istory A.F	R.C Signals	Cabinet	Contacts	CDO's	Sales Enqui	ries
narges List							Charge D	etails								
Code	Fr. Due D	ate	Ins.	I.Fr Descrip	ption	~	General	Special	Special2	Bill On Cor	mpletion O	fMaintenan	e Lease	On Inv	oice Paid	<u>A</u> dd
INSF	12 23/11	/2021	N	Edited	Description											Delete
CMC1	12 10/12	/2021	Ν	Standa	ard Call-out (Charç	System	Wire F	ree Intrud	er Alarm: N	ACP 12 (C	ass VI)	~ <i>a</i>	Billina (Due ?	_
CMC1	12 19/06	/2020	N	Standa	ard Call-out (Charg	-,						a			Audit Tr
CMC2	12 23/11	/2022	N	Call-ou	ut Charge as	per (Schedule	Access	s Control				~			
CMC1	12 19/06	/2020	N	Standa	ard Call-out (Charg	schedule	Access	SCONTO				~			
CMC1	12 23/11	/2022	N	Standa	ard Call-out (Charc										

39005870 - When using multi company by system, would like a configurable option to allow linking the charge to the system, without having to make the system live

New options are available that enable the linking of Site Charges to 'New' systems and the cancelling of Charges that are linked to systems;

♦ 1 - CASH 2022 Configuration	_	×
VI-CASH 2022 Conliguration		^
Call Logging	Site Details	
eMap		
False Alarm Management	Charge Price Precision 2 🔅	
Finance		
Hubspot		
···· Job Costing	Don't Copy the Sales Enquiry Cabinet When Creating A Site From A Sales Enquiry ?	
Ledger		
···· Map		1
MCS	with Holdeonparty by sechenik Endoled	
···· Miscellaneous		
Multi-Currency	Allow The Linking Of A Site Charge To A 'New' System ?	
OnCall		
···· Purchase Invoices	Allow The Cancelling Of A Charge Without Having To Link The Charge To A System ?	
···· Purchase Orders		
···· Reminder Diary		
	Site System ID Numbers	
···· Sales Enquiries		
	Use Automatically Generated Site System ID Numbers?	
·· Site Details	ID Number	
System		

Negative stock can now be prevented in CASH in all areas where the balance is affected (issue/adjustment etc.).

To enable the feature, navigate to 'System Admin > Company Codes > Company Configuration > Stock' and REMOVE the tick, or the black square, from the 'Allow Negative Stock' option. By default, negative stock is allowed to maintain backward compatibility;

🔷 1 - Company Configuration		- ×
Company List	Company Details	
Number Name ^ 1 New Company	Main Stock Location LOC1 Valuation Method	Custodian ARC < >
	Average Price Latest Price Standard Price Force Entry of Serial/Batch Numbers when Adding Equipment against a System Addjusting Stock In Receiving Purchase Orders Addjusting Stock Out Transferring Stock Transferring Stock Issuing Stock Force Entry of Issue Reference Validate Issue Ref. Call Logging Issue Stock from Call Logging Warn when Completing a Call if All the Equipment has Not been Issuer Stock ReOrder Import-Export Folder Import-Export Folder Import-Export Folder	
	Save Undo	Done

With the option removed you receive a notification when the stock reduces to negative and you will not be able to proceed;

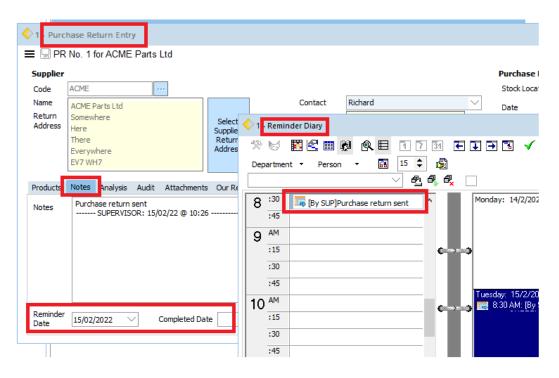
🔷 1 – Stock /	Adjustment -		—	×
Location	TEST		<u>о</u> к	
Product	ABC Product		<u>C</u> ancel	
Qty In Stock	0			
Adjustment	Out Error		×	-
Date	1	Stock Adjustment will cause stock to go r	negative.	
Quantity	1			a
Comments		ОК		e
				2
				e

Purchase Returns now have a functioning attachments tab in line with other areas of CASH;

Supplie	r							
Code	ACME			•••				
Name	ACME	ACME Parts Ltd Somewhere Here There				Contact	Contact	Richard
Return Address					Select Supplier Return		Tel	
Audress	here						Fax	
		Everywhere					Acct. Ref.	
		EV7 WH7					Supplier Returns No.	
Product	s Notes	Analysis	Audit	Attachments	Dur Retur	n Address		
+ Ту	be		Filer	name				
The second se	Attachme	ant	ALL.	tyt				

39005706 - Notes tab in purchase returns to match functionality in the purchase order

Purchase Returns Notes now have the same functionality as other areas of CASH including Reminder & Completed dates;



39005730 - Purchase Return use the email address for return.

If an email address has been entered against a supplier contact, and that contact is used for a Purchase Return, when you submit the purchase return the email address is taken from the Contact, rather than the supplier;

🔷 1 - Supplie	er Details						-			×
🚍 🗔 Supp	plier ACME - ACME Parts Ltd						😰 💥 🛛	1 4	\triangleright	\triangleright
Code	ACME	Address	Somewhere]	Status	New 🗸			
Name	ACME Parts Ltd		Here		1	Tel.			æ	
Search Name	ACME PARTS LTD		There Everywhere		1	Alt. Tel.			æ	
Web Address	4	Postcode		9		Fax				
Contact	Richard	Country				Email	supplier@mentorbs.co			ž
							Exclude from Mail	ng ?		
Contacts Ter	rms Sub-contractor Analysis Bank De	tails Note	s Cabinet							
C 🔷 Submi	t Purchase Return			-	×				<u>A</u> dd	
	ssion Method			Preview				[elete	
Email				Preview	_			-	-	
Email A	Address:			Email			@			
	s@mentorbs.com			Done						
Templ						returns@ment	orbs.com			
💿 De	fault O Selected						~			
	PurchaseReturnEmail.rpt		<u>E</u> dit Layout					1		
									<u>S</u> ave	
+ +									<u>U</u> ndo	

If no email is set against the contact then the supplier email address is used as before.

39006018 – Supplier code visible on the Call Equipment tab

A product's supplier code is now visible on the Call Equipment tab;

Log	Assign	Action(s)	Analyse	Admin	History	Equipment	Purchases	Purchase Order	s Site Cabinet	Attachments	Linked Job Costings	Linked Call Actions
Issue	Audit											
-	🖥 Issue All Equipment 🛛 Esue Selected Equipment Item(s) 🗧 Un-issue Selected Equipment Item(s) 📑 Stock Movements											
iss Iss	ue All Equi	pment 🗄 I	Issue Selected	d Equipmen	t Item(s)	🗄 Un-issue 🗄	Selected Equi	pment Item(s)	Stock Mov	ements		
Action	-	pment 🗄 I oChargeCode		d Equipmen	t Item(s)	🗄 Un-issue S	Selected Equi		Stock Mov	ements	Supplier Code	

The system type description is available as a 'merge field' for renaming OnCall dockets;

Company Details								
General Misc. 1 Misc. 2	2 <u>C</u> abinet <u>D</u> efaul	ts Ledgers	Diary	Stock	Purchases	Job Costing	OnCall	C
Page1 Page2 Page 3								
On Call Docket Reply to Email address Subject text Body text Preview Email						~		
Merge Field	«SITEID»					 Insert Field 	I	
On Call Terms And Co Terms and conditions e	«CALLNUMBER»	E»						

39005957 – NSI Monthly Statistical Return shows BS8243 as opposed to DD243

The NSI Monthly Statistical Return now displays BS8243.

39005929 – Added 'Repair' to the Purchase Return's 'Return Type'

'Repair' is now an option under a Purchase Return's 'return type';

Co	de	Supplier Code	PO No	Description	Return Reason	Return Type	Q	antity	Se
AE	C		0	ABC Product		Repair	\sim	2	2
						Exchange			
						Credit			
						Return Only			
						Repair			

39006272 – When raising a PO from a Job Costing, the 'issued quantity' is considered

When creating a Purchase Order for a Job Costing, CASH now includes the 'issued quantity' when calculating the quantity on order.

39005561 – Suppress the Auto sending of dockets by Call Type

To prevent CASH automatically sending oncall dockets for particular Call Types;

- Navigate to 'System Admin > Company Codes > Reference Codes'
- Select 'Call Types'
- Select the desired call type
- Check 'Don't auto send the docket'

< 1 - Call Types E	ntry	– ×
С		$\square \land \land \land \square$
Codes Available		Code Details
Code	Description ^	
с	Corrective Maintenance	Code C
D	Disconnection	Description Corrective Maintenance
E	Extra Works	Details Confirmation Email
G	General Maintenance	
I	Installation	Chargeable Def.? Customer Contract Discount Enabled ?
0	Communicator Connection	Print Docket Yes 🗸 Diary Bar Colour
P	Preventative Maintenance	
x	Cancelled	Docket Template Plain Paper CM Docket.dot
		Don't Auto Send The Docket ? 🗸

Dockets will not be sent automatically for the selected call types.

39006029 – Supplier Code added to the stock at location table

The supplier code is available within the Stock At Location table;

ABC										< < < < < < < < < <	\triangleright	\triangleright
Receive	Issue	Reserve	UnReserve	Transfer	Bulk Transfer	Adjust +	Adjust -	Apply Filte	er Clear Filter	Copy From Location	Repler	nish
Products at this Location						Location/Prod	luct Details					
<u>Code</u>	Le Description Supplier Code			~	Code TEST	Name	77					
ABC	ABC I	Product			ACMEABO	2		Code	Name Name			
MISC	Misce	ellaneous Pr	oduct		SUPPCOD	E		Product	ABC Product			\sim
SUNDRY	Sund	ry Product						Description				
												v
								Supplier Code	ACMEABC			

Bug Fixes

Reference	Area	Details
39006373	Site Systems	Changing system status does not refresh straight away when
	,	looking in the system select option
39006371	Purchase Orders	Subcontractor PO's are using the default PO template, rather
		than the one specified against the supplier
39006369	Suppliers	Supplier details subcontractor
39006368	Reports	Call Performance Analysis report generates a No Data in
		Range to Preview message
39006366	Company Configuration,	Irrelevant error message appearing when removing a bill on
	Renewals, Sites	completion system link, where multi company by system is
		used
39006365	Attachments	Invoice attachment error
39006364	Sales Enquiries	Sales Enquiry selection has ALL fields added to grid and not
		saving index to registry.
39006360	Sales Enquiries	Search option on sale enquiry does not scroll down when
		using down arrow key on keyboard. Alternates between the
		3rd and 4 line without going any further
39006355	Invoicing	Invoice Attachment error Cannot Create Invoice attachment
		record - creates a blank record and then you cannot delete it
39006349	Job Costing	Job Costing - Sales Enquiry link
39006347	Stock	Stock at locations field 'Description' is not indexed and cannot
		be modified.
39006338	Call Logging, Purchase	In purchase orders, link a purchase order to a call
	orders	
39006335	Call Logging, OnCall	Call deletion record is added to the "record deletions for
		android engineers" table for non- OnCall engineers
39006332	Products	Search Icon (Torch) is missing from Product code selection
		search bar
39006328	Invoicing	Schedule Extract Preview - Causing an Access Violation
39006327	Invoicing	When extracting leased customer renewal charges, the temp
		sites tables are not deleted from the temp folder when closing
		the renewal invoice extract window
39006326	ARC Signals	Incorrect wording on URN input screen
39006324	Call Logging, Purchase	View associated call icon is not enabled on the purchase order
	orders, User Setup	record, but it is on the grid, where the user has no permission
		to edit completed PO
39006320	Sites	In site system selection, the drop down box is not big enough
		to display the maximum character length allowed in a system
20006210	A a seconda lata ufa a s	description
39006319	Accounts Interface	Grammar mistake in the SageAutomation
39006314	High Security, Purchase	Inconsistencies with user settings related to purchase order
20006242	orders, User Setup	permissions - receiving purchase orders
39006312	OnCall Forms	Oncall form merge fields always using company 1
39006305	Accounts Interface	SAGE 50 v28
39006303	Purchase Invoicing	Purchase Invoice Import - PI is less that PO - Incorrect qty on
		PI
39006301	Invoicing	BOCM is not extracting invoices for leased customers where
		the site customer is set to grouped renewals

39006300	Job Costing	In job costing, where a notification of completion and invoiced
39000300	JOD COSTING	date exist, it causes a problem with the invoiced value
39006295	Job Costing	In job costing jobs filter selection, "open PO" status is not
33000233		included in the select all/ invert selection options
39006294	Reminder diary	Diary reminder window
39006291	, Sales enquiries	Sales enquiry search is defaulting to the wrong option when
		launched - as per setting on user
39006287	Job Costing	Job Costing - Cannot raise a PO for Direct Costs
39006285	Purchase Orders	Identical size of logo on w documents. However the logo looks
		bigger and does not compress on purchase order template
39006281	Sales enquiries	Sales enquiry grid cannot be ordered by newest to oldest date
39006280	Multi Company, Sites	Issue when adding a site charge where using multi company
		system link
39006275	Site Details	Site maintenance is hanging when it is trying to display the
		form
39006273	Import / Export	XERO Multi Company
39006270	Reference files, Sites	In reference code replacement, preferred engineer on the
		schedule is not included when replacing an engineer/
		technician code throughout CASH
39006265	Customers	Customer Renumber - Ignores the Company
		Configuration\Ledgers\Sales\ Page 1 setting for Maximum
		Field Lengths for Customer Number
39006263	System admin	Emailing Engineer Dockets from Cash - Filename of pdf not
		working
39006261	Sales Enquiries	Slow speed when loading a Sales Enquiry
39006260	Job Costing, Purchase	MISC items do not auto issue to job costing when the PO is
	orders	linked to the job retrospectively
39006250	OnCall	OnCall Goods Receipt - duplicates original receipt when
		additional lines are added.
39006243	Call Logging	Re-assigning a call to a different Site/System results in the
		CompanyNo being set to the System No (Multi-company by
20006244		system)
39006241	Reminder Dairy	When you click Daily view on reminder diary it takes you to
20006226	Jak Castina	the Scheduler
39006236	Job Costing	Issues with the "on hold" tick on job costing
39006213	Invoicing	Using the 'Goto' button on the Invoice/Credit selection grid, to
20006205		find a record that no longer exists within the Filter
39006205	Call Logging	After creating a Further Action CASH has the original action selected
39006203	Email	
39006203	Eman	EWS - Strange form when logging into Cash and EWS details aren't entered.
39006202	Sales Enquiry	Sales Enquiry - SQL Error when trying to create a New Sales
39000202	Sales Eliquii y	Enquiry when there is a Full Stop in the datapath e.g.
		v2021.1\data
39006201	Job Costing	New Call - Error when clicking on the Linked Job Costings tab
55000201	100 000005	when there is a Full Stop in the datapath e.g. v2021.1\data
39006199	Job Costing	Job Costing - SQL Error when trying to create a New Job when
22000100	G	there is a Full Stop in the datapath e.g. v2021.1\data
39006190	Call Logging, OnCall	When queueing a call to engineer from the assign tab, the call
		status does not update to New/ Queued, until you drop out of
		the call record.
39006189	User Setup	User Setup - Template activation issue
-		

39006183	OnCall Forms	OnCall Form template name doesn't show within a customer
39006182	Templates - quick report	when sending a docket the correct file name isn't used
39006174	Call Logging	Call Logging - Call Action - Started Time - displays blank for 00:00 from OnCall.
39006170	Company Configuration	In multi company, it is not possible to edit the maximum field length boxes on company 2+
39006159	Suppliers	Incorrect Error Message in Supplier Maintenance
39006157	Invoicing	Panel Type displayed against Appt in Scheduler
39006155	Invoicing	When the 'Send Invoices to' option for manual invoicing is set to Sites it does not place a created by name in that invoice field
39006153	Renewals	Bill on Maintenance renewal extract does not attach multiple dockets when there is multiple charges on the invoice with sperate calls for each
39006150	Stock	When Un-Receipting stock, the Stock On Order Quantity is getting out of Synch
39006147	CASH Main Form	Display Settings - CASH Form Issues
39006146	Invoicing	DD Invoice attaches dockets related to a different site
39006142	Sites	In site URNs, it is not possible to assign multiple URNs to multiple different systems.
39006139	Job Costing	Cost Summary for first Job costing created does not calculate figures
39006124	Site Systems	Site System selection dropdown list cuts off and scroll bar not useable if form is maximised
39006121	Purchase invoices, Purchase orders	Issue with the goods received quantities on purchase orders, where more than one line is added to a purchase invoice for the same purchase order product
39006112	Sales enquiries	Sales Enquiry filter
39006106	Call Logging	Amending Logged date adds deadline date to CM call.
39006101	Purchase orders	Error When done Via Purchasing > Un-invoiced Receipts > Maintenance
39006099	Purchase Order	Unable to do any amendments to a PO once the submission is allowed but authorisation is not
39006096	Reports	Stock Reports - Location display
39006095	Stock	The Locations Display needs Tweaking
39006094	Stock	The display of the Location List needs tweaking
39006092	Site Details	PopTheMenu on Site maintenance needs to pop a sub menu rather than a new popup menu.
39006077	Job Costing, Purchase orders, Stock	In stock locations, where a purchase order linked to a job costing is un-receipted, and you have the product auto issue to the job when received, the quantity in stock becomes incorrect
39006069	Job Costing, Purchase orders	In job costing, when a product is un-received against a PO linked to a job, the cost and sale price in the audit is based on the product prices, not on the prices on the PO/ job costing, which impacts the actual product costs on the job
39006067	Purchase orders	Unable to set default PO grid for company 2.
39006063	External Program	Renumber Program - error 5016 when trying to renumber a Site
39006057	OnCall Forms	Oncall Forms not updating on Actions 2 onwards

39006055	Call Logging, Dockets, Email, OnCall - OnCall	When manually sending a docket from a call action, the "respect OnCall forms configuration" is not working when the					
	Forms	form is set to send "instead of docket"					
39006054	Invoicing	The 'Create a PDF copy of the invoice?' still prompted when					
55000051		extract invoices to Sage.					
39006044	Sales enquiries	Stop users seeing sales enquiries via Site when though they					
		are restricted to 'Only showing own enquires'					
39006040	Import / Export	Cash Import Program - CFCustomerResponseConfig - Invalid					
		field					
39006032	Reference files, Timesheets	Unable to delete the associated scheduler entry linked with					
	,	the timesheet entry type					
39006022	Accounts Interface	Sage Batch Update - 'tblPurchaseInvoiceHeader: Field					
		'CustomerNo' not found					
39006018	Invoicing	Invoices not marking as extracted					
39006013	Invoicing - E-Invoicing	Error message when printing an e invoice, where company					
	5 5	filter and column filter are applied in combination					
39006012	Purchase Invoicing	Purchase Invoicing - Discounted lines					
39006003	OnCall - Windows Phone,	In OnCall Metro, when an OOH call is logged without system					
	OnCall - Windows Tablet	equipment selected, the app crashes					
39005999	Invoicing - Chargeable	Error logged in Mentor Comms Server when you send a					
	Calls, MCS	chargeable call invoice with docket attached					
39005993	OnCall	Oncall Update - reject not working					
39005992	OnCall	Spelling Error in Oncall					
39005989	OnCall - Windows Phone,	Spelling error when using no access in OnCall Metro					
55005505	OnCall - Windows Tablet	spennig error when using no access in onean wetto					
39005987	Stock	Stock not updating from PO if Auto issue turned on					
39005951	Call Logging, OnCall	Where a call is transferred to another engineer, there is still					
33003331		two ways in which you end up with records stuck in the OnCa					
		transaction queue					
39006500	Purchase Invoicing	You can't open an associated PO from an extracted &					
55000500		authorised PI					
39006497	Sales Enquiries	Sales Enquiry Selection does not select the correct sort order					
		when "Selecting Another Enquiry" or Add Linked Enquiry					
39006490	Site Details	error message when trying to run the Site URN report					
39006481	Purchase returns	The description field of the product in a purchase return is no					
20000101		editable when you do a manual product selection					
39006420	Sales enquiries	Access violation error message when selecting a different					
		Sales Enquiry from within another Sales Enquiry					
39006415	Site Details	Button placement within Site Maintenance					
39006403	Ledger Interface	'Failed to reconnect to sage data' error when updating Invoid					
		Outstanding Amounts					
39006400	Call Logging	Error logging a call from a site with 1 system					
39006399	Sales Enquiries	Sales Enquiry Status field character count is only 13 so cuttin					
550000000		off the wording					
39006385	Company Configuration	Company Information Record Being Automatically Set In Edit					
22000000	company compandion	Mode When entering Company Configuration					
39006384	Invoicing	Unable to delete multiple Invoices/credits in one go					
39006383	Invoicing	Invoice Print/ Direct Debit Print					
39006276	General	Unable to move a window					
39006248	OnCall - Android	Engineer Stock - Transfer from shared location using enginee					
		location to calculate the available stock					

39006240	Multi Company	'This transaction does not exist as A Invoice' when drilling into				
		a transaction from Customers > View Ledger				
39005924	Purchase orders	In purchase orders, you are now forced to add a nominal code				
		to at least one line when updating invoice tab, even if you do				
		not have purchase invoicing				
39006154	Job Costing, Purchase	Products are not added to job costing when purchase order is				
20006256	orders	submitted via e mail				
39006356	Call Logging, Invoicing -	In Oncall forms, "send instead of docket" and "send with				
	Chargeable Calls, OnCall -	invoice" causes a duplicate attachment when the site is set to				
39006341	OnCall Forms, Sites OnCall - OnCall Forms	"send docket with chargeable call invoice" In OnCall forms, the incorrect schedule details are picked up,				
39000341	Officall - Officall Forms	where schedule details are used as merge fields				
39006401	Sales enquiries	Unlocking a sales enquiry launches the enquiry in locked				
33000401	Sales enquines	mode, and requires closing and re-opening to refresh				
39006503	Customers, OnCall	When a customer is taken off suspended, the site records are				
33000303	customers, onean	not updated back to OnCall for the purposes of adding an				
		OOH job				
39006342	Job Costing	Job Costing fields not calculating correctly				
39006386	Sites	Latitude\Longitude not being set on a Site when created from				
55000500		a customer record already in the database				
39006504	Call Logging	When you change response deadline date/time and click save				
		it does not recognise the save				
39006489	Invoicing	Schedule extract does not sperate different VAT codes and				
	6	puts them on one line				
39006482	Purchase Orders	The created by field in purchase order uses the full name of				
		the person whilst the same field in purchase return uses the				
		log in ID				
39006398	Call Logging	Call Admin Remarks - Adding an entry before the call is				
		created and assigned a number				
39006506	Sales Enquiries	Unable to delete Sales Enquiry from Sales enquiry search				
39006379	Sales enquiries	Sales Enquiry grid is not ordering by enquiry number.				
39006394	Products, Stock	Stock Location Product Description				
39006424	False Alarm Management	Site False Alarm Report				
39006388	Sales enquiries	Sales Enquiry - Find function				
39006406	Sales enquiries	Sales enquiry grid order is not retained when ordering date b				
		newest to oldest				
39006404	Sales Enquiries	Sales enquiry navigate button disabled when opening an SE				
		from within a Site				
39006402	Call Logging, Sales	Issue with "create a sales enquiry from call" when selecting to				
	enquiries	"use the description" to copy attachments, where				
		attachments are unsupported file type				
39006439	Invoicing	Creating an invoice fails with ******** is not a valid integer				
		value in year 2022 when creating payment reference for BE				
		country regs				
39006382	Suppliers	Subcontractor screen changes to terms tab when options				
		ticked				
39006545	Sales Enquiries	Corrected the Sales Enquiry Ordering within Search				
39006550	Sales Enquiries	The selected sales enquiry is retained in the grid				
39005997	Sales Enquiries	When raising SE from completed call it puts the name of the				
		call operator and not the person who raised it.				
39006021	Invoicing	CASH is hanging when attempting to re-print or copy print				
		from the invoice print menu, both previewing and printing				

39006100	Reports	Call Listing Report - blank page - Page 1 of 0
39006123	Site Details	Post codes not linking to e-map correctly - when site created
		from SE or Import
39006129	Insync	InSync changes the between times on fixed scheduler
		appointments
39006158	Call Logging	Spelling mistake in Logunit
39006358	RPT Templates	"New fields have been added to your template" is shown
		whenever you preview or edit a docket template
39006505	Purchase Invoicing	Focussed record in the purchase invoice grid does not change
		when you use the navigation arrows to change the record, in
		all other grids it does
39006515	Sales Enquiries	Sales enquiry search
39006529	General	Issue Track email address not working but still an option in
		CASH
39006560	External Program	Move call attachments to cabinet - deletes call action
		attachments
39006580	Sales Enquiries	Sales Enquiry Error - Error 5006 when you drop out of an
		enquiry having searched using address contains function
39006022	Ledger Interface	Sage Batch Update - 'tblPurchaseInvoiceHeader: Field
		'CustomerNo' not found