

Order & Quote Entry System

1. New Fields- Alternate Product Code and Alternate Description added to Open Documents Optional Grid in the Order Detail line.
2. New Fields- Optional comment fields have been added to the Enter & Edit Orders – Detail Line screen.

ENTER & EDIT ORDERS - Detail Line

Order Number 59491 Firm Order - Line 1
Customer 26826 Triple Fast Manufacturing, Inc.

Availability

On Hand	Available	Branch	Going Out	Coming In
10 EA	10 EA	0 EA	0 EA	0 EA

Detail

Product Code	BBI-961J7UC8
Product Description	5/8"-11 x 3-1/2" 316 Stainless Steel Hex Cap Screw
Classification	CS Cap Screw
Customer Part Number	
Extra/Non Stock Description	
Quantity Ordered	1,000 EA
Unit Sell	3.96990 EA
Percentage Change	-25.00000 CHG%
List Price	5.29320 EA
Line Extension	3,969.90
Unit Cost	1.05860 EA Avg Cost 1.05900 EA Recd 12-17-15
Customer Bin Location	
Line Comment	
Internal Comment	
Customer Quote Comment	
Acknowledgment Comment	
Picking Ticket Comment	
Packing List Comment	



3. New System Flag-There is a new system flag called Point to Check For Customer PO. This flag gives you the option to check for a customer purchase order at Order Entry-First Screen, Order Entry-Last Screen, Allocate Inventory or Invoice Creation. It is located in Utilities, System Administrator System, System Set Up, Miscellaneous Setup, Enter & Edit Entity Flags, Order Entry Flags page 6 of 7.
4. New User Flag-There is a new User flag Show Cust PO in Recent Order List. If this flag is set to Yes, the customer purchase order will show in the most recently selected list.
5. New Report- New inquiry that looks at changes history for all orders at once is located in Order & Quote Entry System, Order Reports, Order Analysis Reports, Full Order Change History.

FULL ORDER CHANGE HISTORY

Date Range: 01-01-17 to 07-31-17
Field: Date Requested

User	Date	Time	Original Value	New Value	Comment	Current Order Number	Current Order Date
System Admin	07-31-17	16:08:04	07-28-17	07-04-17		59405	07-31-17
System Admin	07-31-17	16:07:52	07-31-17	06-15-17		59406	07-31-17
System Admin	07-31-17	13:55:23	07-31-17	07-28-17		59405	07-31-17

6. New Optional Information Grid-The Enter & Edit Sales Order and Order Inquiry screens now have an optional information grid that shows the “Document Output History”

ORDER INQUIRY

Order Number: 59410
Customer P.O. #: 123
Customer: 26709 Bright Sheet Metal
Phone Number: (260) 739-7061
Fax Number: (260) 739-7185
Salesperson: OOO Outside Sales
Payment Terms: 1 Net 30 Days
Tax Authority - Regular: EX TAX EXEMPT

Order Date: 08-09-17
Entered by: System Admin 08-09-17 @ 11:20am
Contact: [User Icon]
Another Inquiry?: Yes

Document Output History

User	Date	Time	Sent To	Document	Type	Output Type
System Admin	08-09-17	14:40:43	F, HP 4050 - Blue Room	59410	Packing List	Paper
System Admin	08-09-17	14:40:36	Dot Matrix	59410	Picking Ticket	Paper
System Admin	08-09-17	14:40:27	Dot Matrix	59410	Sales Order	Paper

7. New Optional Information Grid-An Optional Information Grid showing all payments related to all of an order’s revisions is now available in E&E Orders and Order Inquiry screens.

The screenshot shows the 'E&E Orders' interface. On the left, there are fields for 'ENTER & EDIT ORDERS' including Order Number (59430-01), Order Type (Firm Order), Customer (N Big Blue Box Corp.), Salesperson (OOO Outside Sales), Payment Terms (1 Net 30 Days), Order Date (09/12/2017), Revision Date (09-12-17), Customer P.O. # (123), and Internal Reference. On the right, a 'Payments' table is displayed with a total of 114.27.

Order Number	Pmt Type	Date	Trans Type	Check #	Amount	Comments
59430	Prepayment	09-12-17	Check	123654	30.00	hope this doesn't
59430	Prepayment	09-12-17	Check	123657	9.27	
59430-01	Prepayment	09-12-17	Credit Card		75.00	

- New Optional Information Grid-The Enter & Edit Sales Order Schedule Information now has grids about who and when a sales order's schedule was entered and when the date was modified.

The screenshot shows the 'Order Inquiry' screen for order number 59410. A 'Document Output History' table is highlighted with an orange box. The table lists documents sent to 'F, HP 4050 - Blue Room' and 'Dot Matrix'.

User	Date	Time	Sent To	Document	Type	Output Type
System Admin	08-09-17	14:40:43	F, HP 4050 - Blue Room	59410	Packing List	Paper
System Admin	08-09-17	14:40:36	Dot Matrix	59410	Picking Ticket	Paper
System Admin	08-09-17	14:40:27	Dot Matrix	59410	Sales Order	Paper

- New System Flag-The flag for the editable fields in the Enter & Edit Order final screen has been replaced with a general flag that will apply to all Enter & Edit Final screens as they become enabled with that feature. The flag has been moved to a different screen and is now located in Utilities, System Administrator System, System Set Up, Miscellaneous Setup, Enter & Edit Entity Flags, General Flags. When this flag is set to yes, you will be able to edit the fields shown below:

E&E Orders

ENTER & EDIT ORDERS

Order Number: 59422 Firm Order
 Order Date: 08-11-17
 Customer: 26709 Bright Sheet Metal
 Salesperson: OOO Outside Sales

Addresses

Bill To:	Bright Sheet Metal 1930 S. State Ave. Indianapolis, IN 46203 USA Phone (260) 739-7061 Contact	Ship To:	Bright Sheet Metal 5020 Industrial Road Fort Wayne, IN 46825 USA Phone (260) 739-7061 Contact
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Heading Information

Customer P.O. #	501
Internal Reference	this is a test
Job #	42
F.O.B.	1 hello world
Days Can Ship Early	ASAP
Ship Via	DROP SHIP
Extra Shipper Description	drive fast, take changes
Order Shipping Option	Partial Shipments as Available
Contact Name	Don Platt

Optional Information Optional Fields Delete Cancel Ok

Options

- Help
- Order Contact
- Sales Order Notes
- Customer Notes
- Heading Information
- Detail Lines
- Order Totals
- Order Messages
- Miscellaneous Charges
- Order Options
- Create Invoice

Addresses

Output Options

Label Options

documentConnection

Totals & Payments

My Options

10. New Fields Added to Report: New fields added to the Open Orders by Order Number Report include: Lines Packed, Allocated, Packing List Printed, Delivery Lot, Tracking Number. This report is located in Order & Quote Entry System, Order Reports, Open Order Reports, Open Orders by Order Number
11. New Optional Information Grid-Order-In Enter & Edit Orders, Detail Line Shipment Schedule will now keep track of the original ship date entered. Existing schedules will be left blank

The Business Edge

E&E Orders

ENTER & EDIT ORDERS - Detail Line Shipment Schedule

Order Firm Order 59422 Line 1
 Customer 26709 Bright Sheet Metal

Product Code NNN
 Product Description 1/4"-20 x 1/2" Plain Finish SAE J429 Grade 5 Fully Threaded Round Head Carriage Bolt

Quantity Ordered 1,000 EA
 Quantity Unscheduled 0 EA

Excel E-mail

Ship Date	Days Early	Qty	Orig Date	Comment
01-01-18	ASAP	100	01-01-18	small pallets only
02-05-18	ASAP	200	02-01-18	hello world
03-15-18	ASAP	300	03-01-18	
05-15-18	ASAP	400	04-01-18	

12. New Fields Added to Report-The Order Type has been added as an additional column to the Order Booking Activity Report grid. The Order Booking Activity Report is located in Order & Quote Entry System, Order Reports, Order Booking Reports, Order Booking Activity Report
13. New Optional Column-There are now Optional Columns in Order Detail grid in Enter & Edit Orders and Order Inquiry now includes Reorder Point, Max Qty to Stock, Stocking Objective, Max Stocking Objective and Stocking Unit of Measure
14. New Optional Column-There are now Optional Columns in Order Detail grid in Enter & Edit Orders includes Available to Produce. This column looks at the first level Bill Of Material for the product and calculates how many can be produced. There is a new user flag Show Avail to Produce Column in Orders" in Enter & Edit User Flags – Order Entry that will allow you to see this column.

Purchase Order System

1. New Optional Information Grids- There are now Optional Information Grids for Branch Stocking Values, Open Documents, Recent Product Lost Sales, Recent Product Receipts, Recent Product Sales, Alternates, Substitutes, Kits and Vendor Contract Pricing added to the Enter & Edit RFQ Detail Line screen.

The Business Edge

E&E Request for Quote

ENTER & EDIT REQUEST FOR QUOTE - Detail Line

Request for Quote # 10
 RFQ Date 04-13-17
 Vendor 420 XL Screw Corp

Availability

On Hand	Available	Branch Avail	Going Out	Coming In
609,400 EA	601,255 EA	106,495 EA	8,145 EA	66,000 EA

Detail

Stocking Unit EA EACH Purchasing Unit-> EA EACH
 Product Code NNN
 Product Description 1/4"-20 x 1/2" Plain Finish SAE J429 Grade 5 Fully Threaded Round Head Carriage Bolt
 Classification CB Carriage Bolt
 Alternate Part Number 05325000170

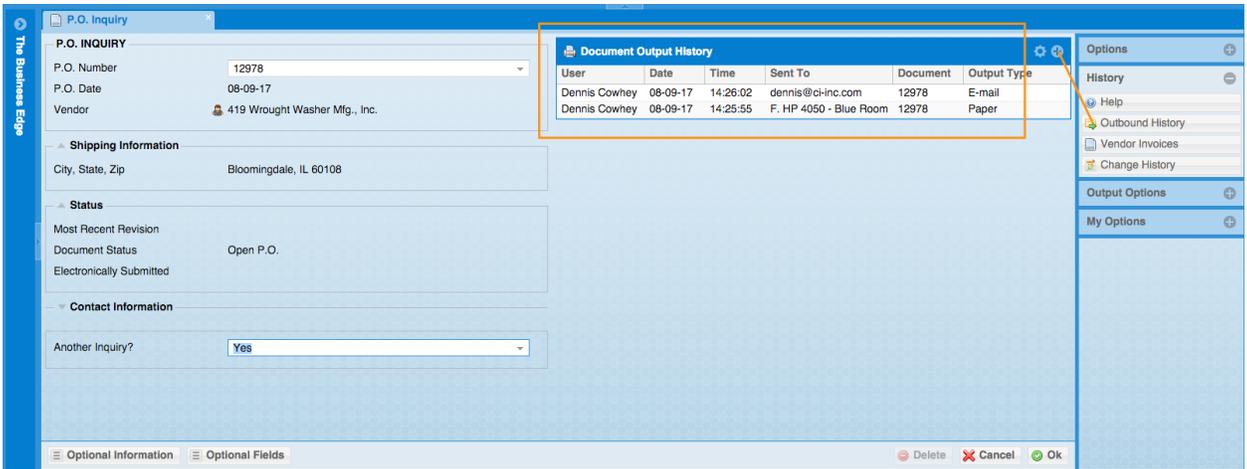
Optional Information

- Alternates, Substitutes, Kits
- Branch Stocking values
- Open Documents
- Product Usage by Branch
- Σ Product Usage Totals

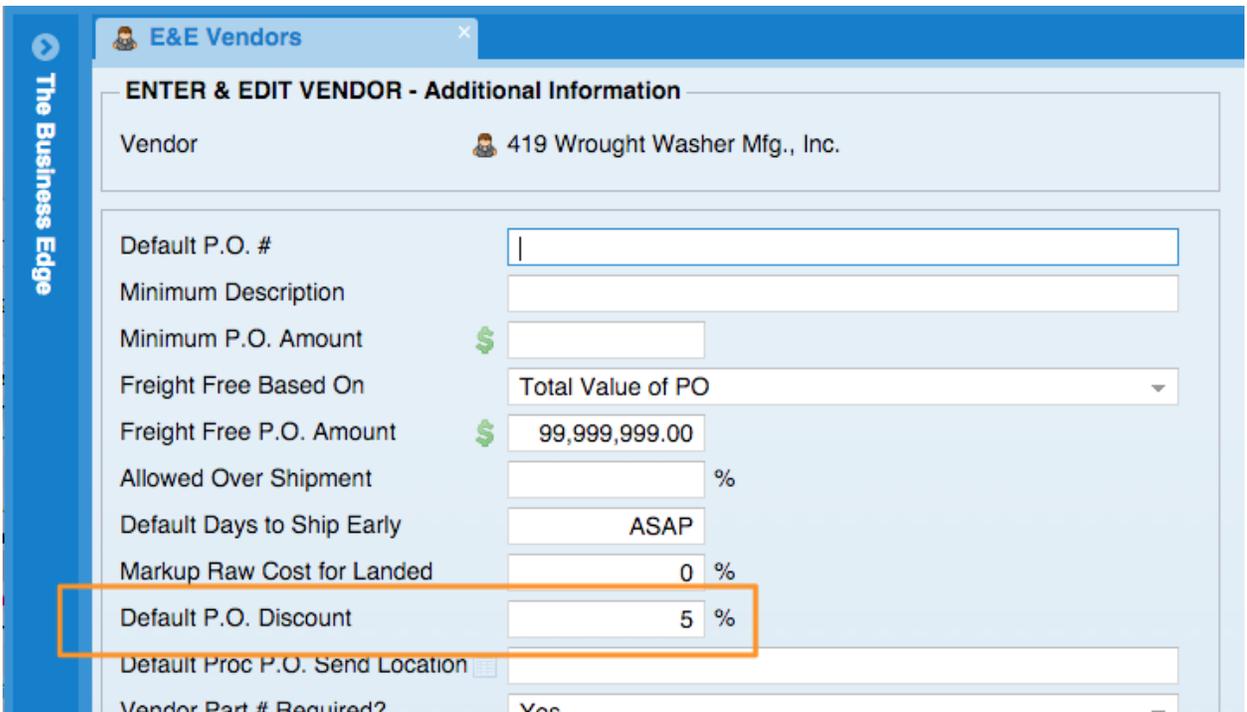
Alternates, Substitutes, Kits

- Alternate Product Codes
- Substitute Products
- Bill of Materials

2. New Optional Information Grid-In Enter & Edit Purchase Orders and in Purchase Order Inquiry there is now an optional information grid for Document Output History



3. New System Flag-There is a new system flag that will allow for a discount percent to affect a P.O. detail line's landed cost. This flag is located in Utilities, System Administrator System, System Set Up, Miscellaneous Setup, Enter & Edit Entity Flags, Purchase Orders Flags, Page 4 of 4, Allow Vendor P.O. Discounts. A vendor can have a Default P.O. Discount



This will be used when creating new P.O.'s for the vendor. The P.O.'s P.O. Discount defaults to the vendor's default but can be overridden for the P.O. without changing the vendor's default

The Business Edge

E&E Purchase Orders

ENTER & EDIT PURCHASE ORDERS

P.O. Number	+ 12993
P.O. Date	08/09/2017
Vendor	419 Wrought Washer Mfg., Inc.
P.O. Discount	5 %
Branch	Chicago
Ship Via	

New detail lines will default to the P.O. Discount but can be overridden with the P.O. Detail Discount field.

The Business Edge

E&E Purchase Orders

ENTER & EDIT P.O. LINE

P.O. Number: 12993 Line 1
P.O. Date: 08-09-17
Vendor: 419 Wrought Washer Mfg., Inc.
Vendor Phone: [Phone Icon]

Availability

On Hand	Available	Branch Avail	Going Out	Coming In
701,900 EA	692,755 EA	198,995 EA	1,000 EA	233,272 EA

Detail

Product Code: NNN
Product Description: 1/4"-20 x 1/2" Plain Finish SAE J429 Grade 5 Fully Threaded Round Head Carriage Bolt
Classification: CB Carriage Bolt
Alternate Part Number: [Dropdown]
Quantity Ordered: 1,000 EA Master Pkg 1,000 EA
Raw Cost: \$ 1.00000 EA
P.O. Detail Discount: 5 %
Landed Unit Cost: \$ 0.95000 EA

If line items exist you will be asked if you want to change their values when changing the P.O. Discount

ENTER & EDIT PURCHASE ORDERS

P.O. Number

P.O. Date

Vendor

P.O. Discount %

Branch

Ship Via

P.O. Detail Lines Exist

 Change Existing Lines With New Discount?

The Business Edge

E&E Purchase Orders

ENTER & EDIT P.O. LINE

P.O. Number: 12993 Line 1
P.O. Date: 08-09-17
Vendor: 419 Wrought Washer Mfg., Inc.
Vendor Phone: [Phone Icon]

Availability

On Hand	Available	Branch Avail	Going Out	Coming In
701,900	692,755	198,995	9,145	235,272

Detail

Product Code: NNN
Product Description: 1/4"-20 x 1/2" Plain Finish SAE J429 Grade 5 Fully Threaded Round Head Carriage Bolt
Classification: CB Carriage Bolt
Alternate Part Number: [Dropdown]
Quantity Ordered: 1,000 EA Master Pkg 1,000 EA
Raw Cost: \$ 1.00000 EA
P.O. Detail Discount: 10 %
Landed Unit Cost: \$ 0.90000 EA

4. New Optional Information Grid-In Enter & Edit Purchase Order Detail Lines there are now Optional Grids that include Alternates, Substitute, Kits.

ENTER & EDIT P.O. LINE

P.O. Number: 12993 Line 1
P.O. Date: 08-09-17
Vendor: 419 Wrought Washer Mfg., Inc.
Vendor Phone:

Availability

On Hand	Available	Branch Avail	Going Out	Coming In
701,900	689,987	198,495	11,913	237,510

Detail

Product Code: NNN
Product Description: 1/4"-20 x 1/2" Plain Finish SAE J429 Grade 5 Fully Threaded Round Head Carriage Bolt
Classification: CB Carriage Bolt
Alternate Part Number:
Quantity Ordered: 1,000 EA Master Pkg 1,000 EA
Raw Cost: \$ 17.00000 EA
P.O. Detail Discount: 3 %
Landed Unit Cost: \$ 16.49000 EA

Optional Information

- Alternates, Substitutes, Kits
 - Alternate Product Codes
 - Substitute Products
 - Bill of Materials
- Branch Stocking Values
- Branch Values
- Lot Tracking Detail
- Open Documents
- Product Open PO's
- Product Usage by Branch
- Product Usage Totals
- Recent Product Lost Sales
- Recent Product Notes
- Recent Product Receipts
- Recent Product Sales
- Vendor Contract Pricing
- Vendor Item Instructions

Alternate Product Codes

Alternate Part	Description	Type	Related Name
02002000020	1/4"-20 x 1/2" Plain Finish SAE J429...	Vendor	XL Screw
1408C5	Carriage Bolt Grade 5 Fully Threaded...	Vendor	Kanebridge
491001	1/4"-20x1/2" (FT) CARRIAGE BOLT...	Vendor	Brighton-Be

Substitute Products

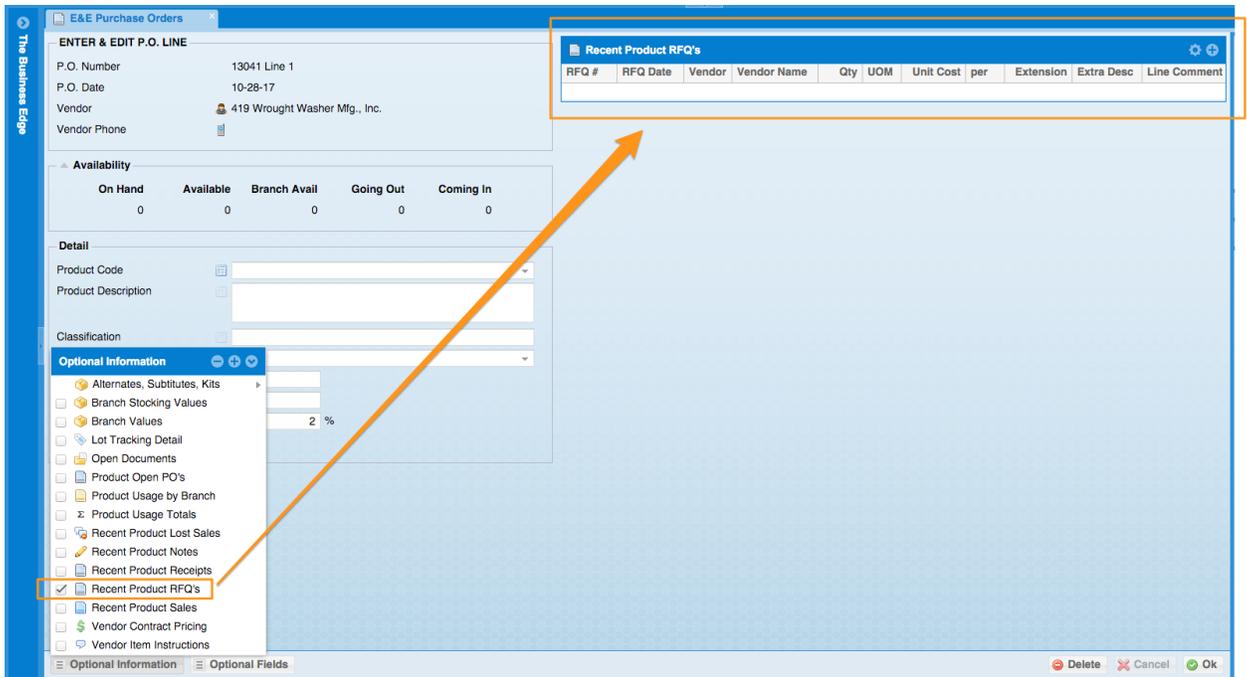
Product Code	Product Description	Factor	PPO Repl
000A502P	1/0 Straight Link Coil Chain Heavy Du...	1.000000000	Useable

Bill of Materials

Est. Material Cost: \$ 0.00000 EA
Fixed Cost: \$ 0.00 per PPO
Theoretical Weight: 0.000000000 lbs per EA

Qty Needed	To Send	UOM	Product Code	Description
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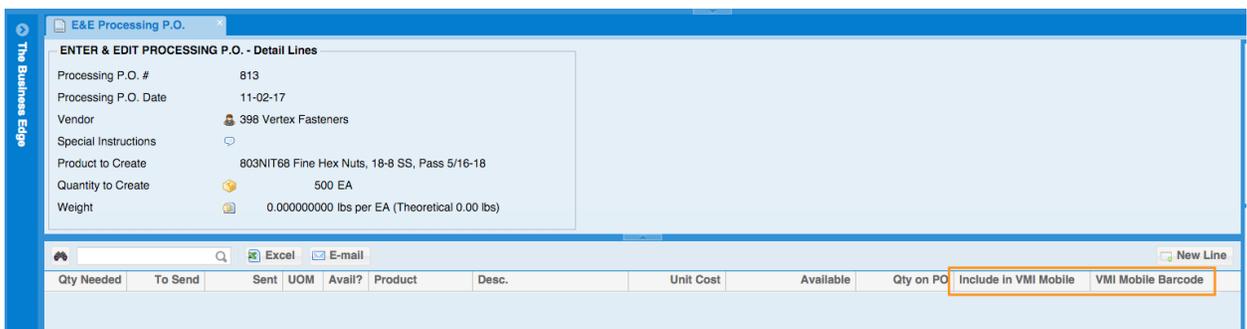
5. New Fields added to report-The Receipts Journal by Product now shows Optional Label Comments column. The Receipts Journal by Product is located in Purchase Order System, Purchase Order Reports, PO Receipts Journals, Receipts Journal by Product
6. New Optional Information Grid-There is now a Optional Information Grid called Recent Product RFQ's added to Product Inquiry and Enter & Edit PO screens, Enter & Edit Order – Detail Line and Enter & Edit RFQ – Detail Line.



7. New Fields added to report-There are new fields added to the Receipts Journal by Vendor grid: Vendor Code, Vendor Name, Cost UOM (per), Extension. The Receipts Journal by Vendor is located in Purchase Order System, Purchase Order Reports, PO Receipts Journals, Receipts Journal by Vendor

Processing Purchase Orders

1. New Optional Column-There is now an Optional columns have been added the the Enter & Edit PPO Detail Lines grid: Include in VMI Mobile and VMI Mobile Barcode.



Supply Chain Network

1. New Feature- Now you have the ability to associate products with XL Screw parts in the XL Screw inquiries.

The screenshot displays a software window titled "XL Screw Corporation" with a sub-section "XL Screw Corporation - Availability". The main area contains a list of product details:

- Product Code
- XL Screw Part #: 02002000060
- XL Screw Description: GR 2 HEX CAP SCREWS, SAE J429, PLN ASME B18.2.1
- Size: 1/4-20 X 1 1/2
- Theoretical Weight: 24,30000 lbs
- Bulk Unit Price: 13.76 M
- Bulk Pieces Per Pkg: 2,000
- Bulk Discount Qty: 2,000

Below this list is a search bar and buttons for "Excel" and "E-mail". At the bottom, a table shows availability data:

Branch Name	Bulk Available	Pkg Available
Cleveland	6,000	3

On the right side, an "Options" panel is visible, containing a "Help" button and a highlighted "Associate Product" button. An orange arrow originates from the "Associate Product" button and points to the "Product Code" field in the main details area.

2. New Optional Information Grid- When entering a PO detail line for XL Screw there is now an optional information grid that will show the response of the web call to the XL Screw site. This is currently for informational use only, the system will have to map UOM's before the response from XL Screw will be able to affect data.

E&E Purchase Orders

ENTER & EDIT P.O. LINE

P.O. Number: 12965 Line 3
P.O. Date: 08-08-17
Vendor: 420 XL Screw Corp
Vendor Phone: (847) 383-2300

Availability

On Hand	Available	Branch Avail	Going Out	Coming In
0 EA	0 EA	0 EA	0 EA	1,166 EA

Packaging Information

Package	Master	Bulk	Theo Weight
0 EA	0 EA	0 EA	0.000000000 lbs

Detail

Product Code: 803NIT68
Product Description: Fine Hex Nuts, 18-8 SS, Pass 5/16-18
Classification: MISC MISCELLANEOUS
Alternate Part Number: 15020000030
Quantity Ordered: 500 EA
Raw Cost: 0.29000 EA
Days Can Ship Early: ASAP
Original Promised Date:
Current Promised Date:
Line Comment:

Stocking Quantities

Max Stock	Min Purch	Package	Master Pkg	Bulk Pkg
0 EA	0 EA	0	0	0

XL Screw Corporation

XL Screw Part #: 15020000030
XL Screw Desc.: FIN HEX NUTS, 18-8 SS, PASS
Size: 5/16-18
Bulk Unit Price: 24.03 M
Bulk Pieces Per Pkg: 4,000
Bulk Discount Qty: 4,000

Branch Name	Bulk Available	Pkg Available
Cleveland	92,000	23

Optional Information | Optional Fields | Delete | Cancel | Ok

- New Feature-Purchase Orders submitted electronically will now show up as outbound history. The upgrade program will create records for Purchase Orders that have already been submitted. Reminder: FSCN stands for Fastener Supply Chain Network.

P.O. Inquiry

P.O. Number: 2260
P.O. Date: 09-18-14
Vendor: 137 Brighton-Best International Inc.

Shipping Information

City, State, Zip: Fort Wayne, IN 46825

Status

Most Recent Revision
Document Status: Invoiced: Rcvd 09-23-14, Inv# SCMX4 09-22-14
Electronically Submitted: WALLEY 09-22-14 14:23:06

Contact Information

Another Inquiry?: Yes

Document Output History

User	Date	Time	Sent To	Document	Status	Type	Output Type
WALLEY	09-22-14	14:23:06	FSCN	2260	Sent	PO	Web Submission

Options: History, Outbound History, Vendor Invoices, Change History, Output Options, My Options

Optional Information | Optional Fields | Delete | Cancel | Ok

Inventory

4. New Report: There is a new inquiry added called Product Substitute Inquiry which is located in Inventory System, Inventory Reports, Inventory Lists, Product Substitute Inquiry
5. New Fields Added to Report: There are now Optional columns that have been added to the Detail Inventory List grid for Tariff and Tariff Description. The Detail Inventory List is located here: Inventory System, Inventory Reports, Inventory Lists, Detail Inventory List
6. New Option in Product Inquiry: In a product inquiry there is an option to see Volume. This is controlled by a flag located below. If you say Yes to Use Volume the Product Inquiry won't show the Theoretical Count. The flag is located in Utilities, System Administrator System, System Set Up, Miscellaneous Setup, Enter & Edit Entity Flags, Inventory Flags, Page 4 of 4, Use Theoretical Volume

Product Inquiry

PRODUCT INQUIRY

Product Code: HM516410

Product Description: TIMKEN BEARING

Classification: NPN NEW PART NUMBER

Alternate Part Number:

Availability

On Hand	Available	Branch Avail	Going Out	Coming In
0 EA	0 EA	0 EA	0 EA	0 EA

Packaging Information

Package	Master	Bulk	Theo Weight	Volume
10 EA	100 EA	5,000 EA	0.01234 lbs	1.23450
1x1x1	20x20x36	72x24x36		

Costs & Prices

List Price	\$	0.0000 EA
Default P.O. Cost	\$	33.7500 EA No Average Cost
Standard Cost	\$	0.0000 EA
Standard Price	\$	0.0000 EA

Another Inquiry? Yes

7. New Fields Added to Report: The Dead Inventory Report grid will now show the product classification code and product classification description as optional columns. The Dead Inventory report is located in Inventory System, Inventory File Maintenance, Dead Inventory System, Dead Inventory Reports, Dead Inventory Report.
8. New Field added to Optional Information Grid-Branch and Branch Name have been added as optional columns in Product Inquiry screens in the Recent Product Receipts optional information grid

PRODUCT INQUIRY EXPERT

Product Code: NNN
 Product Description: 1/4"-20 x 1/2" Plain Finish SAE J429 Grade 5 Fully Threaded Round Head Carriage Bolt
 Classification: CB Carriage Bolt
 Alternate Part Number: [Empty]

Availability

On Hand	Available	Branch Avail	Going Out	Coming In
858,411 EA	240,725 EA	233,473 EA	16,781 EA	282,143 EA

Price & Cost

List Price	0.05236 EA
Price Level	None
Average Cost	0.01280 EA
Default P.O. Cost	0.01248 EA

Inventory

Total Value	10,983.50
Re-Order Point	0 EA
Max Qty to Stock	0 EA
Min Purchase Qty	0 EA
Packaging Qty	10 EA
Master Packaging Qty	1,000 EA
Bulk Packaging Qty	10,000 EA
Theoretical Weight	4.200000000 lbs
Buyer	

Recent Product Receipts

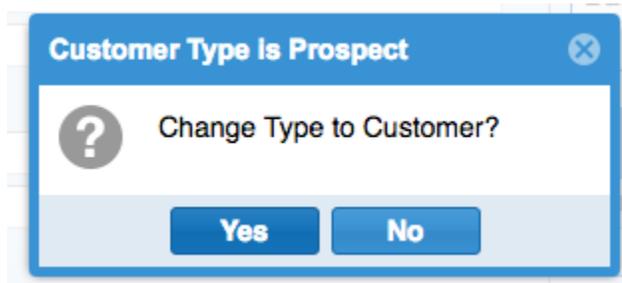
Type	Document	PO Date	Line #	Vendor Name	Received	Qty	per	Branch	Branch Name
PO	13022	10-10-17	1	Wrought Washer Mfg...	10-10-17	1,000	EA	S	Seattle
PO	13021	10-10-17	2	Wrought Washer Mfg...	10-10-17	20,000	EA	S	Seattle
PO	13020	10-10-17	1	Wrought Washer Mfg...	10-10-17	10,000	EA	C	Chicago
PO	13018	10-10-17	1	Wrought Washer Mfg...	10-10-17	10,000	EA	C	Chicago
PO	13017	10-10-17	1	Wrought Washer Mfg...	10-10-17	10,000	EA	C	Chicago

Optional Information

- Alternates, Substitutes, Kits
- Availability
- Costs & Pricing
- General Ledger Information
- Open Documents
- Product Images
- Purchasing
- Recent Product Notes
- Recent Product Receipts**
- Sales History
- Supply Chain Network

Accounts Receivable

- New Fields added to report- The following fields have been added to the report List Contacts by Customer- Entered by and Entered Date. This report is located in Accounts Receivable System, Accounts Receivable Reports, Customer Lists & Labels, List Contacts by Customer.
- New Feature- When entering orders only customers assigned as Customer as their type will show up in lookup lists if the order type is a Firm Order. Orders that are entered with an order type of Quote will include prospects and leads in the lookup lists. When an order type is being changed from a Quote to Firm Order and the customer on the order is not set as a type Customer the system will now ask if you would like to change the customer's type to Customer. In some cases you may want to send samples to a prospect using Enter & Edit Orders while not wanting to change their type from Prospect.



E&E Customers

ENTER & EDIT CUSTOMERS

Customer Code: 988000

Customer Name: Triple Five Mfg

Phone Number: (800) 588-2300

Salesperson: 14 Outside Sales

Inside Salesperson: [Empty]

Payment Terms: 1 Net 30 Days

Credit Limit: \$ 1,000.00

Customer Type: **Prospect** (highlighted with an orange arrow)

Active Customer? [Empty]

Customer Classification: Prospect

Customer Group: [Empty]

11. New Feature-Now, you can view scanned images in invoice inquiry and create invoice screen.

Invoice Inquiry

INVOICE INQUIRY

Invoice Number: [Empty]

Customer P.O. #: [Empty]

Order #: [Empty]

Internal Reference: [Empty]

Job #: [Empty]

Customer: [Empty]

Phone Number: [Empty]

Fax Number: [Empty]

Salesperson: [Empty]

Payment Terms: [Empty]

Invoice Date: [Empty]

Invoice Due Date: [Empty]

Tax Authority - Regular: [Empty]

Sent: No

Another Inquiry?: Yes

1 Options

- F1 Help
- F2 Basic Information
- F3 Detail Lines
- F4 Addresses
- F5 Invoice Totals
- F6 Final Message
- F7 Output Options
- F8 Miscellaneous Charges
- F9 Payment Detail
- F10 Outbound History
- F11 Shipper Tracking Inform
- F12 Images & Faxes

CREATE INVOICE

Invoice Number: 69355
 Invoice Date: 06-30-17
 Customer: 9010 Southwark Metal Mfg. Co. (Notes 08-06-10)
 Total Invoice Amount: \$ 0.00
 Salesperson: 1 Dennis Van Name

Wireless Warehouse

Released by: 0
 Priority: 0
 Who to Pick: 0

Addresses

Bill To: Southwark Metal Mfg. Co.
 2800 Red Lion Road
 Philadelphia, PA 19114
 USA
 Phone: (215) 735-3401
 Contact: [Icon]

Ship To: Southwark Metal Mfg. Co.
 2800 Red Lion Road
 Philadelphia, PA 19114
 USA
 Phone: (215) 735-3401
 Contact: [Icon]

Shipping Method

1 Options

- F1 Help
- F2 Heading Information
- F3 Detail Lines
- F4 Invoice Totals
- F5 Message
- F6 Misc. Charges
- F7 Credit Card Transactions
- F8 Sort Detail Lines
- F9 Apply Credit Memo
- F10 Output Options
- F11 Images & Faxes

2 Addresses

0 My Options

12. New Feature-Shippers can now be marked as inactive so they won't show up as options in the selection grids. Existing documents with inactive shippers will continue to show the shippers that was assigned to them.

E&E Shippers

ENTER & EDIT SHIPPERS

Search: [Input] [Magnifying Glass]

Excel [Icon] E-mail [Icon]

Shipper	Phone	URL	Account #
AAA Cooper	(800) PICK-UPS	www.aacooper.com	
ABF Freight Systems	(800) PICK-UPS	www.abfs.com	
Airborne	(800) PICK-UPS	www.airborne.com	
American Freightways	(800) PICK-UPS	www.af.com	
BADGER EXPRESS			
BAX Global	(800) PICK-UPS	www.baxglobal.com	
BEST WAY - \$30 FLAT R...			
Best Way - Prepaid			
CCX	(800) PICK-UPS	www.con-way.com	
Consolidated Freightways	(800) PICK-UPS	www.cf.com	
Conway Freight			

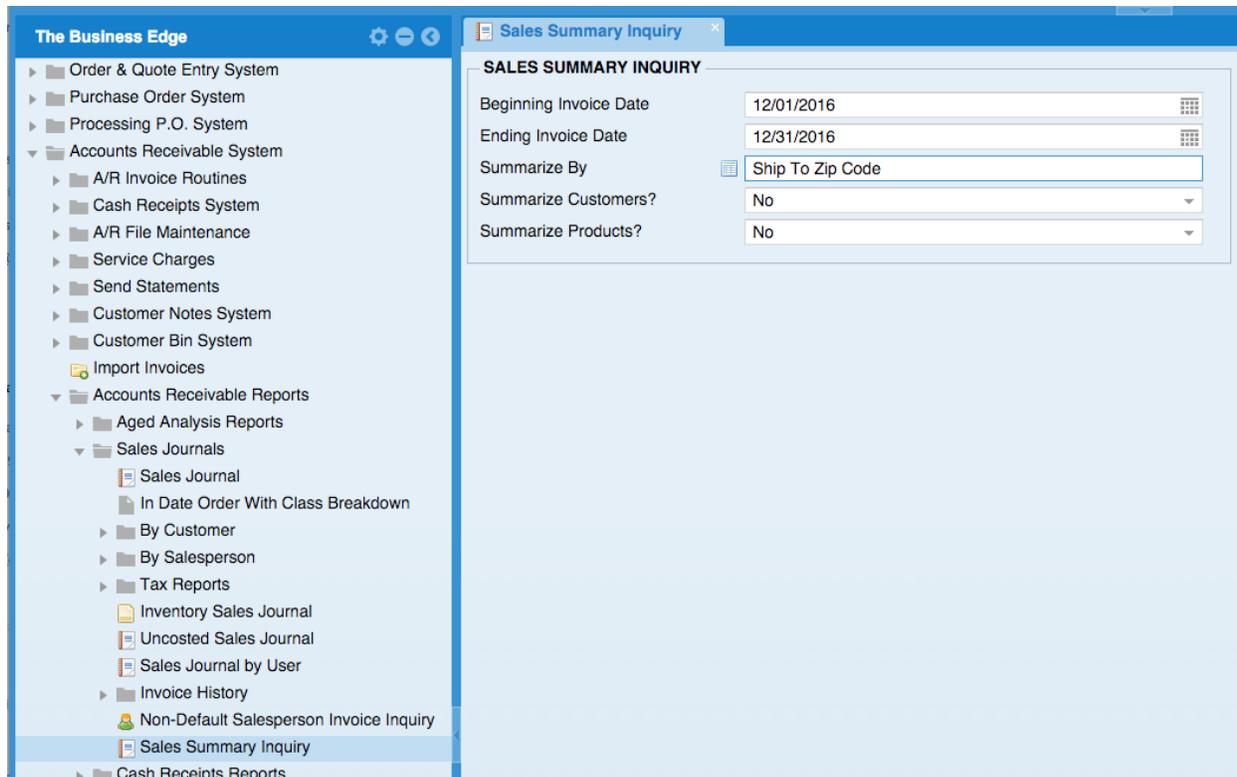
The Business Edge

E&E Shippers

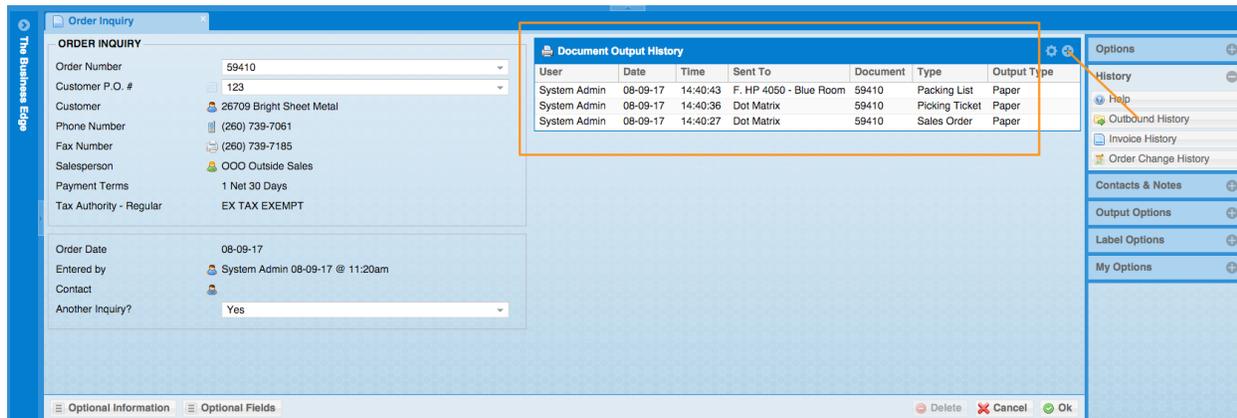
ENTER & EDIT SHIPPERS

Shipper Code	046
Shipper	BAX Global
Shipper Phone Number	(800) PICK-UPS
Shipper URL	www.baxglobal.com
Customer Pays Freight?	No
Billing Option	Prepaid
UPS Service Type	Not Applicable
Saturday Delivery	No
Send to Forms	Shipper Name
Branch	Chicago
Shipper Acct #	
Whse Queue Default Priority	0
Default Freight Amount	\$ 0.00
Method of Shipment	
SCAC Code	
Active Shipper?	No

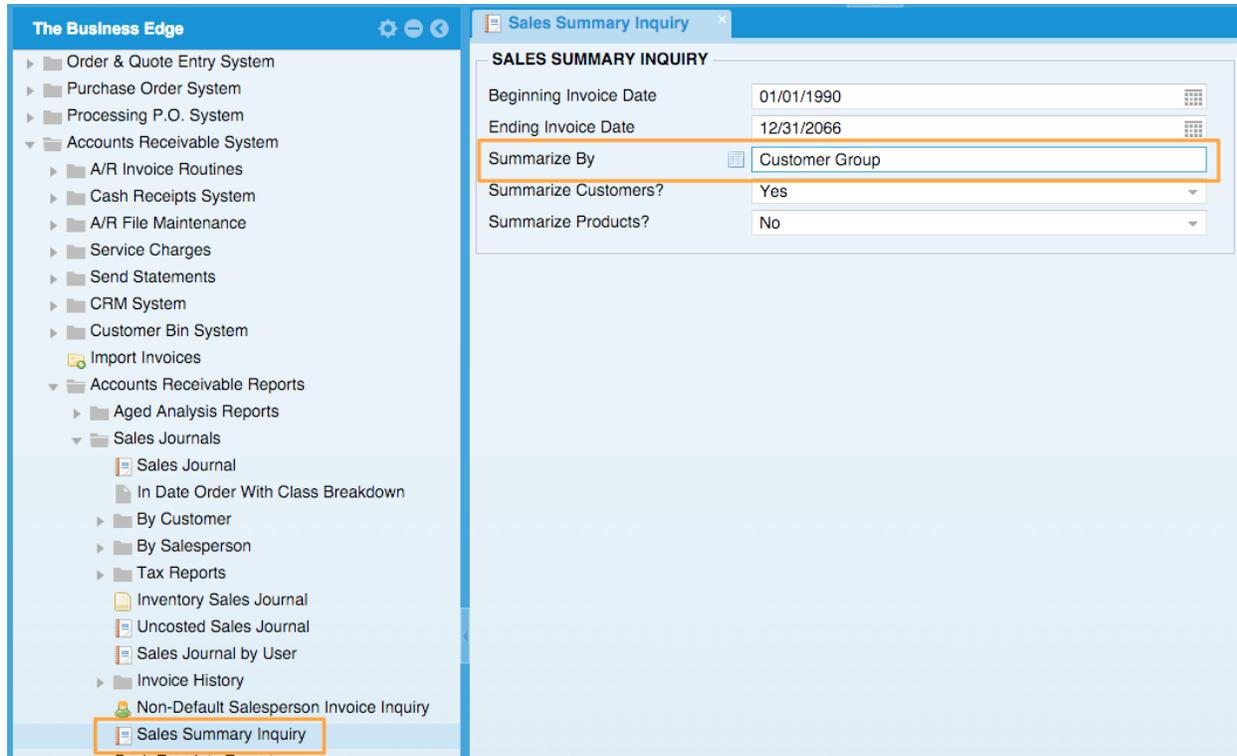
13. New Report-New report located in Accounts Receivable, Accounts Receivable Reports, Sales Journals, Sales Summary Inquiry. This report will allow you to summarize sales by Ship to City, Ship to State, Ship to Zip Code, Bill to City, Bill to State, Bill to Zip Code, Payment Terms, Customer Classification or Sales Person. If you answer "NO" to summarize customers or products the sales will be broken out accordingly.



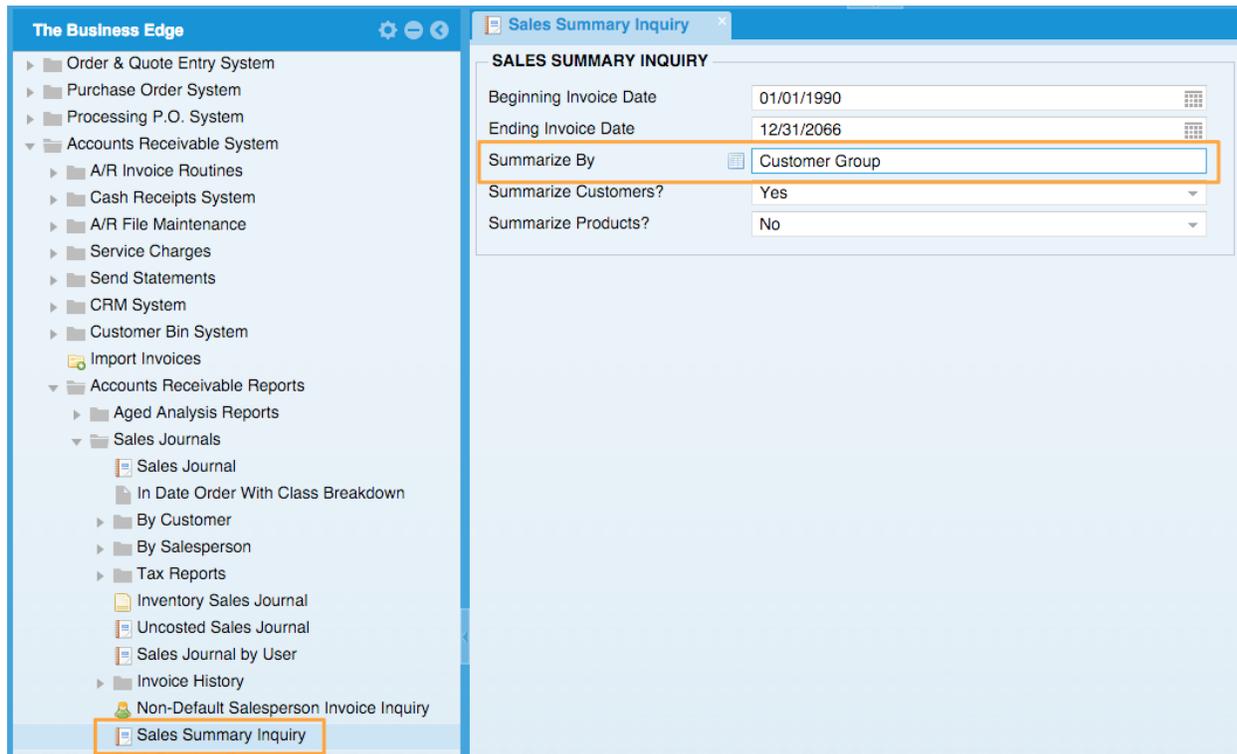
14. New Optional Fields-Optional columns have been added to all of the Customer Address Grids that show: Tax – Service, Tax – Custom, and Tax – Other. Example: Accounts Receivable System, Accounts Receivable Reports, Miscellaneous A/R Reports, List Customer Addresses



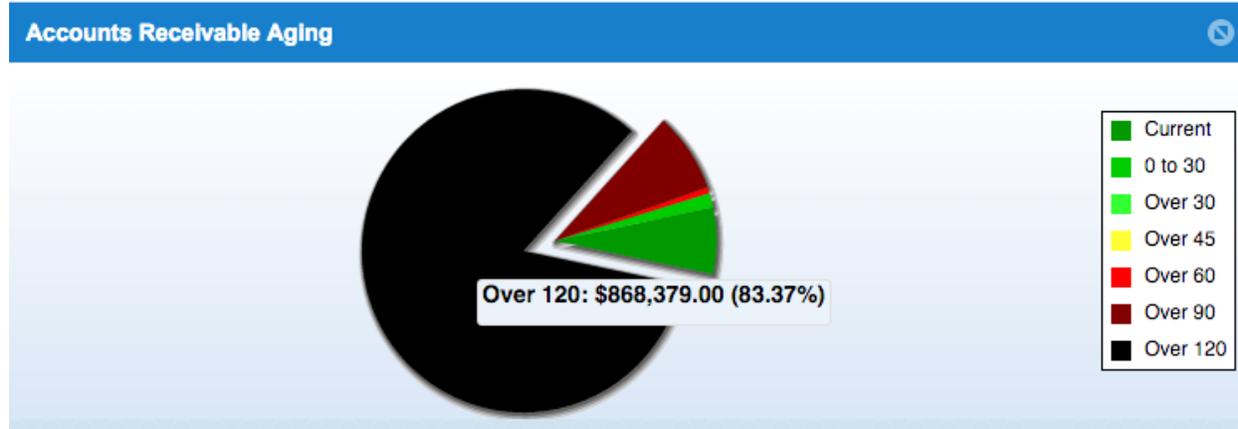
15. New Option on Report: The Sales Summary Inquiry now has an option to summarize by Customer Group. The Sales Summary is located in: Accounts Receivable System, Accounts Receivable Reports, Sales Journals, Sales Summary Inquiry



16. New Optional Field: The Customer's default FOB is now available as an Optional Field on the Customer Inquiry screen when the system flag has been set to use default customer FOB's



17. New Feature-Now on the Accounts Receivable aging report you can see percentage of dollar amount if you hover your mouse over the graph. The report is located here: Accounts Receivable System, Accounts Receivable Reports, Aged Analysis Reports, Aging by Customer



18. New Feature-You can now change your Note Category Filters from the Enter & Edit Notes screen

Customer Inquiry

ENTER & EDIT CUSTOMER NOTES

Customer: 1028 Alkermes Contract Pharma Services
 Phone Number: (260) 413-8861

Options: Help, Note Category Filters

Date	Time	Notes	Entered by	Category Description
08-18-17	11:48am	make sure they didn't bill us for tax	Dennis Cowhey	Accounts Payable
08-18-17	10:51am	this is a note in with a default category	Dennis Cowhey	Default
08-17-17	03:17pm	waiting for check from big customer	Dennis Cowhey	Collections
06-09-16	06:55am	SEND A CONFIRMATION TO MATT FOR EVER...	WALLEY	Default

19. New Feature-In Send Customer Statements the default for Review List before Sending? is now Yes
20. New Report-New inquiry breaks out invoice miscellaneous charges in a grid by invoice date range. This new inquiry is located in Accounts Receivable, Accounts Receivable Reports, Invoice History, Misc. Charge Detail Sales Inquiry

The Business Edge

Misc Charge Detail Sales L...

MISC CHARGE DETAIL SALES INQUIRY

Beginning Invoice Date Sunday, October 01, 2017
Ending Invoice Date Thursday, October 05, 2017

Invoice	Inv Date	Customer	Customer Name	Slsm	Salesperson	MC Code	MC Description	MC Extra Desc	MC Amount	MC Taxable	MC Tax Type
59466	10-05-17	26826	Triple Fast Manufacturing, Inc.	JT	Joe Travis	FREIGHT	INBOUND FREIGHT		100.00	No	None
59466	10-05-17	26826	Triple Fast Manufacturing, Inc.	JT	Joe Travis	RESTOCKFEE	Restocking Fee		25.00	No	None
59467	10-05-17	26826	Triple Fast Manufacturing, Inc.	JT	Joe Travis	EXPEDITEFEE	Expediting Fee	33,	603.00	No	None
59468	10-05-17	26826	Triple Fast Manufacturing, Inc.	JT	Joe Travis	EXPEDITEFEE	Expediting Fee	aaa, bbb, ccc	6.00	No	None

21. New Feature-Note Categories, you can now create categories for notes and choose which notes are visible to you in your user flags. You can set up a Note Category in Accounts Receivable System, CRM System, CRM File Maintenance, Enter & Edit Note Categories

E&E Category

ENTER & EDIT CATEGORY

Category Code: C

Category Description: Collections

Active: Yes

Initiated: Dennis Cowhey 08-17-17 @ 03:10pm

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E&E User Flags

ENTER & EDIT USER FLAGS - GENERAL

Full Name	Dennis Cowhey
Title	PRES President
Password
E-mail	nathan@ci-inc.com
Default Report Printer	F. HP 4050 - Blue Room
Enable Scrolling Box E-mail?	Yes
Default Report Output To	Adobe PDF
Default Note Category	Collections
Default Branch	Chicago
Default "Include All Branches?" Answer	Yes
Show Follow Up Notes on Login & E-Mail	All up to Today
Recent List Limit	20
Show Hot Keys?	No
Grid Export Extension	Excel
Include Hidden Columns?	No
Default New Columns	Visible
Include Test Menu?	Yes
Enable Optional Information Grids?	Yes
Enable Optional Fields?	Yes
Collapsible Grid North Regions?	Yes
Button Alignment	Right
Enable Key Buffering?	Yes
Run in Debug Mode?	Yes

22. New Report-New sales summary inquiry based on lot comments, Lot Comment Sales Summary Inquiry located in Accounts Receivable, Accounts Receivable Reports, Sales Journals, Invoice History, Lot Comment Sales Summary Inquiry
23. New Fields Added to Report-The Salesperson code and name have been added as optional columns to the Customer Payments Report. The Customer Payments report is located in Accounts Receivable, Accounts Receivable Reports, Cash Receipt Reports, Customer Payment Reports.

- 24. New Fields Added to Report-New customer Group and Group Name optional columns have been added to the List Contacts by Customer grid. The List Contacts by Customer report is located in Accounts Receivable System, Accounts Receivable Reports, Customer Lists & Labels, List Contacts by Customer
- 25. New Feature-The Update Deposit will now return to the grid of deposits if more are available to update instead of closing the tab.
- 26. New Fields Added to Report-The Sales Summary Inquiry grid will now show the Total Cost, Total Sales, Number of Customers and Number of Products in the north region. New optional columns have been added for Profit, Profit %, Invoices, Customers and Products. The Sales Summary report is located in Accounts Receivable System, Accounts Receivable Reports, Sales Journals, Sales Summary Inquiry. You also can now drill into row in the Sales Summary Inquiry grid to see the detail that the summary information came from.
- 27. New Fields Added to Report-There are now Optional columns for Last Vendor and Last Vendor Name added to the Customer Inquiry's Detail Sales History grid

General Ledger

- 28. New Fields Added to Report-There are now Optional columns for Value, Balance, Posted By and Time added to the G.L. Transaction Inquiry grid. The Account Transaction Report is located in General Ledger System, Account Transaction Report

The screenshot shows the 'G.L. TRANSACTION INQUIRY' report in The Business Edge. The report parameters are as follows:

G.L. Account	1200 Accounts Receivable
Beginning Transaction Date	Sunday, January 01, 2017
Ending Transaction Date	Sunday, December 31, 2017

The summary table shows the following values:

Period Beginning Balance	\$	843,633.73
Period Activity		135,297.42
Period Ending Balance	\$	978,931.15

The grid header at the bottom of the interface includes the following columns: Date, Ref., Description, Type, Amount, Entry, Value, Balance, Posted By, and Time. The 'Value', 'Balance', 'Posted By', and 'Time' columns are highlighted with an orange box.

Graphical Interface

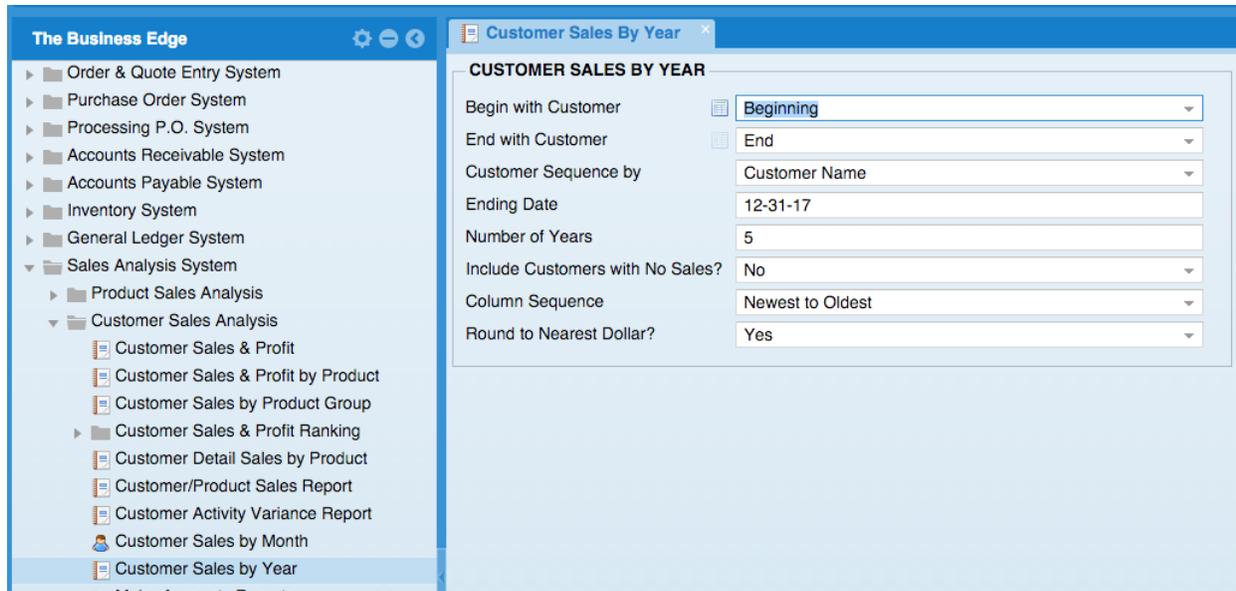
- 29. New Feature-Contact Computer Insights will no longer send you to a web page. It is now a standard grid of information. Chat with Customer Support” coming soon.

The screenshot shows a CRM application window titled 'Fasteners Now Chicago Dennis Cowhey'. The main content area displays a 'CONTACT US' card for Computer Insights, Inc. and a table of contacts. The right-hand navigation pane contains various menu items, with 'Contact Computer Insights' highlighted. An orange arrow points from this menu item to the contact list table.

Contact	Ext	E-mail	Cell Phone	Title
Angela Amico	217	angela@ci-inc.com		Customer Support
Chris Psiaki		cpsiaki@ci-inc.com		Developer
Chris Spradlin	209	chris@ci-inc.com		Customer Support
Dennis Cowhey		dennis@ci-inc.com	(847) 331-5867	in President
Denny Cowhey	203	dcowhey@ci-inc.com	(630) 926-4546	Chairman of the Board
Diane Miller	204	dmiller@ci-inc.com	(847) 757-8816	Vice President of Operations
Gary Adamik	207	gary@ci-inc.com		Customer Support
Jeremy Johnson	216	jeremy@ci-inc.com		Developer
Jim Dyskie	211	jim@ci-inc.com		in Salesperson
Mike Van Name		mikev@ci-inc.com		Vice President of Development
Nick West	218	nick@ci-inc.com		Customer Support
Rachel Wisner	221	rachel@ci-inc.com		Developer

Sales Analysis

30. New Field Added to Report-The following field has been added to the Salesperson Sales by Customer Report include Customer Group. This report is located in Sales Analysis System, Salesperson Sales Analysis, Salesperson Sales by Customer
31. New Report-New Customer YTD Comparative Summary summarizes customer invoice sales by date range and customer range. The Customer YTD Comparative Summary report is located in Sales Analysis System, Customer Sales Analysis, More, Customer YTD Comparative Report
32. New Report-A new report has been added to view customer sales by year, "Customer Sales by Year" located in Sales Analysis System, Customer Sales Analysis, Customer Sales by Year



33. New Option on Report-The final page of the Customer YTD Comparative Report now shows totals for each month as well as a final total for the entire report. The Customer YTD Comparative Report is located in Sales Analysis System, Customer Sales Analysis, More, Customer YTD Comparative Report.

34. New Field Added to Report-New optional cost columns added to Product Sales & Profit grid. The Product Sales & Profit report is located in Sales Analysis System, Product Sales Analysis, Product Sales & Profit

Product Code	Description	P1 QTY	P1 Sales	P1 Cost	P1 Profit	P2 Qty	P2 Sales	P2 Cost	P2 Profit	%Chg Qty	%Chg Cost	%Chg Sales	%Chg Prof
NNN	1/4"-20 x 1/2" PL...	2,000	78.54	25.57	52.97	0	0.00	0.00	0.00	0.0	0.0	0.0	0.0

35. New Field Added to Optional Column-New optional column for All Sales has been added to the Customer and Salesperson's Monthly and Annual summary grids. All Sales and % of All columns will only be available to users that have security access to the Sales Analysis System.

Utilities

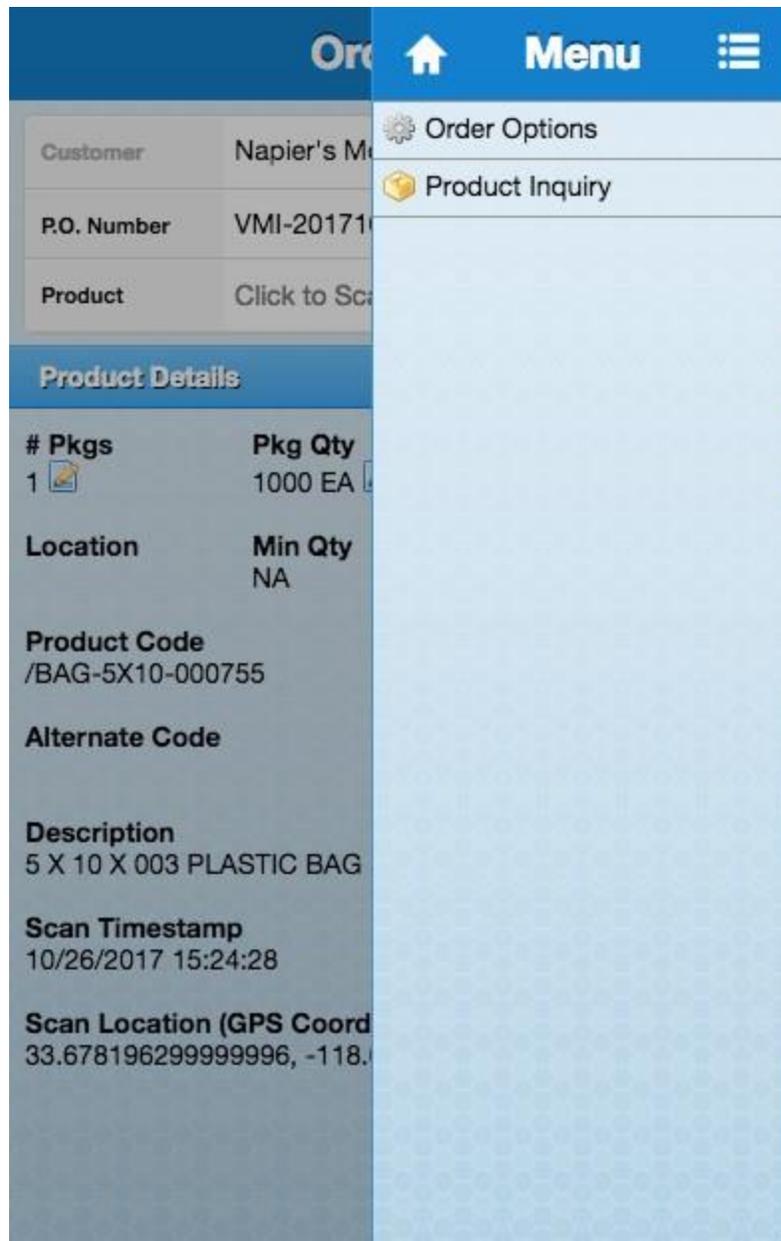
36. New Report Feature- The Export Slsm/Cust/Product Report can now be sent to grid so it can be exported to Excel. This report is located in Utilities,

Export File Data, Export A/R Information, Export Sales, Export Sism/Cust/Product Report

37. New Feature-We try to avoid it when we can but there are times when new releases will require workstation applications to be upgraded. The 2018 release is one of those times. Some of the new features in this workstation upgrade include: Upgrade Chromium browser core from 47 (2016) to 64 (2018), Improved performance and stability, Better window handling and memory management, Support for HTTPS/SSL communication, Support for secureIDs, Mitigations for Spectre Attacks

VMI Mobile

38. New Feature-If VMI Mobile is being used with a normal user (not a “web user”) the Product Inquiry option will be included in the side menu when an active internet connection is detected.



User Flags

39. New User Flags- Printer Flags now include PO Receiving, PPO Picking, PPO Packing, PPO Receiving, PPO traveler, Transfer Pick, and Transfer Pack

User Flags - Default Printers

Default Quote Printer	<input checked="" type="checkbox"/>	G. Optra M412
Default Sales Order Printer	<input type="checkbox"/>	G. Optra M412
Default Picking Ticket Printer	<input type="checkbox"/>	J. Picking Ticket Printer
Default Packing List Printer	<input type="checkbox"/>	G. Optra M412
Default Delivery Log Printer	<input type="checkbox"/>	
Default Bill of Lading Printer	<input type="checkbox"/>	G. Optra M412
Default Invoice Printer	<input type="checkbox"/>	K. Invoice Printer
Default Invoice Receipt Printer	<input type="checkbox"/>	
Default Certificate Printer	<input type="checkbox"/>	
Default Statement Printer	<input type="checkbox"/>	

▲ **Purchase Orders**

Default P.O. Printer	<input type="checkbox"/>	
Default P.O. Receiving Doc Printer	<input type="checkbox"/>	

▲ **Processing Purchase Orders**

Default Processing P.O. Printer	<input type="checkbox"/>	
Default Processing P.O. Picking Printer	<input type="checkbox"/>	
Default Processing P.O. Packing List Printer	<input type="checkbox"/>	
Default Processing P.O. Receiving Doc Printer	<input type="checkbox"/>	

▲ **Vendor Output**

Default Debit Memo Printer	<input type="checkbox"/>	
Default RFQ Printer	<input type="checkbox"/>	
Default Check Printer	<input type="checkbox"/>	

▲ **Transfers**

Default Transfer Picking Ticket Printer	<input type="checkbox"/>	
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▲ **Transfers**

Default Transfer Picking Ticket Printer

Default Transfer Packing List Printer

▲ **Label Printers**

Default Stocking Label Printer

Default Customer Package Label Printer

Default Shipping Label Printer

Default Receipt Label Printer

Default Bin Label Printer

Default Carton Label Printer

Default License Plate Printer

Continue? ▼