Release Notes 8.3.0

The following notes describe changes on the Accounting and Management Products 8.3.0 CD and on the Purchasing and Inventory Applications 8.3.0 CD. Please read them carefully before you use your new software.

The following applications have changed:

- Accounts Payable
- Accounts Receivable
- Address Book
- Contracts
- Inventory
- Job Cost
- ODBC
- Payroll
- Project Management
- Property Management
- Purchasing
- Service Management

For information on previous releases, please refer to the following documents in the Documents\Archives folder of your accounting and management products CD:

- 800ReleaseNotes.pdf
- 810ReleaseNotes.pdf
- 811ReleaseNotes.pdf
- 820ReleaseNotes.pdf
- 821ReleaseNotes.pdf

Upgrade to the 8.3.0 CD

If you have a 7.x.x or 8.x.x CD, upgrade directly to the 8.3.0 CD.

If you have a Gold Collection 5.4.x CD and you use the Standard Edition, upgrade to a 7.5.x or 7.6.x CD before you upgrade to the 8.3.0 CD. Be sure to use File Doctor on all files before you upgrade your 5.4.x CD. You cannot wait until after the upgrade to perform this check because later versions of File Doctor are not compatible with 5.4.x data.

The data file upgrade process can be quite lengthy if you have many large files. For more information, please refer to the TS-Main Help topic "Upgrading files."

Upgrade Your Data Files

After you upgrade your applications, upgrade your data files so that they are compatible with your upgraded applications. Please see the following sections for data file upgrade instructions.

Upgrade Accounting and Management Data Before You Upgrade Estimating Data

The first time that you install an Accounting and Management Products 8.x.x CD and an Estimating Products 6.5.x or later CD, be sure to upgrade your accounting and management data files before you upgrade your estimating data files. This ensures that the upgrade program does not duplicate contact information in Address Book. For more information, please see UpgradetoAddressBook.pdf, available in the Documents folder of your accounting and management products CD.

Determine Which Applications Need Data File Upgrades

CD That You Upgrade From	Applications That Need Data File Upgrades
8.2.0–8.2.2 CDs	Accounts Payable Accounts Receivable Address Book Contracts Inventory Job Cost Payroll Project Management Property Management Purchasing Service Management
8.0.0–8.1.1 CDs	Accounts Payable Accounts Receivable Address Book Cash Management Contracts Inventory Job Cost Payroll Project Management Property Management Purchasing Service Management
7.x.x CD	All accounting and management applications, as well as Inventory and Purchasing.

Upgrade Data Files

To upgrade data files, start TS-Main. Then select **Tools > Upgrade Files** and follow the instructions in the windows.

For more information, see the TS-Main Help topic "Upgrading files."

Accounts Payable

New Features

Chargebacks

Accounts Payable now interfaces with Property Management. You can now enter a tenant charge as a distribution to an invoice and then post the charge and any markup or administration fees in Property Management. You can enter tenant charges and markup information in:

- **Enter Invoices** (**Tasks** menu)
- **Change Invoices** (**Tasks** menu)
- **Pending Invoices** (**Tasks** menu)
- **Record Manual Checks** (**Tasks** menu)
- **Import Invoices** (**Tools** menu)

To set up Accounts Payable for the tenant charge feature, to enter a tenant charge, or for related information, see "Property Management Chargebacks FAQs" in Accounts Payable Help.

Enter Invoices

The **Total Committed** field, which appears below the distribution grid, now has a maximum length of 7.2 characters.

The **Amount Distributed** field was moved to ensure that the values appear correctly and do not truncate.

The following fields were added below the distribution grid:

- **Retainage Amount distributed**
- **Discount Amount distributed**
- **Tax Amount distributed**

ODBC

The AP Lien Waiver record is now set to:

- Allow write.
- Allow replace.
- Allow delete.

All fields on the AP Lien Waiver record are ODBC replaceable.

Fixes

Change Invoices

Paid-side transactions are created correctly when you change the payable account. In an earlier version, if you changed the payable account, the software did not create the paid-side transactions.

Invoice Processing Tasks

If a distribution has incomplete account information, you now receive an error message and cannot continue until you enter the missing account information. The software performs this account verification before you accept an invoice, record a manual check, print, reprint, or void a check. In an earlier version, invoices with missing account information caused an interruption during the print check processes.

Pending Invoices

Tax amounts post to the correct General Ledger tax accounts when you OK and post a pending invoice. In an earlier version, in some circumstances, tax amounts entered on a pending invoice could post to incorrect General Ledger accounts.

Accounts Receivable

New Features

Customer Setup (Setup Menu)

A new field, **SM Invoice Format**, now appears on the **Billing** tab of the **Customer Setup** window. Enter the invoice format this customer normally uses for Service Management invoices. Click [**List**] to select from a list of available invoices.

The **Invoice Format** field was renamed **BL Invoice Format** to distinguish it from the new invoice field for Service Management.

Enter Cash Receipts (Tasks Menu)

You can now write off amounts using **Enter Cash Receipts**. For more information, see "Write off amounts using Enter Cash Receipts" in Accounts Receivable Help.

Finance Charges

Finance charges based on past due amounts can now be generated and included on a customer's accounts receivable statement. You can generate finance charges by invoice as an additional line item or by customer as a separate invoice.

You have the flexibility to calculate finance charges by:

▪ Customer or data folder in Accounts Receivable.

▪ Job or extra in Job Cost.

▪ Contract or contract item in Contracts.

New fields and windows have been added to Accounts Receivable for finance charge setup and generation. For more information on how to set up and use finance charges, see "About Finance Charges," "Setting up Finance Charges," and "To Generate Finance Charges" in Accounts Receivable Help.

Address Book

New Features

You can now view a list of existing Estimating subcontractors and vendors and their numbers when you set up a company as an Estimating subcontractor. The list lets you enter a unique sub number if you do not accept the default number. View the list in **Setup > Company >** [**Use As**] **> Estimating Sub/Vendor**.

The [**View**] button in **Contact Selection List** windows has been replaced with an easy-to-use drop-down list.

Contracts

New Features

Finance Charges

If you use Accounts Receivable, finance charges for past due invoices can now be included on a customer's accounts receivable statement.

You have the flexibility to set up finance charges based on rates by any of the following:

- Contract item or contract in Contracts.

- Job or extra in Job Cost.

- Customer or data folder in Accounts Receivable.

In Contracts, finance charge settings have been added to the **Billing** tab for both the contract and the contract item.

To set up finance charges, you must start in Accounts Receivable. For information on how to set up and use finance charges, look in Accounts Receivable Help under "finance charges." Contracts Help contains finance charge topics specific to Contracts. Accounts Receivable Help contains more topics that fully explain how finance charges interact among Accounts Receivable, Job Cost, and Contracts.

If you currently use Accounts Receivable and Contracts, when you upgrade to the 8.3.0 CD, your existing contracts and contract items for jobs that have a billing method of **Use Contracts** are marked eligible for finance charges, with no finance charge rates entered. (On both the contract and contract item, the **Exempt from finance charge** check box is cleared and **None** is selected.)

Inventory

Fixes

Category Column Appears Only When Appropriate

If you set **JC Settings** to **Never Use** category, the column does not appear in entry columns and cannot be added.

Error Log No Longer Consumes Unlimited Resources

Errors are now appended to the log file.

Item Class COGS Account Now Used for Update from Billing

When the debit account is retrieved during **Update from Billing**, it now uses the COGS account on the item class if one exists.

PO Requisition Report Processes More Quickly

The Crystal report used for Purchasing requisitions has been corrected with a change to a data link between the requisition header and the requisition detail records. As a result, the speed of the report has improved.

Quantities and Values on Hand Now Update Correctly

The quantity and value on hand for an item set up with a FIFO, LIFO or average costing method will update the item master correctly. Previously, errors occurred when the item was issued in **Inventory: Enter Stock Issues** after a negative quantity was entered and posted for that item in **Purchasing: Enter Change Orders.**

Search for Vendor in Enter Invoices and Enter Receipts

When you select to search by code and the vendor IDs are numeric values, the search will now find the vendor selected and keep vendors codes in the proper order.

Search With the F4 Button

If you are in an item field that contains a value and press the F4 key to search the item list, the default item on the list is the item from the entry grid.

Security

Operators without security access to set up a job in Job Cost can no longer add a job in Purchasing or Inventory.

Operators who are not allowed to set up items can no longer add a new item during entry.

Service Management Location Now Required

When you select to synchronize a location in Purchasing or Inventory to Service Management, you must select the Service Management location first.

Standard Edition

References to the Standard Edition have been removed from the software.

Stock Transfers Retain the Correct Accounts

When you manually change the debit or credit account during a stock transfer, the accounts selected are now retained and posted correctly.

Update From Billing Error Message

When you select **Inventory: Tasks** > **Update from Billing** and go directly to the tab for **Step 4** and select [**Clear**] entries, you no longer receive the error message **cdsBLI: Must apply updates before refreshing data**.

Job Cost

Compatibility

Purchasing and Inventory

The Accounting and Management Products 8.3.0 CD contains database changes in Job Cost. To continue to use Purchasing and Inventory with this release, you must install them from the Purchasing and Inventory Applications 8.3.0 CD.

New Features

Finance Charges

If you use Accounts Receivable, finance charges for past due invoices can now be included on a customer's accounts receivable statement.

You have the flexibility to set up finance charges based on rates by any of the following:

- Job or extra in Job Cost.
- Contract item or contract in Contracts.
- Customer or data folder in Accounts Receivable.

In Job Cost, finance charge settings have been added to the **Billing Info** tab for jobs (**Setup > Jobs**) and the **General** tab for extras (**Setup > Extras**).

To set up finance charges, you must start in Accounts Receivable. For information on how to set up and use finance charges, look in Accounts Receivable Help under "finance charges." Job Cost Help contains finance charge topics specific to Job Cost. Accounts Receivable Help contains more topics that fully explain how finance charges interact among Accounts Receivable, Job Cost, and Contracts.

If you currently use Accounts Receivable and Job Cost, when you upgrade to the 8.3.0 CD, existing jobs and extras with a billing method of **Use Quick Bill** are marked eligible for finance charges, with no finance charge rates entered. (On both the job and extra, the **Exempt from finance charge** check box is cleared and **None** is selected.)

Fixes

Import Commitments (Tools > Import)

Previously, when you imported a commitment item with units, unit cost, or both for a category whose units were not being tracked in Job Cost, the commitment item would import with no commitment item amount. Now when you do this, the software calculates and imports a commitment item amount based on the units and unit cost. However, it does not import the units or unit cost because they are not tracked in Job Cost. If you use taxes, the pretax amount is calculated and then used to derive the commitment item total amount.

The track units setting in Job Cost is located in **File > Data Folder Settings > JC Settings**.

This new information has been added to the commitment item Help topic that is listed under "importing, commitment item layout" in the Help index.

ODBC

Fixes

Performance Issue With Access Action Query

In ODBC 8.0.32.120 and later, action queries from Microsoft® Access could perform slowly (an action query makes changes to the data). ODBC 8.3.8 improves the performance of action queries.

Performance Issue With Paste Operation Between Excel and Access

In ODBC 8.0.32.0 and later, ODBC could perform slowly when you pasted data from an Excel sheet to a linked Access table. ODBC 8.3.8 improves the performance of paste operations from Excel.

Unable to Write to Memo Field in an Estimate

In ODBC 8.0.32.0 and later, you could not write to a memo field through a program that used ActiveX Data Objects (ADO) to access the data. ODBC 8.3.8 fixes this issue.

Payroll

New Features

Import Time (Tools Menu)

Import Time now imports cost and revenue transactions from Equipment Cost. For more information, see "About the Import Time record layout" in Payroll Help.

A new field, **Period begin date**, is now available in the **Import Time—Selection** window. If you enter a date in this field, the period-begin date for all new check records will be set to this date.

Interface to Service Management

Other pays and reimbursement pays can now post from Service Management.

Modify Personal Tax Credit Amounts (Tools Menu) (Canada Only)

You can now automatically adjust provincial and federal personal tax credits using **Modify Personal Tax Credits**. For more information, see "About modifying personal tax credits" and "To modify personal tax credits" in Payroll Help.

Fixes

Enter Time (Tasks Menu)

Attachments to time entries are now saved to the correct time entry. Previously the attachment was saved with the preceding time entry.

Import Time (Tools Menu)

Import Time Error File

The import time error file is now located in the folder listed for **Imports** (**File** > **Data Folder Settings** > **File Locations**). Previously, the error file was always located in the data folder.

Standard Categories and Cost Codes

Import Time now provides an option to add standard categories and cost codes to existing jobs when you import time into Payroll. Previously, if a cost code did not already exist on the job, the import record was rejected.

If you import time using units calculated with **Start** and **End** times, the units now import correctly.

Project Management

New Features

Correspondence Log (Documents Menu)

With the correspondence log, you can track and manage project correspondence, such as e-mails, phone calls, faxes, and other documents.

- As you create project-related e-mails and documents in Microsoft Outlook, Word, or Excel, you can make entries for them in Project Management's correspondence log without leaving those applications.

- In the log, you record correspondence information such as how the correspondence was sent, its urgency, its status (whether action is required or you are waiting for a response), when it is due, and when it is completed.

- You can search and sort the correspondence log to quickly find specific entries.

- All your project correspondence e-mails and documents can be stored in a central location.

- When you create entries directly in the Project Management correspondence log, you can attach Microsoft Word or Excel documents, as well as any other kind of file.

- You can attach multiple files to a correspondence log entry.

For more information, see the topic titled "Learn about the correspondence log" in the Project Management Help index (listed under "correspondence log, about").

Reports (Reports Menu)

Custom Reports Created With Crystal Reports

Timberline-provided reports have been updated to reflect name changes for some fields. These name changes apply to Crystal Reports® only and not to field names that you see in Project Management windows. If you used Crystal Reports to create custom reports that contain the following fields, you need to update the report designs to reflect the name changes:

Old Field Name	New Field Name
Submittal record:	
Earliest Revision	Earliest Sbm Revision
Earliest Revision Sequenc	Earliest Sbm Revision Seqnc
Current Revision	Current Sbm Revision
Current Revision Sequence	Current Sbm Seqnc
Current Revision Status	Current Sbm Revision Sts
Submittal revision record (the new record name is Submittal Sbm Revision):	
Revision	Sbm Revision
Revision Status	Sbm Revision Status
Revision Start Date	Sbm Revision Start Date
Revision End Date	Sbm Revision End Date
Drawing record:	
Revision	Draw Revision
Revision Sort Key	Draw Revision Sort Key

Old Field Name	New Field Name
PJ Job record:	
Type	Job Type

Enhancements to Existing Reports

A job prompt has been added to the print selection window for the following reports. It lets you print the report for a specific job rather than all jobs.

- Subcontractor Evaluation (**Reports > Subcontract**)
- Submittal Log - Overdue (**Reports > Submittal**)
- Submittal Log - Coming Due (**Reports > Submittal**)
- Submittal Request Letter (**Reports > Submittal**)
- All dunning letters

Drawing log reports and meeting minute reports that do not print on a form now include project manager.

Phone extensions are now included in reports and inquiries that have phone numbers.

A Cc prompt has been added to the print selection window for all dunning letters. You can add up to three Cc names to dunning letters.

New Reports

In **Reports > Custom Logs**:
- Communications Log (CR)
- Notices to Comply (CR)
- Photo Log (CR)
- Punch List Items (CR)
- Punch List by Rsp Contact (CR)

- Punch List Dunning Letter (CR)
- Safety Notices Log (CR)

In **Reports > Submittals**:
- Submittal Log by Contact (CR)
- Submittal Log as of Date (CR)
- Submittal Distribution (CR)

In **Reports > Job Contact Lists**:
- Contact List by Company
- Contact List

In **Reports > RFIs**:
  RFI Distribution (CR)

Send Attachments

The send attachments feature allows you to e-mail, fax, or print files (such as a Microsoft Word document, an Excel spreadsheet, or a .jpg image file) from within the **Timberline Sending** window. You can automatically include attachments from RFIs, submittals, meeting minutes, and drawing logs when you send these documents.

You can also add attachments and automatically include RFI, submittal, meeting minutes, and drawing attachments as separate items in transmittals. The files are faxed, e-mailed, or printed when you send the transmittal.

For more information, see "Sending attachments in Project Management" in the Project Management Help index (listed under "attachments, sending").

Property Management

Compatibility

Post all Property Management transactions before you upgrade from version 5.x.x to 8.3.3. Property Management cash receipts created in 5.x.x and posted in 8.3.3 will not send information to the Cash Management application.

New Features

Chargebacks

Property Management now interfaces with Accounts Payable to accept charges created through Accounts Payable's invoice entry tasks.

You enter the charge in Accounts Payable and then post the charge in Property Management. In Property Management, you can set up default markup information, including markup charge types, percentages or flat amounts for the charge types, and a journal number to identify the markup charge as a chargeback. Accounts Payable can automatically create markup charges based on the settings in Property Management. Most of the settings and processes are established in Accounts Payable.

Before you create chargeback entries in Accounts Payable, you should select a journal number to use for chargeback entries (**File > Data Folder Settings > PM Settings > GL Information**).

Also, make sure that you set up a **TAX** charge type in Property Management if you use taxes in Accounts Payable. In **Setup > Charge Types**, set up a **TAX** charge type to identify the base accounts required to create chargeback tax transactions.

Reports (Reports Menu)

The report **Chargebacks by Charge Type** (**Reports > Reconciliation**) has been added to this version of Property Management. This report shows information about chargeback entries and their associated General Ledger accounts and Accounts Payable invoices.

Fixes

Clear Paid Items (Tools Menu)

Property Management has greatly improved the performance of the clear paid items feature. Now, when you click **Clear Paid Items** (**Tools > Clear Paid Items**), the software processes the task quickly because it no longer requires that all items associated with a single bank deposit clear together.

The **Cutoff date** field in the **Clear Paid Items** window no longer defaults to the system date. Now you cannot accidentally accept the prefilled system date.

Move Entries (Tools Menu)

Property Management has greatly improved the performance of the move entries feature. Now, when you click **Move Entries** (**Tools > Move Entries**), the software processes the task quickly because it no longer requires that all items associated with a single bank deposit move together.

The **Cutoff date** field in the **Move Entries** window no longer defaults to the system date. Now you cannot accidentally accept the prefilled system date.

Purchasing

Fixes

Approval IDs Now Correct in Import File

When the full 10 characters are used in the approval ID and the APInv.txt file is created, all 10 characters are written to the file. This eliminates the following message: **Approval ID xxxxxxxxxx not found.**

Category Column Appears Only When Appropriate

If you set **JC Settings** to **Never Use** category, the column does not appear in entry columns and cannot be added.

Change Order ID Is Now Read-Only

When you enter change order detail lines, the change order ID can be added as a column. Previously you could override the value, and it would store the new value entered. Then custom reports that used the content of that field would return inaccurate information.

Change Order Reports Now Print and Return Data

When you print a change order format report from the **Reports > Forms** menu, it will now return data when a specific purchase order and change order are entered in the prompt window, even if you do not include leading zeroes. Preceding zeroes are required to find a match for the ID of the purchase order and change order to be printed. For example, if you enter the purchase order number as 11, it is stored as 000011.

Error Log No Longer Consumes Unlimited Resources

Errors are now appended to the log file.

Import Orders with Automatically Commit Selected

When you import orders with **Automatically Commit** selected, the purchase order number is now written to each purchase order line item.

Invoice and Accounting Dates Print Correctly on Send Invoices to AP Journal

The invoice and accounting dates on the Send Invoices to AP journal print correctly, even when changed in the **Post** window.

PO Requisition Report Processes More Quickly

The Crystal report used for Purchasing requisitions has been corrected with a change to a data link between the requisition header and the requisition detail records. As a result, the speed of the report has improved.

Prorated Add-On Amounts Now Import Correctly to Accounts Payable

When add-ons are prorated, the correct amounts are now written to the APInv.txt file and the import does not reject with this message: **Distribution amounts do not sum up to total invoice amount.**

Quantities and Values on Hand Now Update Correctly

The quantity and value on hand for an item set up with a FIFO, LIFO, or average costing method will update the item master correctly. Previously, errors occurred when the item was issued in Inventory's **Enter Stock Issues** after a negative quantity was entered and posted for that item in Purchasing's **Enter Change Orders.**

Search for Vendor in Enter Invoices and Enter Receipts

When you select to search by code and the vendor IDs are numeric values, the search will now find the vendor selected and keep vendors codes in the proper order.

Search With the F4 Button

If you are in an item field that contains a value and press the F4 key to search the item list, the default item on the list is the item from the entry grid.

Security

Operators without security access to set up a job in Job Cost can no longer add a job in Purchasing or Inventory.

Operators who are not allowed to set up items can no longer add a new item during entry.

Standard Edition

References to the Standard Edition have been removed from the software.

Stocking Location for Change Orders

When you enter a change order, the stocking location for a line item now retrieves the location on the header of the purchase order.

Tax Amounts Correct When Tax Is Removed

If the tax is removed when a purchase order is received and invoiced, the tax amounts sent to the APInv.txt file during **Send Invoices to AP** are correctly written as zero. The import file no longer rejects with this message: **Distribution amounts do not sum up to total invoice amount**.

Tax Amounts for Receipts

Tax amounts for receipts are now written correctly.

Taxes for Add-Ons Calculate Correctly

Taxes for add-ons now calculate according to the tax group selected on the add-on line.

Unexpected Error Messages in Enter Change Orders No Longer Occur

Previously messages that began **Access Violation at address...** could occur.

Service Management

New Features

New Help Topics

New topics that explain the new work order billing and review tasks include "Work Order Billing," "Work Order Review," "Work Order Statuses," "Grouping Level," "Invoice Format Retrieval," and "Invoice Tree." Context sensitive Help has been added to the new tasks where appropriate.

Agreement Period

You can now select a specific agreement period in the **Service agreement** field on the **General** tab of the work order.

Dispatch Board Past Due Alarm Setting

When you create a DBoard, you can display the past due alarm by selecting the **Show past due alarm** check box on the **Dispatch Board selector** and window.

Invoice Formats

You can use multiple invoice formats, which will allow you to customize your invoice formats by call type, Accounts Receivable customer, or service location. Click the browse button next to the **Invoice format** field in the **Work Orders Controls** window (for the Accounts Receivable customer and service location) or the **General** window (for the call type), and select the invoice format. You can also select the **Invoice format** on the **Work Orders** tab in **SM Settings.**

New Reports

The following reports have been added:

- Reviewed Work Orders
- Unposted Invoices
- Work Orders by Status
- Work Orders Selected for Billing

Standard Tasks

Standard tasks are now available even if you do not own the Preventive Maintenance add-on.

Work Order Billing

Now you can bill multiple work orders at one time and on one invoice. Open **Tasks > Work Orders > Work Order Billing**; then select the work orders that you want to bill. You can group work orders by Accounts Receivable customer and service location, or you can bill work orders individually. The settings and selections in the **Work Order Billing** window are saved when you exit and return to the window.

Work Order Review

You can now select work order review options in **SM Settings**. Selections include:

- **Never**
- **Optional (warn if not reviewed)**
- **Always**

If you work with a large number of work orders, you can use the **Work Order Review** task to review the information on the work orders. When you have verified the work orders, you will change the statuses to **Reviewed**.

Work Order Statuses

Work order statuses have been modified to give you more control over the state of a work order. They now include:

- **Closed**—Prevents changes and additional line items from being added to the work order.
- **Reviewed**—The work order has been reviewed and is ready to be invoiced and closed.
- **Invoiced**—The work order has been invoiced. If you add items to the work order, the status changes to **Open**.

Fixes

5 Week Schedule—Technician Sort

If you select a technician group in the **5 Week Schedule Settings**, the technicians will sort as they are in the group. If you do not specify a group, the technicians sort by their Payroll employee number.

Accounts Payable Accounts Control

If you use control accounts, the Accounts Payable **Base Accounts** available on the **GL Options** tab in **SM Settings** are now restricted to those control accounts.

Accounts Payable Text File

The General Ledger account now retrieves the correct prefix for purchase order line items in the invoice text file exported to Accounts Payable.

Database Changes

Use the following list to modify your custom reports when database records change from release to release. Please

refer to "Special Considerations for BL, SM, PO, and IV Custom Crystal Report Designs: Timberline Office Database Record Changes" in Crystal.pdf located in the Documents folder on the 8.3.0 CD for more information about previously created custom reports.

- agrperiod
- AR customer
- calltype
- invitem
- invoice
- invoicerelationship
- options
- servicesite
- woitems
- wrokorder

Daily Processing

Preventive maintenance work orders are not generated by the **Daily Processing** task for locations that have been designated as on credit hold.

Dispatch Board—Technician Sort

Technicians now appear on the DBoard in the same order that they appear in the technician group.

Edit Work Orders in Edit Time Entries

If you edit a work order in the **Edit Time Entries** window by selecting **Edit Work Order** from the shortcut menu, the **Register** page for that work order appears.

Entered By

A new **Entered By** column on the **Timestamps** tab of the ECard displays the ID of the employee who created the timestamp.

Job Cost Category

Work orders (not including small jobs) now use the appropriate **JC Category** from the corresponding work order.

Pay IDs in Edit Time Entries

You can now select pay IDs with only the following pay types in **Edit Time Entries**:

- Regular
- Overtime

P.M. Planner and 5 Week Schedule

The **Load Range** settings on the **P.M. Planner** and **5 Week Schedule** are now persistent.

Preventive Maintenance Tasks for Inactive Customers and Equipment

Preventive maintenance work orders are not generated by the **Daily Processing** task for locations and equipment that you have changed to inactive.

Preventive Maintenance Tasks for Inactive Equipment

When you change the status to inactive for a piece of equipment that is associated with a Preventive Maintenance task, the task is removed from the **P.M. Planner**.

Purchase Order Cost and Agreements

The **Use PO Cost for markup** field on the **PO/Inventory** tab in **SM Settings** is now used when work order items covered by an agreement are designated as no longer covered.

Purchase Order Receipt Totals

The total amount column on the **Receipts** tab of the purchase order's properties now includes tax even if you have not selected **Include prorated tax on work order item costs** on the **PO/Inventory** tab in **SM Settings**.

Purchase Order Requested By Field

The **Requested by** field that is available during purchase order entry now prefills with the last technician selected in the previous new purchase order, if it is not work order related.

Report Changes

The following reports have been modified:

- Agre(AU).rpt
- Agre(AU)-both.rpt
- Agre(AU)-pm.rpt
- Agreemnt.rpt
- Agreemnt-both.rpt
- Agreemnt-pm.rpt
- Custbill.rpt
- Custolst.rpt
- Inv(AU).rpt
- Inv(AU)-both.rpt

- Inv(AU)-pm.rpt
- invoice.rpt
- Invoice.rpt
- Invoice-both.rpt
- Invoice-pm.rpt
- invproof.rpt
- jobquote.rpt
- jobquote-both.rpt
- jobquote-pm.rpt
- jqot(AU).rpt
- jqot(AU)-both.rpt
- jqot(AU)-pm.rpt
- pmwo(AU).rpt
- pmwo(AU)-both.rpt
- pmwo(AU)-pm.rpt
- pmwrkord.rpt
- pmwrkord-both.rpt
- pmwrkord-pm.rpt
- sjprfdet.rpt
- tebycust.rpt
- tebyjob.rpt
- tebyprop.rpt
- techasgn.rpt
- techprod.rpt
- wkor(AU).rpt
- wkor(AU)-both.rpt
- wkor(AU)-pm.rpt

- wocstdet.rpt
- wocstdet.rpt
- wrkorder.rpt
- wrkorder-both.rpt
- wrkorder-pm.rpt

Reports Menu

The **Reports** menu has been reorganized into a more logical grouping for easier navigation through the menu, and a new submenu named **Lists** has been added.

Standard Tasks—Cost Quantity

When you enter labor items on a standard task, the cost quantity now prefills in the **Billed Qty** field.

Standard Tasks—Inactive Tasks

All active standard tasks are now available in standard task selection lists even if you have selected the **Standard task is inactive** checkbox for any of the standard tasks in the list.

Status Colors for Views

The status colors red for **On Hold**, green for **Open**, and blue for **Reviewed** are now used in the following:

- The **Work Order** view
- The **Work Order** tab of the **Service Location** view
- The **Work Order Selection** window

Technician Default Settings

When you set up a new technician in Payroll and you select the **Service Management Employee** check box, the new

technician in Service Management has the **Send time to Payroll** check box selected by default.

Technician (Employee) Assignment

The technician field on the location's **Work Order** view is now updated when you change the assigned technician using the edit field on the work order's **Assignments** tab.

Work Order Lookup by Field

You can now enter up to 10 characters in the **Lookup By** field. The previous limit was 8 characters.

Work Order Second Billing Amount

If you bill a work order a second time, the amount represents the balance for the work order, not the original or total billing amount.