Computer Insights, Inc.
The BUSINESS EDGE

Upgrade Notes August 2005 through April 2006

Order & Quote Entry System

1.   New optional system - Counter Sales. We now have a new system, Counter Sales, that may be a good fit for your company. The counter sales module streamlines the over the counter transactions that may be time consuming using the traditional order entry system. If you are interested in this new feature, please call us for a demonstration and quote.

2.   New Feature – Customer Price Inquiry – You can now view Customer Sales History from within the Customer Price Inquiry by Pressing F4-Sales History.

3.   New Feature – Total Weight will now be displayed in the F6-Totals screen when at the final screen of a Sales Order when the flag to show weights is set to yes. If you have weights in your inventory this information can make shipping decisions easier before the order is picked. If you do not have weights in the system and would like to start updating weights as inventory is received there are flags in the system that will force the personnel doing the receiving to enter weights when Purchase Orders are received.

4.   New User Flag - Show Lot Number Receipt Date in Allocating – If this flag is set to yes, when the available lots are displayed during allocating the date that the lot was received will also be displayed. The comment field will be smaller to accommodate the date field. This flag is located in User Flags – Order Entry, on the second screen.

5.   New Information - The F4-Availability Function Key in the Sales Order Detail Line will now include PPO's. You can now also drill into the PO's and PPO's and see the complete detail of the Purchase Orders and PPO's by simply clicking on them or pressing enter on them while highlighted.

If you highlight a PPO that is open, you can press the F3 Key and view the PPO Definition Products and their availability.

6.   New Inquiry Option – When doing a Product Inquiry you now have the option through a User Flag to consolidate Open Documents. The default Product Inquiry offers individual inquiries for Orders, Purchase Orders, etc. This new option if chosen, will consolidate all open documents that affect your availability (including quotes is optional). If you select this option, you will no longer have the individual open document selections.

Users can customize their inquiry with the following three options: 1. Users can select which documents they would like included. 2. Users can select to Sort the

Documents by Date or by Document type and 3. Users can choose to Show a Running Quantity or Cost/Price Information.

This option can be turned on by going to User Flags – Inventory, Press F7-Inquiries, and then press F3- Open Documents Inquiry. Users can also change their preferences when using this inquiry while in the inquiry. So if you are viewing all possible documents and then just want to see Sales Orders you can press F3-Options and change it on the fly.

Because companies often do not want to include Quotes in the Open Document Function Key, when Users select the Open Document Function Key, they will also have an F8-Quotes function key to view them separately.

7.   New Inquiry option - When entering a line item on an Order you have the ability to have specific comments that will appear on different documents. Therefore, the Acknowledgement document can have a different comment from the Pick Ticket for example. You can enter these extra comments by pressing F3-More Comments when in the F6-Comment Function Key. You can now view those Comments through an Order Inquiry by pressing F3-More Comments when viewing the Comments through the function key.

8.   Inquiry Enhancement – Customer Sales History – When selecting a range of Products you can now get a drop down box of parts to select from. You can select products by Product Code, Description, Classification or Alternate Product Code.

Purchase Order System

1.   New Feature – Open PPO Report by Vendor will now be presented in a scrolling box when Screen is selected. This gives you the ability to export it to Excel or a text file.

2.   New Option - The Purchase Order report by User has a new option. You can view all Purchase Orders within a time period or choose to view only Open Purchase Orders. The new question is Show only Open P.O.'s.

3.   New Feature – When a backorder is created for a P.O. any Purchase Order Notes will be transferred to the Backorder. Notes can be added to a Purchase Order through a Purchase Order Inquiry, F3- Show Basic Information, F3- Po Notes.

4.   New Feature – When using the F8-Set PO function key in a Sales Order there is now an internal comment available for the PO Line. When you press F3-Comment, the internal comment is on the bottom of the screen.

5.   New Feature – Vendor Contract Costs – You can now enter Contract Costs in the Vendor Master File. In Enter & Edit Vendors, F5- More, F5 – Vendor Contract Costs you can select a Product, Beginning Date, Ending Date, Cost and minimum line charge. If the ending date is left blank, the Costs will not expire. If you enter a minimum line charge and your line does not equal the minimum line charge, the system will default the line total to the minimum line charge. i.e. If you order 100 pieces at .0185 the line total would be 1.85, if the minimum line charge is 2.00 the cost will be automatically changed to .02.   In the scrolling box where you can view the Contract Cost, a Minimum Quantity Column is also displayed. This is the Minimum Quantity you need to order based on the entered cost to satisfy the minimum line charge.

6.   New Option – You can now print a Stocking Label in the Processing Purchase Order System. You can print a Stocking Label from the F8-Print Options key or from the Print & Fax Options on the Menu. The Stocking labels can only be printed in this area if you are using the standard system generated lot numbers OR if the PPO has been received and the lot number and date received are known.

7.   New Report/Inquiry – PPO Component Availability Planning – This report is similar to the Bill of Materials that can be printed in the Finished Goods System.   After selecting the Product you would like to create you will be prompted for the quantity that you would like to create. You also have the option of including Sub-components.   The system will present the Products and or services needed to create the quantity you have selected as well as the available quantity.   This is located in Purchase Order System, Processing PO System, Processing PO Reports.

8.   New Option – When you are in Enter & Edit PPO's on the Final Screen, F8-Print Options, Fax PPO has been enabled. This function key was present but had brackets around it since it was not an available feature. This feature is now available.

9.   New Field for Export – If you Export the Open Purchase Orders Report, the Special Notes field from the Purchase Order Heading will now be exported along with the Purchase Order Information. This report is often used to expedite Purchase Orders and is located in Purchase Order Reports, Open PO Reports, Open Purchase Orders. This report only has summary heading information, if you would like more detail there are a number of other Purchase Order reports available.

10.   Inquiry enhancements – Purchase History – When viewing purchase history for a Vendor the history was presented in Purchase Order sequence. It will now be displayed in Date Sequence with the most recent receipts on top.

11.   New Report Option – Open Purchase Orders by User – There is a new option when running this report. Show Detail? If you answer Yes to this question, the detail lines of the purchase orders will be included. The default for this question is No.

Accounts Receivable System

1.   New Fields – When exporting the Sales Journal by Customer PO, additional fields will now be included. These fields are Quantity On-Hand, Quantity On Purchase Orders and Quantity On Sales Orders.

2.   New Report Option – Sales Journal by Salesperson with Detail – There is a new option. You can select to show the Price Level that applied to each line item instead of the Accrued Cost. This is a new selection on the Option screen.

3.   New Feature - When viewing Open or Paid Customer Invoices the system the screen will now stay in the same position after drilling into an invoice instead of going back to the top of the scrolling box each time.

4.   New functionality – In Enter & Edit Customers – Use First Ship to On Order has been removed. When this was or will be changed on your system if it was set to Yes the first Ship to Address was designated as the Default Ship to Address. To change the Default Ship to in a Customer Record you can now simply press F7-Ship in Enter & Edit Customers to add or view the Customer's Ship to Addresses. Highlight the Ship to address you would like to change and press the F5-Set/Un Set Default Ship to Address Function Key.

Accounts Payable System

1.   New options – When in Enter & Edit Vendors you can specify the ISO status of each Vendor. Two new options have been added – Evaluation and Quality Suspended. You can view and select all of the options by Pressing Spacebar and Enter at the Vendor Status field in Enter & Edit Vendors.

2.   New Field – When printing the Invoices Prepared for Payment Report, it will now show a check count so that you know how many checks will be generated when the checks are run.

3.   New Feature - When viewing Open or Paid Vendor Invoices in the system, the screen will now stay in the same position after drilling into an invoice instead of going back to the top of the scrolling box each time.

4.   New Report – List Vendor Payment Terms – You can now view a list of Vendor Payment Terms to the screen or paper. This list is available in Accounts Payable, Accounts Payable File Maintenance , 8. List Vendor Payment Terms.

5.   New Fields – In order to track RoHS Compliance additional fields have been added to the Vendor Master File. When entering a new Vendor, you will be prompted for the following new fields in the additional information screen – RoHS Compliant Y/N, Business Type Distributor/Manufacturer/Other, Last Survey Date. In order to place these fields in a logical area F.O.B., Ship Via, Vendor Salesperson, Cage Number and Vendor Web Site have been moved to the F4-Instruction screen. These new fields can also be viewed in a Vendor Inquiry.

Inventory System

1.   New Option – Price Level List Report – This report can be utilized if you are using the Classification Pricing feature. Previously the Price Level List Report printed all levels of pricing. You now have the ability to select a single level of pricing or all pricing levels. This is located in Inventory Reports, Price Table Lists, Price Level List.

2.   New Report Information – When exporting the Current Location Status Inquiry new fields will now be included in the export – Quantity on Order and Quantity Allocated.

3.   New Feature – The Availability Inquiry is now an option when in the Customer Price Inquiry. The Availability inquiry can be accessed with the F5 Key while in the Customer Price Inquiry. This is the same Availability Inquiry as the F4 Key in the Detail Line of an Order.

4.   New Feature – If you have the need for different stocking label formats based on Inventory Classification you can now have multiple size formats. This is helpful if you are labeling your inventory as it is received and the sizes of your inventory vary greatly.   A field called label suffix has been added to Enter & Edit Inventory Classifications. When the system goes to print a stocking label it will add this text to the label name which would call out a format different from the default. There is a $300 flat fee to create a new label in the system.

5.   New Function Key – A Function Key has been added to the Physical Inventory for Tracked Inventory. This new Function Key enables you to change the Manufacturers Lot Number while entering physical counts for tracked inventory.

6.   New Option – Inventory Location Report will now be presented in a scrolling box when presented to the screen. Once the information is presented on the screen the information can be exported to Excel, a Text file or sent as an e-mail.

The information provided includes Product Code, Description, Location, Lot Number, Quantity On Hand, Unit of Measure, Quantity Allocated, Lot Comment, Unit Cost, Cost Unit of Measure, Tag Number, Manufacturer and Manufacturer's Lot Number. This report is located in Inventory Reports, Inventory Lists, Inventory Location Report.

7.   New Option – Detail Inventory List will now go to a scrolling box when it is presented to the screen. Once the information is presented on the screen the information can be exported to Excel, a Text file or sent as an e-mail.

The information provided includes Product Code, Description's, Units of Measure, On-Hand Quantity, Allocated Quantity, Committed, On PO, List Price, Default PO Cost, Last Cost, Minimum Purchase Qty, Stocking Objective, Lead Time. Re-Order Point, Classification, Manufacturer and General Ledger Accounts. This report is located in Inventory Reports, Inventory Lists, Detail Inventory List.

8.   New Report - Location Last Action Inquiry – This new inquiry will show the transactions that were performed by specific locations. The information included is Product Code, Date, Type of Transaction, User and last action, ie. Invoice, Po Receipt etc. This is located in Inventory File Maintenance, Location System, Location Reports, Location Last Action Inquiry.

9.   New Report and functionality – Empty Locations – You can now produce a listing of locations that are empty. This will be presented in a scrolling box and therefore can be exported to Excel, exported to a text file, Printed or e-mailed.

If the user has permissions locations can also be deleted. They can be deleted individually by pressing the F4 on a highlighted location or all locations can be deleted by pressing F5. If you would like to simply remove some locations from the inquiry but do not wish to delete them you can do so with the F3- Remove from List function key.

When this functionality is added to your system the default for the security flag will be set to No. This security is setup in Security Levels. There you can allow only certain Security levels to have that ability to delete locations that are no longer used.

10.   New Feature – Debit Memo's have been added to the Re-Order Point Report.

Sales Analysis

1.   New Feature – In Product Sales Analysis there are options to run ranking reports for your products by Net Sales, Gross Profit and Percent Gross Profit. All of these reports will now be presented in a scrolling window when the output is

set to Screen. This gives you the ability to export the information to Excel or an text file.

2.   New Feature – Export PO Information – You can now export Purchase Order Information and Vendor Invoice information through the Export File Data Menu. The Export Menu has been consolidated to allow for these new additions. The Po and Vendor Invoice Information can be setup and exported from the Accounts Payable Submenu's.

Utilities

1.   New Feature – Blast E-mail. This selection will enable you to send an e-mail to a list of recipients e-mail addresses. After creating a document in another program such as Microsoft Word, the document is saved to the server as an .htm file. A text file containing the email addresses is also saved to the server as a .txt file in your User Directory. The easiest way to create the text file is with Microsoft Excel. You can then select Blast E-mail from the Miscellaneous Utilities menu. The htm will then be the body of the e-mail and it will be sent to everyone on the list of e-mail addresses.

Variable information can also be included in the blast eMail. The Text File needs to have the following format:

recipient@aol.com [varible1] Bob [variable2] ABC Company   [variable3] More specific information, etc.

The .htm file must have [variable1], [variable2], [variable3], etc, embedded in the text so that the system knows when to insert the variables.

When you send the eMail, you be sure to specify the entire path to the directory that contains the .htm and the .txt files.

In order to utilize this feature you must have internet access, be on a recent version of the operating system and have the send mail feature setup on your server. There may be a configuration or upgrade fee, depending on the version of the operating system you are on.

2.   documentConnection – In-Bound Faxing – Document - Optional System

All of your inbound faxes can now be stored on your server and be completely integrated with The BUSINESS EDGE.

Browser interface. Can be set up as a Internet or Intranet application.

Easily relate inbound faxes and scanned documents to a customer, vendor or product with additional document sub categories for each.

Store a subject and comments for a fax or scanned document.

The system will automatically assign Customer or Vendor information based on inbound fax id.

You have the option to automatically assign the inbound fax to a user based on the inbound fax id. For example, all faxes from 630.893.4030 are automatically forwarded to user "Dennis" without stopping at the Fax Administrator screen while faxes coming from 800.893.4030 are set to wait for the Fax Administrator to decide who they should be assigned to.

User's can choose to get e-mail notifications when a new fax is received.

User's can choose to be receive an Instant Message when a new fax is received.

Navigate multiple page faxes with easy to use Next and Previous links or "Jump to" any page number using a drop down list box.

E-mail a fax or a scanned document as a PDF attachment.

View a fax or a scanned document as a PDF.

Each user can maintain their own list of faxes and scanned documents, keep as new or mark them as read.

Integration into Customer Inquiries, Vendor Inquiries, Sales Order Inquiries, Purchase Order Inquiries and more…

All faxes can be accessed by a click of the mouse from within The BUSINESS EDGE or through the stand alone browser interface.

Send a copy of a fax to another user on the system.

Print faxes & scanned documents to any network printer. Print Options; Entire Document (default), This Page, Print Range of Pages

Print in reverse page sequence to ink jet printers, avoid re-shuffling.

Fax a fax you've received or a scanned document to someone else.

Rotate faxes that were sent upside down.

Delete a single page from a multiple page fax.

Split a multiple page fax into single pages.

Delete unwanted faxes.

Create Copies of documents.

The documentConnection system is password protected. Your browser will remember your login information for you or you can click Log Off to require a login and password the next time you bring it up.

Call for a no obligation online demonstration of this exciting new system.

Additional Branch Features

1.   New options – The PO Receipts by Vendor report and the PO Receipts by Product report can now be generated for individual branches.

2.   New Inquiry – Transfer Inquiry – This new Inquiry has been added to the Transfer System Menu.

3.   Inquiry Change – The Customer Invoice Inquiry will no longer show the Branch information on the first screen. The Branch in the top right hand corner of the screen will match the Branch the Invoice was generated for. Sent Information has been added to the Invoice Inquiry which will indicate when an invoice was printed or faxed.