

SuccessWare 5.0 Release Notes

Systems No Longer Supported

- MacOS X 10.2 "Jaguar" is no longer supported.

Features No Longer Supported

- NetHASP keys are no longer supported. These keys are red, have "NetHASP" imprinted upon them, and have not been available for several years.

Those still using NetHASP keys have the following three options:

OPTION 1: Move the key from computer to computer as necessary.

OPTION 2: Install the multi-user version of SuccessWare and connect your NetHASP key to the server computer. This setup will allow you to access SuccessWare from one client at a time. Please note that this option requires an extra computer to run the server software.

OPTION 3: Upgrade to the multi-user version of SuccessWare. This option also requires an extra computer to run the server software, however up to three client computers (or more) are able to access SuccessWare simultaneously. If you choose this option, now or in the future, we will give you \$200 toward purchase or lease.

Enhancements

- Added full Mac OS X 10.5 "Leopard" compatibility.
- Added a comprehensive, built-in backup facility.

This capability keeps you from ever losing your valuable SuccessWare data due to system malfunctions. It can perform full backups automatically or manually and can even log all transactions that occur between backups. If your data file is lost or damaged for any reason, you can easily restore from your latest backup and "integrate" the associated log file to bring your data fully up to date.

A Backup Preferences wizard will appear upon SuccessWare launch to help you set up this important capability and new backup items appear in the File menu.

- Added the ability to hide financial accounts that are no longer used.

To hide an account, choose Modify Accounts from the Financial menu, go to the account, choose Make Account Inactive from the Accounts pop up menu, and then choose Hide Inactive Accounts from the Accounts pop up menu. To view hidden accounts, choose Show Inactive Accounts from the Accounts pop up menu.

- Added preference to disallow client deletions.
- Added an Order Items Progress Report.

This report lists all outstanding order status items (where the status is not Complete, Canceled, or blank). It groups them by their current status and shows the item's client, session, and order information, the date the full order containing the item was promised to the client, the date the item was set to its current status (As Of), the vendor order number (if any), the deadline for the item to move to the next status, and notes about the item. Use this report to track full orders and their individual items that need to be finalized before the order can be completed.

- Added the ability to run the Getting Started Wizards at any time.

Choose Getting Started Wizards from the File menu.

- Added new standard expense category items.
- Changed Type of Previews to Presentation Method.

This is simply a name change and does not affect the function of these fields.

- Allows the export of scheduler date/times in GMT (Greenwich Mean Time).

This was necessary to work around a bug introduced in Microsoft Outlook 2007 on Windows. Outlook 2007 imports local date/times from vCal files as if they are GMT times. Exporting them as GMT allows Outlook 2007 to import the date/times properly. To have SuccessWare export in GMT, open the scheduler preferences and check the box labeled Export all date/times in GMT (Greenwich Mean Time).

Note that Outlook 2007 contains another importation bug that prevents it from importing all but the first of recurring events. This bug has been reported to Microsoft.

- Added a preference for whether or not to include the Total Savings line on printed order forms and email invoices.

To set this option, open preferences, click Orders in the list to the left, and check or uncheck the box labeled Do Not Show Total Savings on Printed Order Forms and Email Invoices.

- Added the ability to insert Client No. into order forms, email, letters, labels, and exported files.
- Added a ProSelect preference to "Use SuccessWare's Product Prices upon Import."

Checking this box will tell SuccessWare to ignore the prices that have been exported from ProSelect and to use the product prices stored in SuccessWare. Unchecking this box will import the prices that are exported from ProSelect.

- Added a display-only Reference Number field for credit card payments.

This field matches the value returned from the credit card processor and allows you to positively match credit card payments in SuccessWare with the processor's transactions.

- Added time to notes separator when clicking Notes buttons.

This is in addition to the date and user name.

- Moved the Preferences menu item from the File menu to the application menu on Mac OS X.

- Added a preference to not show a warning message when adding an order for a client who has no sessions.

To set this option, open preferences, click Orders in the list to the left, and check or uncheck the box labeled Warn When Adding a New Order for a Client with No Sessions. If this box is checked, SuccessWare will display a warning message whenever a user attempts to add an order for a client who has no sessions entered. The message window gives the user the choice of adding a session for the client or proceeding with the order.