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## Next Major Release

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 System Flag-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 Enty-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.

3. New User Flag-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.

4. 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.
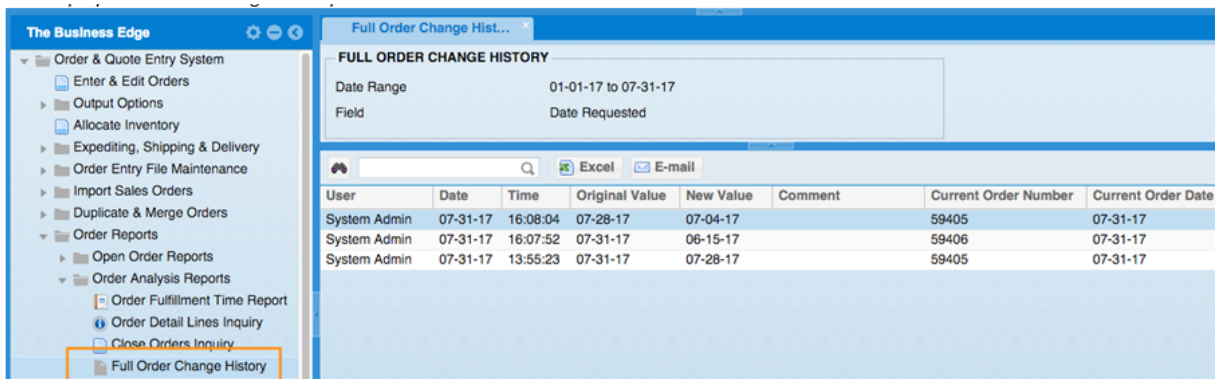

5. New Optional Information Grids-The Enter & Edit Sales Order and Order Inquiry screens now have an optional information grid that shows the "Document Output History"
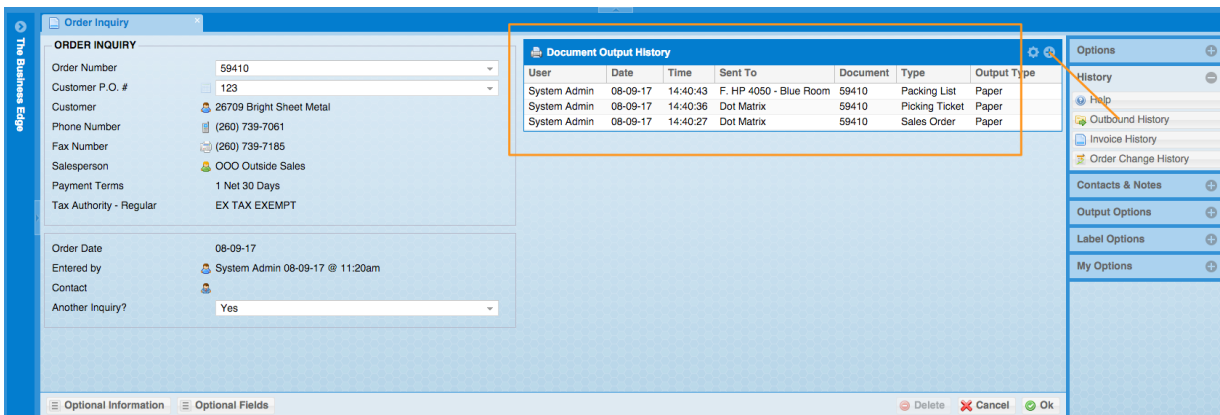
6. New Optional Information Grid-An optional information grid showing all payments related to all of an order's revisions is now available in E&E Orders and Order Inquiry screens.
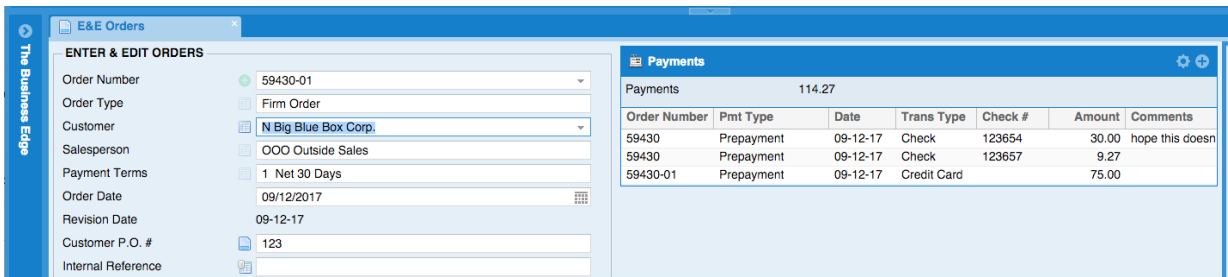
7. New Optional Information Grid-The Enter & Edit Sales Order Schedule Information now has grids about who and when a sales order's schedule was entered and when the date was modified.
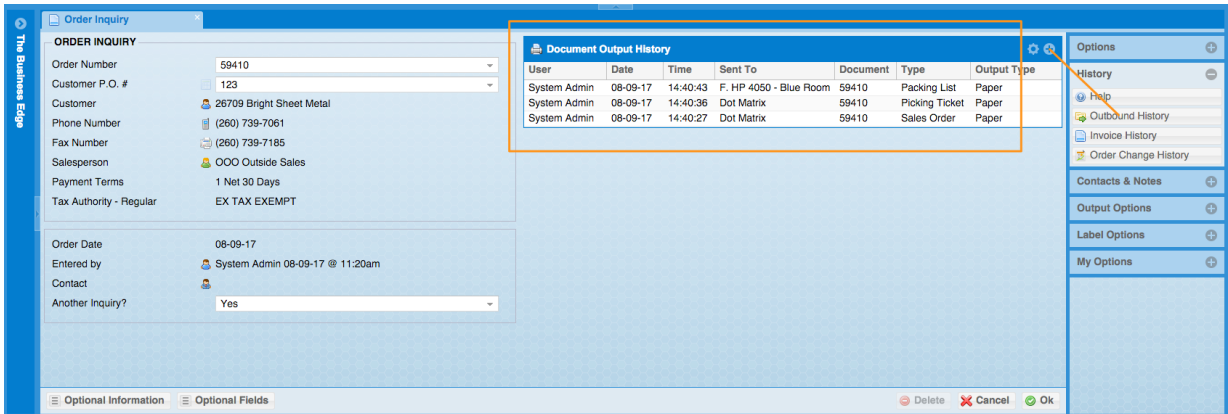
8. New Flag-The flag for the editable fields in the Enter & Edit Order final screen has been replaced with a general flag that will apply to all Enter & Edit Final screens as they become enabled with that feature. The flag has been moved to a different screen and is now located in Utilities, System Administrator 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:

9. 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

10. 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

11. 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

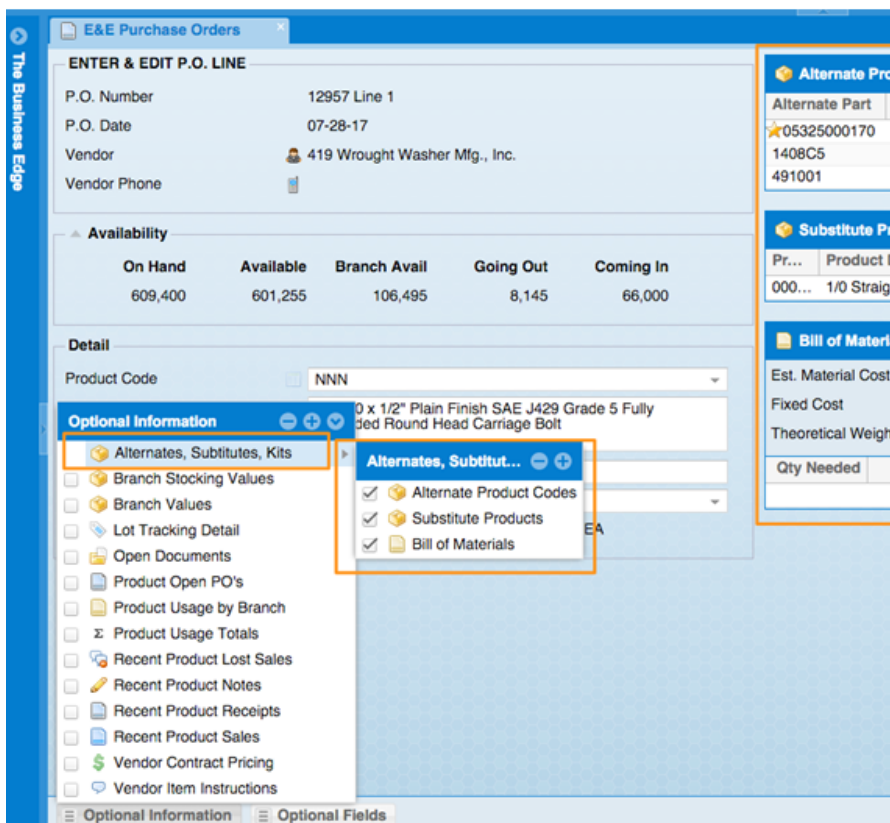# Purchase Order System

1. New Optional Information Grid- Branch Stocking Values, Open Documents, Recent Product Lost Sales, Recent Product Receipts, Recent Product Sales and Vendor Contract Pricing added to the Enter & Edit RFQ Detail Line screen.

2. New Optional Information Grid- Alternates, Substitutes, Kits optional information grids have been added to the Enter & Edit RFQ Detail Line screen.
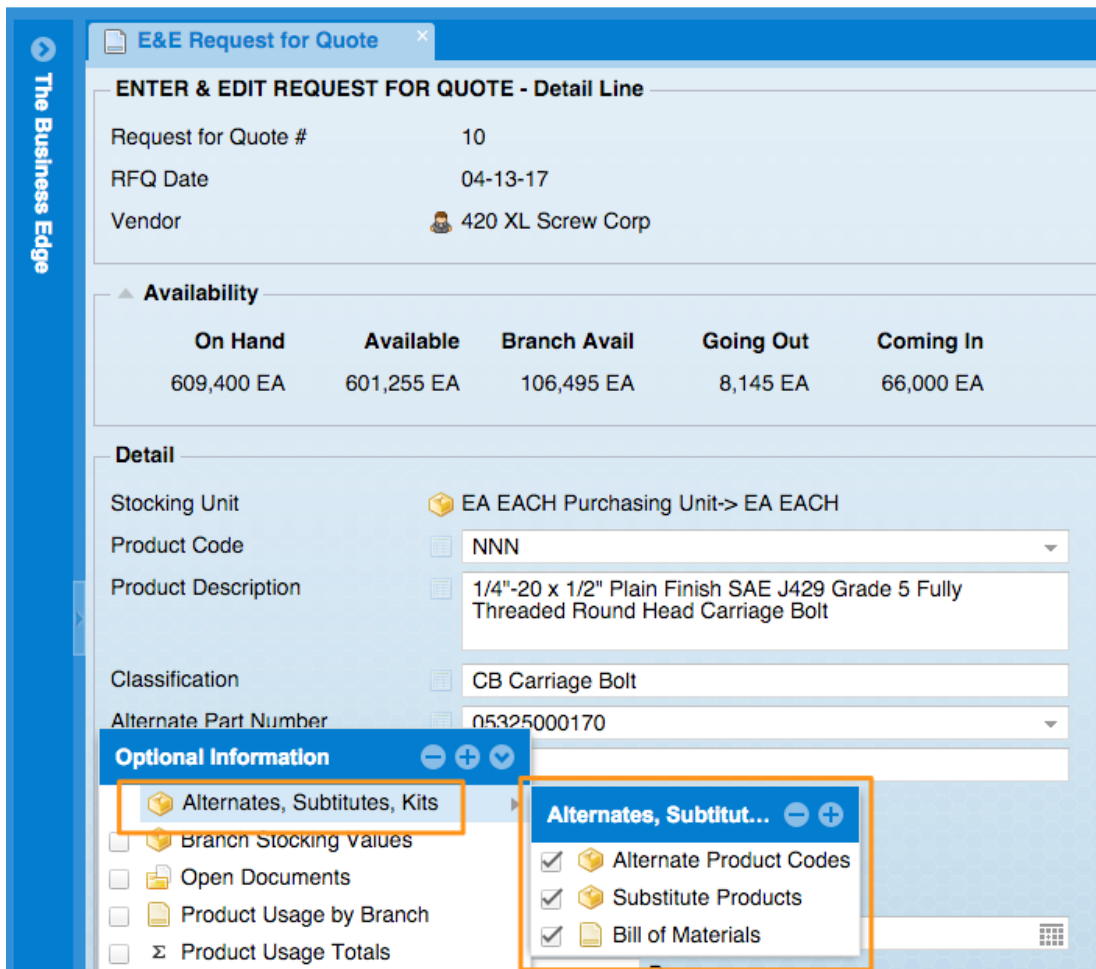
3. New Optional Information Grid- Alternates, Substitutes, Kits Optional Information grids have been added to the Enter & Edit Purchase Order screen.

4. 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"

5. New 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

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.

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	📱

▲ **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

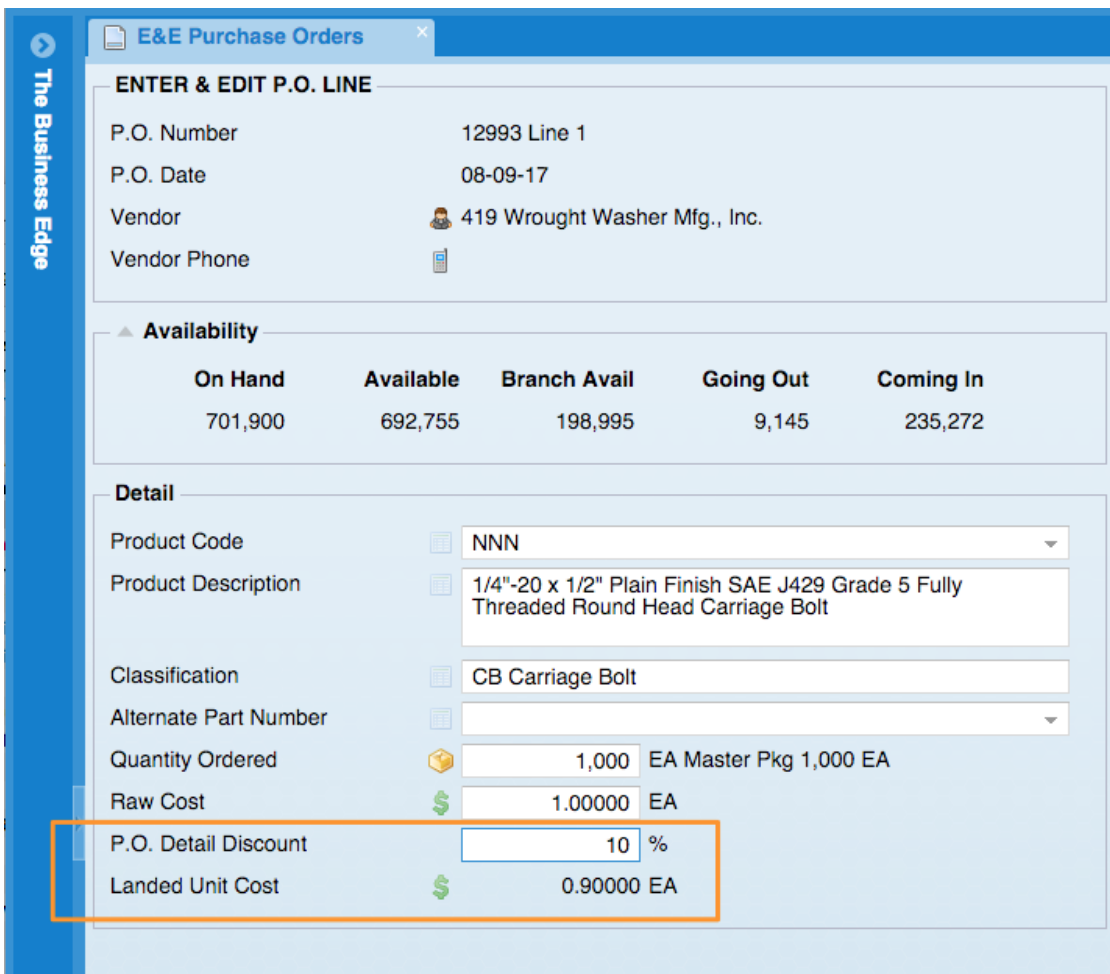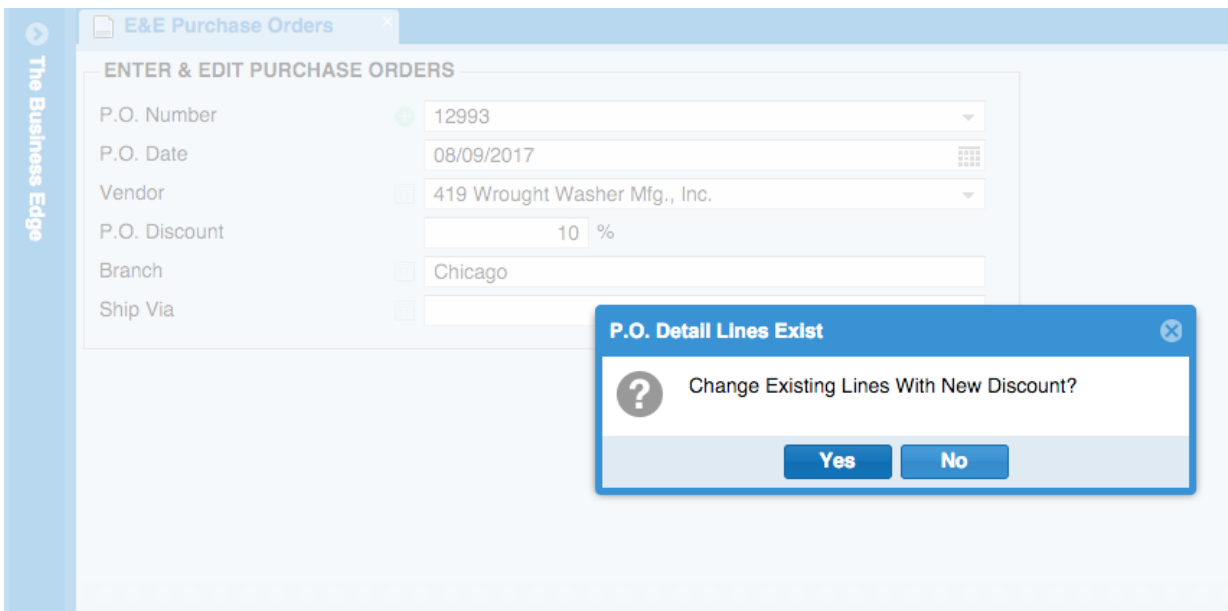|		
Product Code		NNN ▾
Product Description		1/4"-20 x 1/2" Plain Finish SAE J429 Grade 5 Fully Threaded Round Head Carriage Bolt
Classification		CB Carriage Bolt
Alternate Part Number		▾
Quantity Ordered	📦	1,000 EA Master Pkg 1,000 EA
Raw Cost	💲	1.00000 EA
P.O. Detail Discount		5 %
Landed Unit Cost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

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

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	10 %
Branch	Chicago
Ship Via	

P.O. Detail Lines Exist

? Change Existing Lines With New Discount?

Yes   **No**

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	

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	
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

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

7. 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

8. New Optional Information Grid-New optional information grid, "Recent Product RFQ's" added to Product Inquiry and Enter & Edit PO screens, Enter & Edit Order – Detail Line and Enter & Edit RFQ – Detail Line.

9. New Fields added to report-New Optional columns 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
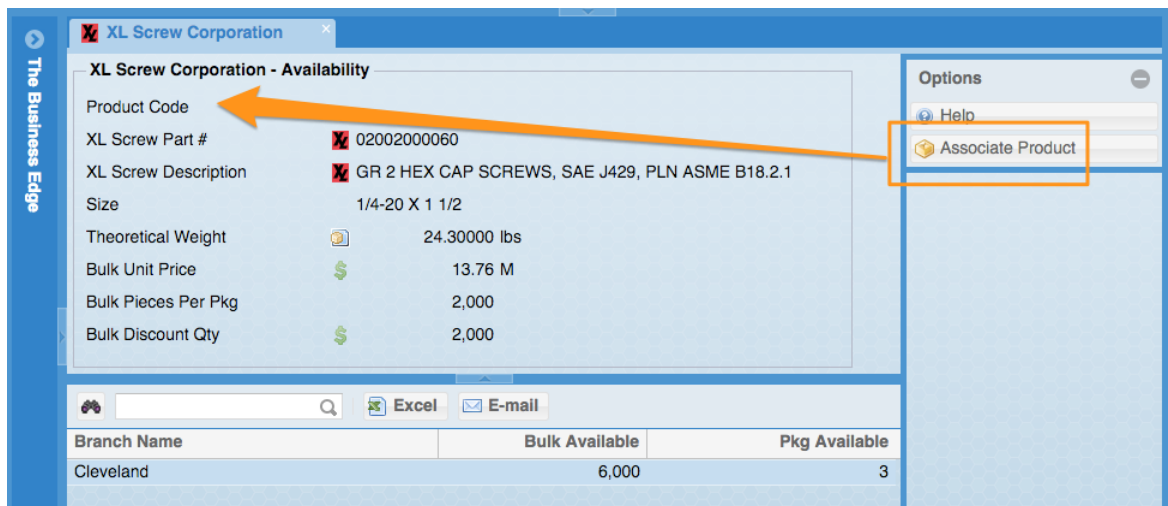
Processing Purchase Orders

1. New Optional Column-New optional columns have been added the the Enter & Edit PPO Detail Lines grid: "Include in VMI Mobile" and "VMI Mobile Barcode".
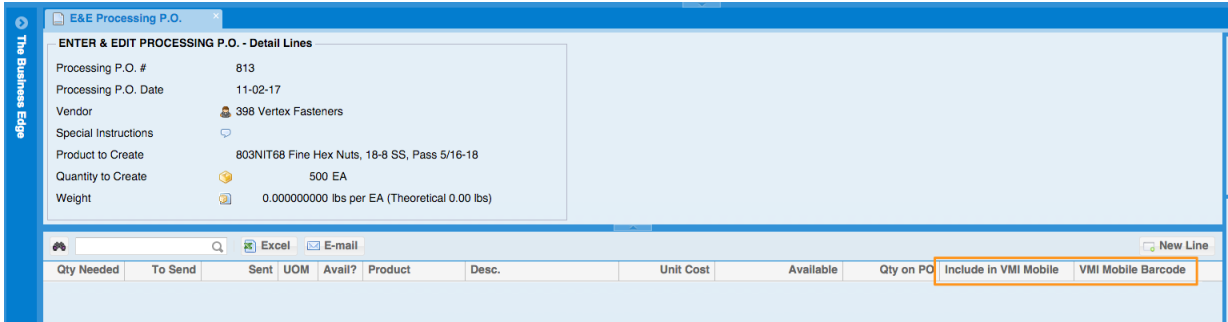
Supply Chain Network

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

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.

3. New Option-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.

Inventory

1. New Report: New inquiry added Product Substitute Inquiry which is located in Inventory System, Inventory Reports, Inventory Lists, Product Substitute Inquiry

2. New Fields added to report: New optional columns 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

3. 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


4. 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.

5. 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
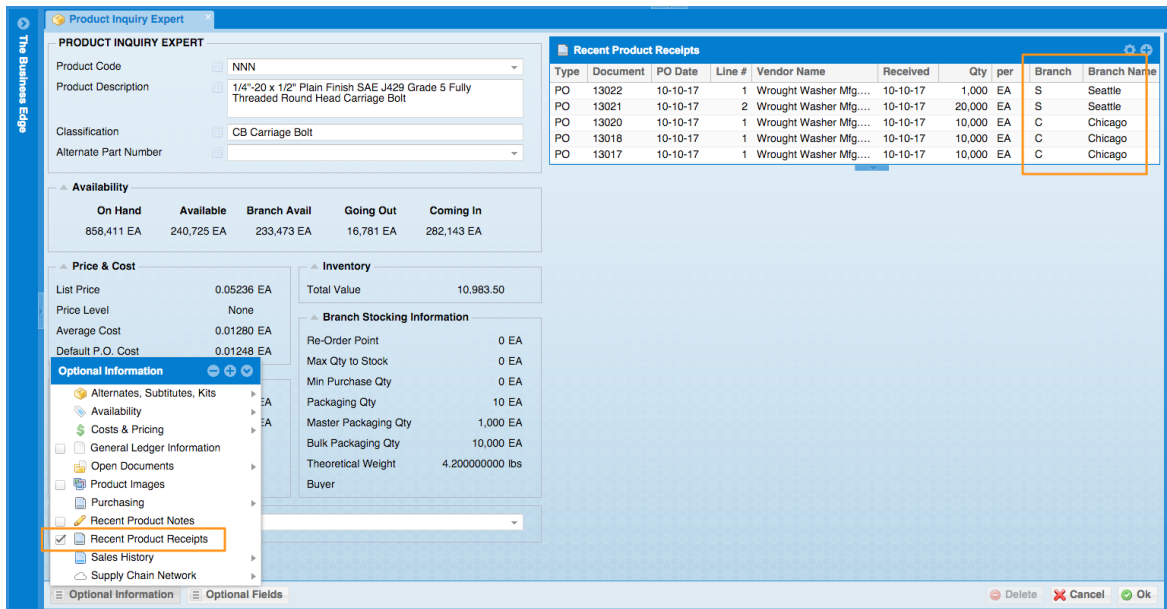
Accounts Receivable

1. 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.

2. New Option-Now, you can view scanned images in invoice inquiry and create invoice screen.
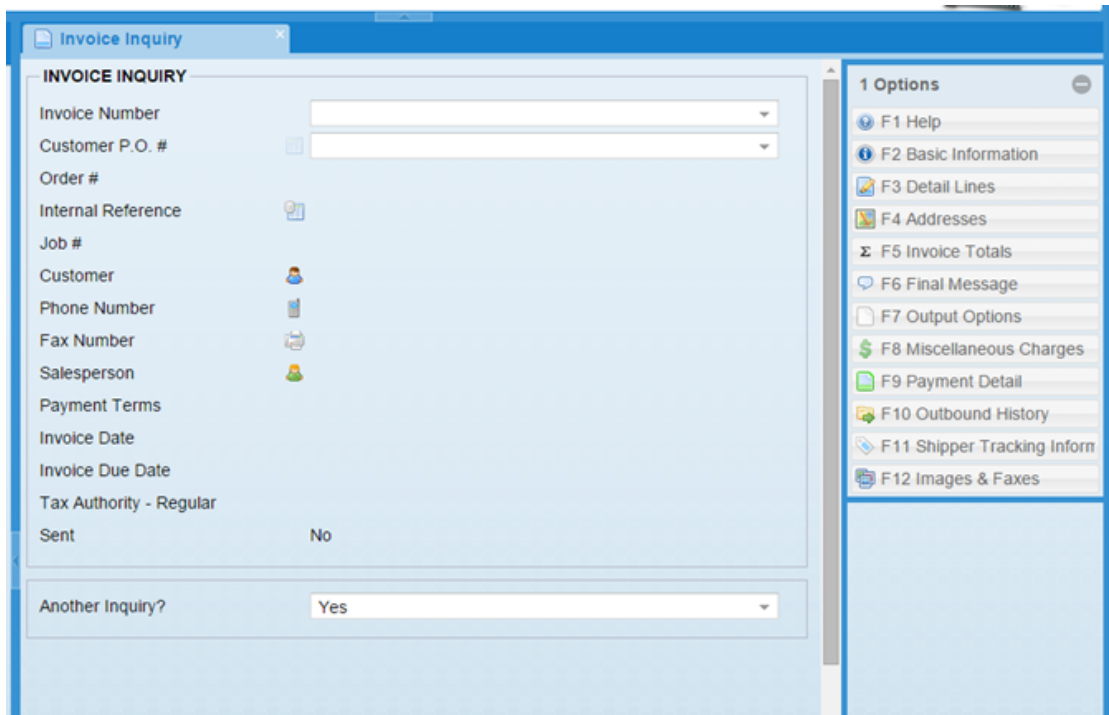
3. New Feaure-Shippers can not be marked as inactive so they won't show up as options in the selection grids. Existing documents with inactive shippers will continue to show the shippers that was assigned to them.

4. 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.

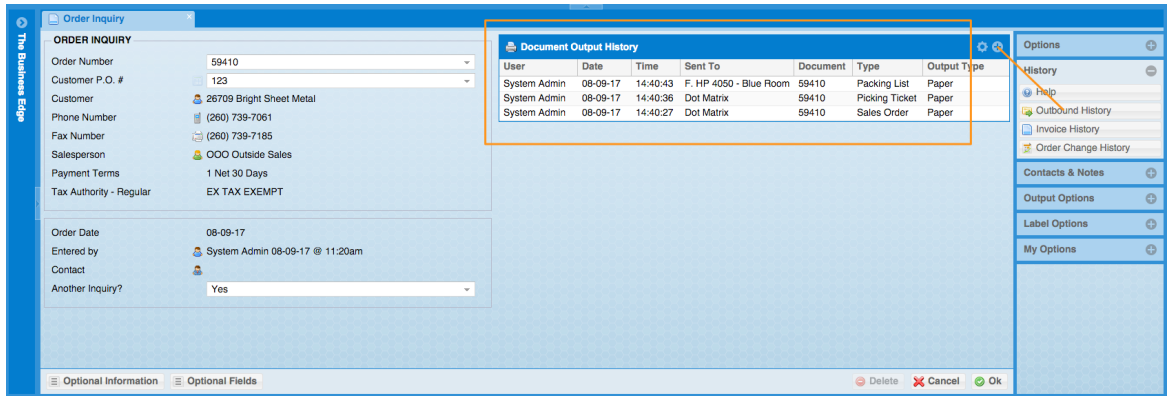5. New Fields added to Customer Address Grids- Optional columns have been added to all of the Customer Address Grids that show: Tax – Service, Tax – Custom, and "Tax – Other. Example: Accounts Receivable System, Accounts Receivable Reports, Miscellaneous A/R Reports, List Customer Addresses

6. 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
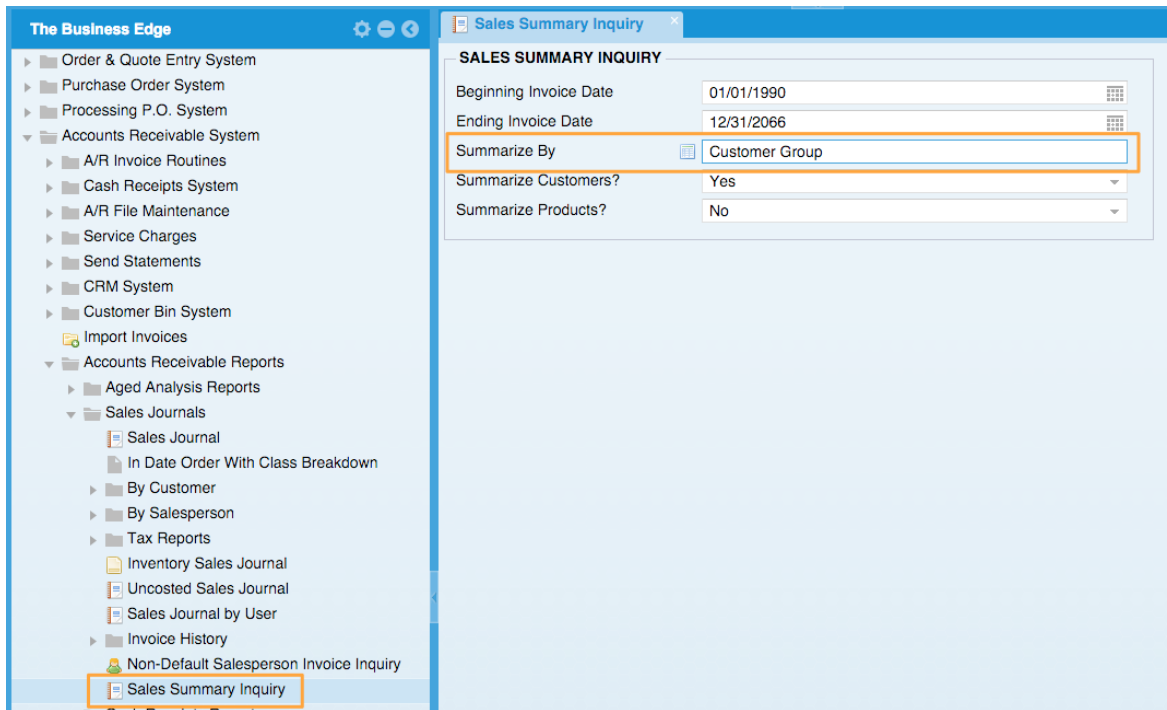

7. New Optional Field: The Customer's default FOB is now available as an Optional Field on the Customer Inquiry screen when the system flag has been set to use default customer FOB's
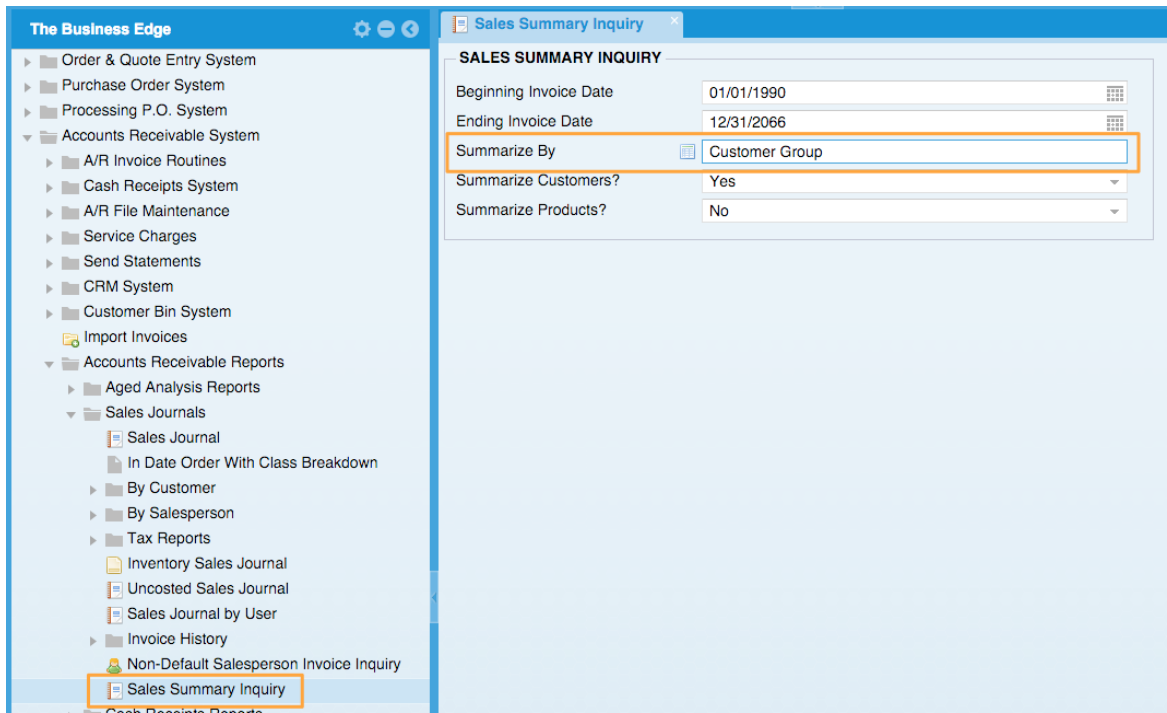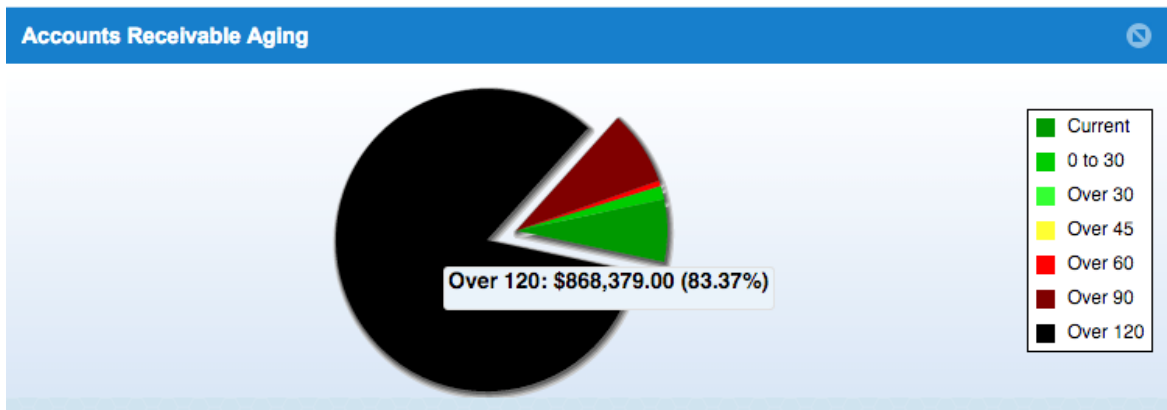
8. New Option-Now on the Accounts Receivable aging report you can see percentage of dollar amount if you hover your mouse over the graph. The report is located here: Accounts Receivable System, Accounts Receivable Reports, Aged Analysis Reports, Aging by Customer
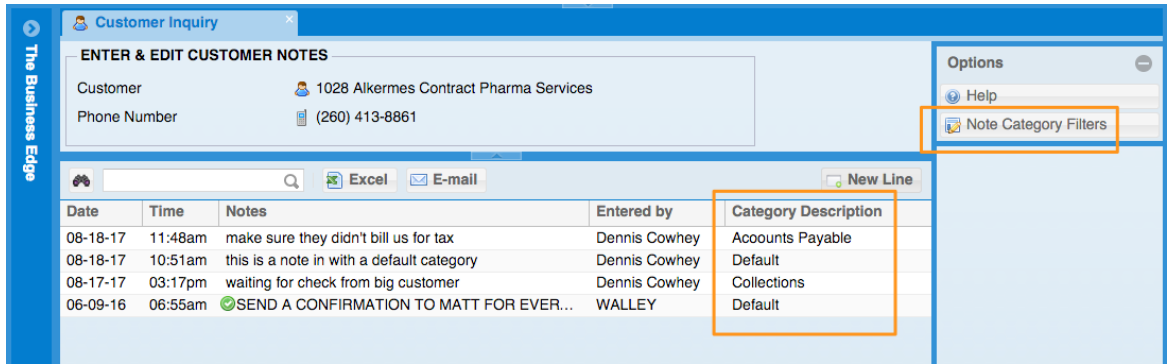
9. New Option-You can now change your Note Category Filters from the Enter & Edit Notes screen
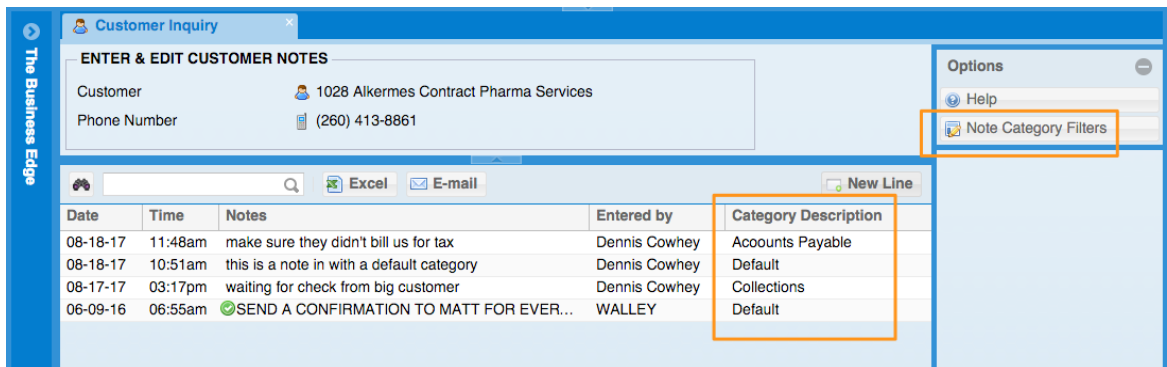
10. New Option-In "Send Customer Statements" the default for "Review List before Sending?" is now "Yes"

Accounts Receivable Aging

Over 120: $868,379.00 (83.37%)

Legend:
- Current
- 0 to 30
- Over 30
- Over 45
- Over 60
- Over 90
- Over 120

11. 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

12. 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

13. 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

14. 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.

15. 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

16. New Feature-The Update Deposit will now return to the grid of deposits if more are available to update instead of closing the tab.

17. 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.

General Ledger

1. New Fields added to report-New optional columns, "Value", "Balance", "Posted By" and "Time" have been added to the "G.L. Transaction Inquiry" grid. The Account Transaction Report is located in General Ledger System, Account Transaction Report

Graphical Interface

1. New Option-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.

Sales Analysis

1. New Optional Column 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

2. 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

3. 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
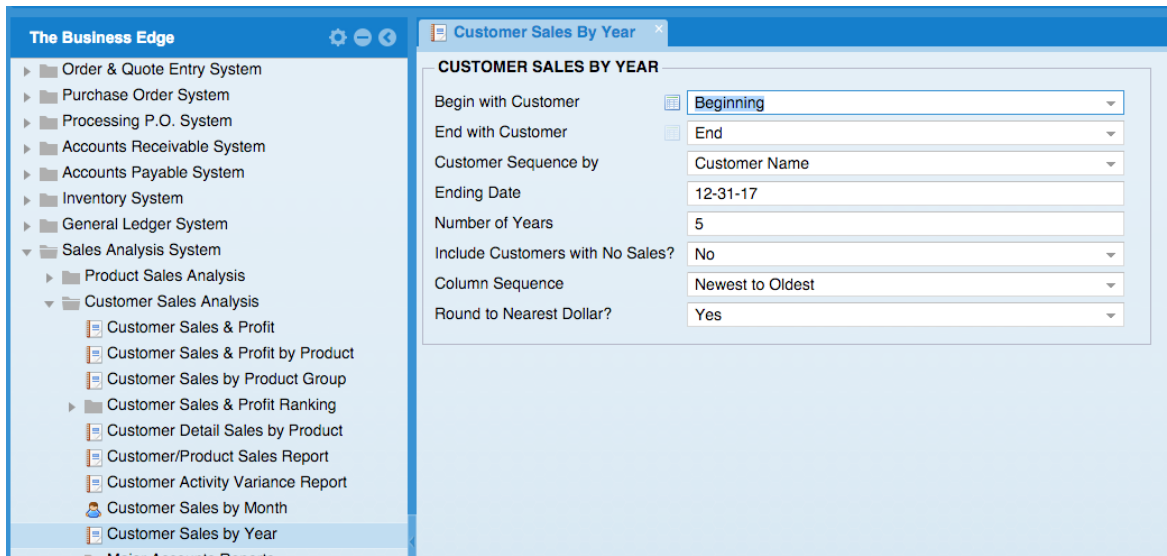
4. New Option on Report-The final page of the Customer YTD Comparative Report now shows totals for each month as well as a final total for the entire report. The Customer YTD Comparative Report is located in Sales Analysis System, Customer Sales Analysis, More, Customer YTD Comparative Report.

5. New Optional Column 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
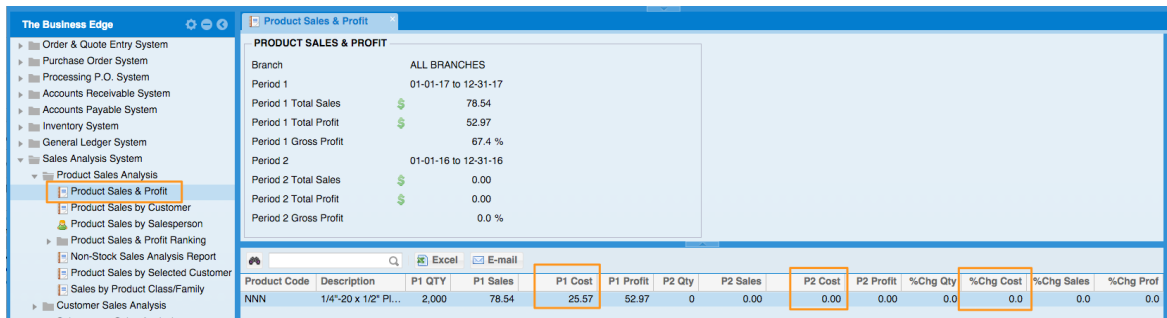
Utilities

1. New Report Option: 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 Slsm/Cust/Product Report

VMI Mobile

1. 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.
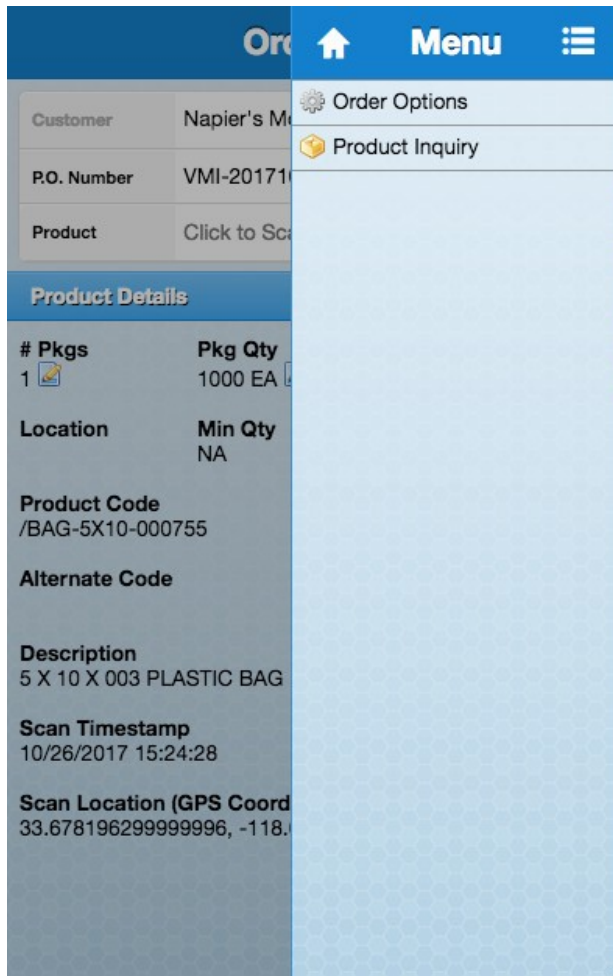
User Flags

1. 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		G. Optra M412
Default Sales Order Printer		G. Optra M412
Default Picking Ticket Printer		J. Picking Ticket Printer
Default Packing List Printer		G. Optra M412
Default Delivery Log Printer		
Default Bill of Lading Printer		G. Optra M412
Default Invoice Printer		K. Invoice Printer
Default Invoice Receipt Printer		
Default Certificate Printer		
Default Statement Printer		

Purchase Orders

Default P.O. Printer		
Default P.O. Receiving Doc Printer		

Processing Purchase Orders

Default Processing P.O. Printer		
Default Processing P.O. Picking Printer		
Default Processing P.O. Packing List Printer		
Default Processing P.O. Receiving Doc Printer		

Vendor Output

Default Debit Memo Printer		
Default RFQ Printer		
Default Check Printer		

Transfers

Default Transfer Picking Ticket Printer		

Transfers

Default Transfer Picking Ticket Printer		
Default Transfer Packing List Printer		

Label Printers

Default Stocking Label Printer		H. Stock Room Label Printer
Default Customer Package Label Printer		H. Stock Room Label Printer
Default Shipping Label Printer		H. Stock Room Label Printer
Default Receipt Label Printer		H. Stock Room Label Printer
Default Bin Label Printer		
Default Carton Label Printer		I. Stock Room Small Labels
Default License Plate Printer		
Continue?		Yes

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