Everest Web Edition
Version 6.0.3 – 6.0.3b Enhancements

Concerns

Within the Concern View, a Copy Concern button will replicate a Concern record for the same Account or a different Account.

Data is copied from:	Data is NOT copied from:
• Concern Tab	• Returns Tab
• Reference Tab	• Attachments Tab
• Product Tab	
• Repairs Tab	

Attachments Tab files now be viewed after a Concern is closed.

Attachments Tab maximum file size increased to 12 megabytes. 6.0.3b

Close Notice button now remains enabled after a Concern is closed.

Spell check button for all text boxes throughout the Concern record. 6.0.3b

Accounts

Transfer Records option enables one Concern or all Concerns to be moved from one Account to another. Also includes the option to transfer all Contacts and all Sales Activities. The Transfer Records button is located in the Edit Account window for Users belonging to User Groups with Delete Account privileges. The Transfer Records feature is also available for Internal Areas.

The lookup for Contact Names will search on the last name or first name. The last name is the new default for lookups. A contact name conversion program will update names to the new format.

Duplicates? button in View | Account Calls will now search on partial phone numbers, not just whole phone numbers.

Lot Number field added to View | Account Calls. 6.0.3b

Documents Tab maximum file size increased to 12 megabytes. 6.0.3b

Actions

A View Account button in Actions complements the View Concern button so users may view information in the Account Notebook including all Account Contacts.

Files may be attached to outgoing email messages generated from Actions | Send Notice.

A context-sensitive Help button was added to the Action Request window.

Spell check button for all text boxes in the Action. 6.0.3b

Sales Activities

Files may be attached to outgoing email messages generated from Sales Activities | Send Notice.

Search

Text in the Resolution is now included with the text in the Detail Description in the keyword search.

Lot Number field added. 6.0.3b

Queries

Export to Excel from Reports | Queries now separates each of the account address data fields into separate columns instead of creating one text string for the entire address.

New Sensitive checkbox field in Queries enables a count and total based on those Concerns checked as Sensitive.

Product Memo field added to Queries. 6.0.3b

Query report printed width expanded. 6.0.3b

Imports

A new format to import source data into Everest requires a header row with column heading labels. The columns can be in any order and certain fields are required, but columns for optional fields can be omitted. The file can have any file name, but it must be saved as a *.csv* (comma separated value).

A new Import feature is the format to import a list of Concerns. One Product record may be included with each Concern record.

Please refer to the Help topic, Imports for a printable list of column header row labels. The required fields are highlighted in the instructions and a spreadsheet template is available for each import.

New Imports:
- Accounts
- Contacts
- Products
- Equipment
- Users
- Concerns (new)

Example Import Template:
- accoutimport.csv
- contactimport.csv
- productimport.csv
- equipmentimport.csv
- userimport.csv
- concernimport.csv (new)

NOTE: The format for automatic imports performed by the Event Manager has not changed.

Notifications

Saved Notification templates can be downloaded from Administration | Notifications. New and updated example templates have been added to the Help.

Notifications templates are HTML file format, replaces previous .RTF format. A built-in HTML Template Editor is launched from the Edit Template button. Template Editor menu includes spell check button and insert keyword button. 6.0.3b

Fixes

Resolved the size of the text box for user defined fields with a numeric data type to apply the full default width or a character limit, when specified.

Corrected a Queries error produced from user defined fields formatted for alpha text.

Vertical scrollbars tested and corrected in Administration and Configuration windows.

Removed the pop-up windows in View and Reports for improved usability and performance.

Copy/Paste function supported for drop down lists in user defined fields.

Audit Log will now record Concern Category Standard Actions.

All saved Notification Templates now appear in drop down list for the Action Default Notice option in Configuration | Actions and in Administration | Notifications | Scheduled Reminders.

In Reports | Concern Reports, the data name label for Mfg Location displays properly in Concern Reports when Select Specific is chosen.

In the Concern Notebook | Reference Tab, a Reference Account using the data name Internal will show the Internal Area List.

In the Concern Notebook | Product Tab, the Lot Number field now checks for duplicates, even when the field is initially left blank. Returning to add a Lot Number to the field after a new Concern was saved, there was not a check to prevent a duplicate number from getting entered. The check did occur on the initial data entry, so it was specific to the re-entry scenario only.

Fixed the Active/Inactive status for Accounts.

Added the option to require data entry with a Required to Save option in Configuration | User Defined Fields.

In Administration | User Information | New User, profiles now save the checkbox settings.

Security improvements have been made to Password expiration and size for Users which are optional system settings in Configuration | Other Options | Default Days.

In Administration | User Information | User Groups, the Delete Attachments privilege was fixed.

Due Dates are correctly adjusting for Holidays and Due Dates based on Work Days which are both Configuration options.

In View | Search Concerns, the Clear Selections button was fixed.

Attachments Description field is now trimmed to 50 characters.

In the Concern Notebook | Concern Tab, an Edit Contact button is available after a Contact is selected.

Category Standard Actions generated with Concerns from View | Account Calls.