

# Release Notes for version 8.3.0.2

The release notes listed below contain resolutions that have been reported and resolved. New features to the application are also listed and may point you to a more detailed document that will be listed in our online knowledgebase or available from support. If you have any questions about release notes, please contact our technical support department via email or 561-969-2882 option 1.

## Accounts Payable (FM)

### New Feature

2934 Release Version 8.3.0.2 1

#### **AP - INVOICING - MAINTAIN INVOICES, Add sublet link to AP for attaching Sublet PO's.**

We have added a new feature to Accounts payable for linking the Sublet Purchas Orders on a work order to its associated AP Invoices.

\*\*\*Requirements;

A valid sublet purchase order must first exist on a work order. It can be open or closed, contain costs or prices or just 0.00

Rules;

A single sublet PO can be attached to one or more invoices. But an invoice can only be attached to one sublet PO. Process;

1, Create a new AP Invoice in Maintain Invoices for the sublet vendor.

2, Locate the Sublet PO field beneath Receiver Id on the form and select a sublet PO typing in the PO number or using F6 to select it.

3, Enter the amount that is being paid against the sublet PO.

4, Accept the vendors default WIP distribution or update it in the GL distribution grid.

5, If there have been previous posted invoices applied to the sublet PO click the Receiver/Sublet tab to view them.

6, Save and process as normal.

\*\*\*Note,

A new tab has been added in the SERVICE MANAGEMENT > MAINTENANCE FUNCTIONS > SUBLET CHARGES form named Payments, this tab contains a grid and displays all posted invoices that have been linked to the sublet PO.

### Bug

11279 Release Version 8.3.0.2 1

**AP - PRINT 1099's, The 1099-INT program does not line up in the appropriate boxes.**

Corrected issues with layout not properly lining up to 1099-I forms when printing. Form is now windows printing compatible.

**Accounts Receivable (FM)**

**Bug**

21183 Release Version 8.3.0.2 1

**AR - INVOICE / STATEMENT - PRINT AR STATEMENTS, Multi-page statements sometimes exceed last line and page break**

In some cases when AR statements that contained multiple pages were printed, the page length would not be honored and the last line of the middle pages would sometimes print <<Continued>> onto the next page and then skip to the next page and begin printing the additional lines. This has been corrected.

21191 Release Version 8.3.0.2 1

**AR - CHARGES - CREATE FINANCE CHARGES, AREA TO CHARGE, Drop down list is repeated**

Corrected the listing to remove the duplicate charge areas.

**API**

**Bug**

25842 Release Version 8.3.0.2 1

**API - TIME CARD ENTRY - COMMENTS, Tech comments are not properly wrapped when written**

When a tech enters comments in time card / clock entry, the comments are not properly written with wrapping and sub-value marks like they do when entered directly into Ops.

26793 Release Version 8.3.0.2 1

**API - Warranty rate is not being set when time clock entries are created.**

Corrected an issue with the time entries coming from Coordination not applying the proper warranty rate based on hierarchy requirements in Ops.

30357 Release Version 8.3.0.2 1

**API - Service/WorkOrders/RetrieveSharedWorkOrders - 500 error**

In some instances a user would encounter a 500 error when attempting to retrieve a customer record and its previously synched work orders. The issue has been corrected.

30358 Release Version 8.3.0.2 1

**API - Customers/UpdateCustomer - Some fields not updating.**

Corrected an issue whereby some fields were not getting updated properly when customers were getting created from the API

**File Maintenance**

**New Feature**

25841 Release Version 8.3.0.2 1

**FM - CUSTOMER BOATS, Add Hull ID to F6 listing**

The grid listing for customer boats has been updated with the boat hull id column.

**Process Change**

30240

Release Version 8.3.0.2 1

**FM - CUSTOMERS - PRINT PARTS HISTORY / PRINT TRANS HISTORY, Present No Items present**

The links for Print Parts History and Print Transaction History have been removed from the Customer Maintenance and Inquiry forms.

\*\*\*New Process;

The Parts Sold History and the Transaction History listing links have been updated to allow all of the contents in the listing grid to be printed.

- 1, To Print the listing, simply click the link, and right click the grid and select print grid, or search in the find panel first then right click and select print grid.
- 2, When the print preview opens customize the report as desired using the tool bar at the top of the form to customize the report layout and options, the margins via page setup.
- 3, To print choose an available printer or choose quick print to print to the default.
- 4, To export directly to a file format such as Excel or PDF, etc. click the save as icon's drop down and select the file format.
- 5, When done close the form.

\*\*\*Note,

The print grid capability also works on all other listing grids when the listing is opened.

**Bug**

26747

Release Version 8.3.0.2 1

**FM - CUSTOMERS - BOAT TAB, Requires click then double click when returning to tab from Customer Boats**

Corrected a focus issue with the tabs to logically place the cursor focus in the appropriate field or cell when each tab is clicked in customer maintenance.

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**General Ledger (FM)**

**Bug**

19336

Release Version 8.3.0.2 1

**GL - G/L Inquiry - Incorrect Page Printouts for Large Detail Inquiry**

Corrected the printout for GL Inquiry to properly fit to page.

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**Inventory Management**

**New Feature**

30201 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Add terms code from customer to form.**

The customer terms code has been added to the Order Entry form below Account Balance and to Point Of Sale Bill To / Ship To form.

31254 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Display customer comments when Customer/Bill to Customer is added to Order**

An update has been made to Order Entry for displaying the Ship to and Bill to customer comments. Whenever the customer id is added if there are comments on the Comments tab in the customer record those will be displayed.

Also the customer id can be right clicked and inquired on. When the customer record opens in inquiry mode the focus will be on the Comments tab.

**Bug**

21192 Release Version 8.3.0.2 1

**IM - MAINTENANCE FUNCTIONS - CHANGE PART NUMBER, Process does not update POS or OE tickets**

Corrected the change part routine to update both POS and Order Entry items.

23368 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Partial BO received, creates new BO for selection in Purchase Orders**

Corrected an issue where by parts that were back ordered and partially received, left the outstanding items available to be ordered again. The remaining non-received parts will not longer display in PO Entry as an available back order.

25836 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Generate invoice to POS does not write PO#**

Corrected an issue with the Order Entry PO number not getting written to the associated POS ticket when the order was submitted for invoicing.

26746 Release Version 8.3.0.2 1

**IM - PURCHASING - PO ENTRY - PARTS DETAIL MAINTENANCE, Work Order Qty cell decimal is shifted left three positions**

In some instances when the form opened the quantity special ordered for a work order would be shifted, so 5.00 would become .05. This has been corrected.

28008 Release Version 8.3.0.2 1

**IM - PURCHASING - INVENTORY RECEIVING, \search and select inactive part does not prompt inactive**

Corrected an issue whereby a clerk could perform a \search while in the receiver and add an inactive part to it.

28146 Release Version 8.3.0.2 1

**IN - Rebuild.Qty.Allocated - Not rebuilding OE records.**

Added order entry to the rebuild inventory quantity allocated routine.

28168 Release Version 8.3.0.2 1

**IM - Rebuild.Qty.Allocated does not rebuild from suspended POS tickets.**

Corrected an issue with rebuilding inventory allocations not including suspended POS invoices.

28186 Release Version 8.3.0.2 1

**IN - Order Entry - Closing Orders and Creating Invoices does not remove allocation for order**

Corrected an issue with allocations not getting updated properly from order entry.

28199 Release Version 8.3.0.2 1

**IM - PURCHASING - PURCHASE ORDER ENTRY, Adding WO special orders to recommended PO's generates duplicate entry on the WO.**

Corrected an issue whereby in some instances adding a special order from service to a recommended order would generate an additional entry on the work order when the special order was received.

30176 Release Version 8.3.0.2 1

**OE - GENERATE INVOICE, Order ID does not get written to POS ticket**

When the Order was submitted for invoicing and the POS ticket generated. The order ID was not getting written to the associated POS ticket record.

30647 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Bill code tax schema is not being honored when customer is taxable**

The sales tax routines were not following the same hierarchy as other areas of the application. For customers who were taxable the issue was apparent when adding NOTAX billing codes to an order. This has been corrected.

30660 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, On Save but not Post, QTY group info is not correct when order is cleared then viewed,.**

In some instances when a order was generated for a location other than location 1. The available quantity would display improperly for Location 1 in other areas until the order was closed then it would return to the correct Available quantity.

30760 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Qty Available field is not updating as expected when the other qty fields update.**

Corrected several display issues with the quantity group on the order entry form. Quantity information will update properly as the order is updated.

30768 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Generate Invoice fails to roll back completely when POS ticket cannot generate**

In some instances a clerk would generate an invoice to AR and the resulting invoice could not complete. The order would get written with a POS ticket id but it actually didn't invoice. A catch has been added to the process and if the order cannot fully complete the entire process will roll back to the order and prompt the clerk that the invoice failed to generate, try again later. The clerk can then try again immediately or come back later and invoice. If successful the normal print and take payment messages will appear as expected. The order will be marked closed.

30778 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Allows multiple instances of Order to be billed and updated.**

In some cases the same clerk or multiple clerks could access the order, maintain it and bill the order. The proper messages would be displayed but the clerk was allowed past them. This issue is corrected.

30781 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Core parts are not adding with parent**

When adding a part that contains a core part, only the parent part was being added. Corrected the issue and core parts will now be added along with the parent part.

30991 Release Version 8.3.0.2 1

**IM - ORDER ENTRY - XLOF layouts with logos do not print logo**

Corrected an issue with printing Logo on xlof layouts from Order Entry. Properly defined layouts will now print the logo as expected

Task

23389 Release Version 8.3.0.2 1

**IM - ORDER ENTRY, Add back order number field to form.**

A field has been added to display the back order id on the original order when viewing closed and invoiced orders. It is display only.

**Layout Designer**

**New Feature**

30258 Release Version 8.3.0.2 1

**LD - TPOS / CR LAYOUTS, Update CC layouts to print EMV transaction details when present**

The standard POS layouts for credit and debit cards have been updated to print the EMV transaction details when the cards are dipped.

\*\*\*Note,

EMV capability requires that your account has been integrated with a Worldpay merchant credit card processing account. For more information contact support@mytaskit.com.

**Marina Management**

**Process Change**

23432 Release Version 8.3.0.2 1

**MM - RENT ROLL - Printer icon should be inactive for programs**

The Rent Roll form's Summary, Discrepancy, and Utilization programs have been updated to utilize only the spreadsheet control. This was done to accommodate multiple formats for the programs which were not easily readable in a printed format.

**Bug**

21188 Release Version 8.3.0.2 1

**MM - LAUNCH MANAGEMENT - LAUNCH MONITOR, Do Not Launch warning not displaying for all types**

When a boat was flagged do not launch, not all standard and custom launch ticket types were prompting the message. The clerk will now be prompted for any action in the monitor when the boat is flagged do not launch.

21727 Release Version 8.3.0.2 1

**MM - RENT ROLL - SLIP DETAIL, Report header states April 1 - 30 regardless of date range selected.**

Corrected a default header issue on the report. The proper date range will display now.



22471 Release Version 8.3.0.2 1

**MM - RESERVATION ENTRY, Linear slips display regardless of space available.**

Corrected an issue in reservations whereby, When assigning slips during entry if the slip type is flagged as linear, and the boat's draft and beam do not exceed the slip's draft and beam, then it appears in the available listing regardless of the space left available. For example a 200' slip already has a 150' boat reserved but not checked in for part or all of the date range, and the new reservation's boat is 120' the slip appears as available when it really isn't.

23287 Release Version 8.3.0.2 1

**MM - STORAGE PROPOSALS - STORAGE PROPOSAL MAINTENANCE, Odd boat dimensions and/or bill code amounts generate bad installment message**

Corrected an issue whereby an odd boat length and an odd bill code rate when added to a proposal created from the boat record would generate an error that that the extension of the bill code does not match the installments.

25928 Release Version 8.3.0.2 1

**MM - METER - ENTER METER READINGS, Attempting to change End Read Date in entry grid errors out and changes to 12/31/67**

Corrected the meter entry grid to allow the end meter date to be edited as desired.

27035 Release Version 8.3.0.2 1

**MM - RENT ROLL, Slip Detail & Slip Movement History must be previewed first to print.**

Corrected an issue with the rent roll Slip Detail and Movement History reports not working unless they were previewed first.

28171 Release Version 8.3.0.2 1

**MM - RENT ROLL - RENT ROLL SLIP TYPES, Selection is ignored when printing reports.**

Corrected an issue whereby the rent roll type selection was getting ignored when the clerk removed wet or dry types.

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Non-Specific

New Feature

**NS - WORLDPAY - FIRST MILE**

EMV certification has been achieved with the Worldpay credit card processing integration. For additional information and to activate EMV for your accounts please contact support@mytaskit.com

\*\*\*Requirements;

- Must have the Worldpay credit card integration.
- Must have an Ingenico ISC 250 with latest payload version.
- Consumer must present a chipped card for dipping.

\*\*\*To Setup

- Must contact support to schedule switching your Worldpay integration to EMV and First Mile.
- POS register changes for each register for pay types have to be updated
- Location parameters will be updated.
- Custom layouts for credit and debit transactions will need to be updated.

\*\*\*Process Changes

- There will some minor changes to processes when initiating and completing an EMV transaction.
- Printed merchant copies of EMV transactions are no longer printed. Instead the merchant copy is stored in the gateway with the customer signature. The merchant copy can be reviewed or printed as needed from the gateway.
- When selecting credit or debit on the Finish / Pay form the clerk will be prompted and the terminal will prompt the consumer to dip the card (when in hand) or manually enter the number on the terminal. Once approval the terminal will prompt the consumer to sign onscreen.
- In addition to the above changes and part of an ongoing effort. Transaction processing for all types has been streamlined for completing the ticket. This includes eliminating several extra taps and clicks when the full amount is accepted when entering a pay type and not prompting a \$0.00 change due message.
- All other processes remain the same.

**Bug**

**NS - PRINT CONTROLLER, Print preview hangs for File and Email tabs**

Corrected an issue with report generator hanging in certain instances when previewing then attempting to email or export the output.

30777 Release Version 8.3.0.2 1

**NS - Custom Reports do not generate.**

Due to a change with date and time stamping some custom reports would not work as expected. This issue has been corrected.

**Point Of Sale**

**Bug**

21186 Release Version 8.3.0.2 1

**POS - EOD - Batch is out of balance by a penny**

In some instances a POS ticket that had a discount would not round properly to the nearest cent and close out of balance. When this happened the batch and its report would be out by .01 cent. The issue has been corrected, now when there is a rounding issue with discounts the discount amount will be properly adjusted to the nearest .01 cent to bring the discount and ticket into balance.

22507 Release Version 8.3.0.2 1

**POS - Customer tax schema is ignored when customer is added to ticket.**

When a customer was added to the POS ticket after items had been added the application was not properly checking to verify that the customer was exempt or had a different tax schema defined on their account.

The application will now properly check for exempt status or a tax schema;

A, If the customer is exempt the tax amount only will be removed. The default schema's will remain on each item.

B, If the customer has a different tax schema defined then the clerk will be prompted to update the ticket with the customer's tax schema replacing the default schemas. This does not override NOTAX.

26028 Release Version 8.3.0.2 1

**POS - Refunding split payment tickets to AR with other payment types, Adds instead of subtracting other payment type amounts.**

In some instances when a POS invoice was paid by split payment types with one of them being AR. If the ticket was refunded the application was improperly attempting to apply the entire refund to AR instead of the original payment types.

26040 Release Version 8.3.0.2 1

**POS - FUNCTIONS - DAILY PROCEDURES - END OF DAY, Disallow Summary tab when in Detail checkout**

Corrected an issue with the summary tab being available when detail checkout was selected. The summary tab would then incorrectly display totals if it was clicked. Now if the clerk wants to check out in summary the default detail checkout flag must be unchecked first then the summary values can be entered.

31166 Release Version 8.3.0.2 1

**POS - System Hangs/Locks when using MyTaskIt and TPOS at the same time**

Corrected issues with the Printer selection form in POS interfering with MyTaskit when the form is left open by the clerk and not closed.

\*\*\*Note, while the issue is resolved for the lock and hang in MyTaskit. Clerks should always immediately close the printer form in POS if not printing to completely write the transaction to the database. Leaving the printer form open until the next transaction could potentially cause other issues if the connect to the server is lost and so on.

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**Report Generator**

**Bug**

30787 Release Version 8.3.0.2 1

**RG - Trap DM.POS.DAILY.ITEM.SALES for release**

Corrected the specifics for the report to select all sales (No Voids) that are complete for YESTERDAY.

\*\*\*Note the report's date specifics can be edited for, TODAY, YESTERDAY, FIRST, LAST, or a specified date range.

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**Sales Management**

**Bug**

23280 Release Version 8.3.0.2 1

**SM - MAINTENANCE - INVENTORY - PACKAGES/BUNDLES, Package and Bundle grid issues**

Corrected a grid tab order issue with the focus moving to next line improperly

27027 Release Version 8.3.0.2 1

**SM - MAINTENANCE - INVENTORY, Location history tab disappears on save**

In some instances if the sales management module was not set to multi-location the Location History tab would disappear when the unit was saved.

27029 Release Version 8.3.0.2 1

**SM - PURCHASING - INVENTORY RECEIPTS, Floor Plan Maintenance opens to clerk's default location, not receiver location**

Corrected an issue with the form was opening using the clerks default location instead of the inventory unit's current location.

28367 Release Version 8.3.0.2 1

**SM - PROSPECTS - FOLLOW UP, Cannot type clerk id greater than 5 characters in next actions grids**

Corrected an issue with not being able to type clerk id's greater than 5 characters into the clerk id cell.

28408 Release Version 8.3.0.2 1

**SM - SALES FUNCTIONS - CONTRACT MAINTENANCE, Grid issue with \, \ \, and direct entry of model id**

Corrected several issues with using \ and \ \ to select models to add to a contract.

28409 Release Version 8.3.0.2 1

**SM - SALES FUNCTIONS - CONTRACT MAINTENANCE, Accessories previously rigged load improperly.**

In some instances creating a contract and adding a unit to it that had previously rigged accessories. The rigged accessories would not load as expected.

28411 Release Version 8.3.0.2 1

**SM - SALES FUNCTIONS - CONTRACT or QUOTE MAINTENANCE, \ search listing focus is not on first row**

When the \ search listing opened it was not placing focus on row one of the listing. This has been corrected.

30353 Release Version 8.3.0.2 1

**SM - PROSPECT FUNCTIONS - PROSPECTS- PROSPECT INFO TAB - CO-BUYER INFORMATION TAB, Attach Photo button's text changed to "Remove Photo" after clicking cancel on picture selecting**

If the clerk clicked the attach photo button then cancelled the action without adding a photo the button's text label would state remove photo instead of remaining as attach photo.

30355 Release Version 8.3.0.2 1

**SM - PROSPECT FUNCTIONS - PROSPECTS - PROSPECT INFO TAB - CO-BUYER INFORMATION TAB, The information entered in County field disappears after mouse cursor click on any other fields**

The county field would not retain the information entered into it after focus moved to another field.

**Bug**

21723                      Release Version    8.3.0.2        1

**WO - Maintenance Functions - Work Orders - Journal Transaction Created for Parts on Work Order for a Closed Accounting Period**

Corrected an issue that was allowing clerks to review a previously saved part from a posted period then add new parts to the operation using the closed period date.

23286                      Release Version    8.3.0.2        1

**WO - MAINTENANCE FUNCTIONS - ESTIMATES, When resolution is less than minimum Approved flag floats over expand.**

Corrected an issue when some lower resolutions were used, and then when the expand box was opened the approved flag would float over the box and comments.

23372                      Release Version    8.3.0.2        1

**WO - SCHEDULE, Unscheduled Operations only display for clerk's home location**

Corrected an issue whereby the unscheduled operations form was not properly opening to the selected location when a clerk was allowed to work in more than one location.

23380                      Release Version    8.3.0.2        1

**WO - MAINTENANCE FUNCTIONS - TIME CARD REVIEW, Error message appears when work order form is already open**

Corrected the process to confirm to rules. When maintaining time cards, then no work order charges forms may be opened. When maintaining work order charges then the time cards form may not be opened.

25927                      Release Version    8.3.0.2        1

**WO - MAINTENANCE FUNCTIONS - SERVICE PRINTING, Clearing invoice field does not allow the form to be cleared or closed.**

Corrected an issue with clearing an invoice id then attempting to clear the form.

25930                      Release Version    8.3.0.2        1

**WO - MAINTENANCE FUNCTIONS - SUBLET CHARGES, Purchase date in closed period does not allow focus to move from field.**

Corrected a behavioral issue with viewing sublet charges that were added in a previous period that is now closed. The application will now prompt the clerk and allow a graceful exit.

26739 Release Version 8.3.0.2 1

**WO - MAINTENANCE FUNCTIONS - WORK ORDERS, Special orders with two lines do not update properly when manually delivered**

In certain instances when there are only two lines on a special order and the flag is not set to auto deliver to the work order when received. The second line item would not properly deliver and remain and open.

28410 Release Version 8.3.0.2 1

**WO - Service Printing - Layouts with logos don't print logo on all pages.**

When service layouts that contained a logo were printed, under certain conditions the logo would not print on all pages of the layout.

30162 Release Version 8.3.0.2 1

**WO - SERVICE SCHEDULE, Unscheduled Operations opens in proper the location but form header is for clerk's home location**

Corrected and issue with the unscheduled operations form location drop down where it was not properly updating to the selected location even though the data was correct for the location selected when opening it.

30279 Release Version 8.3.0.2 1

**WO - SERVICE SCHEDULE - NEW APPOINTMENT, Grid allows sorting / filtering and updates improperly**

The Edit Schedule grid under Add New Appointment was incorrectly allowed to be sorted. Then if the clerk added techs, the grid would update and improperly assign the techs to the wrong operation. The grid has been corrected to follow standards and not allow sorting or filtering.

684 Release Version 8.3.0.2 1

**WO - WORK ORDER DEPOSIT - MULTI-CURRENCY - Cash Receipt can't post [18479]**

Corrected an issue with clicking the create deposits link from the work order and attempting to take a deposit when cash receipts is running in multi-currency mode. The currency would not properly convert forcing the deposit to be taken from cash receipts and linking to the work order.

System Administration

New Feature

30965 Release Version 8.3.0.2 1

**SA - CONFIGURATION - INVENTORY MANAGEMENT - ORDER ENTRY, Add grid to parameters to allow excluding items from sales reporting**

A new grid has been added to Inventory Management parameters on the Order Entry tab to allow specific non-merchandise/inventory (Bill Codes) to be excluded on the Sales by Customer Service Rep report. Items entered in the grid will remain excluded from CLSA reporting until they are removed.

31206 Release Version 8.3.0.2 1

**SA - CROSS REFERENCES, Add REBUILD.CLSA to drop down listing**

The Cross References menu has been updated with the CLSA File cross reference. It rebuilds the sales data for the Sales by Customer Service Rep report.

**Bug**

23369 Release Version 8.3.0.2 1

**SA - UTILITIES - COMBINE 2 CUSTOMER RECORDS. Does not properly update Opcode Bill To Customer for Work Orders, Estimates, Templates**

Corrected an issue with the bill to customer name not getting updated when the combine two customers utility was run.