WinLine Version 10.2 Build 10002

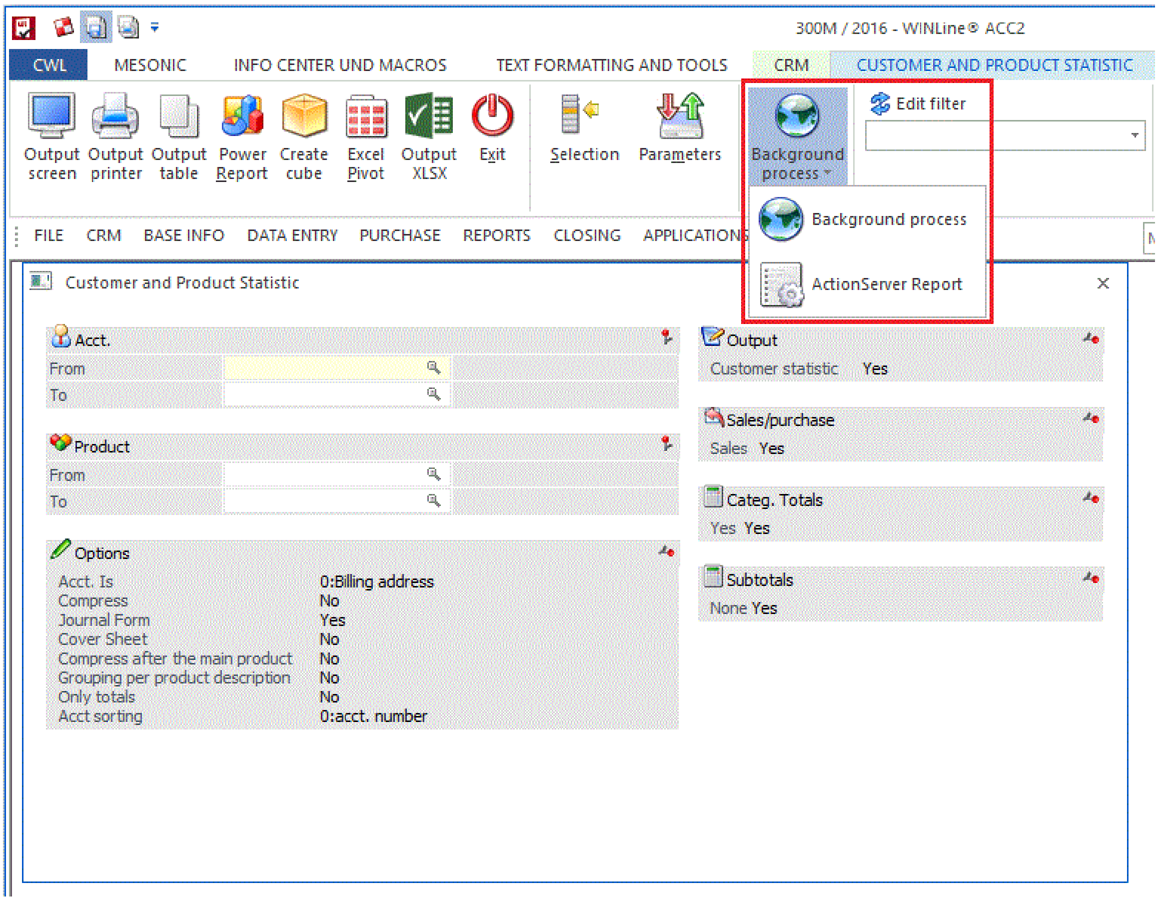
Listing Of New Program Features

WinLine General Features

Attention: This useful new report output mode lets you generate reports using parallel multi-thread processes while you continue working in other areas in the program!

WinLine Background Process / Action Server Report

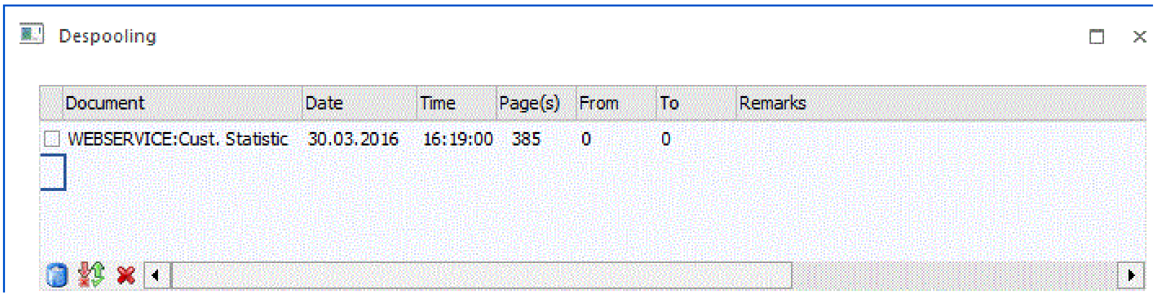
Using these new output modes, you can output even large, time-consuming reports with a "background process" while you continue to work at the same time on other actions in WinLine.



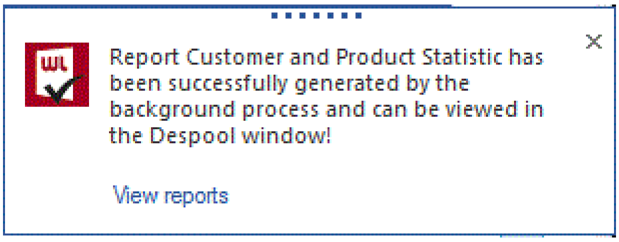
The new Background Process/Action Server Report button is illustrated above in WinLine ACC2 for the Sales Statistics report.

The WinLine Server (application server) must be started and running to use this new report output method. Normal WinLine users, i.e., users who are neither Enterprise Connect or Mobile Connect users, can also use the Background Process output mode when the WinLine Server is running.

When the report is finished by means of the background process, it is automatically inserted to the Despooler window (background process generated reports are denoted with prefix "WebService").



An alert is also shown in the Window taskbar containing a link to open the report in a window on the screen.

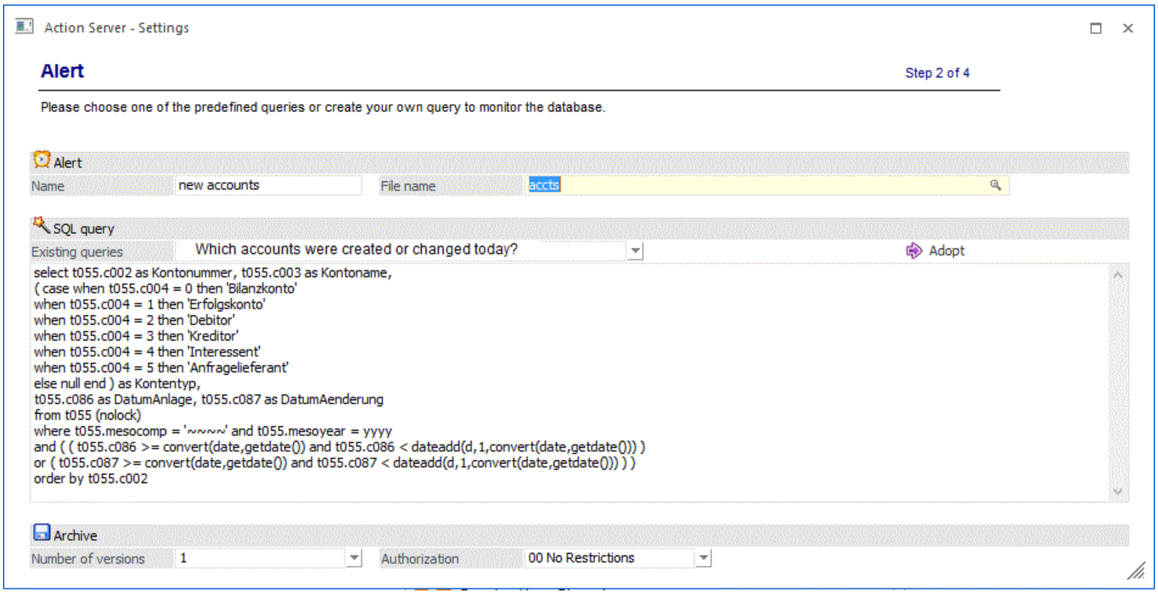


Using the ActionServer Report mode, you can set up the report on-the-fly to be generated by the Action Server, either on a one-time or periodic basis.

Note:
The WinLine Server (formerly named the Enterprise WinLine server) is now installed automatically in a new installation or when updating to this version. The configuration settings for the server remain the same as in previous versions. The WinLine Server is required for the new “Background Process” reports (see previous chapter).

WinLine Alerts

A new type of action is now supported in the Action Server that generates alerts based on a SQL query of the WinLine DB. Several pre-configured queries are available for use in the release version (e.g., an alert that generates a report displaying all newly created or changed accounts for the day). New SQL queries can also be set up for your own kinds of alerts.



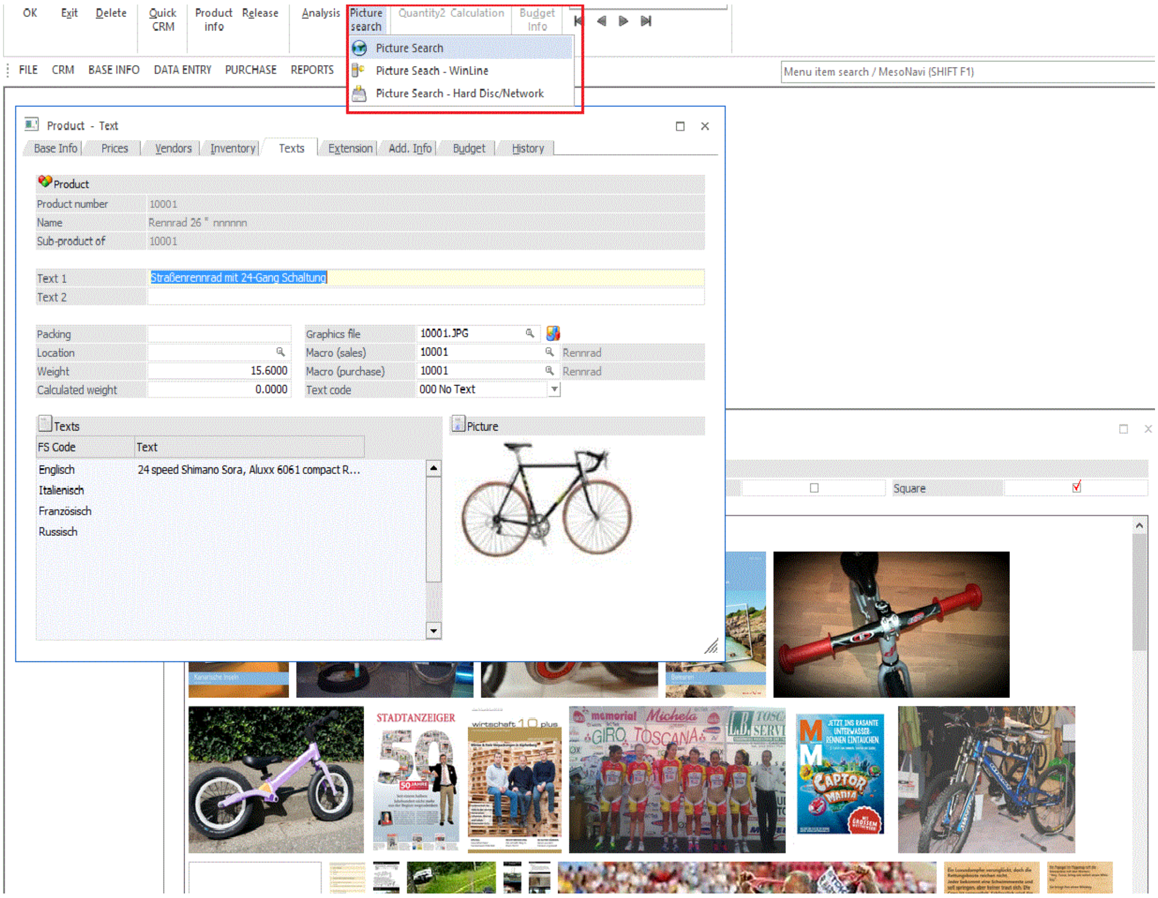
The pre-configured SQL query for new and changed account alert has been loaded for a new alert action in the ActionServer definition window.

A CRM action step can also be triggered automatically when the alert is generated and the results can be displayed in a CRM list in a WinLine Cockpit. The alert report generated by the action is automatically attached to the CRM action step.

Attention: Useful new function!
Images can now be accessed, selected and edited from one of several different sources for use in WinLine!

WinLine Picture Search – Image Processing, Management and Storage

Images can now be searched for directly from the Internet (via Google picture search), from the local network or hard disc, or from the WinLine database.



Searching for an image via Google picture search in a browser window is illustrated above in the Product Base Info window.

Images that are found in the Picture Search window can be edited by a double-click on the desired image.   The selected image can then be cropped for saving in the WinLine database.

The new Picture Search feature is supported in the following areas in WinLine:

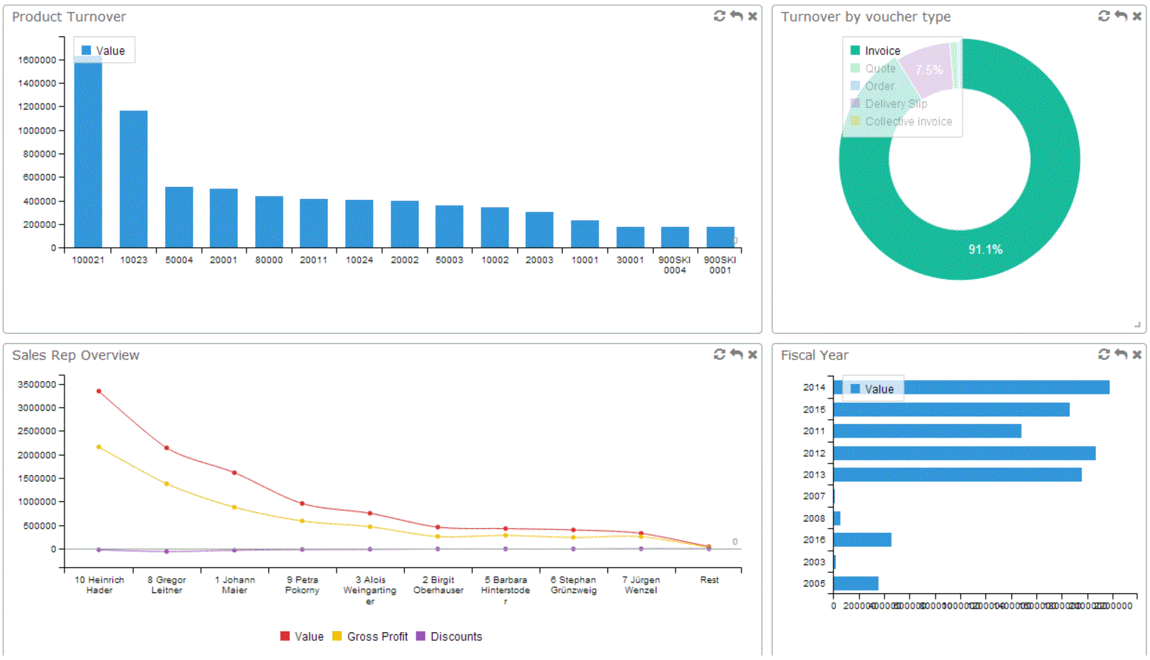
WinLine ADMIN – "User Setup" window
WinLine START – Contact Base Info
WinLine ACC1/ACC2 – AR/AP Account Base Info
WinLine ACC2 – Prospective Customer/Vendor window
WinLine ACC2 – Sales Rep Base Info

WinLine ACC2 – Product Base Info (sub-tab "Text")

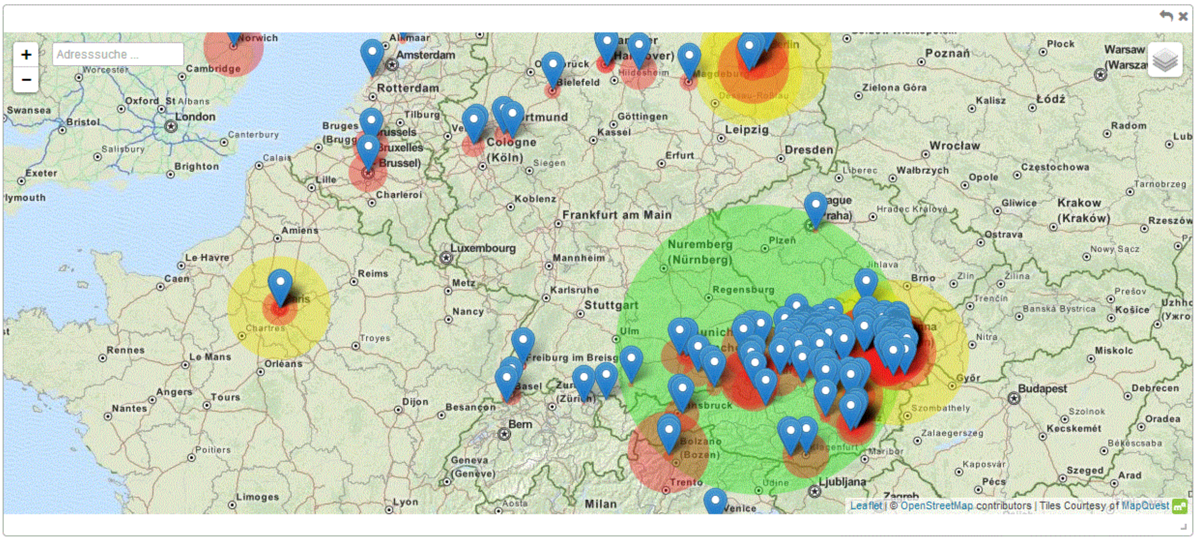
WinLine Power Reports – New Chart-Based Reports

The new WinLine Power Report is a chart-based report type that uses data generated by the WinLine OLAP tool. The chart reports are highly interactive and can be quickly filtered and configured in layout. The Power Report output mode is supported for WinLine lists, OLAP cubes and other selected reports in WinLine (i.e., print button "Power Report" is display for the report).

WinLine lists can be inserted into the WinLine Cockpit as a power report (the Power Report is a widget control).



The new geo data (see feature description below) can be accessed in Power Reports as a geomap. In this connection, Power Reports in the form of maps can be output for geographical displays. This mode is supported with lists of type AR/AP account, sales statistics and (contact) address data.



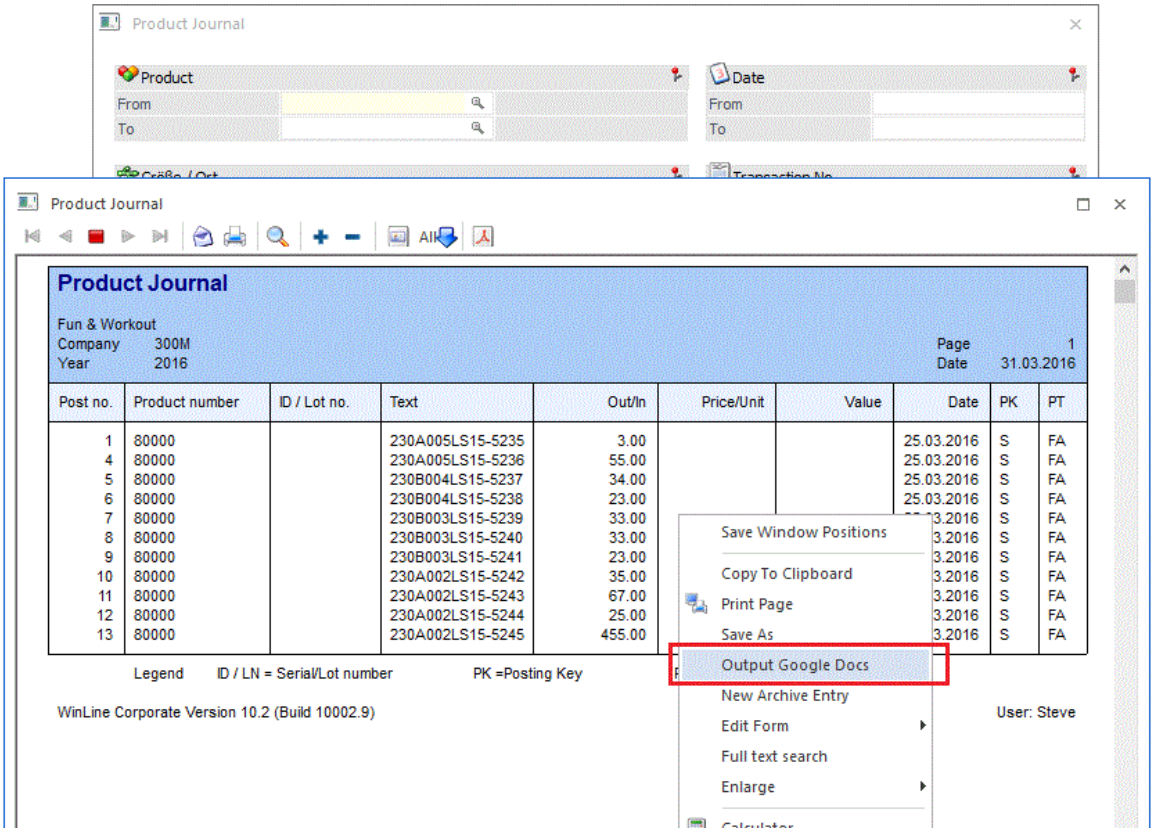
Document Management with Google Drive

WinLine now features an interface with Google Drive that can be used to store and edit documents on a shared basis. Google Drive is a file-hosting service of Google Inc.. Space of up to 15 GB is made available in the standard account for users with a Google account.

Documents can be uploaded directly from WinLine in the following areas:

Upload from report screen preview

Right-click with the mouse in a report screen preview and select the "Output Google Docs":



Backup Assistant in WinLine ADMIN

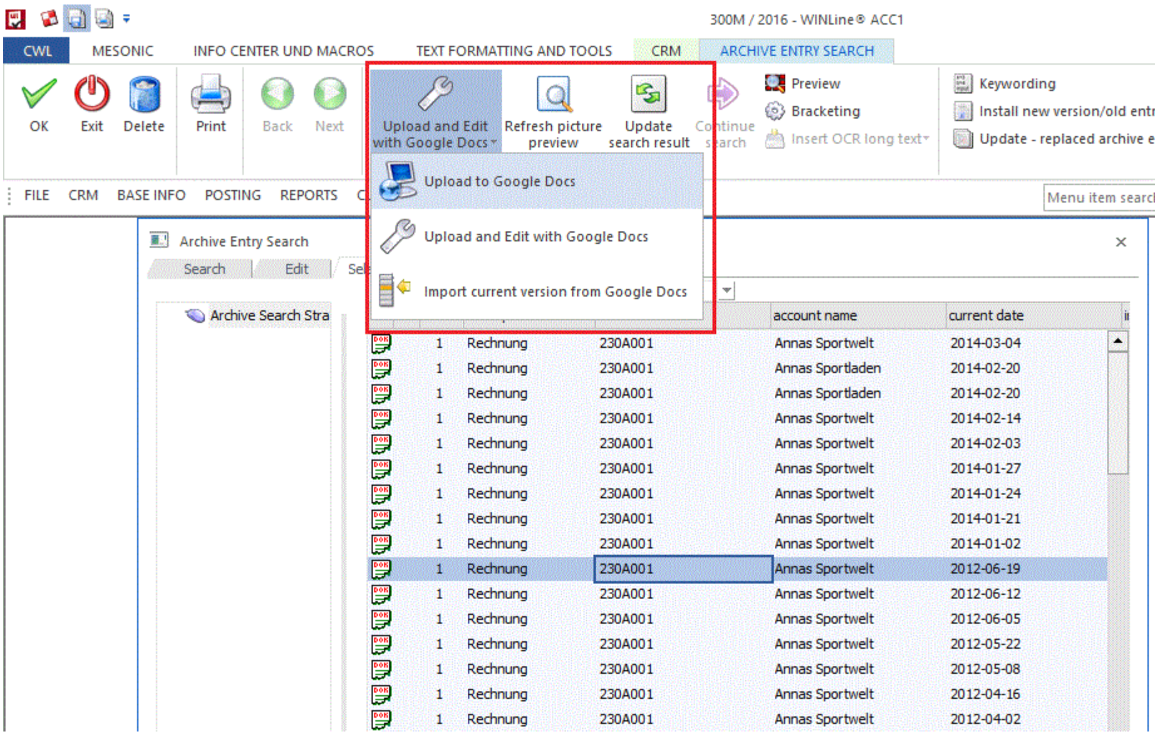
Backups generated in WinLine can be directly uploaded to Google Drive.

Trial Balance Report

The "Trial Balance" report can now be output as in MS Excel chart format and then automatically uploaded to Google Drive as a document.

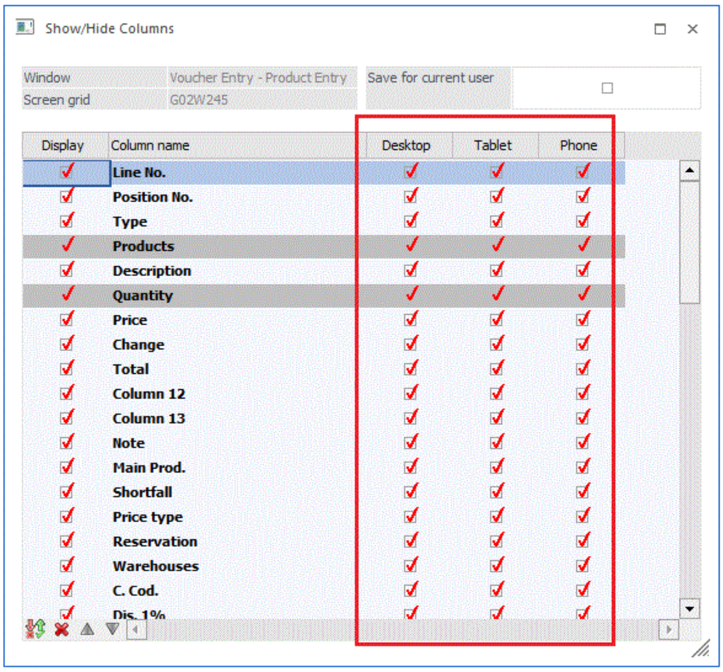
Search Archive Entry

WinLine Archive entries can now be uploaded from the "Archive Entry Search" window to Google Drive and optionally also opened for processing in Google Drive (using one of the Google Drive document editing components, e.g., Google Docs or Google tables). The editing document can then be inserted as a revised archive entry into the WinLine Archive.



DTP Settings

The screen display can now be configured for use by a particular end device (DTP = Desktop/Tablet/Smartphone).



The screen configuration options are available in the following areas in WinLine:

- WinLine Display Grids – Menu item "Show/Hide Columns"
- WinLine START - Cockpit Definition
- WinLine INFO - Cockpit Definition
- WinLine INFO Settings

Office Addin - Office Addins for MS Office 2016

The mesonic Addins Version 10.3.6 offer support for Office 2016.

Update to Version 10.2 – New System Database Table 220CMP

A new system database table, T220CMP Geodata, is automatically installed during the update to WinLine Version 10.2. The geodata contained in the table are organized by ZIP codes for millions of locations. The information is accessible in the new Power Reports feature, e.g., in connection with AR/AP account reports based on location analysis.

User-defined Columns in Grid-Displays with Column Filter

User-defined table columns can now be insert via window script in Output Table view windows (e.g., ACC1 Journal, output mode "Output table"). All functions (filter, sorting and grouping) are supported for the inserted grid column.

WinLine START

Settings – Number of Entries in the Filter Selection

A new field, "Number of entries in filter selection", is now available in sub-tab area "Admn" in the "Settings" window in WinLine START. Using the field, you can set up globally the maximum number of filters that will be displayed for selection in the filter selection combo box in various areas of the program.

Cockpit Definition – DTP Settings and Color Selection

The following new features are now available in the Cockpit Definition window:

1. Columns "Desktop / Tablet / Phone"
You can decide by checkbox which Cockpits elements are displayed respectively on one of the three types of end device.

2. Color
The color of the Cockpit element icon is by default steered by the first letter of the name of respective element. Using the color settings, you can override this logic with the corresponding selection box. The following variants are available:

- 0 - Automatic (default)
- 1 - Turquoise
- 2 - Green

- 3 - Blue
- 4 - Violet
- 5 - Yellow
- 6 - Orange
- 7 - Red

Conversion of Contacts

When converting a contact record to an AR/AP account or a contact person of an AR/AP account, the following telephone numbers are assigned as follows:

Base Info: business phone number without extension is mapped to the telephone field. Private phone number is discarded, fax number is adopted to fax number (without extension) and the cell phone number is adopted directly.

All numbers are adopted for standard contact persons.

Display Voucher Info as PDF via Webservice

The Voucher Info (from ARCHIVE) can now be called via WEBService by using a macro.

ACC2 Parameter - New Option "Open as simulation" at the offer level

New option, "2 Open as simulation", is located in the ACC2 Parameters in settings area "Vouchers, BOM/Kit Lists". When the option is set, the new Production Simulation Project window is opened for order-based vouchers at the offer level. Option "1 open as production project" corresponds to the checkbox in previous versions, by which a production project can be generated during entry of an offer.

ACC2 Parameter – New Option "GL Accounts without authorization"

This new option is located in the ACC2 Parameters, settings area "Vouchers, General".

When the option is activated, GL accounts can be used in Voucher Entry for which the user has no authorization (i.e., override of the authorization profile for the GL account).

Cockpit Definition – Editing of Cockpit Settings for WinLine Lists

A new grid button "Cockpit Settings" is now available in the list selection area in the "List - Cockpit Settings" window. This new option allows you to edit all settings for a list in connection with the Cockpit.

WinLine ACC1

Payment Transactions – Window Redesign

The Payment Transaction window has been redesigned and various buttons have been altered.

The payment batch selection step has been expanded with a payment info display area per batch.

A navigation tree menu is now available at the left of the window for moving back and forward between steps in the Assistant.

The selection grid for editing the invoices to be paid is now a separate window. It is no longer automatically opened, since the assignment of invoices to a payment batch is saved when the "Output" mode is opened.

Several additional kinds of information are now displayed in the selection grid for editing invoices (OIF display, OI text, etc.). A new display area, "Error list" is located in the lower part of the window. Plausibility errors in connection with bank account data for SEPA transactions are displayed in this area.

The bank account window can be opened with the "Banks" button, when the focus is set to a grid line containing an account.

Note:
MDP partner projects should be checked for correct functioning in this window after the update.

Balance Sheet / Profit Statement Report – Redesign

The previous two report window for generated the report have now been reduced to one window.

Note:
MDP partner projects should be checked for correct functioning in this window after the update.

Existing WebService calls for the balance sheet need to be adapted since now only window ID 168 is used. Additional window calls for printing the balance sheet are no longer needed.

Balance Sheet – Output Table

Up to 29 companies can now be compared when issued a consolidated balance sheet in the "Output Table" mode.

Output Table Display Mode – New Option "Detailed Output"

A new button, "Detailed Output" is now available when the ACC1 Journal or Account Sheet report is displayed in the "Output Table" mode. When the button is pressed, a separate line is shown in the output grid for each account in the posting. The following columns are altered in the display:

- Instead of the 'Debit' and 'Credit' columns in the grid, column 'Account' is listed in the grid.
- Instead of column 'Amount', the detailed info grid contains columns 'Debit amount' und 'Credit amount'.
- an additional column 'Contra Account' is displayed in the detailed info display grid.

File Copy Output Report – Semicolon character

During output to a TXT file in WinLine ACC1, the program checks whether the selected delimiting character is contained in a posting text or in a voucher number. When this is the case, the character is removed from these locations for the output of the Journal and Account Sheet, so that a column shift is not triggered during electronic processing of the output file.

File Copy Output Report – Period Selection

A restriction of output by fiscal period can now be set in the File Copy Output report in WinLine ACC1 for the following variants:

- Journal
- Account Sheet
- Trial Balance

SEPA Payments – SEPA Files for Foreign Banks

A mesonic.ini parameter is required for generation of SEPA clearing files for banks with country code that is not either D (Germany) or A (Austria).

[CLEARING]
CreateForeignSepaFiles=1

The following parameter is required to create the SEPA clearing file according to the respective country rules:

CreateForeignSepaFilesCountryCode=A
or
CreateForeignSepaFilesCountryCode=D
or
CreateForeignSepaFilesCountryCode=I

When the additional parameter is set in the mesonic.ini, the foreign SEPA file is generated according to the respective country rules: (A=Austria, D=Germany and I=Italy).

Creditor ID

By means of the following mesonic.ini entry, the validation routine for checking the Creditor ID in Company Base Info is suppressed during generation of SEPA clearing files:

[Clearing]
CreateForeignSepaFiles=1

Note:
When a German or Austrian Creditor ID has been assigned, the validation routine is applied, even when the mesonic.ini entry is set.

Tax Report Generator Report – Tax Totals

Tax totals are now printed for each tax code in this report.

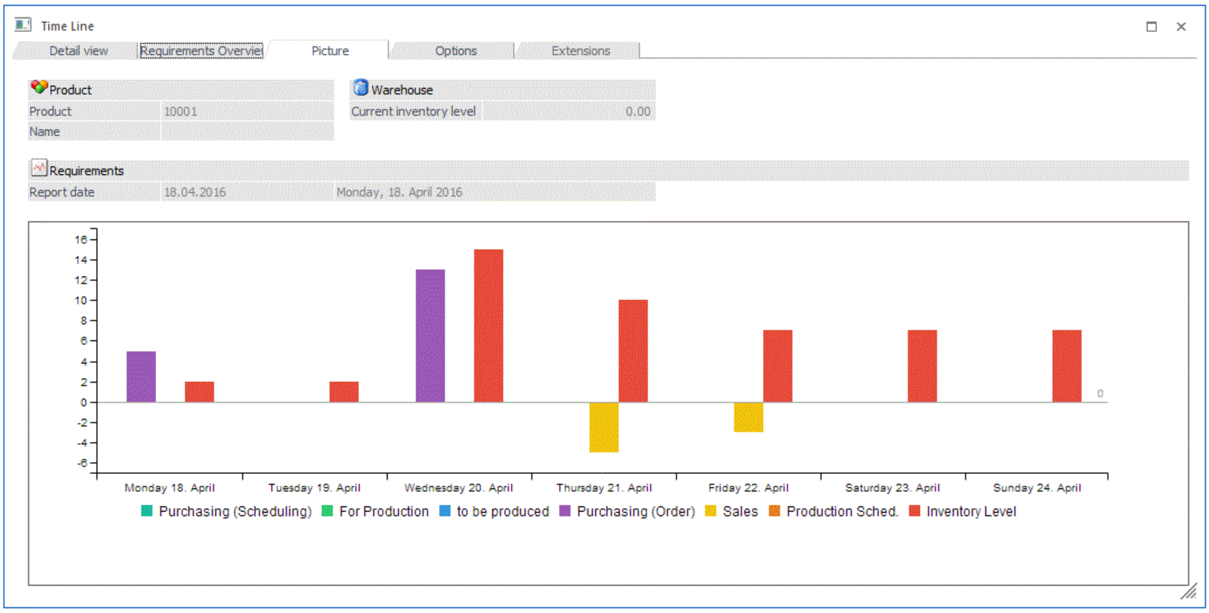
Posting Real Time Batch – Asset Base Info during Posting

New asset groups can now be set up while entering asset base info during posting of a vendor purchase invoice in the Posting Real Time Batch window.

WinLine ACC2

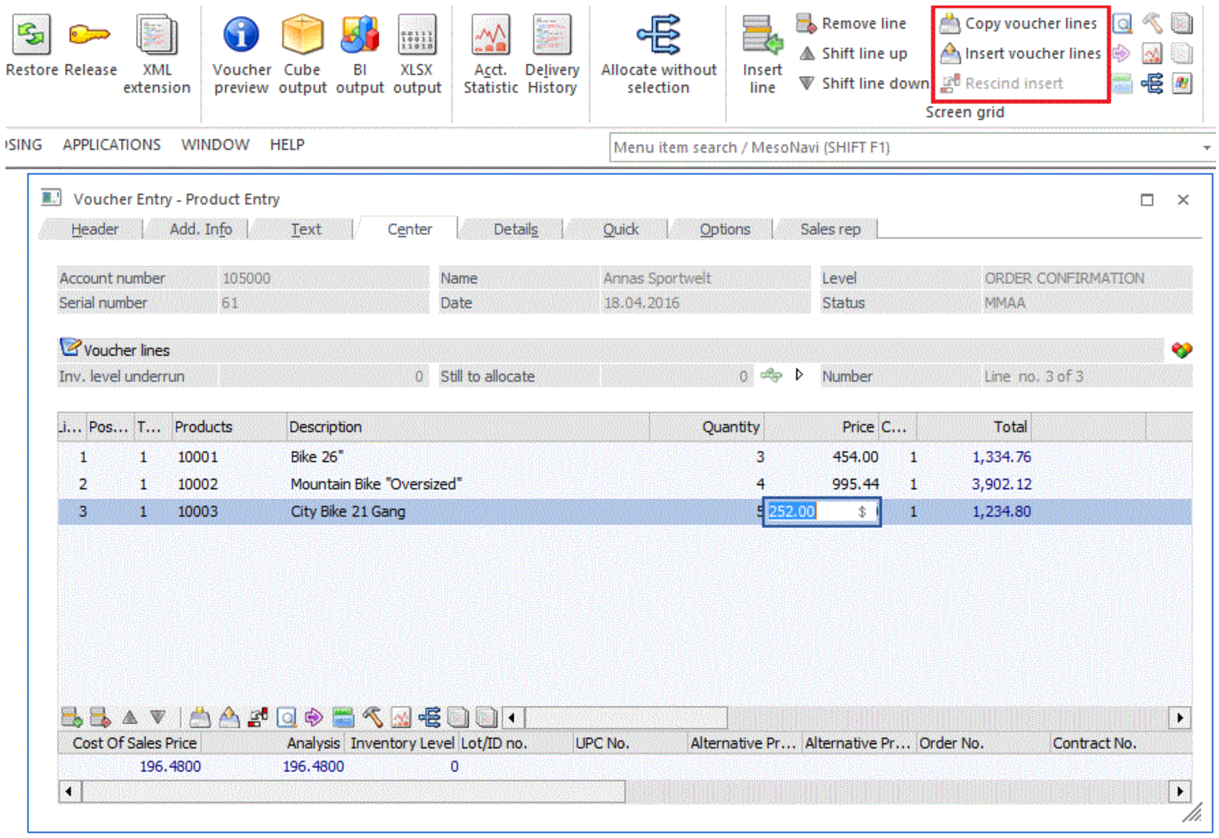
Preview Product Requirements Window - Number of Posted Invoices

The Preview Product Requirements window now features a new tab area for displaying a Power Report chart of the product scheduling data.



Voucher Entry – New Options for Copying Voucher Lines

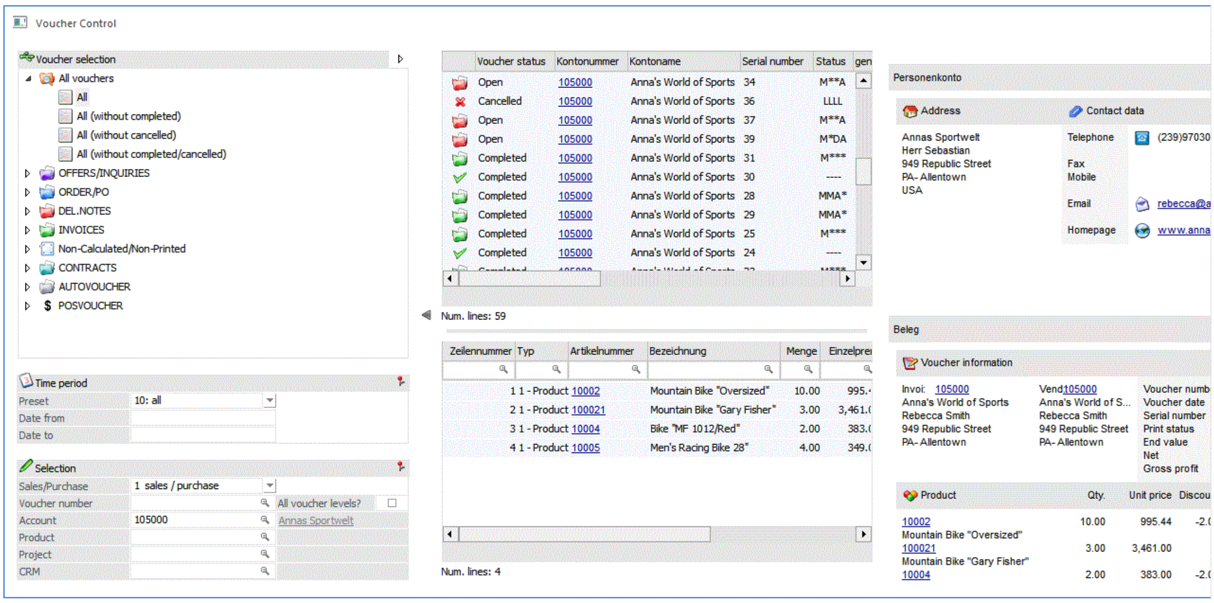
Three new buttons are available in the product entry tab area of Voucher Entry for copying, inserting and rescinding voucher lines from one voucher to another.



Voucher lines can be marked and then copied to the clipboard with the Copy Voucher Line button. They are then inserted into another voucher, for example, another "parked" voucher with the Insert Voucher Line button. Up to 10 inserted lines can be removed with the third button.

Voucher Control – New Window for Managing Vouchers

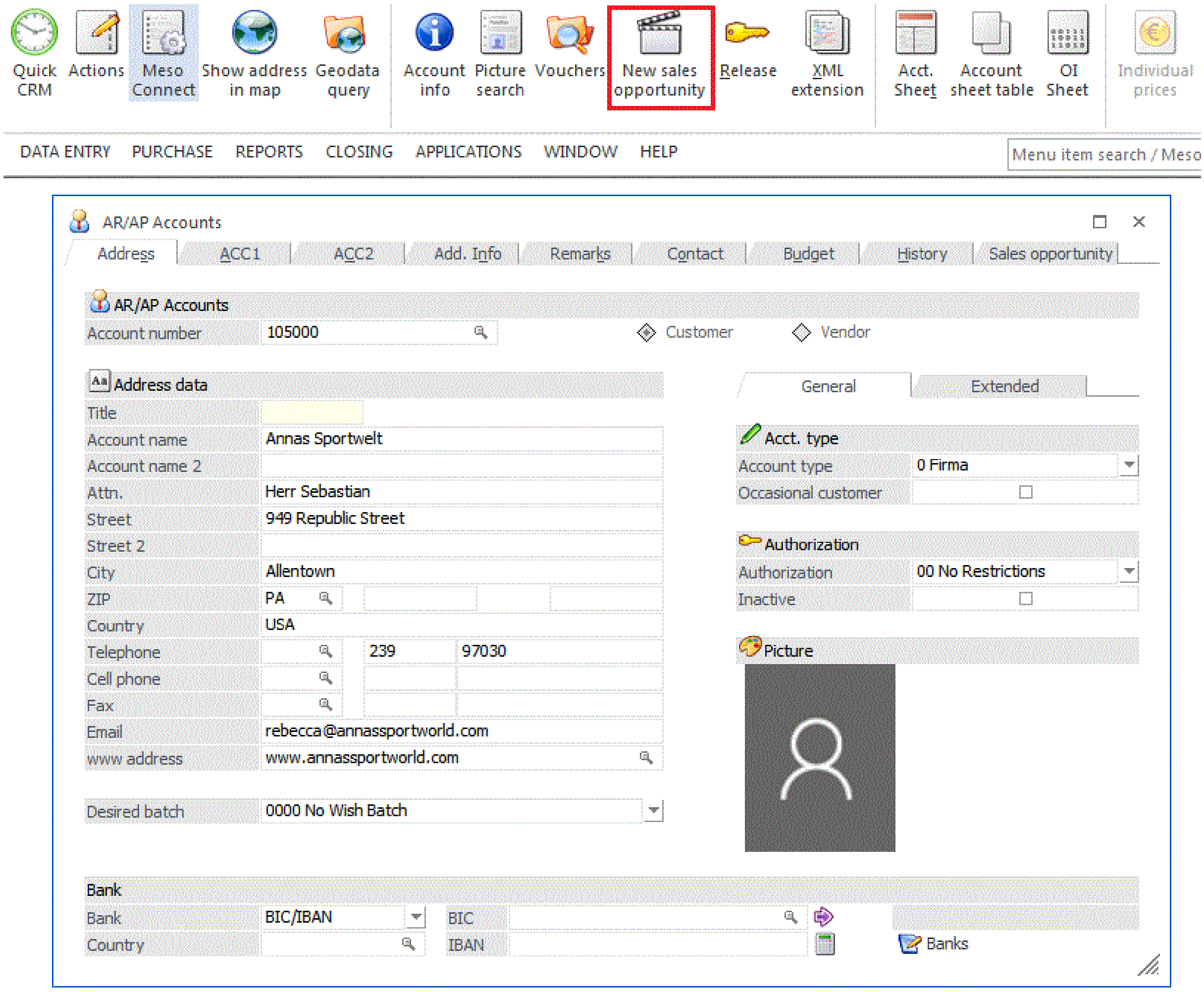
This new window offers a structured approach to displaying voucher header and voucher center lines, which are selected with a range of selection filter options.



Various processing options can be performed on the vouchers displayed in the windows, i.e., conversion to a higher voucher level, voucher copy, voucher cancellation, print voucher.

New Project Type – Sales Opportunity Projects

A separate new window, Sales Opportunity, is now available in the Project Management menu. Sales opportunities are a new kind of project type in WinLine. A new sales opportunity can be set up directly from the AR/AP Account Base Info window, as well as the Prospective Customer/Vendor Base Info window.



Invoice Register: New output modes, Consideration for non-posted invoices

New output options Power Report, Create Cube, Excel Pivot, and Output XLSX are now available for this report.
Using new option "Observe not yet posted invoices" you can include invoices in ACC2 posting batches -1 to -12 in the output variants: Power Report, Create Cube and Output XLSX.

Sales Statistics – Locked variables

Locked variables are now observed in the Sales Statistics I and I (screen display, table output, BI output, cube output, etc.). The locked variables are displayed with either *** or 0. The Gross Profit column is not filled (table or XLSX output) when the gross profit variable is locked.

Voucher Entry – Voucher Entry for users with locked variables

Locked variables are observed in the cube, BI and XLSX output from Voucher Entry (display with 0 or ***).

Product Journal – Product Journal with locked variables

Locked variables in the Product Journal (T083) are observed in the cube, BI and XLSX, screen and printer output (display with 0 or ***).

Product Period List – Product Period List with locked variables

Locked variables in the Product Journal (T308) are observed in the cube, BI and XLSX, screen and printer output (display with 0 or ***).

ACC2 Formulas – User-defined table columns and voucher line formulas

Variables corresponding to user-defined table columns (i.e., variables >= 500) can now be used in voucher line formulas. Values in user-defined grid columns can therewith be populated with a voucher line formula.
Additionally, variables from a MDP window script (view 495) are also exposed in voucher line formulas.

Collective Invoices – New Grouping Code for Printing of Collective Invoices

A new field, "Grouping for CI", is located now in sub-tab area "Additional Info" in the Voucher Entry and Telesales windows. A 10-place alphanumeric code can be entered in the field as a sorting criteria when printing collective invoices.

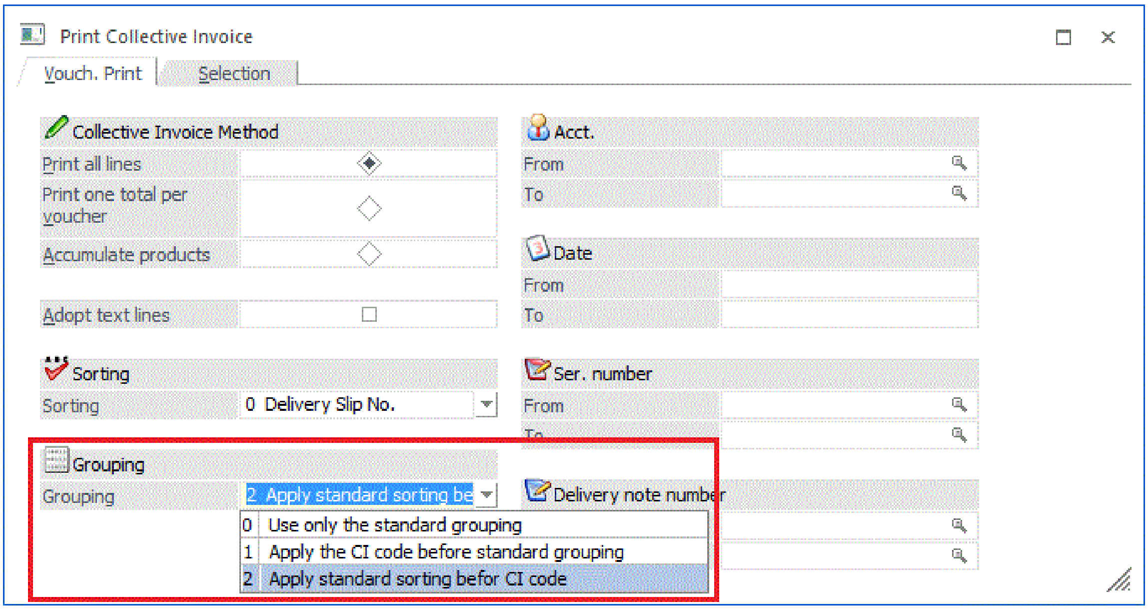
The new field is also supported in voucher templates, i.e., for use in individual form templates for vouchers and for export/import of vouchers.

A new combo selection box is available in the "Print Collective Invoice" window with the following options:

- 0: use only the standard grouping
  This option corresponds to the function in previous WinLine versions. (The delivery notes are sorted – within an account number – by foreign currency, gross/net code or price list, print status of the delivery note and voucher discount. The new grouping code is thereby not applied.

- 1: Apply the CI code before standard grouping
  The Grouping for CI in the respective delivery note voucher is applied for sorting before the standard group (i.e., before option 0).

- 2: Apply standard sorting before CI code
  The new grouping code is applied after sorting (DN number, DN date, etc.).



The new sorting code can be used, for example, to sort delivery notes for the same customer, but with different bank payment data, so that the collective invoices are sorted first by bank payment info.

Vendor/Customer-specific Price List Report – New Output Variant

This report can now be issued in the "Output Table" mode. The output can also be exported to MS Excel.

E-Billing – Expanded Options For Export to XML file of Vouchers

Version 10.2 contains several kinds of improvements and extensions to the existing E-Billing Voucher XML Export functions. Direct access is now supported to many additional Base Info and Transaction fields for use in the XML export template.

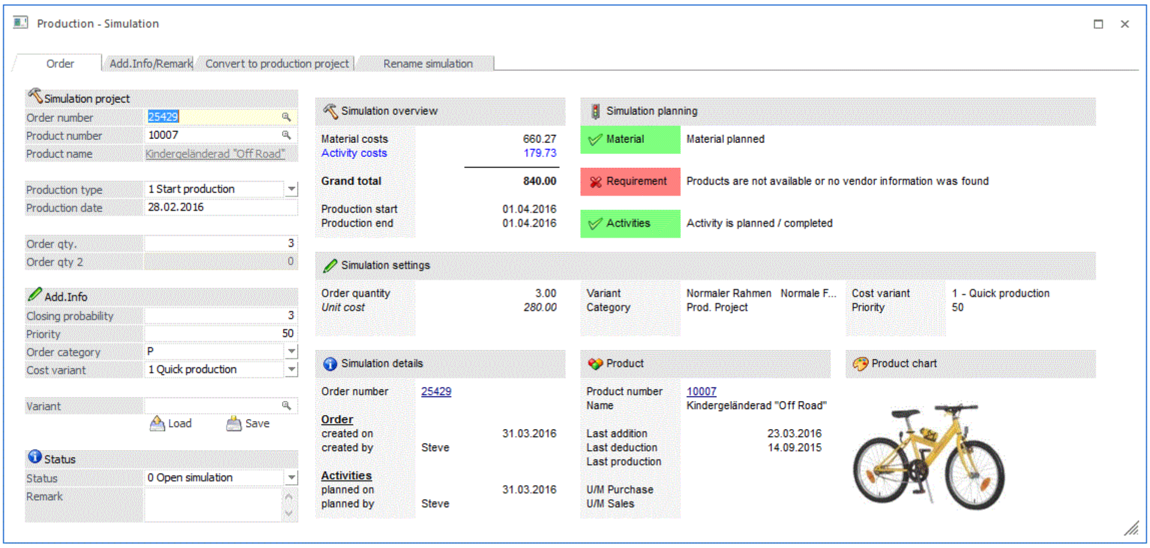
WinLine PPS

The production module has been renamed to ***"WinLine PPS"*** *to reflect the large number of new and existing features that have now been incorporated into the production module.*

Attention: major new feature!
A whole new class of production project, simulation projects, is now available for simulating production schedules and costs by means of several variable input factors. Using the new simulations, you can run alternative "what-if" scenarios for production scheduling.

Production Simulation – Simulation Projects

Simulation projects can be generated in two menu items in WinLine:
- Voucher Entry in ACC2 during offer entry (see ACC2 Parameter setting)
- Manual entry in new window "Production Simulation" in WinLine PPS



When a simulation project is generated during offer entry, it is automatically converted to a production project when the offer is converted to a customer order. The simulation is preserved, however, and receives status "finished". In this manner, it is possible to later compare the simulated values with the planned production values and also the actual values after production completion.

Based on a tentative delivery date, you can perform "what-if" scenario analyses in a simulated environment, taking into account the actual material and resource commitments for currently scheduled production projects.

Activity Base Info – Cost variants "standard/quick/cheap" production

A new combo selection box, "Cost Variant" is available the Activity Base Info window. Three cost variants can be selected: "standard production", "quick production" and "cheap production".

All the field settings in the window can be individually set for each cost variant for a particular activity. (In this manner, an activity can now represent up to three separate activity variants). You can choose to adopt the settings of an existing variant when setting up a new variant.

Cost variants that are not set up yet, are denoted in the selection box with a "*". All existing variants are saved at one time when the OK button is pressed in the window.

The new cost variant can be selected during generation of a production or simulation project.

PPS Base Info – New window "Production project categories"

This new window can be opened with menu item "Base Info/Categories" in WinLine PPS. Categories can be set up both for production as well as simulation projects. Each category can be assigned a "from priority" value.

Example:
Priority 0 to 50 = Production offer
Priority 50 to 100 = Production projects
Priority 100 to 500 = high priority production projects
from Priority 1000 = Production projects with highest priority

A production category can be selected during creation of a production or simulation project. The corresponding minimum priority value is then automatically set for the project. In this sense, the category serves as a quick selection method in order to prioritize a project during creation.

Graphical Control Panel – Resource Calendar Report

When you double-click on a production project bar (or the production project in the tree display), the Resources chart report is opened for the respective project. The resources planned for the project are displayed in a chart display.

Production Modification – Material requisition correction slip for partial material requisitions

When a BOM part that has already been partial requisitioned is removed in the Production Modification window, a material requisition correction slip is automatically generated. A corresponding inventory posting (reversal) is generated at the same time for the part (or parts) that has (have) been removed.

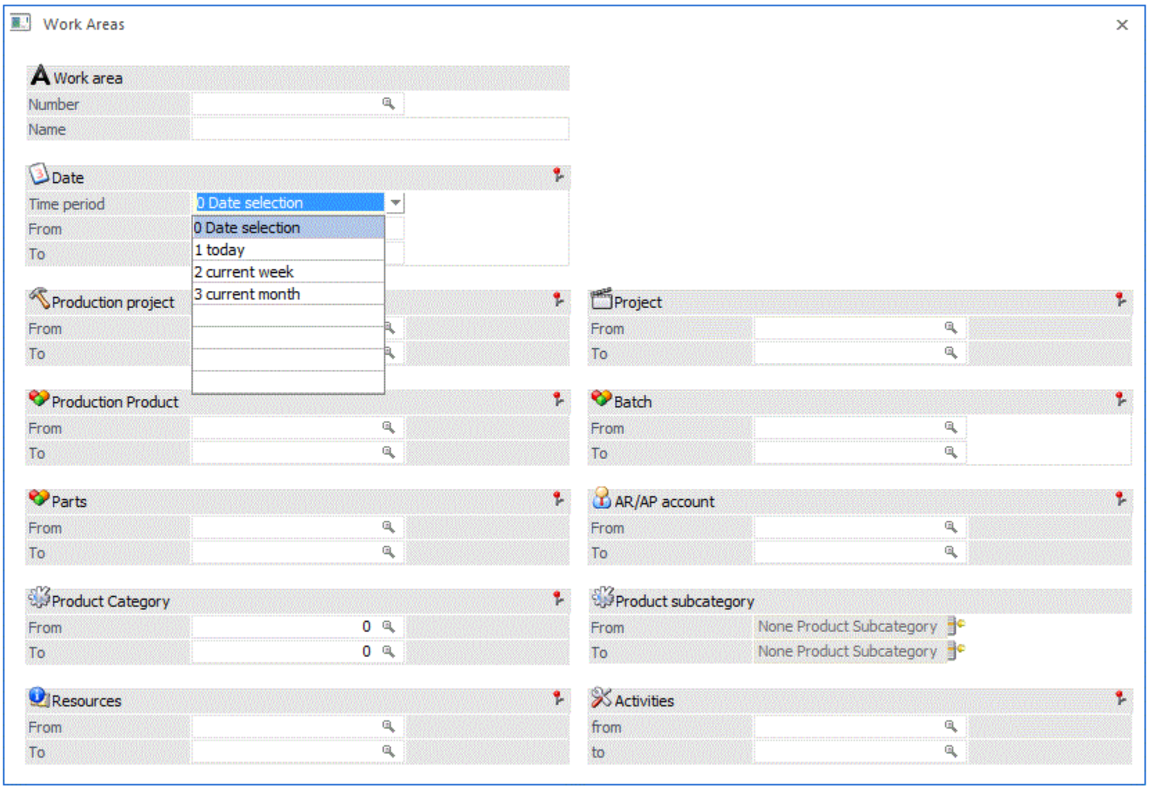
Reserving Resources Report – New Variable for Output

Form P99W183 now contains variable "0/47 ACT hours". Using this variable, you can output the total of all entered ACT times for a resource or resource group in a respective time period (day, week, and month).

Work Areas Base Info – New selection restriction fields

Several new selection fields have been added to the window:

- Date selection mode: 4 different modes (by date, today, current week, current month) can now be set for the respective work area
- "From/To" fields: parts, batch number, project, AR/AP accounts, and activities

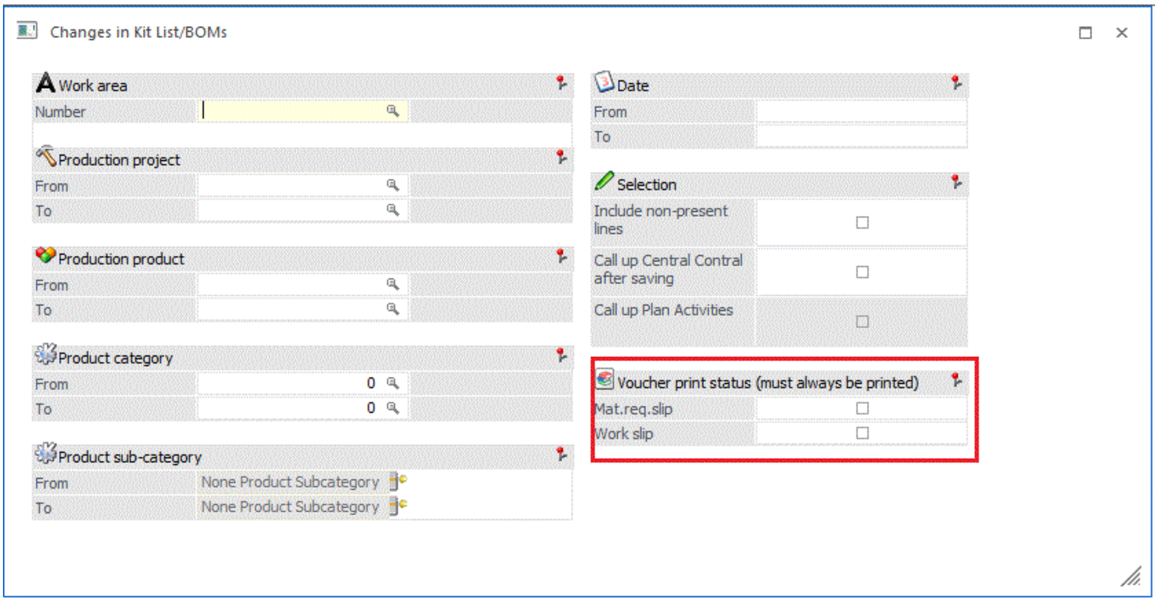


Final Run Report – Invalid COST entries during Final Run Report

When a non-existing cost center or cost type assigned to a resource being used in a project during the final run report is detected, the final run report is no longer aborted. The focus is now set in the first grid line containing an invalid cost entry. A warning text, "cost center or cost type not set up" is also shown. The final run report can first be completed when all COST entries have been changed and are valid.

Changes in Kit List/BOM – Check for printed material requisition or work slip

The second step of the "Changes in Kit List/BOMs" window contains two new checkbox options:



Both options are deactivated by default. When the respective option is deactivated, production projects are only observed for BOM changes when either the material requisition or work slip is not yet printed. Vice versa, when the options are activated, BOM changes are synchronized to only to production projects with printed slips.

In this sense, it is necessary under circumstances to run the synchronization procedure in two separate runs. One run for projects with unprinted slips and another run for projects with printed slips.

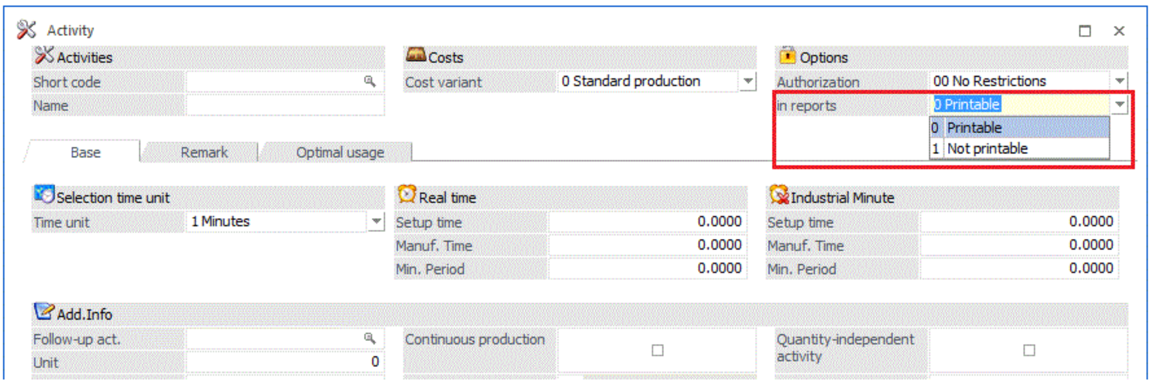
Availability List window- Tab-Area "Product Exclusion List"

A remark can now be entered for each product that is entered in the exclusion grid. Additionally, the entered products in the grid can be saved for later use with the grid button "Save settings".

Work in Progress List – New Report "Work in Progress"

This new list reports on activities that are not yet completed within a specified time period. Actual entered resource time entries are also listed in for the activity, i.e., a remaining amount of production time (planned time – actual entered time) is listed per activity.

An additional function has also been added for activities in Activity Base Info:



Using this setting, it is possible to steer in the new Work In Progress report whether the activities are included in the output or not (e.g., activities that represent set up routines can be excluded from the report),

WinLine LIST

LIST Output – Image Output

When a field containing an image file link is contained in a list definition (e.g., in AR/AP Account Base Info, Employee Base Info, etc.), the image is automatically printed in the screen/printer or table output modes. The size of image can be adjusted in the form connected with the list.

Multi-Voucher Calendar – Color-Coding in the Multi-Voucher Calendar List

The color-coding of voucher levels and threshold levels can be defined now individually for each list.

LIST-Assistant – Date Format

The date format can now be set in the List-Assistant (available options: standard date, standard date with time, short Windows format and long Windows format). By default, type "01 Standard date" is suggested for normal date values. Date values in CRM lists use type "00 Standard date with time" by default. The date in the table output mode can be adjusted with or without time.

List Assistant – Drill-Down Match Code

The Power Report is available in the DrillDown-Match Code area. A linked list using the drilldown can be output as a Power Report.

Standard Contact Person

The filter for the Address List has been extended with the "Contact type" function. This allows for selection by standard contact person or the company contact person.

WinLine LIST Output – Output of lists with View 204

Database view V204 is used for calculating coordinates for the Geo Map (Power Report) in WinLine LIST. WinLine always processes all data (independent of the selected output variant). For this reason, view 204 is required for the following list types:

01 – Customer Base Info
02 – Vendor Base Info
06 – Sales Statistics
13 – Prospects (Customers)
14 - Prospects (Vendors)
20 - Addresses

The GeoMap mode of the Power Report is not available in WinLine LIST when view V204 does not exist or is not accessible. (A corresponding error is written to the Audit Journal when view V204 is not accessible).

Attention: Cool new feature!

List Output – New Features for the Output Table mode

The following new features are supported now with the Output Table output mode:

- Button "Display"
When the Display button is pressed (or the F5 key) the table output is executed again.

- Button "Export"
When this button is pressed, the area (lines) marked in the grid are exported to MS Excel. All column headers are exported, as well. The data can be imported afterwards with the Import button or with the WinLine Excel Add-In.

- Button "Import"
Data that has been exported to an MS Excel file (see Button "Export") can be reimported with this button. The following variants can be used in this connection:

Import to Base Info

The import is performed after selecting the MS Excel file. The data to be imported is synchronized with the existing Base Info, whereby new data is imported or existing data is modified.

Import as Notes List
The import is performed after selecting the MS Excel file. The "Change campaign" window is opened and the data records are marked to be imported.

Import to Base Info and to Notes List
The import is performed after selecting the MS Excel file. The data to be imported is synchronized with the existing Base Info, whereby new data is imported or existing data is modified. Afterwards, the "Change campaign" window is opened and the data records are marked to be imported.

Notes on export and import:

The following list types support this new feature:

01 – Customer Base Info
02 – Vendor Base Info
04 – Product Base Info
13 – Prospects (customers)
20 - Addresses
21 - Projects

The ODBC driver that will be used for the export/import procedure is set in the Template Settings (WinLine START, Templates, Template Parameters, tab-area "Options", option "Standard Excel Driver"). A so-called "name area" is set up in the MS Excel file upon export. The name area must be expanded when additional data records are added to the file to be imported.

The WinLine EXIM license is required for this feature. When the license is not entered in the system, a maximum of 10 records can be exported. This feature is not supported in the Enterprise Connect.

WinLine Server

Setup – EWL Folder

The WinLine Server (formerly named the Enterprise WinLine server) is automatically installed during an update to WinLine Version 10.2 Build 10002. This is also the case when the Enterprise Connect was not previously installed in the already existing WinLine version installation. The WinLine Server is required for the new "Background Process" reports (see previous chapter).

WinLine ARCHIVE

Archive – Archive Database in the System Info Window

The database where archive entries are stored can be migrated to a separate database (either with the cwlsetup.exe or during WinLine installation). The name of the database is now displayed in the System Info window.

New Archive Entry - Drag & Drop to the Product Base Info window

When a file is being inserted as a new archive entry by Drag&Drop to the Product Base Info window, key words "041 – product number" and "042 – product name" are automatically preset in the New Archive Entry window with the respective product record data.

WinLine CRM

WinLine Share - New Social Collaboration Platform in WinLine

The new WinLine Share feature offers social media functions for WinLine CRM users directly in WinLine:

- User discussion forums

Discussion threads can be started on-the-fly by any Share user. Other Share users can then join the discussion at their discretion.

- Chat box

The chat box features a range of emoticons. Up to 2000 characters or 20 emoticons can be entered per chat message.

- Discussion and Chat Counter Display

The number of unread discussions and chats is displayed in the status bar.

- Like/Dislike/Prioritize

Share entries can be qualified with one of three options.

WinLine Share is included for all WinLine CRM users.

CRM Users - New Access Options

Stand-alone CRM users (i.e., not a CWL user) now have the following features available by default:

Archive

All Archive functions, including Archive II (external documents) are now supported (even when no ARCHIVE II license is present in the system)

- Voucher Entry (WinLine ACC2 license is prerequisite)

- Alongside the Batch Entry of Voucher window, the normal Voucher Entry window is now also available for stand-along CRM users.

- The Voucher Entry window can be inserted for use in a Cockpit. The window can only be used with an individual form template in the Cockpit, however.

- Voucher levels in the sales area are supported for use by stand-alone users (i.e., not purchase voucher levels)

Workflow Templates - Templates Applied With "Preset" Voucher Templates

When a voucher template is preset for a workflow step, the workflow template is applied when a voucher is saved and the workflow step is opened, i.e., the fields preset in the workflow template are adopted automatically.

INFO Module – INFO Module for Stand-Alone CRM Users

The following INFO module areas are now available to stand-alone CRM users:

- Customer information
- Vendor information
- Prospect information

Workflow Editor – New Feature for Follow-Up Actions in the Workflow Editor

The follow-up action "Open CRM case before or after template" has been extended so that a voucher level can be specified for the action. I.e., when a workflow step is being generated, for which a voucher template is assigned (before or after), the assigned voucher level is applied when opening the voucher template. When several vouchers are associated with the workflow, the Voucher Match code is opened to select a particular voucher.

Key-Word Window – Available Now for Stand-Alone CRM Users

Stand-alone CRM users can now use the Keywording window to add key words to an existing archive entry (even when the ARCHIVE I and/or Archive II license are not present in the system).

Archiving Workflows – New Follow-up Action Option

The follow-up action for archiving workflows (no. 55) has been extended to print the case view as an Adobe PDF file and to append the PDF to the case upload, as well as generate an archive entry. The Mesonic PDF Converter must be installed for this feature.

Workflows/Voucher Templates – New Preset Options

It is now possible to specify in this menu item the values that are adopted from a CRM workflow step (fields from CRM tables T170 as well as CRM additional fields T057) to an individual form voucher entry window. An action of type "Open template after CRM case" must be set up in the workflow to enable this new feature. The presets from a CRM case can be made during generation of a new voucher.

Open Invoice Reconciliation – Automatic Workflow Step

CRM follow-up steps can be assigned in the Open Invoice Parameters, which are automatically generated for an "associated" workflow when open invoices are reconciled. When open invoices are reconciled (either to "-1" or "-2"), the program checks whether the account number and the OI number to be reconciled are contained in a one or more workflows. If this is the case, the corresponding follow-up workflow step is automatically generated.

Contact Report - "Company Name" Column in the Table Output Mode

The Table Output mode now contains this column by default.

Project Information – Generation of New CRM Case

Fields "project number" and "customer account" are now automatically preset when generating a CRM case for a project (and when a customer is assigned to the project).

WinLine Mobile Connect

Email Settings - Format for Email Transmission

The settings for email transmission format are stored in the 'client.config' file in the respective user folder. This setting is applied for each mobile WinLine session with the same user. Note: this setting is not applied in the Corporate WinLine, which uses the setting in the mesonic.ini.

Session Handling – Display Contents of Existing Session (all opened windows)

Eine bestehende Session kann von einer neu gestarteten Session direkt durch Auswahl im Login-Fenster der mobile connect geholt werden.

Signatures – Insertion of Signature to Voucher (PDF)

When generating a voucher in the Mobile Connect, e.g, a customer order, it is possible to save the customer signature (by stylus on a tablet device) as an arhive entry for the voucher. The signature can then be included in the voucher printout.

Audio Feeds – Save Live Audio Feed to WinLine Archive

A new menu item, Record, is available in the Quick Menu box. Use it to record a live audio feed as a WinLine Archive entry.

WinLine Info

INFO Modules – Four New INFO Modules

The following new modules are now available in WinLine INFO:

- Customer information
- Vendor information
- Prospect information
- GL Account information

Display Settings - Definition of User-Defined Views

User-specific views can be set up in the "Settings - View" menu item. The views configure the information displayed in the INFO modules.

Note:
The views are also saved separately for each company.

WinLine ASSET

Asset Sales – Voucher Number For Asset Sale

The voucher number that was entered during asset sales in WinLine ASSET is now adopted automatically to both posting lines (sales invoice and PO posting) in the ACC1 posting batch.

WinLine ADMIN

User Matchcode – Window Redesign

The User Matchcode window now contains three sub-tab areas, which are always active for use:

- Sub-tab "User"
All WinLine user that have authorization for the current company are displayed here.

- Sub-tab "WEB User"
All Web users are displayed here.

- Sub-tab "CRM User"
All users that have an activated CRM user checkbox are shown here. Authorization for the current company must also be present.

Database Connections – Restore of Company with Different User-Defined Table Columns

When a company backup (MBAC) containing user-defined table columns, which are different than the system settings, is being restored, it is now possible to enter the company in the Database Connections window. The setting can first be saved, however, by double-clicking on the new connection line in the grid, upon which a separate window is opened in which the user-defined table columns can be synchronized between the system and company settings.

When the program detects that different user-defined table columns are contained in the company backup, the user is now informed per message box that the company must be restored to a new empty database (similar to company backups from a previous version). The "Update company list" option may not be activated in order to successfully perform the restore to the empty database.

Backup Assistant - Last Back Up File

The last backup file (saved in the mesonic.ini) is now always suggested in the Backup Assistant.

WinLine Form Editor

Control Element – Set Global Font for Auxmail Control Element

The entered plain text can be now be formatted with function {$FONT:<FontFamily>} – corresponding to {$FONT:Arial} – and font size with {$SIZE:<Font size>px} – corresponding to {$SIZE:12px}.

External Object/OIF - Refresh of Cockpit Lists

The new OIF object "Cockpit List" supports the output of all WinLine LIST lists that have option "Create Cockpit View" activated (area "Settings").
The refresh for such lists is executed at pre-defined points. Using syntax <REFRESHVAR:view/var> in a where statement causes the refresh to be executed.

Example:

An OIF element of type "Object – Cockpit List" (CRM Lists) is inserted in the Voucher Management OIF form. To trigger a refresh of the OIF when switching accounts, the following where statement is inserted in the form:

where T170.C009 = '<REFRESHVAR:50/2>' and T170.C030 = -10001 and T170.C004 = 1 and T170.MESOCOMP = N'~~~~'

This causes the OIF to be refreshed when VAR:50/2 (account number) is changed.

New OIF Display Objects – New OIF Types "Object"

The following new OIFs of type "Object" are now available:

1. Open Invoices
Detail infos on an open invoice can now be output in an OIF with new object "Open Invoices". The information that is output is steered with an extra form. The key is the "OI key" (i.e., the field "Text" or area "View/Var" must be populated).

Attention:
The unique OI key consists of the following string (stored in T019.c000): -account number-open invoice number

2. Display picture
Using new object "Display picture", you can now insert the picture file saved for AR/AP accounts, contacts, sales reps, products and employee records in an OIF. The information that is output is steered with an extra form. The variable "picture" of the object serves as the key (i.e., the field "Text" or area "View/Var" must be populated).

Note:
When the picture is selected in the OIF, the "Picture Search" function is started in the program.

MDP Project – Start Script from Another Script

One or more scripts can now be imported at runtime with the following function:

$IMPORT:scriptname1,scriptname2,…

This allows you to save functions that are used in several scripts in one place.

The function may only be inserted as a comment line, e.g., '$Import:... since it is an internal special function (not a standard VBScript function).

All scripts that should be loaded with the import function have to be named in one line. The comment line is closed with a carriage return character.

Note:
No empty spaces may be contained in the script name listing after the comma delimiter, i.e., only the next script name.

Example:
Two system scripts (script1 and Script2) are set up that are called with another system script (calling script). The calling script thus contains the new function.

System script1

```
'(Declarations)
Function Script1
Script1 = "This is script1"
End Function
'End of (declarations)

-------

System script2
'(Declarations)
Function Script2
Script2 = "This is script2"
End Function
'End of (deklarations)

-------

Calling script
'(Declarations)
'$IMPORT:script1,script2
'End of (declarations)

Sub CWLScript_OnScriptStart()
msgbox "System script calls the following script functions: " & CHR(13) & script1() &
CHR(13) & Script2()
End Sub
'End of (declarations)
```

CWLStart Object – Original User Number of Shadow User

The user number of the "real" user behind a shadow user can be returned with the new 'CWLStart.CurrentUser.OrigNumber' property.

Macros – New Function MGetRelativeDate and Property McurrentPeriod

The new MGetRelativeDate (nWhatDate) functions returns the following date values (relative to the Windows system date) depending on the calling parameter:

0 – current date (same as 1)
1 – current day
2 – one day before the current day
3 – start of the month
4 – end of the month
5 – start of last month
6 – end of last month
7 – start of the week
8 – end of the week
9 – start of last week
10 – end of last week

The new MCurrentPeriod property returns the current period. The function is compatible to the function in reports, i.e., it always returns the current month.