



Release Notes – WMS Version 4.73.01

Introduction:

This upgrade is an assembly of 35 requests over the past year from WMS users who submitted their ideas on enhancing the workings of **The Wine Management System**. We thank them for their input! If you have any suggestions, please contact us via our web site (www.wms4wine.com) or email (wms4wine@telus.net).

The following changes have been included in this Release 4.73.01:

1.0 Accounting:

- **Sales Payments** – This report includes a section for manual entries for coin counts for the office float.

1.1 Production:

- **Task Labels: *** NEW ***** – this redesigned form allows you to set a specific name to a specific task for a specific Week Type.
- This screen is accessed by selecting the “a” button on the **Production Sequence Periods** form.
- **Hidden Stages: *** NEW ***** For Stages that are not going to be used, mark these as “NA”. **Production label names of “NA” will NOT print those dates on your Production Labels.** There will be a blank displayed.
- **Production Master:**
 - **Bin *** NEW ***** - This field that may be used to hold the physical location of a wine, i.e., on the shelf, can be seen and sorted by on this form. The report, **List By Bin** is available in the Report Selector on this form.

Week Type	Label Stage 2	Label Stage 3	Label Stage 4	Label Stage 5	Label Stage 6	Label Stage 7
2 Week	Secondary	NA	Rack1	Rack2	NA	Filter
3 Week	Secondary	Add Sugar	NA	Rack	Rack	Filter
4 Week	Secondary	Add Sugar	Stabilize	Rack	Rack	Filter
5 Week	Secondary	Add Sugar	Stabilize	Rack	Rack	Filter
6 Week	Secondary	NA	Stabilize	NA	Rack	Filter
7 Week	Secondary	Add Sugar	Stabilize	Rack	Rack	Filter
8 Week	Secondary	Add Sugar	Stabilize	Rack	Rack	Filter
9 Week	Secondary	Add Sugar	Stabilize	Rack	Rack	Filter

1.2 Purchasing:

- **Import Products – Import *.csv file:**
 - **Supplier Key** – correctly assigning the Supplier’s ID to the data being imported into the products form has been completed. This task is done in the background.
- **Products:**
 - **Weight ***NEW*****– this new field (lbs or kgs Per Case) will work in conjunction with the Purchase Order form to assist you in determining the overall weight of shipments from your suppliers. Note that the order weight also shows on the individual items on the Purchase Order line items.



1.3 Sales:

- **Appointment Scheduler:**

- **F5** – the **BIN** field has been added to a display on this form to allow you to review its location in the Wine Production area. As well, the report “**Full Day’s Appointments**” and the “**Scheduled Appointments**” report will display the bin number on the printout. The “**All Scheduled Appointments**” does **NOT** include the Bin number.

- **Find Customer, F8:**

- **Accounts Receivable Aging Summary *** NEW ***** – this button, **\$\$**, has been added to a bottom of the F8 form to display the total charges owing for the current selected customer.

- **Invoice:**

- **Bottle Labels ½ Page *** NEW ***** – identical to the current full page of 30 small bottle labels, this report will print only 15 labels on a 3X10 label sheet. (To use the bottom half, simply flip the sheet.
- **Gift Certificate *** NEW ***** – This report printout is available on the Invoice’s report selector and when selected to print after a purchase of a Gift Certificate (GC) from THIS Invoice, a prompt for the Receptient’s Name and a prompt for the Sender’s Name pops up prior to printing. These can also be left blank to fill in by hand. The value of the GC is printed on the receipt and is complete with your store information as well as validation signature of a store member.
- **Item Product - Discontinued** – If an **Invoice is Locked**, all **discontinued Item Products will be shown** on the screen. If an **Invoice is Unlocked**, the **Discontinued Item Products will not be displayed** on screen and in the Drop Down selector.
- **Referred By *** NEW ***** – this field has been added to a display on this form to allow you to assign how this customer came to your store. This field is updateable by simply double clicking on the Drop Down field. A form will be displayed to allow you to add, edit or delete the current entries.
 - **Required *** NEW ***** - should the Require Entry field in the Preferences form be **set**, then a small red “**R**” will be shown next to the Referred By drop down field indicating this entry **MUST** be filled.
 - **Sales Referral Summary *** NEW ***** - A new report has been added to the Sales Reports Switchboard to summarize sales by Referral Type. See the Reports section of the document for details.
- **See Notes *** CHANGED ***** – for any entry into the **Customer’s Notes** field, the first 5 to 10 words will be displayed on the Invoice when the customer name has been selected.. This new option allows you to view any reminders without having to double click to jump to this field on the Customer’s form.

- **Gift Certificate** - This form has an additional 2 fields to correctly assigned specific Gift Certificates purchased previously. The process is as follows.

- Any gift certicate that has been purchased as an Item Product will be displayed in the Drop Down Selector labelled **GC Certificate #** when **Gift Certificate** has been selected as a method of payment.

- Upon opening the **GC Certificate #**, the current **UNREDEEMED** GCs will be shown in Ascending order based on the \$ value. It is also sorted by

Payments	
Invoice Number	3
Card Holder	Adams, Peter & Karen
Payment Method	Gift Certificate
Credit Card #	
Payment Date	10-10-2007
Card Exp. Date	4
Payment Amount	\$0.00
CC Authoriz. #	
Balance	\$198.00
Credit Acct. Rec.	<input type="checkbox"/>
\$\$ Offered	\$0.00
Gift Certificate #	
Change Given	\$0.00
GC Redeemed	
Note	

GC From	GC
4-6 \$50.00	\$5
2-4 \$100.00	\$1



the Invoice Number, so in the above example, Invoice 4 sold a GC for \$50 and Invoice #2 sold an invoice for \$100.

- For redeeming a GC, simple pick the item in the **Gift Certificate #** field and it will fill in the appropriate value in the **Payment Amount** field. Once used, it cannot be selected again. Note that the **GC Redeemed checkbox** will be filled.
- A report is available to display all of the GC purchased and all of the GC's redeemed. A balance owing of the outstanding GCs is also shown at the bottom of the report. This report is available on the Product's report selector and can be tailored to any specific date range.

• **Orders – Limited Edition:**

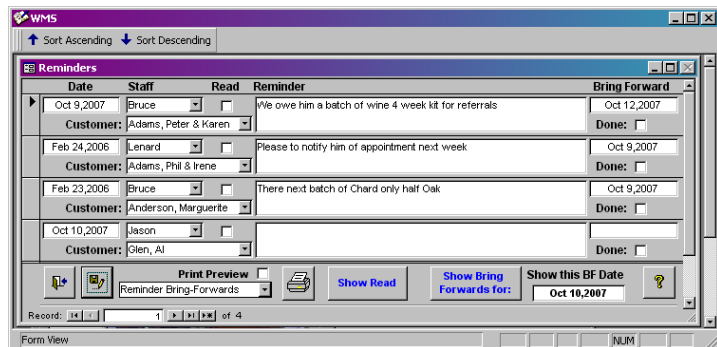
- **On Invoice** - This drop down button now will display only the Invoices of the Customer's Name selected on the current specific line.

• **Customer History– Pre-WMS:**

- **Invoice Date**- This date field now has a pop-up calendar option when you right mouse click this field.

• **Reminders:**

- ***** Updated ***** – this form has added a Bring Forward feature to allow for reporting options for this form. Additional fields are:
 - **Done** – a bring forward item has been completed
 - **Show Bring Forwards for "Date"** – this button and date field allows you to select only those items for a specific date.
 - **Reminder Bring Forwards Report** – this report shows specific date related items
 - **Reminder details** – this area for data entry has been expanded for ease of reading.



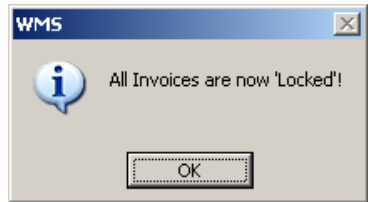

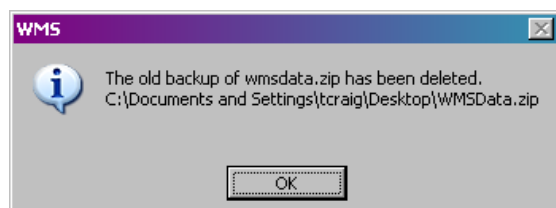
• **Previous Customer Info:**

- **Order Date *** Changed ***** – this field now has the pop up calendar to enter the date. In addition, the Past Order field now allows for any type of numeric entry.

• **Referring Summary** – This form is located on the Sales Switchboard and details all of the customers referred by other WMS customers.

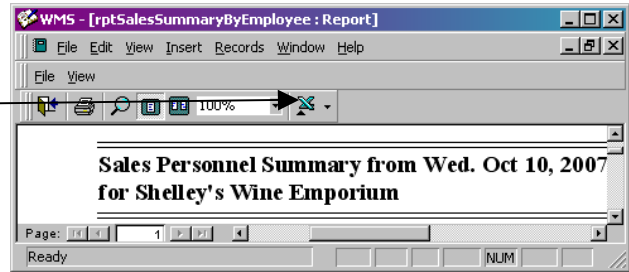
- Details show the **Referred By** name, the **Customer's** name, **Date** of the referral, **Invoice #** of the referral, a **Done** checkbox to indicate that a **Thank You** letter has been sent and the **Date Done** field to indicate when the letter was sent.
- A **Print** checkbox is available for each line to allow you to print only those letters you choose. The text for the body of the **Thank You** letter is set on the **Preferences** form under **WMS Defaults**.
- Reports available in the Report Selector on this form are:
 - Customer's Envelopes
 - Mailing Labels
 - Sales Referral Summary
 - Thank You Letter

1.4 Setup:

- **Employee Information – Active checkbox** - this form has a checkbox to mark any employee as **Active** or **Inactive**. If an employee is marked as **Inactive**, their name will not appear on the **Salesperson** drop down selector on the Invoice.
- **Auto Locking of All Invoices *** NEW ***** - to ensure that all of the Invoices have been locked, whenever you exit WMS on the **Backup Data** form, a short process will run. A prompt will be displayed when the process is complete.
- **PC Regional Setting - Short Date *** NEW ***** - to ensure that the production dates conform to the standard Short Date Format defined in each PC (using the US Standard of **mm-dd-yyyy**), a function has been added to the startup process in WMS to reset the format to the **mm-dd-yyyy** configuration. This process is done in the background and should correct any minimal issues with Production Dates. This date now shows on the Switchboard.
- **Silent Backups *** NEW ***** - to provide a secondary backup of the current WMSDATA.MDB file should the User select NO on the Backups Form, a date/time stamped file will be created in the folder beneath the default directory of WMS (generally installed at C:\Program Files\WMS2000\Backups). These files are uncompressed so at some point, users of WMS may want to delete older version of these backups using Windows Explorer.
- **Preferences – Enhancements Tab**
 - **Days to Notify** – this field when set to **99** now **restricts all emails from being sent** to any customers via www.brewcheck.com. The default value is set to 7 days.
- **Preferences – Invoice Defaults Tab**
 - **Required Referral *** NEW ***** – when this checkbox is filled, the users of WMS will be required to enter the type or name of the referral for this invoice. The 'Referred By' field on the Invoice is editable by double clicking on the Drop Down button to allow to activate and de-activate types of referrals.
- **Startup Screen** - The format for the startup splash screen has been updated and widened to include the Web Services web site www.brewcheck.com and the new logos for The Wine Management System, www.wms4wine.com
- **WMSDATA Backups *** NEW ***** – To ensure that a backup is correctly done; a message prompt will indicate that a previous version of the file WMSDATA.ZIP **at the selected location**, has been removed.
Simply press **OK** and the new backup file will be created.
- **Vista** – this operating system will be detected and displayed on the **About WMS** form available in the Administrative Switchboard.

1.5 Reports:

- **AR Aging Summary**– This report is now available on the Function Key, F8 form using the \$\$ button at the bottom of the form. The current total for all monies owed will be previewed for the current customer selected on F8.
- **Customer Receipt** – if a spousal name is included in the Customer Information screen, it will now be displayed on the Customer’s receipt.
- **Export Reports** – Any report created in WMS can be exported using the toolbar options. Open the Drop Down on the Tool Bar and select the X button for exporting to Excel.



- **General Journal Month Detail Report** – This been renamed to **Month-End Journal**. This is reflected in changes to the Flowchart as well.
- **Gift Certificate Status** – This report is available on the Product’s report selector and can be tailored to any specific date range. All of the GC purchased and all of the GC’s redeemed will be shown with a balance owing of the outstanding GCs is also shown at the bottom of the report.
- **Sales Payments** – This report now includes a section for manual entries for coin counts for the office float.
- **Sales Referred Summary** – This report is located on the Sales Reports Switchboard and groups the results by Referral Type detailing the Invoice Date, Invoice #, Customer, Referred By and whether the Thank You letter has been sent (done). Totals for each type are grouped by the specific Referral Type; Customer, Ads, Friend, Walk-by etc.

1.6 Trainer & WMS Winery:

- All changes have been added to new versions of the Trainer & Winery programs, and will be available for web site downloads. Please contact Technical Support for changes to data files associated with each of these programs.

1.7 Web Services:

- **Web Service Daily Upload Function:**
This form has been redesigned to streamline the upload process.

