New Features for Version 8.0

General

- The Menus have been reorganized to be in alphabetical order
- There's are NEW tool-bar icons that are bigger (XP style)
- A filter feature has been added on 'columns' in the edit lists.
- All 'date-pick' fields now have a 'drop-down' calendar date.
- Additional phone numbers have been added to the company and stores information.
- Multiple reports can be previewed at the same time and other activities can be performed while in preview mode.
- When reports are sent to files, they automatically open.
- Reports that are written to a file are now outputted to the My Documents directory by default for easier recall.
- Screen and grid settings are now stored in the database so they will be the same, even when using another computer.
- Many configuration settings now have an option to 'Obsolete' the entry: Inventory-Adjustments, Advertising-Source, Customer Affiliates, Customer Types, Inventory Return Reasons, Job Types, Vendor Types, POS Void Reasons, POS Warranty Reasons. ***Note:*** You can still REPORT on the obsolete items, you just can't pick them for NEW entries.

Security

- There is a new User Access system with login and password.
- User Groups can be setup to make employee security settings faster and easier.
- Menu options are not visible to the user if they don't have access to that option.

POS

- You can 'link' Agents and/or Sold-to Customers to Bill-to Customers.
- Line item tax selection is now possible and the sales tax report totals for exemptions have been revamped.
- The Daily Deposit transaction number is now displayed in the POS payment grid.
- A Map button has been added in the Job tab for a quick-link to the MapQuest© map site for mapping Mobile jobs.
- The Invoice report now has an Auto/Flat selection.
- When a new Glaxis® dispatch is received, there is now a 'pop-up' message alerting you to it on all computers.
- The Glaxis ™ status icon displays a 'Glaxis polling' status that is always displayed.
- You can do a Job search by any/all phone numbers.
- When creating a job you can pull up a Mailing List customer by any/all phone numbers (Mailing List module required).
- Employees can now be setup as Auto, Flat, or Both for technician types.
- For Multi-Store customers, employees can be assigned to multiple stores without being setup as the head office location.
- The Job Search screen has been reorganized and many new additional fields have been added.
- There is now a field for the County on the Invoice for cash customers.
- You can type in the customer zip code and the City, State, and County will be auto-filled.
- There is a shortcut (CTRL-I) to edit the additional description for the line item.
- Even if a job is closed, you can now view all of the customer phone numbers using the drop down.
- You now have the ability to search for Closed or Void jobs.
- The CSR field now defaults to Mainstreet login the user used if that user is setup as a CSR.
- A Surcharge can be automatically added to the Invoice. ***See:*** Surcharge in the Setup Configuration section of the Administrator manual.
- You can assign required fields to specific customers.

- A different CSR can be added at each stage of the job: Quote, Order, Invoice and Job and tracked allowing you to know who quoted the job vs. who invoiced the job.
- Invoice forms can be customized, including adding/removing fields, changing fonts, adding a company logo and moving field positions.
- Multiple messages can be added to a job by selecting them from a list when printing or setting defaults for each job type. ***See:*** Invoice Messages in the Setup Configuration section of the Administrator manual.
- Can set Multiple Price-levels per Customer and specify the default price-level.
- New Credit 'Wizard' feature helps walk you through issuing credits.
- Now you can Save & Clear the order or Print & Clear the order without having to choose New.

Auto Glass
- New tree format for Auto Glass makes finding parts for glass easier.
- Improved auto glass descriptions in regard to attachments
- AGRSS fields now include: Lot#, DOT#, Primer#, Activator# and you can search on these fields in the Job Search.

Flat-Glass
- Large projects can be billed in chunks over time with the Progress Billing feature.
- Flat Glass dimensions can be added to the PO, Receive Items, and Transfers to correctly calculate costs and quantities to be received.
- Added ability to print item labels in POS and receipts.
- Added Square Inch to the units available in the Parts file.
- The Dimension Method for the part, which includes 440+ shapes, can be changed to any shape at order time.

Scheduler
- Print the schedule as it looks on the screen.
- Additional tech types may now be added (i.e. Estimator).
- The view setting is held if you change it.
- Pager, Cell Phone, and Email fields have been added to the Employees file. These fields then show up in the Tech list in the Scheduler window.
- Techs can now be setup as Auto, Flat, or Both as the Tech Type eliminating having to setup the employee twice.

EDI
- Ability to re-print the EDI-Status report for a specific close-out date.
- The Dispatch number and/or Referral number displays on **Status** and **Unacknowledged** report.

Mailing List
- You can create, edit, and customize Word® documents for Mail-Merge printing that allows you to send out follow up letters, thank-you's, promotional messages, or whatever else you can think of to reach your customers.

POS Reports
- All 'date-pick' fields now have a 'drop-down' calendar date.
- You can simply press the letter 'B' to select Jan-1 of the current year for quicker yearly reports. You can also press the letter 'T' to select TODAY as the date.
- Added job location to POS invoice report, cleaned up empty lines.
- The Open Order Report now includes a CSR, Shop/Mobile, Job Type, and Auto/Flat selection.
- The Open Quote Report now includes a CSR and Auto/Flat selection.
- There is now a cash basis Use Tax report.

A/P

- Payroll amounts will be hidden on the check register if the user has ‘no print check’ access.
- The check amount will be hidden on a voided check form if the user has ‘no print check’ access.
- The Invoice/Bill Entry program now has a ‘Save & Continue with same Vendor’ option.
- A Bank Reconciliation can now be Re-Opened through the Administrator module.
- The Bank Reconciliation has been enhanced to be more User-Friendly (<Enter> checks and moves to the next line. <Alt-T>takes you directly to clear-items, different Withdrawal & Deposit amount columns, etc.
- If an amount on an Invoice was posted to the wrong GL account and has already been paid, you can now Edit and Save the G/L account posting. You still will not be able to change the amount.
- The G/L accounts on Miscellaneous Checks can now be Edited and Saved if they were posted incorrectly.
- Bank/Checking-accounts can be marked as INACTIVE but still be reported on.
- Miscellaneous Checks can be printed for an existing bill that was already entered through the Invoice program.
- Invoices can be entered in and paid using an EFT or CREDIT CARD payment method.
- The Vendor file allows you to select the Payment Method you normally use to pay that vendor.
- EFT and CREDIT-CARD purchases can be entered in without printing checks.
- A Credit-Card Bank-Account reconciliation program has been added so that credit card transactions can be verified so that none are missed or entered with incorrect amounts.
- Miscellaneous Credit-Card purchase can be added through the Misc.-Checks/EFT/Credit Card Receipts program.
- Multi-Store Daily Deposits will now file to the AP Journal by the store location based on the location that the AR payments were posted.
- A button has been added to the Items tab in the Invoice program to ‘receive-ALL’ items.

AP Reports

- The Check Register report will now print ‘Void Items Only’.
- Miscellaneous Check amounts will show on the Payments and Vendor Purchase Summary report.

Purchase Orders

- You can now add a part on the purchase order and link it to an invoice number and the part number no longer has to match if it is a flat glass part. This allows you to bill out your part number, while ordering using the vendor part number on the purchase order.

A/R

- A new Collection System allows you to view a Customer’s entire list of open items as well as a complete history. It also allows you to add notes to keep on file regarding their account. Any of the items on their account can be opened by simply double clicking the item.
- You can setup Multiple Price-levels for each Customer and specify a default price-level. When using the Price Level drop down in POS, that customers Price levels are listed at the top of the list so there is no need to search for their other price levels.
- The Daily Deposit now allows you to view payments for a specific payment type or multiple-payment types.
- The Daily Deposit for Multi-Store allows you to view payment transactions for a specific store or ALL stores.
- Additional phone number fields for Cell-# and Other-# have been added to the Customer account file.

AR Reports

- The Customer Activity report has been improved to include more detail and account balance information.
- The Payments report can be selected by the Customer's check number.
- The Detail version of the Customer List report now includes their tax-id, other phone numbers as well as a check-box to include any Notes that have been added to the Customer's file. You can also print the Customer List report for a specific price-level.

G/L

- The FULL General-Ledger Account and Name will display as a 'Tool-Tip' when the mouse is above the Account-Dropdown button.
- There is a new 12 Period Income Analysis report which includes an option to only include periods for the fiscal-year as well as a Comparative Balance sheet report that allows you to choose a 3-Year or 3-Month comparison
- You can type in the entire G/L account number in a drop-down list instead of just the first number.
- Many Balance Sheet and Income Statement reports have the option to include/exclude 0 balances
- The G/L account number/name field has been expanded in many screens to display more of the name.

Inventory

- There is now the ability for multiple IV-controlling accounts in G/L, based on the IV-Category of the part.
- The Receive-Items section now has a 'receive-ALL' items button.

Payroll

- The Employee master file now has fields for Cell-phone number and Drivers License.
- State-Unemployment tax can be set to be exempt per employee.
- Local taxes that are withheld are now based on the Employee city, not the Company city.
- Payroll register is now ordered by the Employees last name.
- The Employee List report can now be selected by Employee.
- Optionally print Sick/Vacation hours-used/available on the check stub.
- Deductions can be set as a '%-of-gross-pay'. I.e.) 401K= 2% deduction
- The YTD deductions/additions are printed on the check stub. I.e.) 401K
- Company-Side Addition/Deductions can be added such as a 401K match or Training-Tax.
- New reports: Employee Deductions and Quarterly State Unemployment.
- Direct Deposit checks print a check stub for each employees pay, but not an actual check. This is NOT an EFT to the company checking account, simply a method of recording the employees pay. An actual EFT transaction of the employees pay would have to be setup with your bank.
- Added 'SIMPLE-Retirement' deduction.