Computer Insights, Inc.
The BUSINESS EDGE

Upgrade Notes February 2008

Order & Quote Entry System

1. New report - Expedite Salesperson Orders – This new report can be generated for any range of Salespersons. A Date Range can be selected. The Date range options are Date Requested/Scheduled Date or Order Date. The information included is slightly different when presented to the screen and exported versus the printed version. This report is located in Order Reports, Scheduling & Expediting Report.

Counter Sales System

1. New Feature – Salesperson field is now available on the Counter Sales Heading Screen.

2. New Feature – Counter Sales will now accept returns (negative quantities). There is a new function key for Users that have access to do returns – F7-Return. This function key will allow the user to select a specific invoice for the Customer or Scroll through invoices for the Customer and choose the Detail Line associated with the return. This is not a mandatory way to select an item but a convenience for the User to get the correct Price for the line item.

The System does not record what line items were returned.

If the Product that is getting returned is a tracked item the User will need to put in a location and a lot number where the product is returned to.

If the return is done using Cash as the payment term, the cash will be removed from the cash drawer. If the return is done using a Check payment term, the system will leave the invoice as open with a negative balance. A check will then need to be cut through the Accounts Payable system.

3. New Feature – Edit Open Counter Sales – This will allow Users to edit an open counter sales invoice to change Products, Prices or Payments.

4. New Flags – There are 2 new User Security Flags associated with the above new features. Allowed to enter returns in Counter Sales and Allowed to Edit Counter Sales Invoice. These new flags are located on Screen 3 in Enter & Edit User Security.

Purchase Order System

1. New Feature – Warn Inspection Needed During Receipt – When a Product has the field Inspection Required set to Yes and the Flag Warn Inspection Needed During Receipt Flag is set to Yes, the system will warn the User that the product they are receiving requires inspection.

The Inspection Required question can be changed in Enter & Edit Products, F6-Stocking Information. The flag to turn on the warning message is located in Entity & System Flags – Purchase Orders - Warn Inspection Needed During PO Receipt?

2. New Feature – GL Summary now available in Purchase Order Receipts Journal by Product and Purchase Order Receipts Journal by Vendor. If the User Flag Show G/L Summary in Purchases Journal is set to Yes in User Flags Accounts Payable, you will now be provided with GL Summaries after these receipt reports.

Processing Purchase Order System

1. Processing PO - PPO Component Expediting Report - For ISO / Manufacturing Systems - There is a new option for including / excluding / limiting the PPO's listed on this report to the internal vendor.

Accounts Receivable System

1. Customer Account Status Report is now in a scroll box. This report presents customer invoice activity for a specified date range. This report is located in Accounts Receivable Reports, Customer Status Reports.

2. New Feature – Remove Customer Part Numbers – If you have a situation where your customer has changed their internal numbering system and you need to remove their old Alternate Product Codes; you can now do so through the menu. After selecting the Customer, the system will show all of that Customers Part Numbers. If there are any that you do not want to remove you can highlight them and Press F2 – Do Not Remove those will then be removed from the scroll box. Any Customer Part #'s in the scroll box will be removed after answering Yes in the confirmation screen. This is located in Accounts Receivable Maintenance, Customer Miscellaneous Maintenance, Remove Customer Part Numbers.

3. New Flag – Fax during Batch Processing - We brought back the use of an old flag – Fax Invoices Daily, it is located in Invoice Output in Enter & Edit Customers.
The upgrade process will populate the value of the new flag with the old flag's value.
If the flag is set to No the "In Process Faxing" options will not fax the invoice even if there is a "To Fax Number" filled out.

4. New Feature – When creating individual EDI Invoices Users could only create one EDI invoice in the past. There is a new feature that will enable Users to Over-write,

Append the file or Cancel. This way a series of invoices can be created and sent in one batch.

5. New User Warning – When entering Freight on an Invoice the system will now warn the User if the freight entered is more than $1,000.

Inventory System

1. New Field – Master Package Quantity from the Inventory Master file has been added to the Product Usage Scroll Box when presented to the screen.

2. New Feature – Warn Inspection Needed During Receipt – When a Product has the field Inspection Required set to Yes and the Flag Warn Inspection Needed During Receipt Flag is set to Yes, the system will warn the User that the product they are receiving requires inspection.

The Inspection Required question can be changed in Enter & Edit Products, F6-Stocking Information. The flag to turn on the warning message is located in Entity & System Flags – Purchase Orders - Warn Inspection Needed During PO Receipt?

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4. New Feature – When running the Adjustment Report by Date or Adjustment Report by Lot # you can now designate what types of Adjustments you would like included in the report. The different types of Adjustments include Auto Adjustments, Debit Memo's, Finished Goods, Dismantle from Finished Good, Laid in Cost, Manual Adjustments, Physical Inventory, Processing Purchase Orders, Used for Finished Goods and Work Orders.

You can User F3 to Select All types, F4 to Deselect All Types and use the F5 to Select/Deselect individual types you would like to include in your report. By default all adjustments will be included.

Sales Analysis

1. New Heading and column– When the Product Sales & Profit Report is generated to the screen it is presented in a scroll box. The Totals will now be displayed on the heading of the scroll box. When this report is presented in a scroll box a column will now be included for Gross Profit %.

Utilities

1. New Functionality – Print Screen – To print a screen anywhere in The BUSINESS EDGE Users will now use the Print Screen icon on the top of Powerterm or Ctrl P to print the screen. This is due to new features being added in the system there is a need for additional function keys.

2. New Feature - My Menu System - The "My Menu" system can now accept users on sub "My Menus". The screens to edit the My Menus have changed to include these new features.