



RELEASE HIGHLIGHTS

Software Version: 1802

DOCUMENT VERSION CONTROL

VERSION	DATE	AUTHOR	DOCUMENT CHANGES
1.0	12 Jul. 2018	Baseplan Software	Customer Release
2.0	05 Jun. 2019	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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EQUIPMENT

EQUIPMENT AVAILABILITY

The ability to perform an advanced search has been added to the *Equipment Availability* screen. Users can search on the Equipment Ledger description using the **Description Search** field which will provide greater flexibility when searching. This can be used when displaying data using all hierarchies; types, makes and models.

◀ STATUS AND EQUIPMENT OPTIONS

Rental Status

Available <input checked="" type="checkbox"/>	Terminated <input type="checkbox"/>	All <input type="checkbox"/>
Current <input type="checkbox"/>	Inspection Pending <input type="checkbox"/>	
In Transfer <input type="checkbox"/>	Reserved <input type="checkbox"/>	

Utilisation:

◀ EQUIPMENT AVAILABILITY DETAILS

Description Search:

Branch Level:

Value:

Multiple Equipment types, models and makes and models can also be selected, with the available equipment for all selections displaying in the grid.

◀ EQUIPMENT AVAILABILITY DETAILS

Description Search:

Equipment Type:

- 1000 - 1800kg I/C Forklift
- 2000 - 3000kg I/C Forklift
- 3 Wheel Battery Electric Forklift
- 3300 - 4500kg I/C Forklift
- 4 Wheel Battery Electric Forklift

FINANCE

PURCHASE ORDER WORKFLOW

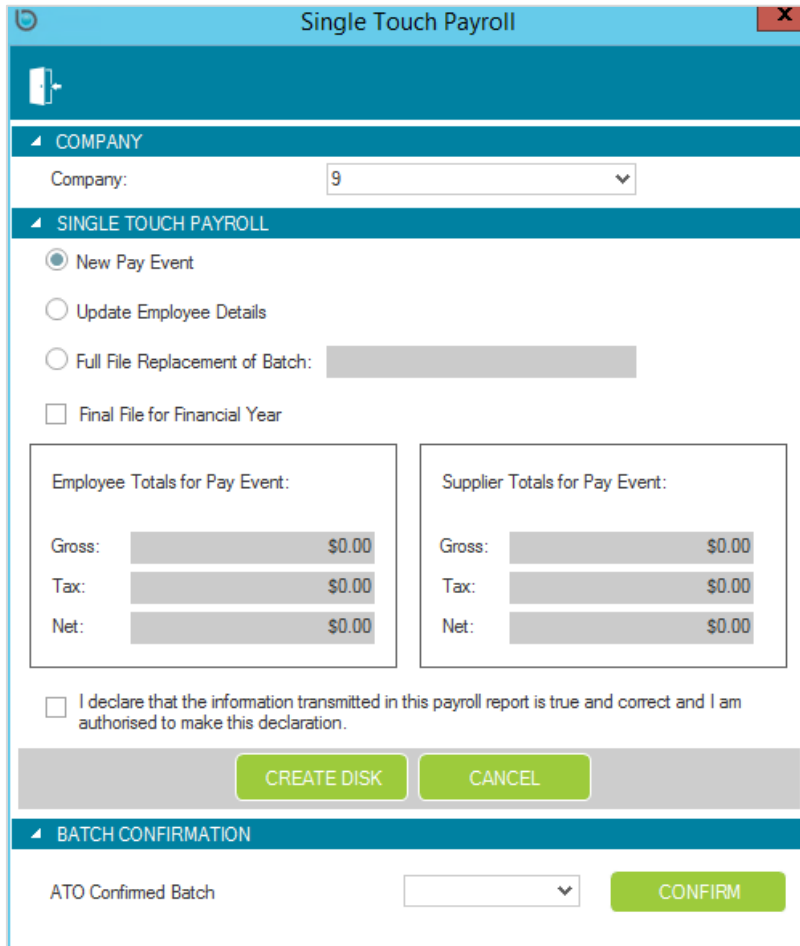
The workflow process now allows for both Operational and Financial approval of Purchase Orders and Credit Notes. Now all managers (users) in the approval hierarchy will approve the PO/Credit Note until it is approved by a manager with sufficient PO Limits/Credit Inv limit. Managers who do not have sufficient PO Limits/Credit Inv limits can reject a workflow request or approve the request which is considered operational approval.

Escalation of workflow requests when managers do not respond in time will now always escalate to the next manager in line.

Related Parameters: **Enable In Between Managers to Operationally Approve the POs**

SINGLE TOUCH PAYROLL

Enhancements to the Payroll module have been made for Single Touch Payroll processing. Once pays have been processed, the information is transmitted to the ATO via the *Singe Touch Payroll* screen.



Single Touch Payroll (STP) is a government initiative to streamline business reporting obligations. Under STP requirements, payroll information for each pay run is sent to the ATO. STP also enables the reporting of payroll-related information such as updates to Employee Details, PAYG withholding and superannuation to the ATO from payroll software solutions.

Related Parameters: **Enable Single Touch Payroll**, **Initial STP Batch ID**, **Capture Suppliers PAYG Withheld in Single Touch Payroll**.

SERVICE

SERVICE SCHEDULING

The Service Scheduling process has greater flexibility to determine the date of Service calls/Service jobs created from the *Equipment Due for Services* screen. Administrators can configure parameters using the following options:

1 = Booked date if it exists otherwise the job created date will be used

2 = Booked date if it exists otherwise the scheduled due date will be used

3 = Always use job created date

4 = Always use scheduled date

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

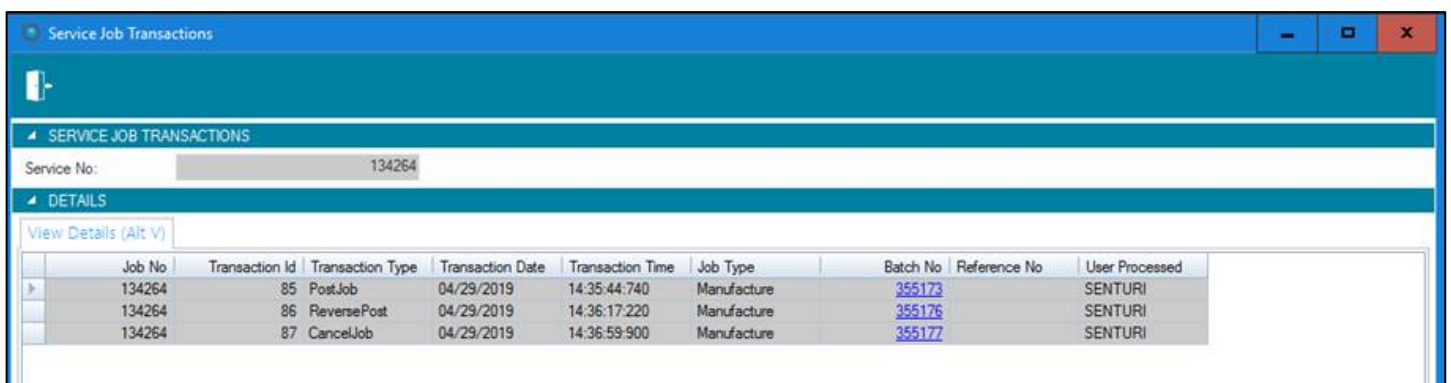
SERVICE JOB REVERSAL

Service job processing has been enhanced with the ability to cancel posted internal, external and manufacturing service jobs.

Users can now:

- Reverse 'POSTED' internal and manufacturing service jobs using the new **Reverse Post** option from **Service Jobs > Actions**. This will re-open the service job and reverse the GL journal batch created from the job posting. The service job can then be cancelled using the existing **Cancel Job** Action. Cancelling a 'Manufacture' service job that already has produced items will create negative produced item records; move the manufactured items from Stock back to GL WIP and move the consumed items from GL WIP back to Stock.
- Reverse 'POSTED' external service jobs by crediting the invoice in full with **Affect Stock** checked, posting the credit note and then selecting the new **Cancel Posted Job** option from **Service Jobs > Actions**. This will cancel the service job.

Users can track details of the changes made to the service job from the new *Service Job Transactions* screen, available from **Service Jobs > Views**.



The screenshot shows the 'Service Job Transactions' window. The 'Service No.' field is set to 134264. The 'DETAILS' section shows a table of transactions:

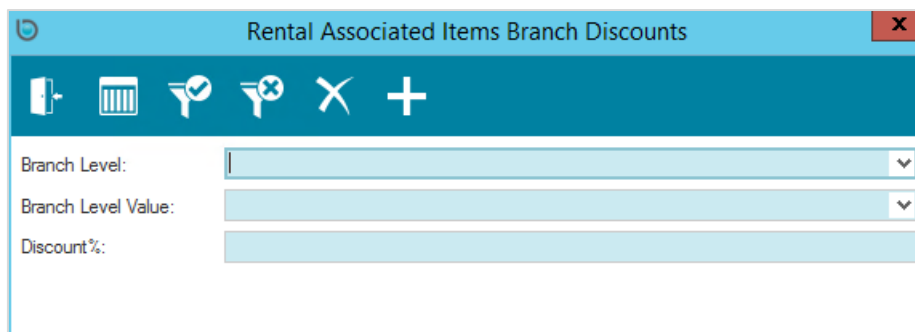
Job No	Transaction Id	Transaction Type	Transaction Date	Transaction Time	Job Type	Batch No	Reference No	User Processed
134264	85	PostJob	04/29/2019	14:35:44:740	Manufacture	355173		SENTURI
134264	86	ReversePost	04/29/2019	14:36:17:220	Manufacture	355176		SENTURI
134264	87	CancelJob	04/29/2019	14:36:59:900	Manufacture	355177		SENTURI

RENTAL

ASSOCIATED ITEMS DISCOUNTS

Discounts can now be configured by branches for Associated Items in the *Associated Items Discounts* screen (accessed via the DISCOUNTS button on the *Associated Items* screen). This allows for discounts to be created for specific levels.

When deriving rates for Associated Items, the new DISCOUNT button functionality on the *Associated Items* screen will take priority over the existing **Discount %** field.



Rental Associated Items Branch Discounts

Branch Level:

Branch Level Value:

Discount%:

GENERAL

SSRS REPORTING

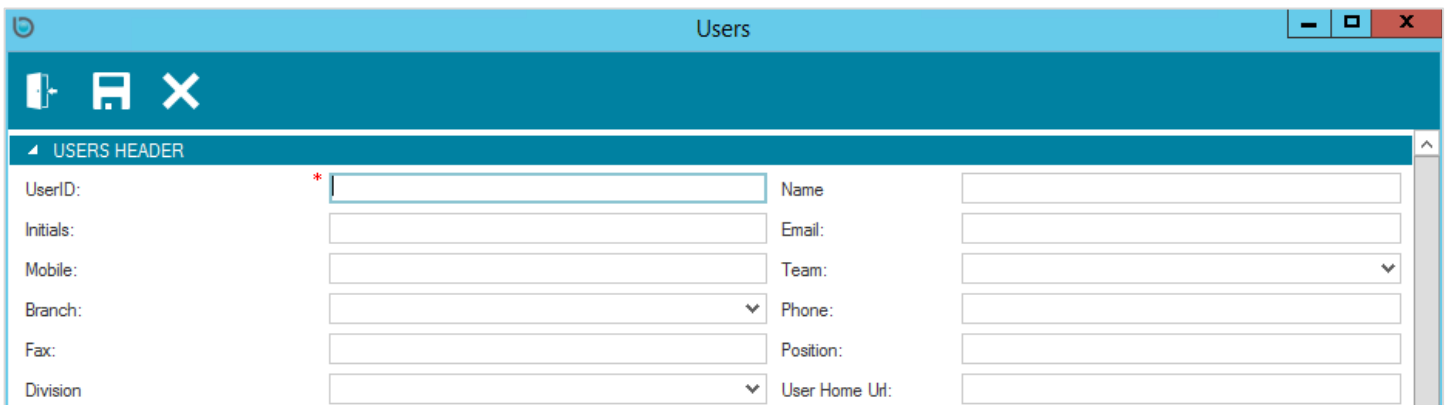
Enhances integration with SQL Reporting Services (SSRS) reporting by allowing a single SSRS reporting service instance to be used for multiple Enterprise databases. The reports for Enterprise will be progressively migrated from Crystal Reports to SQL Server Reporting Services (SSRS).

Note: A SSRS portal must be configured when upgrading.

Related Parameters: **SSRS Web Service URL, SSRS Web Service Environment Base Folder.**

DASHBOARD

Administrators can configure user specific dashboard screens by adding the relevant URL to the new **User Home URL** field in the *Users* screen.

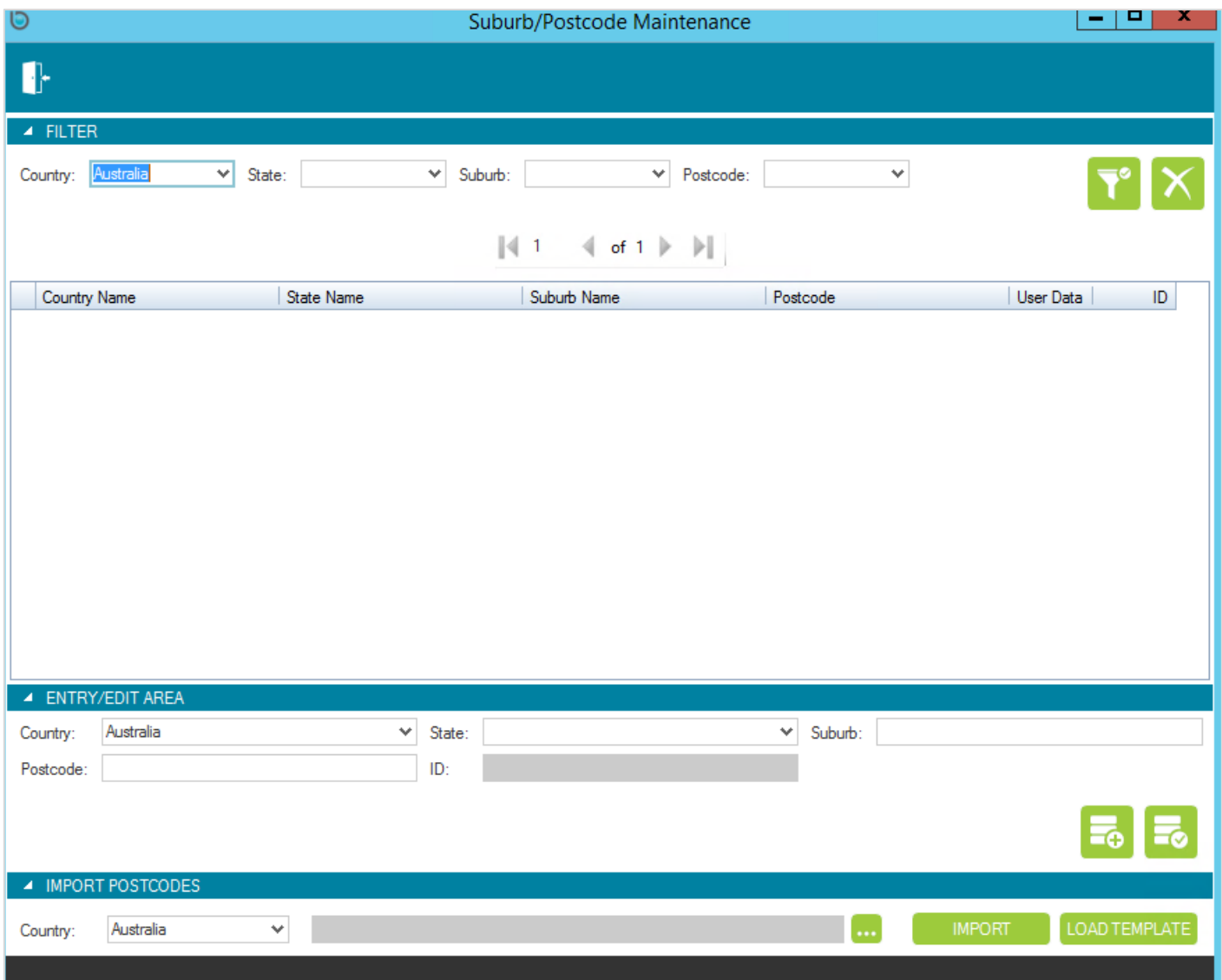


USERS HEADER			
UserID: *	<input type="text"/>	Name	<input type="text"/>
Initials:	<input type="text"/>	Email:	<input type="text"/>
Mobile:	<input type="text"/>	Team:	<input type="text" value="v"/>
Branch:	<input type="text" value="v"/>	Phone:	<input type="text"/>
Fax:	<input type="text"/>	Position:	<input type="text"/>
Division	<input type="text" value="v"/>	User Home Url:	<input type="text"/>

Related Parameters: **Overrides the DashboardHomeUrl with value in Position field in Edit User screen**

SUBURB/POST CODE EDITOR

Administrators can now maintain Postcode and Suburb information in the *Suburb Postcode Maintenance* screen. Postcode/Suburbs can be imported from a .csv file or can be created manually. When postcodes/suburbs are created manually, the **User Data** checkbox will be checked and this information will not be overwritten when importing postcodes/suburbs unless the .csv file has the same record.



The screenshot shows the 'Suburb/Postcode Maintenance' application window. It features a teal header bar with the title 'Suburb/Postcode Maintenance'. Below the header is a 'FILTER' section with dropdown menus for 'Country' (set to 'Australia'), 'State', 'Suburb', and 'Postcode'. To the right of the filters are icons for a search filter and a close button. Below the filters is a pagination control showing '1 of 1' records. The main area contains a table with the following columns: 'Country Name', 'State Name', 'Suburb Name', 'Postcode', 'User Data', and 'ID'. The table is currently empty. Below the table is an 'ENTRY/EDIT AREA' with input fields for 'Country' (set to 'Australia'), 'State', 'Suburb', 'Postcode', and 'ID'. To the right of these fields are icons for adding and saving records. At the bottom is an 'IMPORT POSTCODES' section with a 'Country' dropdown (set to 'Australia'), a file selection button (three dots), and two buttons: 'IMPORT' and 'LOAD TEMPLATE'.

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