4.5.16 - 01 Nov 2021

General Release - 4.5.16.2

Scheduled Release 01 Nov 2021

General

- **Extension columns:** Extension columns details are saving fine now for following pages : Jobs Daysheets, Quotes, Companies, People, Job WorkCentre, SubContract, Contract, Purchase Requisition.

Jobs

- **Budget validation:** Enforce Budget Validation calculation has now been changed to cater for Journal Budget. The budget type is now read from each budget line (estimateLines), instead of reading from the budget type on the budget header (estimates).

Integration

Business Central:

- **Tax Code on AP Invoice:** The tax code on the exported AP Invoice lines is derived from the AP Invoice lines, rather than from the Business Central GL Account.
  In Workbench an expense activity (and associated GL account) used on an AP Invoice line may sometimes attract GST, and sometimes not, depending on the supplier.

Beta Release 4.5.16.1

Scheduled Release - 25 October 2021

Feature Revisions

System Performance:

For our Clients with their Workbench instances hosted on our AWS servers, there has been a performance enhancement which improves the page load speed (HTTP compression has been enabled).

General:

- **Attachments:**

Improved drag and drop design on any Attachments screen throughout the application. A well defined area has been added, where users can drag and drop one file at a time. Note that the square goes blue when the file is being dropped in the right place. If the file is not dropped in the right place, the browser will try to open the file by default.

Attached Files ✕

New Attachment

Drag and drop one file at a time here

+ Copy

Select File [Choose File] No file chosen

File URL [_____]

File Group [_____ ⌄]

Details [_____]

[Upload]

Existing Attachments

File Name	Upload Date	File Group	Details	Edit	Delete
List of SNs.txt	2021-10-26 09:53			Edit	Delete

- Plant Issues auto batch process:
  Plant issues are auto-batched for issues created from:
    - Log Maintenance Plant tab
    - Daysheets Plant tab

These batches will now have the financial company of the Plant Item's Profit Centre: Plant Profit Centre FinCo.
Batches created from Upvise, are already behaving this way.

- Stock Issues auto batch process:
  Stock issues are auto-batched for issues created from:
    - Log Maintenance Stock tab
    - Daysheets Stock tab
    - Stock pick

These batches will now have the financial company of the Stock Item's Stock location's Profit Centre: Stock item Stock Location (Stock Job) Profit Centre FinCo.
Batches created from Upvise, are already behaving this way.

Jobs:

- Job Enquiry:
  Further changes on the Financial Summary tab:
    1. Budget Revenue Total has been changed to display the sum of Revenue on Budget lines, and not the sum of the Cost on Budget Lines.
    2. Cost Summary now displays **all Cost Categories** that are part of budgets with a budget type flagged as **'In Forecast budget'**. On previous release, it was only including Cost Categories if there was an actual cost against them and those with hours/hr/hrs /hour in the Unit were being excluded.
    3. "Hours Summary" section: the Budget column label changed to "Hours" and displays quantity of hours budgeted for and the % Complete is based on actual quantity of hours and budgeted quantity of hours.

Job - 6102 : HEB Road Works

| Financial Summary | Summary | Detail | Transactions | Orders | Outputs | Invoicing | Documents | Revenue | Dashboard |

Financial Period 2022/02 - Aug 2021

Revenue	MTD	YTD	LTD	Budget	% Complete
Approved Revenue	0.00	0.00	0.00		
Unapproved Revenue	11,275.00	126,912.50	217,387.50		
Total Revenue	11,275.00	126,912.50	217,387.50	1,146,225.00	18.97%

Cost Summary					
Labour	7,536.00	11,884.00	19,312.00	335,000.00	5.76%
Plant	5,096.00	6,112.00	10,728.00	411,500.00	2.61%
Materials - General	0.00	0.00	0.00	15,000.00	0.00%
Subcontractor	0.00	0.00	0.00	100,000.00	0.00%
Materials - Quarry & Bulk	0.00	0.00	0.00	100,000.00	0.00%
Management & Supervision	1,132.00	1,132.00	3,322.00	50,000.00	6.64%
Total Costs	13,764.00	19,128.00	33,362.00	1,011,500.00	3.30%

Surplus / Deficit					
Surplus / Deficit	-2,489.00	107,784.50	184,025.50	134,725.00	136.59%

Hours Summary					Hours
Labour		228.00	380.00	4,200.00	9.05%
Plant		88.00	168.00	2,901.00	5.79%
Management & Supervision		20.00	56.00	500.00	11.20%
Total Hours		336.00	604.00	7,601.00	7.95%

🏠 Dashboard › Cost Categories

Description *	Unit
Materials - Quarry & Bulk	m3
Fuel	ltr
Pipework	lm
Labour	Hrs
Plant	Hrs
Management & Supervision	Hrs

Daysheets:

Dockets tab: When copying Daysheets from one day to another the docket numbers on each docket line are now copied as well.

Purchasing:

- AP Vouchers:
  PO Lines tab:
  - the **Approved PO** field is now enabled by either of these two permissions: 'Voucher Lines Edit' OR 'Voucher Header Edit'
    It was previously only enabled by permission 'Voucher Header Edit'

  - Invoices Qty and Value: The current AP invoice being processed in a voucher is now excluded from these two columns, in order to show the correct qty and values under Remaining columns.

- **AP Invoice Edit:**
  When creating a new manual AP Invoice, the screen now opens with the cursor ready to type on the Supplier field (first field on the screen). It used to open on the Invoice No field (second field on the screen).

Stock & Quotes

Three new fields have been added to the Stock Item screen (up to 4 decimal places):

- Area
- Weight
- Volume

These fields can be enabled in the Quote module, using Grid management. They will only display on 'At Cost Element' Cost Sheets. The values are read only and will be populated for lines relating to stock items, by multiplying the Weight, Area and Volume by the line Quantity.

Cost Sheet 1 : Project Management / Quote 1-10

Details	Type *	Line Code	Plant Rate	Unit	Qty *	Cost Rate *	Total Cost	Markup % *	Selling Rate *	Total Sell	Margin %	Activity *	Work Centre *	Description	Area	Weight	Volume
	Labour	A3 : Senior Professio...			100.0000	70.0000	7,000.00	0%	150.00	15,000.00	53.33%	DES : Design	Q01 : Project ...		0.000	0.000	0.000
	Labour	A1 : Project Manager			80.0000	100.0000	8,000.00	0%	100.00	8,000.00	0%	PM : Project M...	Q01 : Project ...		0.000	0.000	0.000
	Labour	B5 : Leading Hand			300.0000	35.0000	10,500.00	0%	45.00	13,500.00	22.22%	ASSEM : Asse...	Q01 : Project ...		0.000	0.000	0.000
	Plant	XY1234			1,000.0000	0.8000	800.00	0%	1.50	1,500.00	46.67%	UTES : Utility V...	Q01 : Project ...	4WD Utility	0.000	0.000	0.000
	Item	1200-A8/10-C		Nr	1.0000	0.0000	0.00	0%	0.00	0.00	0%	TRK : Heavy Tr...	Q01 : Project ...	Towel shelf with towel bar	1.123	0.123	4.130

New Line

| | | | | | | | Total | 26,300.00 | 44.49% | | 38,000.00 | 30.79% | | | | 1.123 | 0.123 | 4.130 |

Page 1 of 1   View 1 - 5 of 5

Integration

MYOB Advanced

- File attachments with a space in the file name, attached to Workbench AP Invoices were failing to export to MYOB after MYOB Advanced 2021.1+ upgrade last week. It was due to the space in the file name. Workbench can now handle the export of these attachments successfully.
- When populating inter-co AP Invoice lines with the inter-co job, Analysis1 is now populated with the default MYOB Advanced Branch for the batch FinCo, as per the Setting.

Upvise

- Timesheets break: Upvise integration now falls back to the global setting value on Workbench setting 'Break Duration Hours', whenever there is no value set by PC or byFinco. This is used in the Upvise integration to calculate the field 'Number of Breaks'.

SAP B1

- When starting the SAP agent the following Workbench Settings will be set for the FinCo:
  Financial System = SAP
  Export Job Codes = enabled for the financial company being integrated.