

EVE 5.9.2 Enhancements

1. Certification Type

With the advent of PADI’s e-Learner and Touch products, EVE’s integration to PIC Online has a few extra things to be aware of. The most important of these is the addition of the Registration code (AKA Digital code) that applies to some products. EVE fully supported the new PADI products in EVE 5.9 but we have added some user interface improvements to make the process more seamless. Since students can now take e.g. an Open Water course as a regular course, as an e-Learner or using a Touch product, sometimes a Registration code should be submitted with the PIC and sometimes it shouldn’t. If the EVE user submits an Open Water PIC with no Registration code for an e-Learner certification, the store will be charged for a PIC even though the student already paid for the PIC when they bought the course. To reduce the likelihood of this happening, we have added a new Certification Type picklist to those places in EVE where a Course Enrollment can be created.

Booking Wizard

Customer: Roger Lockwood

Introduction | Select Courses | Select Customer(s) | Options | Requirements | Course Price

OW 4/15/2015 (8)

Customer
Roger Lockwood

Course Price: Roger Lockwood

	Pre-Tax	Tax	Total	Amount Being Paid
Course Price	\$359.09	\$35.91	\$395.00	\$395.00
Deposit			\$100.00	
Already Paid	\$0.00	\$0.00	\$0.00	
		Owes	\$395.00	

Enrollment
Status: Enrolled
☐ Pre-Registration?
☐ PADI e-Learner

Certification Type

Registration Code

Customer notes

Show on invoice

Copy to all customers on this Booking

<< Previous

Next >>

Finish

Cancel

Certification: (New #1)

General Enrollment PIC Online Money

ID (New #1)

Customer* Roger Lockwood

Course Type* Openwater Diver

Certification Date Saturday, March 7, 2015

Certification #

Instructor

Status* Certified

Certification Type

☐ e-Learner

☐ Standard

☒ Touch

Notes

Created Last Updated

Attendance Record New Save Close

If the Certification Type is 'e-Learner' or 'Touch', that tells EVE to expect a Registration code to be in place on the Certification when the PIC is submitted to PADI. If none is present, EVE will show it's missing in the Status message on the Pending PICs form. If you try to submit the PIC anyway, EVE will prompt you to enter the code.

PIC Online. Staging Server

Course Type [Show All] Instructor [Show All]

Pending Upload History

First Name	Last Name	Mid...	Course Type	Status	Sex	Address
Pete	Smit	K	Deep Diver	-Valid-	Male	3801
Open	Water Test		Deep Diver	-Valid-	Male	3801
SHARON	BABIN	R	Discover Scuba Divi...	No Email.	Female	3543 G
Jordan	Blair	L	Discover Scuba Divi...	-Valid-	Female	3222B
Gena	Paez	M	Discover Scuba Divi...	-Valid-	Female	1000 Al
Lily	Nilan	B	Discover Scuba Divi...	-Valid-	Female	3222B
Austin	Jackson		Open Water Diver	-Valid- No Registration Code.	Male	8 Wilde
THOMAS	AARON	A	EFR: Prim. & Scnd.	-Valid-	Male	408 OA
Michael	Montagne	A	Oxygen First Aid	-Valid-	Male	400 Am
Theron	Hunter	B	ReActivate.	-Valid-	Male	123
Cristian	Stoichin	C	ReActivate.	-Valid-	Male	886 Gar
Adam	Lockwood		ReActivate	-Valid-	Male	3801 H

Store View [CompoundStore]

Count: 12

Open Certification Record(s)... Open Customer Record(s)... Send to PIC Online Cancel

You can override that behavior (i.e. so no prompt is shown) by removing the tick from the 'Show a prompt when submitting PIC if a Registration Code is required but none is present' checkbox on the Courses tab of the Options form.

Options (ISSYSVAIO)

Print Layouts Printers Staff Members Start/End of Day Appearance Sound Backups Email Text Messaging
EVE Sales Customers Inventory Courses Trips Rentals Services Data Entry Groups Point Of Sale Labels

Course # Format: <Prefix> <StartDate> Beep
Course # Date Format: ddMMMyyyy hh:mm

During Course Creation

- ☒ Insist on at least one Module being on the Course Start Date
- ☐ Insist on at least one Module being on the Course End Date
- ☒ Only Staff Allowed to Teach the Course Type can be added
- ☐ Show Booking Wizard when Customers added on Course form
- ☒ Show Prompt if no Matching Stock Items

When selling Courses

- ☒ Set default amount being paid to the full price of the course
- ☐ Set default amount being paid to the Deposit amount
- ☒ Show Course Balance Due in Invoice Line Item Notes
- ☐ When line item price changed, change Course price also.

When Courses are Pasted on Calendar

- ☐ Link Stock Items from Course being Copied
- ☐ Link Stock Items based on Rules
- ☒ If Original Items don't match Rules, Ask

PICs OnLine

PIC Status when Certs are entered Manually
Do Not Upload

Return Card to: Store

☒ Show a prompt when submitting PIC if a Registration Code is required but none is present

OK Cancel

If the Certification Type is 'Standard', that tells EVE that no Registration code needs to be present on the Certification so there will be no status message nor prompt on the Pending PICs form.

You can search for certifications that have a particular Certification Type using the Certification Search form ...

Certification Search

General Dates

Course Type Instructor Customer Certification # Completion Status Enrollment Status PIC Status Cert. Notes

Cert. Type: e-Learner
Cert. Priority:

Search Clear

Select

e-Learner
[Show All]
e-Learner
Standard
Touch

Open OK Cancel

Customer	Cert #	Course Type	Certification Date
Austin Jackson	15030F6611	Open Water Diver	3/10/2015
James Lavoy	13060M1665	Open Water Diver	6/2/2013
Heidi Clark	13030K3264	Open Water Diver	3/17/2013
Chris Mullins	1301007978	Open Water Diver	12/28/2012
Jason Johnson	12090R7372	Open Water Diver	9/2/2012

Count = 43. [Do Not Show Unavailable](#) [Store View \[CompoundStore\]](#)

...and using the PIC Online form.

PIC Online. Staging Server!

Course Type [Show All] Cert. Type Standard Credits for Store Acme Diving. #7016
 Instructor [Show All] PIC Credits: 57. EFR Credits: 9. DSD Credits: No Limit

Pending Upload History

First Name	Last Name	Mid...	Course Type	Status	Return Card To	Date of Birth	Sex	Address Line 1	Add ^
AMIR	FAGHIH		Advanced Open Water Diver	-Valid-	Store	5/13/2011	Male	32 WOODLAND LO...	
Pete	Smit	K	Deep Diver	-Valid-	Store	1/1/1936	Male	3801	hunt
SHARON	BABIN	R	Discover Scuba Diving	No Email.	Store	4/16/1963	Female	3543 GREYSTONE ...	
Jordan	Blair	L	Discover Scuba Diving	-Valid-	Store	8/9/1968	Female	3222B Tamarron Blvd.	
Gena	Paez	M	Discover Scuba Diving	-Valid-	Store	2/25/1982	Female	1000 Alden Drive	
Lily	Nilan	B	Discover Scuba Diving	-Valid-	Store	10/31/1998	Male	3222B Tamarron Blvd	
Eliana	Abramowitz	L	Open Water Diver	No Certifying Instructor.	Store	1/3/1998	Female	72 St. Stephens Sch...	
RACHEL	ABBOTT	M	Open Water Diver	-Valid-	Store	4/22/1987	Female	405 KEENLAND DR	

Store View: [CompoundStore] Count: 11

Open Certification Record(s)... Open Customer Record(s)... Send to PIC Online Close

2. New “Invoice Type” sales report

A new Sales report (accessed by clicking File and then Reports) has been added called “Invoice Type Tax Report” primarily for our Spanish users who are required to submit a report in this format every month to the tax authorities.

3. Emailing Receipts and Quotes

When saving a new Invoice or Quote you have always been able to Email the receipt to the customer (as well as print it). You could also search for existing Invoices/Quotes and email those straight from the search grid. However, in this latter case, the user was required to type the email address – it was not defaulted. Now it is defaulted to the email address of the customer on the Invoice/Quote.

4. Equipment Serial Numbers

When creating new Equipment items, EVE will now show a prompt if the serial number being added already exists on the equipment database. The prompt will let you open the existing item to view it and/or create the new item anyway. The prompt will only be shown if the customer, stock type and reference number match the existing item. If you don’t want to see the prompt there is a check box on the prompt so you can turn it off.

5. Exporting data

Search forms in EVE are designed to retrieve just enough information for you to be able to identify which record(s) you’re interested in. e.g. when doing a customer search, EVE retrieves customer name, email address, etc. but not work address details, etc. It does this so searches will run as fast as possible, especially when the EVE database is hosted in the Cloud – i.e. the more data you have to pull from the database over a slow connection, the slower EVE will perform. While that’s great for day-to-day operation of EVE, it does cause an issue when you want to export data. i.e. some of the data you’re interested in may not be included in the search results. For this reason, by default, when you export data from EVE, it runs a command to retrieve all those other interesting columns of information to include in the Export file. If you want to override that and export exactly the information that’s already in the search results, you can hold down the Shift key when you click Export. If you don’t hold down Shift at that point, EVE will show a prompt letting you know about the Shift feature. If you don’t want to see that prompt, there is a check box on the prompt so you can turn it off.

6. EVE OnLine links

In EVE, most people like to create individual stock items for those items of equipment that come in different colors and/or sizes. That way you can track stock levels on the different colors/sizes and correctly add items to Purchase Orders, etc. However, in EVE OnLine (the e-Commerce package that links to your website and lets you sell your equipment, courses and trips on-line) that will effectively mean the same item appears multiple times. For this reason, EVE OnLine has always allowed you to link those items together into one. The item is only displayed once in EVE OnLine and the user is presented with picklists to choose the color and/or size. For those people that get a little carried away when linking items, we have now made it easier to remove the link in EVE. i.e. open the stock item that’s erroneously linked, go to the EVE OnLine/Links tab and click “Delete Link to Parent”

7. Transfers

We have added the ability to open the stock item on a Transfer by right clicking on the gray left hand column of the grid on the Transfer form and then clicking Open Stock Item(s)...

8. EVE Agent changes

1/ EVE can be configured so a sequence number (Ticket number) is generated for each invoice (in addition to the automatically generated Invoice number). The Ticket number can be seeded to whatever value you want – e.g. if you have imported invoices from another Point of Sale system, you may want your EVE invoices to start with a Ticket # that follows on from your existing numbers. It is a Spanish requirement that Ticket numbers are reset to 1 at the start of each year for each Invoice Type. We have therefore added an EVE Agent job called “Reset Invoice Ticket Number” that will do this on the 1st January. The job is Unavailable by default so you will need to open the job on the SQL Commands tab of the EVE Agent to turn it on.

2/ We have made a small change to the way that the ExpiryDays option works for those EVE Agent jobs that are defined to run on a specific day of the month. ExpiryDays governs how long an email should stay unsent in the queue (e.g. if you have internet problems) before it expires. For instance, you may want a Happy Birthday email to expire the same day (it looks bad to wish someone a happy birthday 3 days late) while e.g. an email inviting someone onto an Advanced course 12 months after they completed their Open Water could afford to go out several days later.

9. PIC Online

Occasionally you may see an error message returned by the PIC Online interface saying ‘Wrong XML data’ – e.g. when a temporary glitch in the internet connection occurs during submission of the PIC. When EVE sees this error, it will now wait a second and then do an automatic Retry.

EVE 5.9.1 Enhancements

Here is a recap of changes made in EVE 5.9.1:

10. Support for MailChimp v2.0

Since version 5.8, EVE has included support for the MailChimp email system. Until now it has used version 1.3 of MailChimp. We have now upgraded to use version 2.0 – the latest version. This adds support for the full range of MailChimp’s data centers and has speed and reliability benefits.

11. Current Cost Price

When EVE needs to determine the current Cost Price on an item (e.g. when calculating discounts, etc.) it has always matched the Cost Price Level set on the Supplier form against the Level set on the Prices tab of the Stock Item. E.g. if there are 3 cost prices set on the Stock Item for Levels 1, 2 and 3 and the Supplier has Level 2 set, EVE will use the Level 2 price.

Stock Item: Avid - SM

General Stores Suppliers Prices Stock Levels Serial Nos Packages Links Documents EVE OnLine Chart History

North Store

Retail Prices

Show Price in EVE OnLine? ☒

Sales Tax Standard Rate Define Tax on Stock Type form. [Click here](#) to open.

Price Type	Unit Price	Inc. Tax	Status
Retail	\$588.00	\$636.51	Price Set
Agent	\$588.00	\$636.51	Use Retail
Dive Master	\$529.20	\$572.86	Divemaster

Cost Prices

Cost Price Level 2

Purchase Tax No Tax

Cost Price	Inc. Tax	Level
\$249.90	\$249.90	1
\$229.00	\$229.00	2
\$209.00	\$209.00	3

Sherwood Scuba

New Save Close

While that is the 'correct' thing for EVE to do, it has lead to cases where stores have had an incorrect Level set on the supplier so no matching cost price was found leading to EVE using 0 as the Cost Price. That can result in misleading profit figures as the Cost price is written to the invoice at the time of the sale.

So, in EVE 5.9.1 we have relaxed the rules on how the current Cost Price is determined. If there is a match on the Level, EVE will use the matching Cost Price as it always has. However, if there is no Level match, EVE will now use the lowest, non-zero cost price on the stock item instead. If you don't like this new method it can be overridden so that a match on Level must be present. Contact Integrated Scuba Systems if you want that to be the case.

12. Translate option

Now that EVE has been translated into Spanish and Italian, the Translate option (right click on a label in EVE and click Translate) has been changed so you must choose the Language that the translation refers to.

13. EVE Agent changes

The main form of the EVE Agent has been improved by the addition of a Description column and by the removal of some of the 'techie' columns. Also, for EVE OnLine users, it's now possible to include customers' EVE OnLine password in auto-emails. E.g. when a new customer record is added to the database, you could have EVE auto-generate an EVE OnLine username and password and send an auto-email at the end of the day to the customer saying "thank you for shopping with us – visit our online store and login using username XXX and password YYY"

14. Log File

In previous versions of EVE, when you clicked the EVE icon at the top right of the program, there was an "Email log file to ISSYS" option. That relied on the store having previously entered their email account details in EVE otherwise the email could not be sent. We have now replaced that option by one called "Upload Log File to ISSYS" which sends the log file by FTP to our server and requires no account details to be present.

Issues Resolved

In previous versions of the EVE Agent, if a very long campaign name was specified, the email would not be sent. This has been resolved. MailChimp defines the maximum campaign name length to be 100 characters.

In EVE 5.9 there was an issue with setting multiple Course Module Costs at the same time. This has been resolved.

In EVE 5.9 there was an issue with blank images resulting when acquiring a student image on the customer form in some cases when EVE was being run in a Virtual Machine. This has been resolved.

In EVE 5.9 there was an issue with the call to Initialize TAPI (Telephony Application Program Interface) – only supported on Windows XP. This has been resolved.

In EVE 5.9 the Copy Profile to Future Trips button was missing in the Profile section of the Customer form. This has been added.

In EVE 5.9 there was an issue with the cost price that was used on Transfers when multiple items were being transferred. This has been resolved.

In previous versions of EVE there was an issue merging Ongoing Invoices issue if one or more items had been Refunded on one of the invoices being merged. This has been resolved.

In EVE 5.9 an error was shown in some circumstances when a job was opened on the Tasks tab of the EVE Agent. This has been resolved.

In EVE 5.9 an error was shown when using the Pricing wizard to update retail prices using a cost price based formula if no cost price was set for an item.

In previous versions of the EVE Agent the email expiry date did not work as expected in some cases when the email job was set to run on a particular day of the month (rather than the usual option to run every day). This was been resolved.

In some cases Stock Levels were not adjusted correctly when an item was deleted from a saved Ongoing Invoice. This has been corrected.

In EVE 5.9 the calendar shown when selling a day-trip (charter) did not correctly highlight days when trips were defined. In addition, when first loaded, the calendar on the booking wizard did not necessarily highlight today. These 2 issues have been resolved.

In EVE 5.9 an error resulted in some cases when a Task was copied and pasted on the Calendar. This has been resolved.