

The BUSINESS EDGE Release Notes through December 2016

Order & Quote Entry System

1. New Fields added to report – The following fields have been added to the Allocated Orders report when presented to the screen – Ship to City, State, Zip, First Ship Date and Shipper information including Freight and Date Shipped on. This report is located in Order & Quote Entry System, Order Reports, Allocated Order Reports.
2. New Field added to screen - The Ship Via field has been added to Print Picking Tickets Not Printed. When choosing what Pick Tickets you would like to pick this is useful information. This is located in Order & Quote Entry System, Output Options, Print Orders & Packing Lists, Print Picking Tickets Not Printed.
3. New Field added to grids – Order Entered By has been added to the Open Orders by Customer and Open Orders by Customer All Detail reports. These reports are located in Order Reports, Open Order Reports.
4. New Field added to grid – The Description field has been added to the Backorders by Product Report. This can be found in Order & Quote Entry System, Order Reports, Sales Back Order Reports.

Accounts Receivable System

1. New Feature – Excel option added - The following report will now be presented in a grid and can be exported to excel - Order Reports, Lost Sales Reports, Lost Sales Report – By Customer.
2. New Field added to grid – The Freight field has been added to the following report when presented to the screen: Accounts Receivable System, Accounts Receivable Reports, Sales Journals, By Salesperson, By Salesperson.
3. New Optional Information Grid - Customer Contacts have been added to Order and Invoice Entry and Inquiry screens as an optional information grid.
4. New Fields added to grid – Original Invoice Amount, Entered By, Date & Time has been added to the Accounts Receivable Aging grid.

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5. New field added to Reports – Inside Salesperson has been added to the following reports:

Customer Sales 12 month Report located in Customer Sales Analysis.

Customer Sales & Profit Report located in Customer Sales Analysis.

Customer Last Sales Detail Report found in Accounts Receivable, Customer Activity Reports.

Contract Price List – located in Inventory, Inventory Reports, Cost & Price Table Lists, Customer Contract Prices.

6. New Information on Screen – When using the Customer Bin System you can now view the PO # when you click or enter on a Bin record. This is located in Accounts Receivable, Customer Bin System, Enter & Edit Customer Bins.
7. Customer Balance Change – When displaying Customer Balances the system was taking the Grace Period for Credit Warning flag into consideration when displaying past due balances. The system will now break out the actual past due balance and only use the flag for the Credit Warnings. This will give a more accurate picture of what a Customer owes.
8. New Field Added – Average P.O. Cost has been added as an optional column in the VMI Sales Report By Customer. This is located in Accounts Receivable, Customer Bins, VMI Reports.
9. New Print Option – List Customer Classifications can now be Output to paper or Adobe. This is located in Accounts Receivable Maintenance, Customer Classification System.
10. New Fields added to grid – Order Type, Inside Salesperson, Salesperson have been added to the Sales Journal by Customer. This is located in Accounts Receivable Reports, Sales Journals, By Customer.
11. Change to email notification method - When a customer is put on credit hold the Salesperson associated with that Customer receives an e-mail. In the past the e-mail came from the Administrator. The e-mail will now come from the person that put the Customer on credit hold as long as they have a valid e-mail address.

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12. New Feature – Create Invoices from Expedited List. When this flag is turned on this feature will enable Users to create invoices without going through the Allocation screens. All Allocated Orders will be presented in a grid. When a User clicks or enters on an Order they will be in the Create Invoice screen. This feature was previously only available for clients using the Warehouse Management System. To use this feature a new flag Allow Create I in Expedite List must be changed to yes. This is located in Entity Flags Accounts Receivable Screen 4.

Purchase Order System

1. New Warning – When entering a Purchase Order through Enter & Edit Orders using Set PO, a message will appear if the product you are entering is already on the Purchase Order.
2. New Information on screen – Total Charges & Total Credits are now displayed in the heading in Vendor Inquiry, Vendor Financials, and Summarize Financials.
3. New Field added to screen – Standard Cost has been added to the detail lines of a Purchase Order.
4. New Field – Discount Date has been added to the grid information on the Cash Requirements Report. This is located in Accounts Payable, Accounts Payable Reports.
5. New Feature – Debit Memo Totals – when in Update Debit Memo when you type in the Debit Memo number the totals will be displayed on the screen. It is very important to be sure that the totals are correct before updating a Debit Memo.
6. New Flag – Require Po Confirmed before Receiving. If it is your procedure to be sure PO's are confirmed this flag will help ensure the accuracy of Receipts. When this flag is set to Yes, a PO must be confirmed before a User will be able to receive it in the system. This flag is in Entity Flags – Purchase Orders, screen 4.
7. New Flag – Copy Vendor PO/PPO Message to Final Message. When this flag is set to Yes and there is a PO/PPO Message setup in the Vendor Master record,

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the system will automatically copy it to the Final Message on the PO or PPO. This flag is located in Entity flags – Purchase Orders, screen 4.

8. New Receiving Option – Quick Receive and Post Accrued. When this option is activated there is an additional Receiving program available where the first prompt is the PO Number instead of the Vendor. The flag to turn this on is located in Entity & System Flags – Purchase Orders, screen 4.

Processing Purchase Order System

1. New Date Field on PPO Heading – “Date to Send to Processor” this works just like the Date Requested and or Schedule Date on Sales Orders. This is the date that the warehouse is to ship out the PPO to the Processor. In the past the system would use either today's date (default) or the Date Requested. This date will be used in Open Documents and the ARS System.

When using the Wireless Warehouse this date must be filed in in order to get into the picking queue. The queue will use this date to figure out when the product for the PPO should be pulled.

When using the Documents to be Picked report – this date will be used as to when to pick them.

When entering new PPO's the system will default today as the date to send the PPO. The user can change or blank out the date. When the date is blank, most reports will put the document at the bottom of the list just as it does with Orders without a requested date.

2. New feature in the ARS System – When Traverse PPO's is answered “Yes” while Preparing Parts for Replenishment in the ARS, the system will now suggest replenishing the raw material when it is suggesting a PPO for the finished good. There is no longer a need to run the ARS multiple times.

If the quantity on the PPO is changed in the batch the components will need to be manually changed, the system will not re-calculate within the batch.

Inventory

1. New Field added to screen - Receipt Date has been added to the Current Location Status Inquiry. This can be found in Inventory, Inventory Reports,

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Inventory Balance Status Reports, Tracking Balance Status Reports, Current Location Status Inquiry.

2. New field added to screen – Default Location (an optional field) has been added to the heading screen in Change Product Locations.

Accounts Payable

1. New field added to screen - Invoice Discount Date has been added to the Cash Requirements Report. This can be found in Accounts Payable, Accounts Payable Reports, Cash Requirements Report.
2. New Date Range Option – When viewing Purchase History in a Vendor Inquiry, you can now put in a date range to narrow down the history you would like to view.

General Ledger System

1. If you enter * as first beginning date of the Income Statement the periods will be set to Jan 1, of current and previous year and the last day of last month for the current and previous year. Example: today is Aug 10, 2016 an * entry will set the periods to be...

INCOME STATEMENT	
Income Statement Format	<input type="text" value="1 STANDARD"/>
Period Beginning Date	<input type="text" value="01-01-16"/>
Period Ending Date	<input type="text" value="07-31-16"/>
Previous Period Beg. Date	<input type="text" value="01-01-15"/>
Previous Period End. Date	<input type="text" value="07-31-15"/>

2. New Date options for Income Statement and Balance Sheet – In the past the Income Statement and Balance Sheet could only be generated for full month periods. You can now generate these reports with any date and the information will only reflect the data for that period.

Sales Analysis System

1. New Field – Inside Salesperson in the following report: Sales Analysis System, Customer Sales Analysis, Customer Sales Analysis, Customer Sales & Profit.

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2. New Field – Inside Salesperson – added to Sales Analysis, Customer Sales Analysis, Customer Sales 12 Month Report.

Utilities

1. New Flag – Include Recent Notes Info Next to Codes – In the graphical interface notes can be seen very easily in the optional information grids. This makes it unnecessary to show the last note date next to the Code in the system. Changing this flag to “No” will remove the follow up date taking space on the screen. This flag is located in Edit, General Flags.

Brighton Best

The Brighton Best Integration programs have been re-written with improved functionality. Below are some of the changes/options you will see in the new version.

- **General** – Any system that had New Jersey (Logan Township, NJ) as the default warehouse will automatically change to default to the Sayreville (Sayerville, NJ) warehouse.
- **Inquiries:**
 - You will no longer have to enter a quantity before seeing available values.
 - Both package and bulk values will be shown on one screen for pack quantities, available quantities, standard and discount prices.
 - Case and Pallet quantities will be displayed when applicable.
- **E&E PO:**

There are 2 flags that control the Package Quantity Rules for Brighton Best. Enter & Edit PO Package Rule and Convert PO Package Rule. The options are – Round Up, Round Down, Change to Closest or Do Not Change. These flags can be changed in the Brighton Best Flags which are located in the Entity Record.

There is a New P.O. Submission confirmation screen that will display the Vendor Sales Order Number, Confirmed Time, Ship Via, FOB, Total Amount and Line Count.

- **E&E PO Detail Lines**
 - The system will warn when a P.O. quantity ordered is higher than what is available for the selected warehouse.

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- If the quantity is not evenly divisible by the package quantity you are now prompted to select from a list showing the over and under quantities. The sequence of values is based on the “E&E P.O. Package Qty. Rule” flag: Round up, Round Down, or Round Closest.
- New columns when selecting a pack type, the columns are now – Group, Package Type, Package Quantity, Discount Quantity, Price, Discounted Price and Unit of Measure.
- New Columns when selecting a Brighton Best warehouse are Bulk Available, Package Available and Distance (approximate distance to warehouse).
- The system now has a flag for “Default Package Type”. The system will use this value unless the product selected is not available in the default package type. This flag can be changed in the Brighton Best flags located in Utilities, System Administrator, Entity System, Edit Entity, Supply Chain Network.
- The default minimum BBI order is \$25.00. This can be changed in the Brighton Best flags located in Utilities, System Administrator, Entity System, Edit Entity, Supply Chain Network.
- New grid tip will show up next to the warehouse name when there is not enough available. Mouse over will show the warehouse name and availability.
- “Review Electronic P.O.” and “Submit Electronic P.O.” now use the same validation logic with the ability to drill in and edit line items.

TBE Mobile

We have begun to roll out some of the features in the new TBE Mobile. Currently available is the CRM – Customer Relationship Management App. This includes Customer and Product Inquiries with up to the minute information available to run on any (iOS or Android) smart phone, tablet or notebook computer as well as other devices. The system provides real time two-way communication between mobile users, wherever they may be, and the live system. The screens vary automatically based on

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the size of the screen on each device. The intuitive interface is the same style as any app on the devices so it is very easy for the remote users to navigate.

The cost for the CRM Module is \$600 and \$60 per Quarter for the first User, \$300 and \$30 per Quarter for any additional Users.

Call Client Support if you would like a 30 Day Trial.

Coming soon – Signature Capture and new Vendor Managed Inventory Apps.