



RELEASE HIGHLIGHTS

Software Version: 1801

DOCUMENT VERSION CONTROL

VERSION	DATE	AUTHOR	DOCUMENT CHANGES
1.0	23 May, 2018	Baseplan Software	Customer Release

Please note: The information provided in Baseplan documentation is a generic guide using the Baseplan applications and all the functionalities therein. Some of the functions described may not be applicable to Baseplan SBE users. It is intended that users refer to their respective software editions, and apply the relevant company processes and procedures when using this guide.

For SBE users: The SBE application interface will appear in a different colour to that of the Baseplan Enterprise application. For demonstration purposes, screens from the Baseplan Enterprise application are used in this guide.

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ASSETS

ASSET ACTIVATION

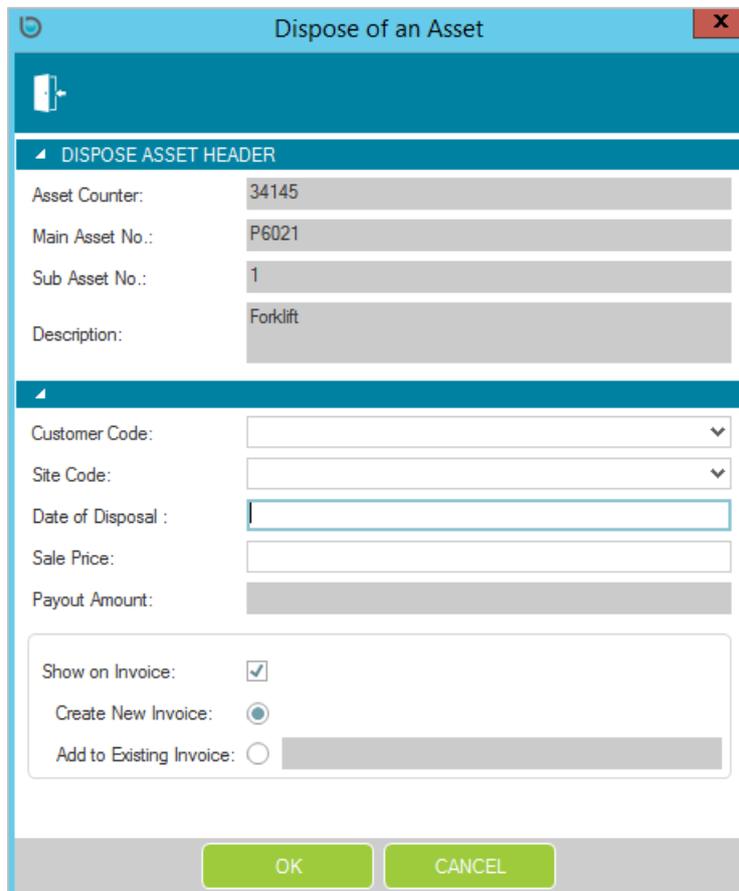
Enhances the Asset Activation process to create an open equipment inspection for serialised assets linked to equipment items. The inspection must be completed in order for the equipment item to be available to rent. Assets can be activated from the Asset Master or as part of the Request for Quotation (RFQ) process.

Related Parameter: **Generate Open Inspection for Serialised Item on Activation**

ASSET DISPOSAL

Enhances the Asset Disposal process so that serialised equipment can be invoiced when the **Sale Price** is zero. The **Show on Invoice** checkbox will default to checked when the **Sale Price** is zero, allowing the item to be added to an invoice.

A new invoice will be created or the item added to an existing invoice, if the **Add to Existing Invoice** option is selected.

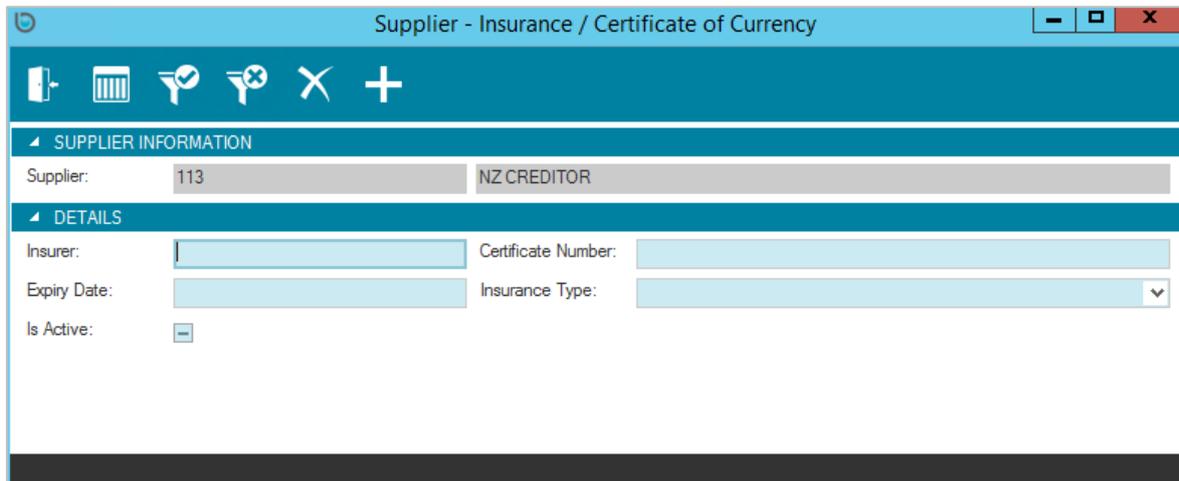


DISPOSE ASSET HEADER	
Asset Counter:	34145
Main Asset No.:	P6021
Sub Asset No.:	1
Description:	Forklift
Customer Code:	<input type="text"/>
Site Code:	<input type="text"/>
Date of Disposal :	<input type="text"/>
Sale Price:	<input type="text"/>
Payout Amount:	<input type="text"/>
Show on Invoice:	<input checked="" type="checkbox"/>
Create New Invoice:	<input checked="" type="radio"/>
Add to Existing Invoice:	<input type="radio"/>

FINANCE

SUPPLIER CERTIFICATES OF CURRENCY

Certificates of Currency information can now be entered for Suppliers using the *Supplier – Insurance / Certificate of Currency* screen; copies of the certificates can also be attached to the screen.



To track when certificates expire, a new report *Supplier Insurance – Certificate of Currency Expiry* is available along with email notifications advising when a Supplier certificate is due to expire. The Reminder Service needs to be configured to generate the email notifications.

Baseplan Enterprise

Supplier Insurance - Certificate Of Currency Expiry					Date : 17/04/2018 Time: 12:17:06PM
For Supplier Code From: All To: All					
For Expiry Date From: All To: All					
Is Active: All					
Insurance Type	Expiry Date	Certificate Number	Insurer	Is Active	
Supplier: AA LIGHEZZOLO PTY LTD Phone: (02) 9639 5357 Fax: (02) 94847575					
Industrial Special Risks	12/05/2019	55983236011	AMMI	Yes	

Related Parameters: **Email Recipient to Notify of Supplier Insurance Certificate Expiry, Lead Time in Days to Send a Notification Email Before Date Due**

CUSTOMER INSURANCE EXPIRY

Email notifications advising when Customers' insurance is due to expire can now be configured. Emails will be sent to the Collection Officer for the Customer account. The Reminder Service needs to be configured to generate the email notifications.

Related Parameters: **Lead Time in Days to Send a Notification Email Before Date Due**

EMAILING CUSTOMER INVOICES

Additional documents, such as Terms and Conditions can be automatically attached when emailing rental invoices to customers.

Note: Changes to Rental Invoice reports are required to use this functionality.

Related Parameter: **Invoice Attachment Document Path**

DETAILED AGED TRIAL BALANCE REPORT

The Detailed Aged Trial Balance report has been enhanced by adding Branch Code scoping which allows users to generate the report based on the branch code of transactions: Invoices, Credit Notes, Payments, etc.

SERVICE

SERVICE SCHEDULING

Improvements to the Service Scheduling process enable users to control the date that is used when creating service calls and jobs from the *Equipment Due for Service* screen. Now the following options are available to determine which date is used as the service call or job date:

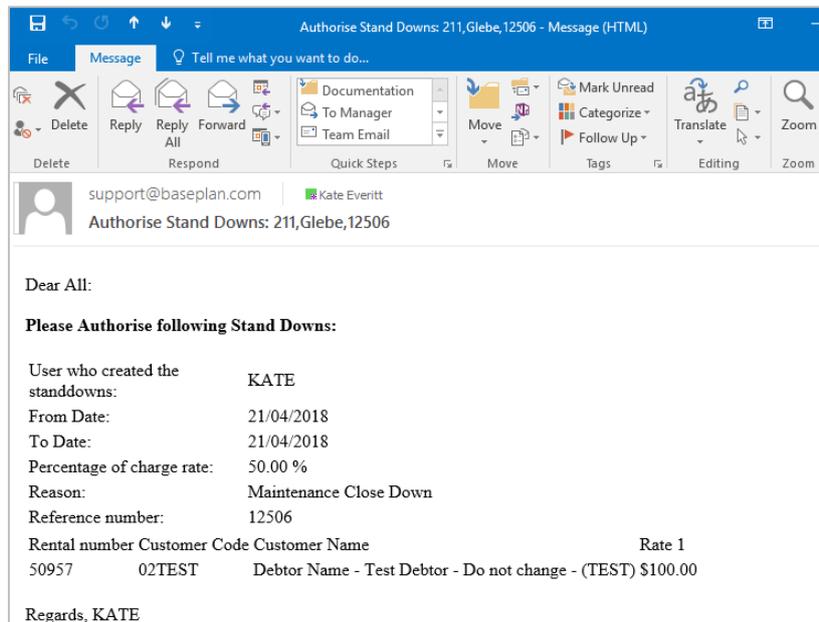
- 1 = Booked date if it exists otherwise the date the call/job was created
- 2 = Booked date if it exists otherwise the scheduled due date from the service schedule
- 3 = Always use job created date
- 4 = Always use scheduled due date from the service schedule

Related Parameters: **Date to be used for Service Calls Created from the Equipment Due for Service Screen, Date to be used for Service Jobs Created from the Equipment Due for Service Screen.**

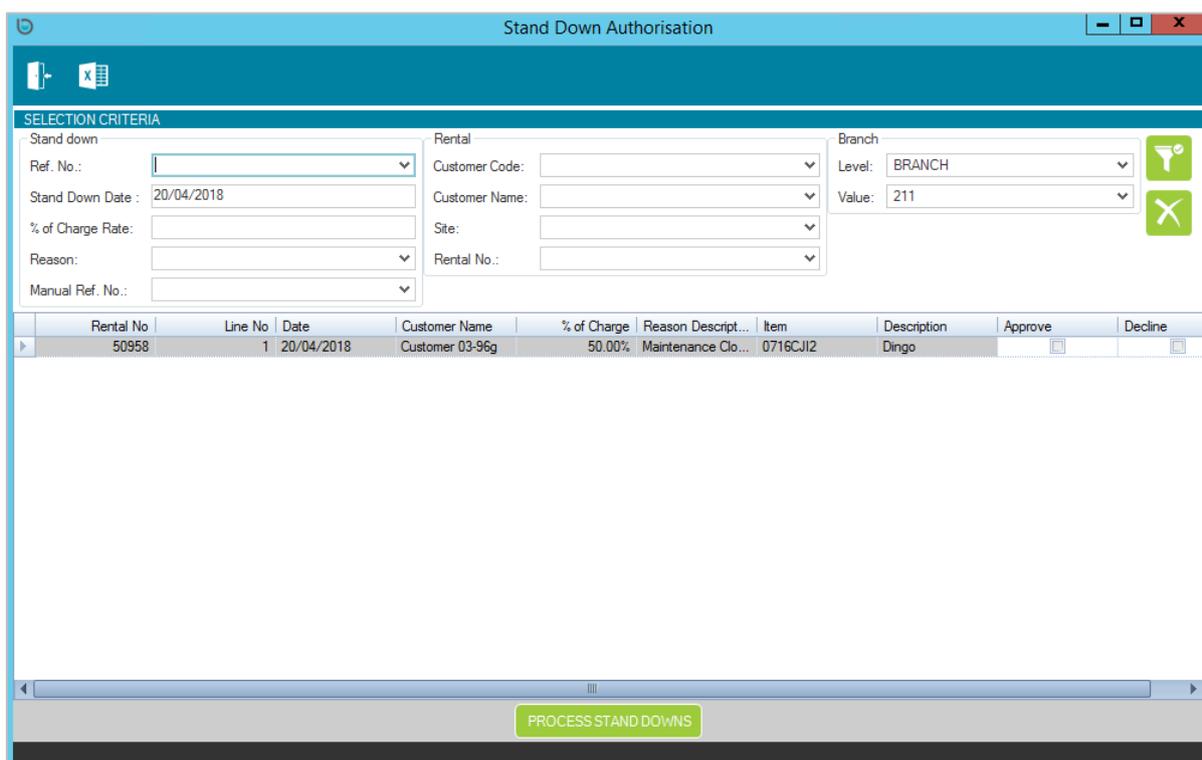
RENTAL

STAND DOWN AUTHORISATION

Rental stand downs can now be authorised, when required, by utilising the new authorisation functionality. Emails will be sent to users authorised to approve stand downs for a particular branch.



The new *Stand Down Authorisation* screen is then used to reject or approve stand downs. When a stand down is approved or rejected, the user who created the stand down will receive an email notification.



Open stand downs will not be applied when billing contracts and the Prebill report has an asterisk (*) next to rental contract detail lines that have open stand downs, and a static footnote [* Rental line has unauthorised stand downs.] at the end of the report.

Related Parameter: **Authorisation - Stand Downs**

TERMINATE RENTAL

The *Terminate Rental* screen has been enhanced with the addition of a **Transport Required** checkbox that indicates if transport is required. This allows users to indicate if transport is not required so the system will not automatically calculate pick up charges and create Pickup docketts.

Terminate Rental
Actions

TERMINATE RENTAL

Current Date: 20/04/2018
Current Time: 1:06:01 AM
Internal External

Termination No: 24075
Customer ID: 03-96
Rental No: 50958

TERMINATION DETAILS

Term Date: 20/04/2018
Term Time: 5:00:00 PM
Reason: HTC
Requested by:

SHIPPING / TRANSPORT DETAILS

Shipping Details

Run ID:

Earliest Date: 20/04/2018

Latest Date:

Contact Name:

Tel (Site): Mob:

Customer Ref.:

Site: _144

Transport Details

Supplier:

Supplier Cost:

Trans Order No:

Vehicle:

Driver:

Special Pick Up Instructions:

Print Pickup Docket:

Include Sales Items:

Create Separate Docketts:

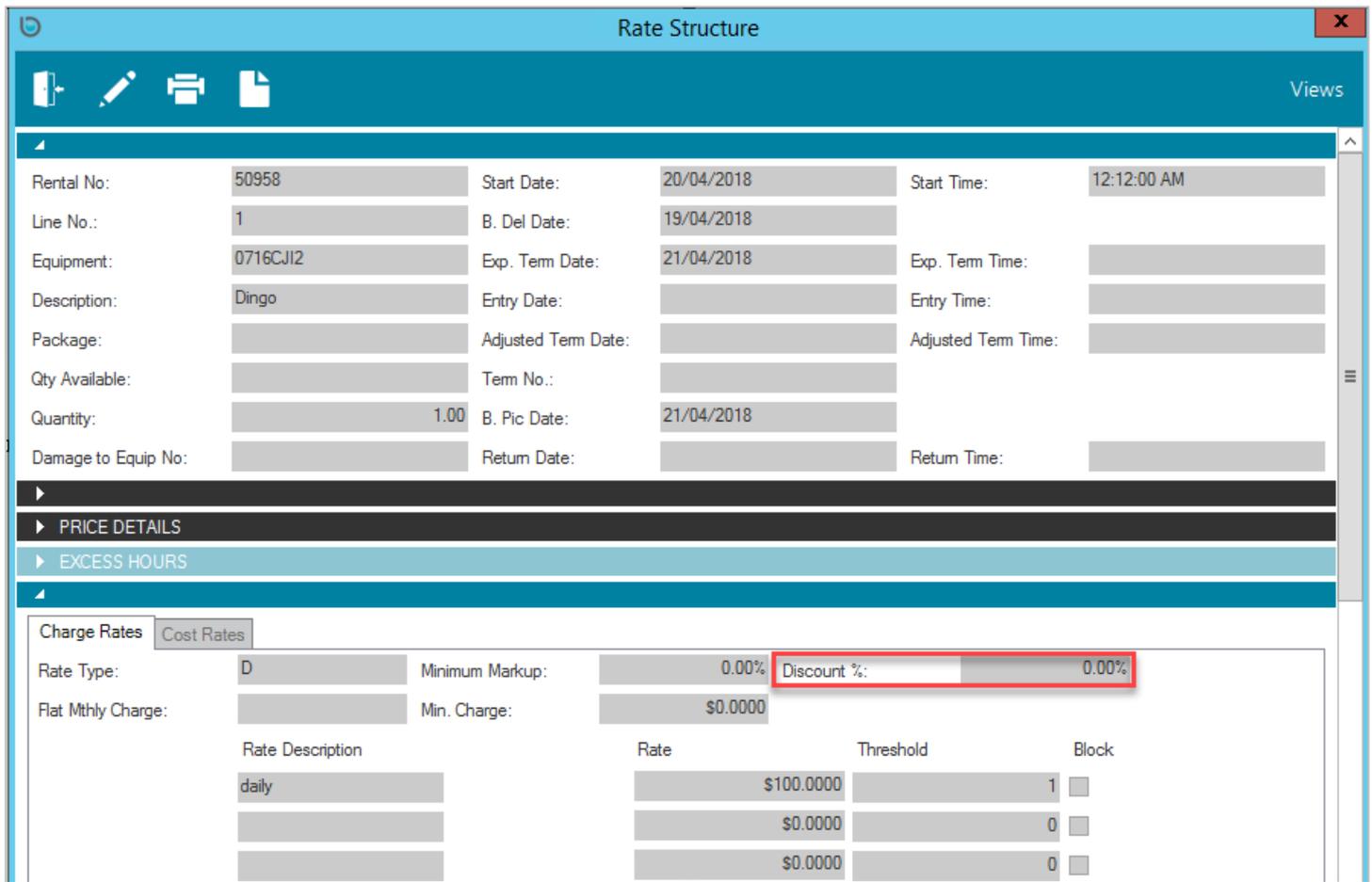
Transport Required:

DETAILS

Rental No	Line Number	Item	Description	Q...	Term Qty	select	Exp Term Date	Start Date	Start Time	Event	Stand
50958	1	0716CJ12	Dingo	1	1	<input type="checkbox"/>	21/04/2018	20/04/2018	12:12:00 AM		
50958	3	Pickup Charge		1	0	<input type="checkbox"/>		19/04/2018	9:00:00 AM		

EQUIPMENT DISCOUNT

Discounts can be applied on a Rental Contract detail line rather than just the Rental Contract header, giving customers greater flexibility when determining equipment pricing. This functionality is security controlled and discounts can be applied on the *Add Rental Item* and *Rate Structure* screens.



The screenshot shows the 'Rate Structure' window with the following details:

Rental No:	50958	Start Date:	20/04/2018	Start Time:	12:12:00 AM
Line No.:	1	B. Del Date:	19/04/2018		
Equipment:	0716CJ12	Exp. Term Date:	21/04/2018	Exp. Term Time:	
Description:	Dingo	Entry Date:		Entry Time:	
Package:		Adjusted Term Date:		Adjusted Term Time:	
Qty Available:		Term No.:			
Quantity:	1.00	B. Pic Date:	21/04/2018		
Damage to Equip No:		Return Date:		Return Time:	

Below the details are expandable sections for 'PRICE DETAILS' and 'EXCESS HOURS'. The 'Charge Rates' section is active, showing:

Rate Type:	D	Minimum Markup:	0.00%	Discount %:	0.00%
Flat Mthly Charge:		Min. Charge:	\$0.0000		

The 'Charge Rates' table includes the following data:

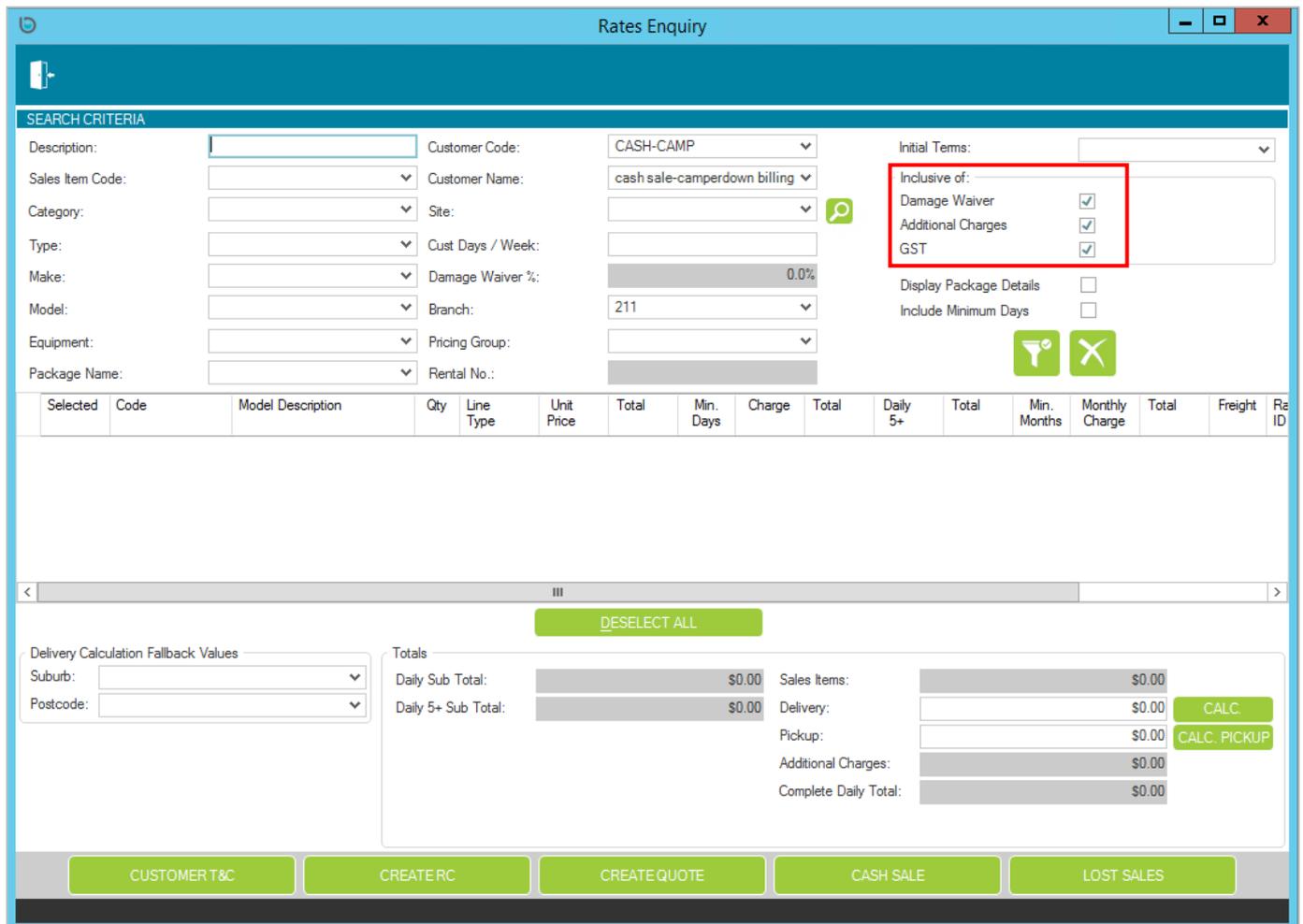
Rate Description	Rate	Threshold	Block
daily	\$100.0000	1	<input type="checkbox"/>
	\$0.0000	0	<input type="checkbox"/>
	\$0.0000	0	<input type="checkbox"/>

TIME UTILISATION REPORT

Equipment utilisation and average rental rates can now be analysed using the Time Utilisation report, improving customers' reporting capabilities.

RATES ENQUIRY / SEARCH

Enhancements have been made to the *Rates Enquiry* screen so that rates can be displayed inclusive of all charges. **Damage Waiver**, **Additional Charges** and **GST** checkboxes have been added giving users the ability to select which charges should be included in the rental rates. Additional Charges values will display in the **Additional Charges Total** field instead of the rate columns.



SEARCH CRITERIA

Description: Customer Code: CASH-CAMP Initial Terms:

Sales Item Code: Customer Name: cash sale-camperdown billing

Category: Site:

Type: Cust Days / Week:

Make: Damage Waiver %: 0.0%

Model: Branch: 211

Equipment: Pricing Group:

Package Name: Rental No.:

Inclusive of:

- Damage Waiver
- Additional Charges
- GST

Display Package Details

Include Minimum Days

Selected	Code	Model Description	Qty	Line Type	Unit Price	Total	Min. Days	Charge	Total	Daily 5+	Total	Min. Months	Monthly Charge	Total	Freight	Re ID
DESELECT ALL																

Delivery Calculation Fallback Values

Suburb:

Postcode:

Totals

Daily Sub Total: \$0.00

Daily 5+ Sub Total: \$0.00

Sales Items: \$0.00

Delivery: \$0.00 **CALC.**

Pickup: \$0.00 **CALC. PICKUP**

Additional Charges: \$0.00

Complete Daily Total: \$0.00

CUSTOMERT&C **CREATERC** **CREATE QUOTE** **CASH SALE** **LOST SALES**

Related Parameters: **Rates Enquiry Default to Include Additional Charges**, **Rates Enquiry Default to Include Damage Waiver**, **Rates Enquiry Default to Include GST**

ENTERPRISE APPLICATION INSTALLATION

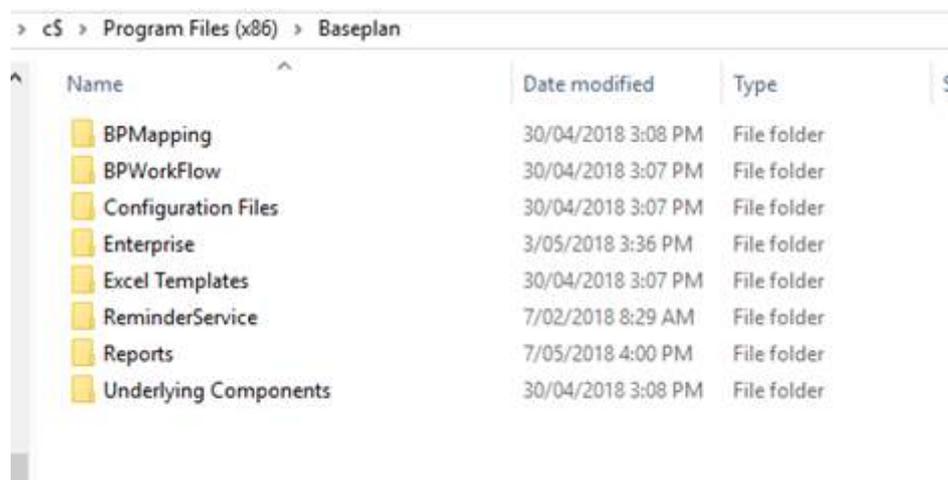
REPORT PROCESSING

Enhances the reporting system to allow reports to be stored and managed centrally in a shared directory. The application will search for report files in the shared directory first, and then in the Enterprise Application installation folder as per previous behaviour.

Related Parameters: **Overridden Reports Directory**, **Overridden Custom Reports Directory**

INSTALLATION FOLDER

Changes have been made to the Baseplan installation folder configuration. When BPEnterprise 1801 MSI is installed, there will be a new folder structure.



The screenshot shows a Windows Explorer window with the address bar set to `c:\Program Files (x86)\Baseplan`. The main pane displays a list of folders with columns for Name, Date modified, and Type.

Name	Date modified	Type
BPMapping	30/04/2018 3:08 PM	File folder
BPWorkflow	30/04/2018 3:07 PM	File folder
Configuration Files	30/04/2018 3:07 PM	File folder
Enterprise	3/05/2018 3:36 PM	File folder
Excel Templates	30/04/2018 3:07 PM	File folder
ReminderService	7/02/2018 8:29 AM	File folder
Reports	7/05/2018 4:00 PM	File folder
Underlying Components	30/04/2018 3:08 PM	File folder

The BPEnterprise exe and DLLs will be located in the Enterprise folder, and the report files will be located in the Reports folder.

Enterprise desktop shortcuts file path will need to be updated to ***C:\Program Files (x86)\Baseplan\Enterprise***.

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