



Update 1016 (version 6.00) New Enhancements

This document details the new enhancements included in ProfitNet version 6.00. If you have any questions, please call YADA Systems Technical Support at 800-634-2614. Our business hours are Monday-Friday, 7:30 am to 5:45 pm Central time.

Production


- **Menus** – To help you narrow down your search, the ProfitNet menus have been redesigned.
- **User Identification** – The name of the user currently logged into ProfitNet appears at the top of the window.
- **Attachments** – The following Attachment options have been added so you can now:
 - Delete the original file after attaching it to a job
 - Flip, rotate, crop, zoom and print images
 - Attach PDF and Document files
 - Attach files directly from a scanner
- **Phone Number Enhancements** – The Work Phone Ext. field on the Customer/Vehicle tab now accommodates six characters. In addition, you can now list extensions for Insurance Companies and Agents.
- **Employee Teams** – When logging labor, Teams can now be setup to default to a specific department.
- **Employee Status** – Only active employees are now displayed on all search screens. There is still an option to View All employees if needed.
- **Enhanced Required Field Window** – Along with the new Customer PO Number and Delivered Date required fields, you can also select fields **Required Before Converting Jobs** and **Required Before Closing Jobs**. This feature can be found in System Utilities/Production Management/Go to Required Fields Setup.
- **Supplier Status** – To customize your Suppliers that appear when Ordering or Receiving parts, you can now determine if a Supplier is Active or Inactive.
- **Detail Line Enhancements** – The following are new features for the Detail Lines:
 - Notes can now be added/edited to individual detail lines and they are also available on the Estimate/RO printout.
 - A part price supplement can now be viewed with the original detail line. A + on the detail line allows you to toggle to showing the supplement by itself or included in the original line. This setting can be set on the fly or defaulted within System Utilities. This is also available on the Estimate/RO printout.
- **Event Log** – The user that completed an event is now included on the Event Log report. The Event Log report is located under Reports on the main ProfitNet window.
- **Agent Abbreviation Field** – The Agent Abbreviation field now allows up to 20 characters.

- **Maximum Arrivals and Delivers per Day** – To eliminate over-scheduling for a specific day, a maximum number of arrivals and delivers per day setting is now available in System Utilities under Production. Once the maximum number has been reached, the user is notified.
- **Fixed Cost Invoices** – Fixed cost invoices can now be entered without having to first select an RO. This streamlines the process of keying invoices for multiple ROs.

ADP ShopLink

- **Exporting Parts Price Supplement Data to ADP ShopLink** - Parts price supplementing data can now be shared between ProfitNet and ADP ShopLink. This means parts price changes made in ProfitNet can automatically be exported back to ADP ShopLink. Please contact YADA Systems Technical Support at 800-634-2614 to activate this feature.

Vehicle Tracker

- **Specifying Priority** – To help you prioritize the jobs in your shop, you can now set a priority level per department for specific jobs listed in Vehicle Tracker. To access, highlight your specific job, select the  icon from the toolbar and select a priority level with 1=Highest and 99=Lowest. The priority number appears under the department column for the specific job. Displayed vehicles can also be sorted by the priority level and filtered by department.


Work Planner

- **Employees** – A Check box now exists to select and deselect an Employee from being visible within Work Planner.
- **Viewing Employees** – Located at File/Employee, a **View Employee In Work Planner** box has been added. Mark the box if you would like a specific employee to appear in the main Work Planner window.
- **Appointment Start and Stop Times** – To provide additional appointment information, Work Planner now allows start and stop times.
- **Appointment Reminders** – A pop-up Appointment Reminder window will appear allowing you to access the appointment from this window. To determine when this reminder should appear prior to the appointment, a drop-down list is available when creating your appointment.
- **More Details with Flyovers** – To view additional appointment details, a flyover mode has been added. To access, simply right-click within Work Planner and select **Enable 'Flyover' mode**. A pop-up window with additional details will appear.
- **Appointment Modified By** – A notation of who last modified an appointment is now documented for every appointment. This is helpful if someone besides you schedules an appointment.
- **Automatic Subject Field** – The Subject field is automatically completed when a Category is selected. If you type your own subject in the field, it will not be overwritten if a different category is selected.
- **Appointments Associated with Estimates** – An appointment can now be associated with an Estimate.

Parts

- **Ordering Parts** – Check boxes are now available under the Order Parts tab and the Order All button allowing the option to select a combination of part types instead of just OEM, Non-OEM and Sublet.
- **Returned Parts** – A Returned Parts tab has been added to the Lines tab.
- **Reasons for Returned Parts** – To eliminate questions on why a part has been returned, the setting “Require Returned Parts Reason” is now available in System Utilities under Parts & Labor. A Returned Part Reason will need to be selected before proceeding.
- **Adding the Part Price to Labels** – When designing custom part labels, you can now include the part price. To access, go to System Utilities/Printing Setup and Report Options/Go to Labels Setup.
- **Invoices** – When adding a fixed cost invoice, the creator’s name is now recorded.

Time Card and Job Costing

- **Clocking In and Out of the Shop** – Time Card now allows employees to clock in and out of the shop. While clocked in to the shop, employees can also clock in and out of ROs.
- **Accessing Labor Entry from Employee Scheduling** – By simply selecting the  icon from the Employee Scheduling toolbar, you can now easily access Labor Entry.

Accounting

- **RO Number same as AR Invoice Number** – The RO number can now be set as the AR Invoice number. To access this feature, go to System Utilities, select Accounting and select Go to System Accounting Settings.
- **Clear Accounting Fields for Supplier** – Accounting fields for a Supplier can now be cleared and the Supplier can be resent to your accounting package. This feature is similar to the available feature for Customers when sending to accounting packages.
- **Sending Deposits** – ProfitNet can now be configured to send deposits to specific accounts in your accounting package.
- **QuickBooks SDK 6.0** – Support has been added for QuickBooks SDK 6.0.
- **QuickBooks Time Card Transactions** - Customer and RO# references are now included when time card transactions are sent to QuickBooks. These references provide additional RO information to help identify records.

Reports

- **Payment Listing Report** – The Payment Date, Payment Method and Payment Type has been added under the Sort Options tab for the Payment Listing report. The Payment Posted Date has been added under the Payment Dates tab.
- **Parts Listing Report** – A **Show Supplier** box has been added to the Additional Report Filters window when either printing or previewing this report.

- **New Paint and Material Bill Invoice** – The Paint and Material Bill Invoice report from your Formula Retrieval is now available in ProfitNet. Detailed costing is displayed on this report and is a great tool when showing an insurance company the costs of Paint and Material. This report is available within the Repair Order Options tab or from the Report menu on the ProfitNet toolbar.
- **Printing with Multiple Trays** – Selecting default trays for specific reports can now be configured within System Utilities or on the fly. This feature allows you to print your estimates and repair orders from Tray 1 with plain paper and address labels from Tray 2.
- **Accounts Receivable I Report** – A **Show overpaid jobs** filter option has been added to this report.
- **Customer Listing Report** – This report now displays email addresses. Sort options have also been added to this report.
- **Follow-up Letter and Custom Invoice** – To add more customization, additional fields can be used for the Follow-up Letter and Custom Invoice. The fields include Cell Phone, Work Phone + Extension, Alt Phone, and Alt Work Phone + Extension.
- **Employee Flag Sheet** – The report criteria now appears at the top of the report.
- **Sales Journal I Report** – Sorting by Revenue Type is now available for this report.
- **AR Unpaid/Overpaid Billed Jobs and AR Unpaid Billed Jobs III** – The claim number now appears on both of these reports.
- **Estimate/RO & Final Bill Print Outs** – A Hide Labor/Paint hours option has been added to these reports. This option can be set on the fly or defaulted within System Utilities. There is also an option to print all Techs and/or Estimators including the Estimator's License # associated to the job on the report.
- **Associated Dates Filters** – All reports can now be filtered using dates from the Associated Dates window. To use this filter, select a report and click **Show Additional Date Filters** on the **Date Options** tab.
- **Supplier Invoice/Supplier Invoice Summary** – Grand Totals now appear at the bottom of these reports.
- **New Total Loss Report** – All jobs with a Total Loss status are printed on this report.
- **Custom Folder Tags** – You can now print Custom Folder Tags in a landscape mode.

Messaging

- **Vehicle Tracker Movement Event** – A message event to send an email is now available when a vehicle moves in Vehicle Tracker.
- **All Labor Completed Event** – A message event can now be setup to send an email when all labor has been completed on a job.

Security

- **Can View Order/Receive/Invoices Screens** – By marking the Can View Order/Rec/Inv. Screen within security settings, a user is limited to only viewing this information.

- **Can Modify Job Rates** – When unmarked, this new security setting will not allow a user to change rates on a job. However, to simplify when changing Insurance Companies, the user does have the ability to accept the prompt to reload the rates.
- **Security Templates** – When a Security Template is changed, all users with that template are now automatically updated.
- **Security Template Imports** – To eliminate recreating Security Templates with multiple databases, the Security Templates can now be imported from other databases.
- **Can Delete Estimate Files** – When this option is marked, a user can delete estimates from the Estimate Package File Import Utility window.
- **Can Grant Higher Security Than Self** – This option, when unmarked, restricts a user from granting themselves or other users a higher security level.
- **Can Edit Templates/Individual Security** – This option, when unmarked, restricts a user from modifying the security templates or individual security settings.
- **User Setup Window** – For easier access, the User Setup window is now available from the main ProfitNet window under System.
- **User is Locked**– A **User is Locked** checkbox has been added to the User Setup window. Only a supervisor or the specific user can modify this option. A locked user cannot be deleted without a Verification code from YADA Systems Technical Support. Only the **User is Active** option can be changed for a locked user.
- **Access to Modify Others Appointments** – Located under Utilities on the Security Template Maintenance window, this security feature when unmarked eliminates a user from editing or deleting appointments other than their own.
- **Can Edit Supplier ID/GL Codes** – This security feature limits who can change a supplier ID and GL account. With the security setting turned off, a user is unable to edit or add either the Supplier ID or the GL account.
- **Password Field for Users** – The Password field for a specific user cannot be viewed unless you enter the password for the user.

ADP DMS Interface

- **Adding Multiple Technicians or Advisors** – To save time when adding to your ProfitNet database, multiple technicians or advisors can now be added at once. Using the check box, simply select all Technicians/Advisors you wish to import from ADP DMS.
- **Parts Linking** – You now have more control over your parts! When using the ADP DMS Interface, you can now link a part from ADP DMS to a part in ProfitNet.

Reynolds & Reynolds

- **Parts Linking** – You now have more control over your parts! When using the Reynolds & Reynolds Interface, you can now link a part from Reynolds & Reynolds to a part in ProfitNet.

Consolidated Report Generator

- **New Reports** – The following reports have been added to the Consolidated Report Generator:
 - Department Efficiency Report
 - Sales Document Report
 - Referred by Listing Report
- **Report Totals as Summaries** – All reports now print report totals as summaries per shop/database.

Database Administrator

- **Easier To Run DBAdmin**– If another database is in use, the Database Administrator program (DBAdmin) now allows access to one database not in use.
- **Last Run Date**– The last run date is now available on the File Version window.

