Platinum Online 2.13.6 Release Notes

Features

Version	Area	Category	Description	
2.13.6	Technician Activity	Enhancement	Introduced a display for total clocked hours and estimated hours on a job, giving users better visibility of job progress and time management.	13364
2.13.6	Technician Activity	Enhancement	This feature introduces configurable prompts to ensure technicians complete all necessary actions on a job when logging off or finishing an activity. Prompts include reminders for adding job descriptions, uploading images, and updating job statuses. These prompts only appear if time has been recorded and corresponding actions remain incomplete. System settings allow administrators to enable or disable prompts for job descriptions, images, and statuses, offering flexibility to suit different workflows. This ensures technicians provide accurate and complete information while minimising unnecessary interruptions for jobs they have not worked on.	13545
2.13.6	Platinum Online Signature	Enhancement	Signatures added to customer & unit media are now stamped with improved references, ensuring better traceability and clarity.	13618 13619
2.13.6	Framework Update	Enhancement	The system has been upgraded to Angular 17, enhancing performance, security, and compatibility with modern frameworks.	15008
2.13.6	Themes for Platinum Online	Enhancement	A light/dark theme toggle has been added to Platinum Online, offering users more control over their interface preferences.	15064

2.13.6	Platinum Online	Enhancement	Detailed unit & customer information is now displayed when selected, providing users with greater insight during the selection process.	15060 15061
4.3.6	SMS	Bug fix	Corrected an issue where SMS messages were being sent to the wrong phone number, ensuring messages are sent to the intended recipients.	15197
4.3.6	Unit Sales	Bug fix	Addressed a bug where additional units on sales orders were not being reported correctly, ensuring that all units are accurately reflected in the reports.	15137
4.3.6	VAT Reporting	Bug fix	Fixed an issue causing the VAT100 report to quit prematurely, ensuring that the report generates and completes as expected.	15103
4.3.6	Workshop	Bug fix	Resolved an issue where items ordered through a workshop job were linked to an incorrect sales order reference, improving accuracy in order tracking and history.	14968
4.3.6	Quickbooks	Bug fix	This fix addresses an issue where the QuickBooks Standard System Report did not correctly handle VAT variables, ensuring accurate data reporting for VAT-related entries.	14922
4.3.6	Workshop Diary	Enhancement	This enhancement ensures that tagged workshop jobs remain tagged throughout their lifecycle. It improves organisation and traceability, preventing tags from being unintentionally removed during updates or workflow changes.	15215
4.3.6	Workshop Diary	Enhancement	This feature allows users to nudge multiple workshop jobs simultaneously, streamlining the process of adjusting schedules or reallocating resources. It improves efficiency by reducing the time required to update job timings individually.	14368
4.3.6	Unit Sales (Auto Trader API)	Enhancement	The Auto Trader API streamlines data sharing between your Dealer Management System (DMS) and Auto Trader. This integration eliminates the need for manual data entry by automatically	14834

			synchronising vehicle stock details, saving time and reducing errors. It ensures your listings are always up to date, improving efficiency and the customer experience.	
2.13.5	Print check Sheets	Enhancement	It is now possible to print a check sheet from Platinum Online. Be sure to check over the system settings to ensure the print record is set up for it.	14960
2.13.5	Create Admin Check Sheet	Enhancement	It is now possible to create administration check sheets within Platinum Online.	14890
2.13.5	Email Check Sheet	Enhancement	It is now possible to email check sheets from Platinum Online. Be sure that you have SXmail set up. Our support team can help out with that.	14815
2.13.5	Create Unit Sales Check Sheet	Enhancement	It is now possible to create Unit Sales check sheets from Platinum Online.	14888
4.3.5	Check Sheet admin	Enhancement	You can now view administrative check sheets within reports and settings on desktop Platinum.	15161
4.3.5	Auto Trader	Feature	Unit modifications to trigger automatic uploads to Auto Trader.	14934
4.3.5	Auto Trader	Feature	Real time update settings to feed accounts.	14967
4.3.5	Auto Trader	Feature	Lifecycle state for Auto Trader adverts.	15195
4.3.5	Admin Check Sheet	Enhancement	Standard label types update for administrative check sheets.	15170
4.3.5	Point of Sale	Enhancement	System setting for emailing receipts in point of sale.	15185
4.3.5	Check Sheet Unit Sales	Enhancement	To be able to view completed unit sales check sheets in desktop Platinum.	15160

4.3.5	Xero Report	Enhancement	Xero report will now include VAT figures for the margin scheme.	14957
4.3.5	Advisory Check sheet	Bug fix	Advisory check sheet issue has been fixed where the advisory was always showing as "Pass".	15146
4.3.5	Year End	Bug fix	Year end behaviour issue addressed where systems without the Nominal and Purchase Ledger could perform a cleardown which created errors.	13779
4.3.5	Unit Sales Totals	Bug fix	Unit Sales grand total calculational issue has been fixed.	15179
4.3.4	Point of sale email receipt option	Enhancement	It is now possible to not print a receipt from the Point of sale screen in Platinum. You'll find the option on the bottom left of the payment screen.	14767
4.3.4	Point of sale no receipt print out	Enhancement	It is now possible to email a receipt from the Point of sale screen in Platinum. You'll find the option on the bottom left of the payment screen.	15044
4.3.4	Fitted units	Bug fix	We have addressed an issue when amending a sales order with fitted units against it creates a new workshop job.	15135
2.13.4	Platinum online	Enhancement	We've made a visual enhancement within the workshop area. This will allow you to see up 3 pieces of unique information relating to the unit. You can view the registration, VIN, Chassis, Stock code or Engine number from Platinum online. This is determined from the system settings in Platinum.	14954
2.13.4	Check sheet question type of signature	Enhancement	You can now utilise the question type of "signature" within the enhanced check sheets. This will give you the ability to capture signatures for multiple technician sign offs.	15141

2.13.4	Check sheet image annotation	Enhancement	You can now annotate on images within a template. This is useful for the workshop administrator to point out known issues to look out for.	14821 14954
2.13.4	Check sheet image annotation	Enhancement	You can now annotate on images that have been provided within a check sheet. This is useful for technicians providing feedback on images supplied on a check sheet.	14889
2.13.4	Search functionality in the enhanced check sheets	Bug fix	We have addressed an issue where you could not use the search functionality on the model and manufacturer code.	15025
2.13.4	Unsaved data lost	Bug fix	We have fixed an issue where you would lose unsaved data when navigating away from an open check sheet.	14939
2.13.4	Error on submission	Bug fix	We have fixed an issue where missing information on a check sheet caused an error upon submission.	14934
2.13.4	Server error	Bug fix	We have fixed an issue where a server error would occur when only the footer option was selected.	14933
2.13.4	Check sheet logo	Bug fix	We have addressed an issue with the check sheet logo not being recorded properly when a check sheet has images/signatures placed against it.	15139
4.3.3.1	Currency conversion	Bug fix	We have fixed an issue within the currency conversion where it was picking up incorrect figures.	15130
4.3.3	Fitting additional units	Bug fix	We have addressed an issue where you could not delete the link between two units if you no longer require the unit to be fitted.	14989

2.13.2	Platinum Online	Image annotation	It is now possible to annotate over uploaded images in the enhanced check sheets. Simply upload an image to the check sheet and press the pencil icon to use the tools available to make annotations.	14902
2.13.1	Platinum Online	Sales order picking	You can now see a list of all your orders that need to be picked. Simply press "Show more" at the bottom of the list to see the full Picking order list.	14489
2.13.1	Platinum Online	Technician activity	We have fixed an issue within Technician activity. Platinum Online would crash when a unit which does not have a check sheet associated with it when applied to a job.	15032
4.3.2	Platinum Online	Enhanced check sheets edit	You can now edit your enhanced check sheet drafts and published templates by going back into the check sheet.	14965
4.3.2	Platinum Online	Enhanced check sheets delete	You can now delete your template drafts and published check sheets from Platinum Online.	15005
4.3.2	Platinum Online	Enhanced check sheets information	When applying an enhanced check sheet to a workshop job, you can now see the customer/unit/job information against the check sheet.	14966
4.3.1.1	Logistics	Logistics planning screen performance	We have identified and fixed an issue within the logistics planning screen causing slow performance.	15108
4.3.1.1	Payroll	SPP for adoption	We have addressed an issue where the adoption SPP was using the new rules irrespective of the child due date.	15107

4.3.1	Payroll	NI changes	Changes to National Insurance Contributions have been implemented as per HMRC guidelines.	15088
4.3.1	Payroll	Year end	Tax Year End needs to be processed with new rates and thresholds as per the below article: https://www.catalyst-uk-support.com/kb/index.php?title=Payroll_end_of_year **Only update your Platinum system once you have run your final pay period before tax year end**	15095
4.3.1	Payroll	Statutory Paternity Pay Leave	It is now possible to break up the 2 weekly block of paternal leave into separate weeks as per the HMRC changes.	15029
4.3	Platinum Online	Enhanced Check sheets	Enhanced check sheets are now available within the workshop for Platinum Online. Please see here for setup details	
4.2.16	Logistics	Planning Screen job edit	It is now possible for users of the Logistics module to edit certain job details from the Planning Screen without entering the job.	15069
4.2.16	Logistics	Repeatable jobs	It is now possible for Logistics users to set up repeatable jobs using the existing copy function. Users can select the days in which the jobs will repeat.	15068
4.2.16	Logistics	Bulk date change	You can now apply a job date to multiple jobs. This is done by tagging the job and using the new function.	15063
4.2.16	Logistics	Tagged jobs show totals	It is now possible to see a total sum of the jobs that are tagged. This gives you the rates against the jobs and weight information	15051

4.2.16	Logistics	Planning Screen date ranges	A series of new buttons has been introduced in the Logistics Planning Screen. This will allow users cycle through the date ranges on the planning screen with ease.	15073
4.2.15	Reports	Workshop Reports	A new workshop report variable I28 has been created to read transaction date to report on sold engineer hours.	13655
4.2.14	Payroll	NI Changes	Changes to National Insurance Contributions have been implemented as per HMRC guidelines. This update needs to be installed to be effective for pay period containing 6th January. Please refer to the communication that has been sent out, but please contact our support team with any queries regarding the update.	15022
4.2.12	Customers & Suppliers	Look up	Within Add or Edit Customers & Add or Edit Suppliers new columns have been added to show Address lines 1-5, phone numbers and email address, so this information can be seen at a glance.	13809
4.2.11	Workshop	Workshop Job	From the Invoice Items tab within a workshop job a new column has been added P. Order to show the order number against backordered items. If there is more than one order this item an Order Review popup using Shift F2 allows all orders to be displayed.	14331
4.2.10	Payroll	Year End	Tax Year End needs to be processed with new rates and thresholds as per the below article:	

| | | | https://www.catalyst-uk-support.com/kb/index.php?title=Payroll_end_of_year

Only update your Platinum system once you have run your final pay period before tax year end | |

Quality

Version	Area	Category	Description	Ref
4.2.15	Purchase Ledger	Postings	If Cash Accounting is in use, a rounding error has been resolved to correct the total payment when posting purchase invoices.	14956
4.2.15	Purchase Ledger	Bulk Payments	When Settlement Discounts are posted via Bulk Payments, the VAT on these adjustments are now included on the VAT return.	14895
4.2.14	Stock Control	Purchase Ordering	When stock items are price corrected within purchase orders, nominal postings are now correctly writing to debit cost of sales and credit stock where Work in Progress modifiers setting is in use.	15032
4.2.12	Unit Sales	Unit Credits	When crediting a Unit deal the write down posting are now correctly updating the stock and cost of sale accounts.	14353
4.2.12	Purchase Ledger	Supplier History	When posting a credit note to a supplier account, from the adjustments screen the amounts and totals are now displayed.	14446
4.2.12	Purchase Ledger	Supplier Relationship Manager	Where Supplier and Customers have the same account code the correct information against each account is displayed in SRM and CRM.	14633
4.2.11	Workshop	Estimate	If an Invoice account is changed on a workshop job where there are estimate items a check is	14848

			now made to correctly update the VAT rate if required, for both invoice and estimate stock items.	
4.2.9.0	Stock Control	Point of Sale	Stock items with a discount associated are now correctly priced on the invoice and payment screen at POS if promotional discounts are in use.	14573
4.2.9.0	Unit Sales	Site Location	When generating a Unit Sale document, a warning message is now displayed only when the site logged into, and the unit location do not match.	14826
4.2.9.0	Payroll	End of Year	Date change on P60 End of Year Cert report to 2023.	14839
4.2.8.0	Workshop	Fitted Units	If a fitted unit is removed from the main unit on a workshop job the system now removes the link completely from the two records and allows it to be fitted to another unit without error.	14709
4.2.8.0	Workshop	Stock Codes	A stock item can now only be renamed from Add or Edit Stock Items. A loophole where a stock code could be renamed within the list of items within a workshop job has been prevented.	12939
4.2.8.0	Workshop	Import Internal Job	The Import routine for creation of Internal Workshop Jobs now create in the correct sequence.	14755
4.2.8.0	Workshop	Invoicing Internal jobs	A warning has been added for internal jobs when the invoice account is set to "log unit expenses" and the unit is "in Stock status" to advise users expense records and accompanying nominals will be posted.	12170
4.2.8.0	Workshop	Invoice Template	When a workshop credit note is raised using ~707 document token the balance due now displays correctly without including past payments.	13911

4.2.8.0	Logistics	Create Ticket	Logistics Invoices are now displaying job numbers in the correct order. Numeric tickets are smallest to largest and alphanumeric are alpha character order then number, smallest to largest.	14754
4.2.8.0	Unit Sales	Unit Expense	Unit expense cost of sale postings now match the site the unit was sold through rather than the site the user is logged in to.	13551
4.2.8.0	Unit Sales	Add/Edit Unit	When the status of a unit is changed as well as the cost the nominal postings are now taking into account the amended cost before and after the change to status.	14351
4.2.8.0	Unit Sales	Credit Unit	With Deferred Profit enabled, where a credit is produced for a discounted unit, the prepayment journals for the credit are now posting correctly.	14698
4.2.8.0	Stock Control	Stock Movements	***IMPORTANT* Depot Movement Process** The quantity and nominal postings are now posted against the correct depots when moving stock between depots. There is no longer a requirement to use minus quantities. Please see updated knowledge article below. https://www.catalyst-uk-support.com/kb/index.php?title=How_do_I_Transfer_Stock_between_Depots%3F	14445