

Order & Quote Entry System

1. New Field- Enter & Edit Order Detail Lines users can now choose to see Customer's last sale information which can include Date, Quantity, Price, Extension and the percentage change.

Line	Ord	Shp	UOM	Product Code	Product Description	Unit Price	Per	Total Price	List Price	Per	Last Sale	Last Sale Qty	Last Sale Price	Last Sale Ext	% Change
2	1,000	0	EA	BB1-O7FA21Q4	3/8"-16 x 4" Zinc Finish AST...	0.2700	EA	270.00	0.37888	EA	09-23-16	100	0.30310	30.31	-10.9
1	1,000	0	EA	68W3W003	6" UV Black Cable Tie 18#	0.0476	EA	47.60	0.05600	EA	08-31-16	500	0.04200	21.00	13.3

2. New Field- Purchase Order / PPO column added to the Shipping Schedule by Date report located in Order & Quote Entry System, Order Reports, Scheduling & Expediting Reports, Shipping Schedule by Date.
3. New Flag- Orders-Warn if no sell? If a detail line is allocated for zero unit price a flag will warn you. This will only affect non-tracked items and will only run the test if the system flag, "Orders-Warn if no sell?" is set to Yes. This flag is in Entity & System Flags, Order Entry.
4. New Field- Line Comment and Internal Comment added to the Orders in Excess of Stock report located in Order & Quote Entry, Order Reports, Order Requirements Reports, Orders in Excess of Stock.
5. New Field- Internal reference, Job number, FOB, Counter sale, Customer group Code, Customer group description and Function added to the shipping schedule-show documents report located in Order & Quote Entry System, Order Reports, Scheduling & Expediting Reports, Shipping Schedule – Show Documents.
6. New Field- Over ship, Allow back order, Cust PO Line number and when track ROHS compliance is set to Yes: require ROHS added to Enter & Edit Orders, detail lines.
7. New System Flag- Counter Sales flag added that will show the "Contact Name" field in Enter & Edit Counter Sales based on the system flag "Show Order Contact on Main Screen?" located in Entity & System Flags, Order Entry.
8. New Option- In Enter & Edit Counter sales. Now, there is a button called "Customer Contacts" in the "Options" accordion that will bring you to Enter & Edit Contacts. You can also get to Enter & Edit Contacts by clicking on the (+) button on the optional information grid for Customer Contacts.
9. New System Flag- In the Graphical Interface "Password to Override Edit Price Security". If a password is not entered they cannot override the security and will only see an Access Denied message. This flag is in Entity & System Flags, Order Entry.

Entity & System Flags

ENTITY & SYSTEM FLAGS - Order Entry (4 of 7)

Credit Warning in Order Entry? Yes

Credit Warning in Order Inquiry? Yes

Auto Calculate No of Package Labels? No

Allow Terms Changes during Edit Order? Yes

Default Line Item Price on Credit Items Zero

Include Closed Orders in Lost Sales? No

Password to Override Edit Price Security

Days to Auto-Show Old Quotes 0 Days

Orders-Price Change Option Confirm Change

E&E Orders

ENTER & EDIT ORDERS - Detail Line

Order Number 59366 Firm Order - Line 2

Customer 1436 Klinge Corporation

Availability

On Hand	Available	Branch	Going Out	Coming In
0 EA	-5,024 EA	-5,024 EA	5,024 EA	1,250 EA

Detail

Product Code BBI-5UDC5IN4

Product Description M12-1.75 x 80mm CL 12.9 DIN 912 Plain Socket Head Cap Screw BIG BLUE BOX

Classification SHCS Socket Cap Scre

Customer Part Number 4021-00803

Extra/Non Stock Description

Quantity Ordered 70 EA

Unit Sell EA

Percentage Change -50.00000 CHG%

List Price 1,161.85 M

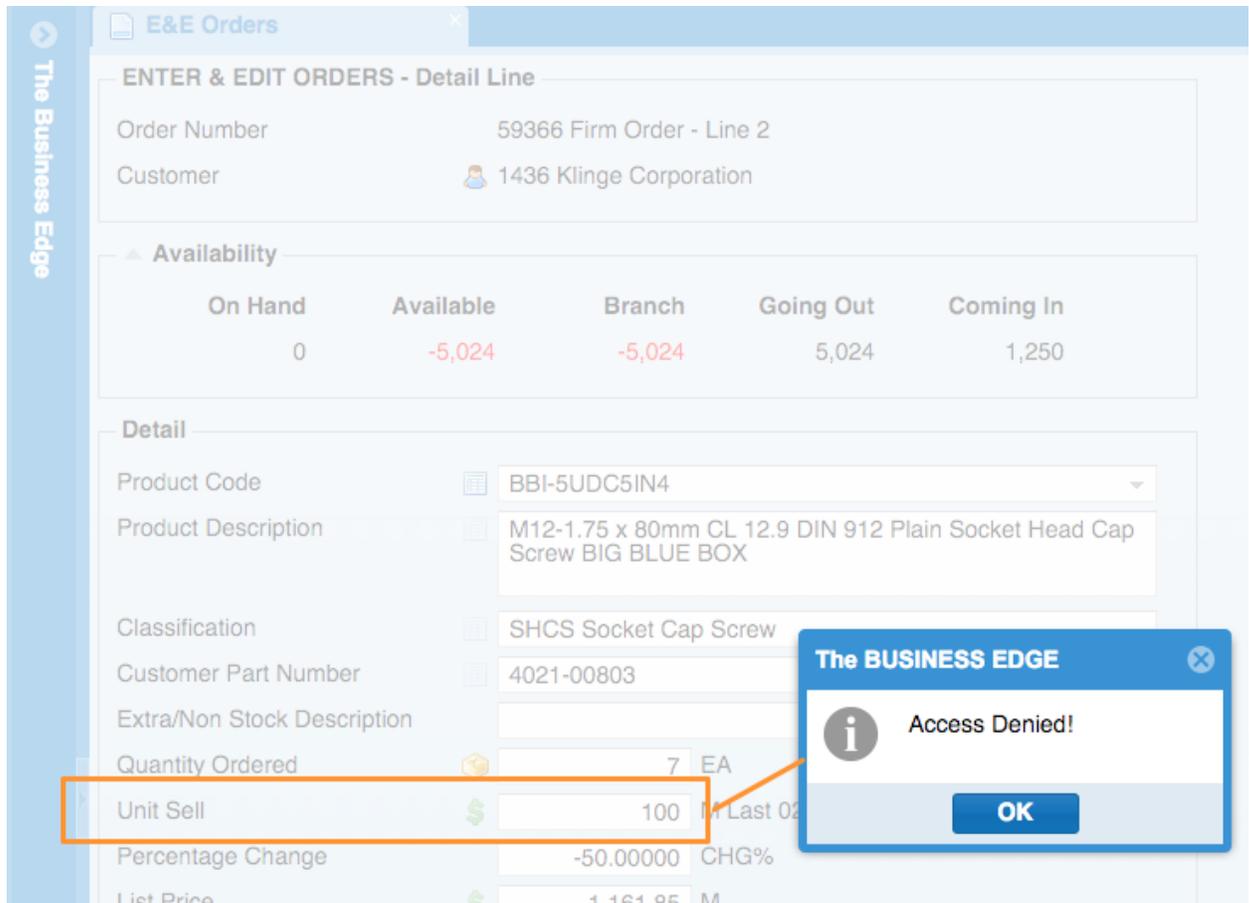
Line Extension 40.67

Unit Cost 224.11 M No Avg Cost Based 02-16-15

SECURITY CHECK

Enter Password

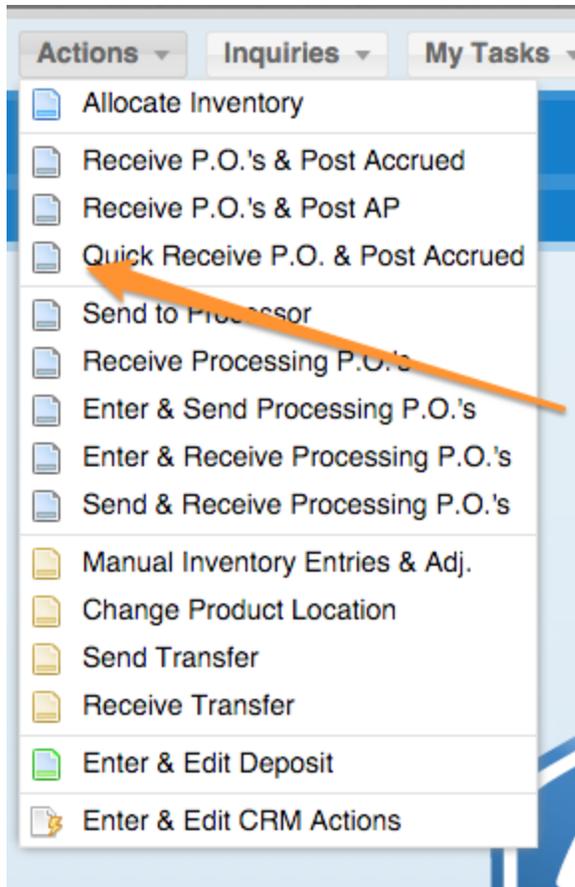
Delete Cancel Ok



10. New Option- When entering a Brighton Best Purchase Order from within Enter & Edit Orders you will now be prompted to select a package group & type.
11. New Field added to report- The following fields have been added to the Back Order by Product report- salesperson code and name. This report is in Order & Quote Entry System, Order Reports, Sales Order Back Order Reports, Back Orders by Product.

Purchase Order System

1. New Feature – Users will now get a warning message if they select a Purchase Order in Enter & Edit PO's that has already been confirmed. PO's are marked as confirmed on the Final Screen of Enter & Edit PO's or through the Open PO's not Confirmed List.
2. New System Flag-Quick Receive P.O. & Post Accrued? When this flag is set to "Yes" the "Quick Receive P.O. & Post Accrued" menu item will be included in the "Actions" toolbar menu. This flag is in Entity & System Flags, Purchase Orders Page 4 of 4.



3. New Feature- The Purchase Order Inquiry detail line screen will show information related to BBI, Kanebridge or XL Screw if the Purchase Order was entered as an electronic Purchase Order. The Purchase Orders entered as standard Purchase Orders will continue to show costs the way they have in previous releases.

The Business Edge

P.O. Inquiry

P.O. INQUIRY - Detail Line

P.O. Information 12906 Line # 1 137 Brighton-Best International Inc.

Product Code BBI-32MTGVTT

Product Description 7/8"-9 x 1-3/4" Plain Finish SAE J429 Grade 5 Hex Cap Screw

Brighton-Best Part Number	 846507	
Brighton-Best Pack Type	 BBI Bulk	
Brighton-Best Warehouse	 Chicago	
Quantity Ordered	 1,280 EA	
Quantity Received	 0 EA	
Quantity Back Ordered	 EA	
Brighton-Best Price	 0.42123 EA	
Brighton-Best Price Override		
Landed Cost	 0.42123 EA	
Line Comment		

4. Kanebridge PO

The Business Edge

P.O. Inquiry

P.O. INQUIRY - Detail Line

P.O. Information 12935 Line # 1 258 Kanebridge Corporation

Product Code K-089KQ34Q

Product Description 8 x 1-5/8 Clear Ruspert Type 17 Flat 6Lobe Drive Deck Screw

Kanebridge Part Number **K** 0828DTF17D

Quantity Ordered  8,000 EA

Quantity Received  0 EA

Quantity Back Ordered  EA

Kanebridge Price Level **K** Large Order

Kanebridge Base Price  0.00000 EA

Kanebridge Special Price  0.00000 EA

Kanebridge Large Order Price  0.00000 EA

Landed Cost  27.12000 EA

Line Comment 

5. Standard PO

The Business Edge

P.O. Inquiry

P.O. INQUIRY - Detail Line

P.O. Information 12898 Line # 1 315 Pac-Fas

Product Code BBI-0RN1NJ62

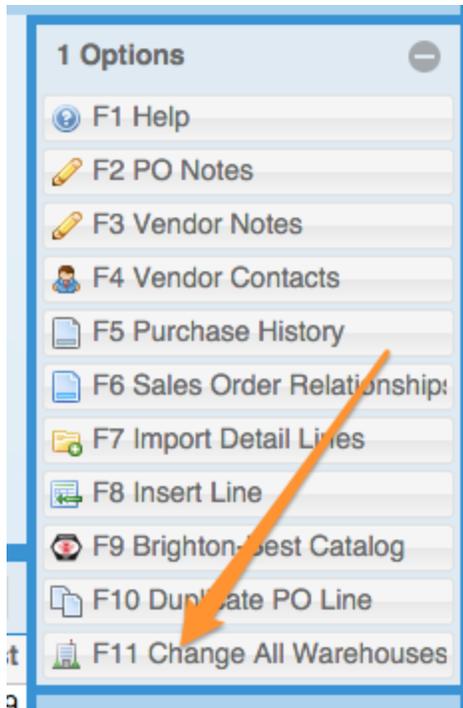
Product Description #10 x 0.750" Zinc Finish Fender Washer

Alternate

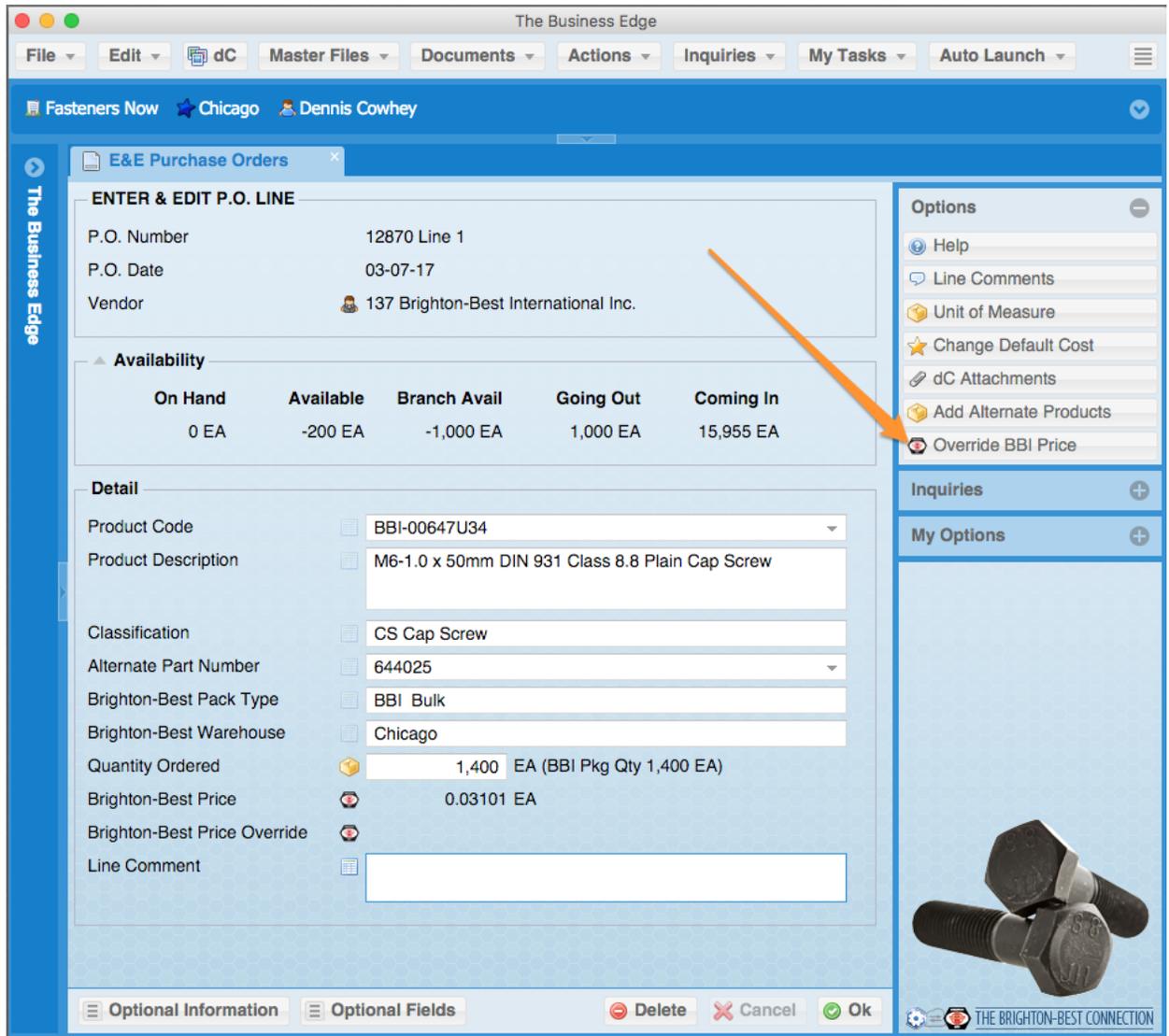
Extra/Non Stock Desc.

Quantity Ordered		1,000 EA
Quantity Received		0 EA
Quantity Back Ordered		EA
Raw Cost		0.00625 EA
Days Can Ship Early	<input type="text" value="0"/>	
Landed Cost		0.00625 EA
Line Comment		

6. New Option- in Brighton Best Purchase Orders you now have the option to change all detail lines to one warehouse. This is in the detail lines of a Brighton Best Purchase Order.



7. New Option- in Brighton Best Purchase Orders you now have the ability to override Brighton Best Pricing, but still submit the Purchase Order electronically. This is located on the final screen of a Brighton Best Purchase Order



Processing Purchase Order System

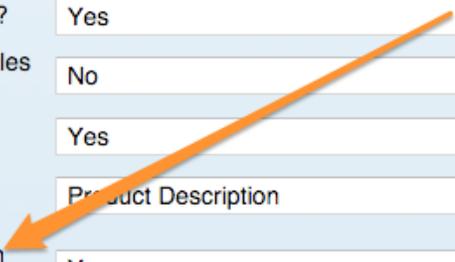
1. New Field- Entered by, Entered date and Entered time added to the PPO Component Expediting Report located Processing P.O. System, Processing P.O. Reports, PPO Component Expediting Report

Inventory

1. New Fields- Available Quantities and Line Comment fields are now available on the Enter/Edit Transfer Detail line.
2. New User Flag – Show Stocking Info in Selection Grid – This new flag will allow Users to add stocking information columns to the product selection grid.

ENTER & EDIT USER FLAGS - INVENTORY

Product Inquiry Style	General
Product Inquiry Order Entry Style	General
Add PPO Usg to Sales Qty in Expert w/ Stkng Inq?	Yes
Primary Product Selection Method	Product Code
Move Multiple Times per Session?	No
Product Report Sequence	Product Code
Skip Zero Qty & Value Items?	Yes
Default Man Adj Location	
Usage Includes Current Month?	Yes
Include Quotes / Pending in Sales Order Inquiry?	No
Enable Product Fast Find?	Yes
Description to Show When Selected by Alternate	Product Description
Show Stocking Info in Selection Grid?	Yes



The screenshot shows a 'Columns' menu with the following items checked:

- Product Code
- Product Description
- Branch Avail
- Branch On Hand
- Branch Allocated
- Branch Reserved
- Branch In Warehouse
- Branch Committed
- Branch Coming In
- Br Avail to Promise
- Available
- Default Cost
- Standard Cost
- Standard Price
- per
- Selling Description
- Text to Include in Find Search
- Stocking UOM
- 12 Month Usage
- List Price
- Classification
- Category Code
- Category Description
- Primary Vendor
- Primary Vendor Name
- Ord Min Qty
- Pkg Qty
- Master Pkg Qty
- Bulk Pkg Qty
- Primary Mfg
- ARS Type
- Br Stock Obj
- Br Lead Time
- Br Re-Order Pt
- Br Max Qty Stock
- Br Min PO Qty
- Br Opt PO Qty
- Br Primary Vend
- Br Primary Vend Name
- Br Def Loc
- Br Stock Zone
- Br Fwd Pick Min
- Br Fwd Pick Max
- Br Min Re-Ord Pt
- Br Min Max Qty to Stock
- Br Max Stock Obj
- Br Stock Type

An orange arrow points to the bottom section of the menu, which is highlighted with a red box.

Accounts Receivable

1. New Fields- Extra Description and Line Comment columns added to Customer Inquiry, Most Recent Sales.

The screenshot shows a 'Customer Inquiry' window with the following details:

- Customer: 26668 Hammer Plastics (Notes 03-20-17)
- Date Range: 01-01-17 to 04-05-17
- Inventory Beginning: Beginning
- Inventory Ending: End
- Inventory Sequence: Product Code

The table below shows the data for the 'Most Recent Sales' query:

Product Code	Product Description	Inv Date	Ord	Shp	UOM	Invoice #	Cost	Price	List Price	Per	Extra Description	Line Comment
/TEST	Test Product	04-05-17	1,000	1,000	EA	59357	0.00000	0.00000	0.00000	EA	Scrap Washers	No skids over 50 lbs

An orange arrow points to the 'Extra Description' and 'Line Comment' columns in the table, which are highlighted with a red box.

2. New Report- “Who Does Not Buy What” This new Inquiry enables a User to Enter a Product Code and see what Customers are not buying that item. It is located in Accounts Receivable System, Accounts Receivable Reports, Customer Activity Reports, Who Does Not Buy What.

Accounts Payable

1. New Feature-In Process Checks by Date you now have the option to update without printing the checks. This would be used when paying vendors via ACH

PRINT & UPDATE PREPARED CHECKS	
Cash Account	1000 Cash Account 1
Beginning Check Number	<input type="text"/>
Check Date	05-31-17
Maximum Check Amount	\$ 999,999.00
G.L. Discount Account	4000-001 Cost of Goods

Begin with Vendor	Beginning
End with Vendor	End
Vendor Sequence by	Vendor Name

Actually Print Checks?	Yes
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Output Options	
Output To	Adobe PDF
Printer	1. HP Pro 400 - Support
Number of Copies	1

General Ledger

1. New Feature- Income statement dates are now available. 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	1 STANDARD
Period Beginning Date	01-01-16
Period Ending Date	07-31-16
Previous Period Beg. Date	01-01-15
Previous Period End. Date	07-31-15

2. New Feature-The executive summary can now be viewed in an exportable grid located in General Ledger System, General Ledger Reports, Executive Summary Grid.

Executive Summary

Date Ending: 12/31/2015
 Summary Period: Day
 Figures Calculated On: 04-28-17 14:38:38

Accounts Receivable & Cash		Accounts Payable	
Cash	285,694.54	Accrued Payable	50,918.15
Accounts Receivable	556,491.85	Accounts Payable	45,491.98
Cash Receipts	1,347.04	Vendor Invoices	3,979.08 Day
Cost of Goods Sold	23,396.98	Returns to Vendors	0.00 Day
Discounts Given	0.00	Cash Disbursements	6,092.41 Day
		Discounts Taken	-2.61 Day

Customer Invoices		Inventory	
Invoices	3,786.20 Day	Inventory Value	850,000.00
Credit	0.00 Day	Goods Received	757.57
Gross Margin Value	1,871.88 Day	Adjustments	46.30
Gross Margin Percent	49.44 %	Turns	0.0551
Number of Invoices	26		

Customer Orders		Open Documents	
Open Sales Orders	104,249.21	Open P.O.'s	114,530.29
New Sales Orders	3,636.50 Day	New P.O.'s	2,981.89 Day

Another Inquiry? Yes

Options

- Help
- Customer Invoices
- Clear Cached Values

3. New Feature-There is a new button on the Executive Summary screen that will show the invoices and values that the numbers in the "Customer Invoices" field set come from.

Sales Analysis

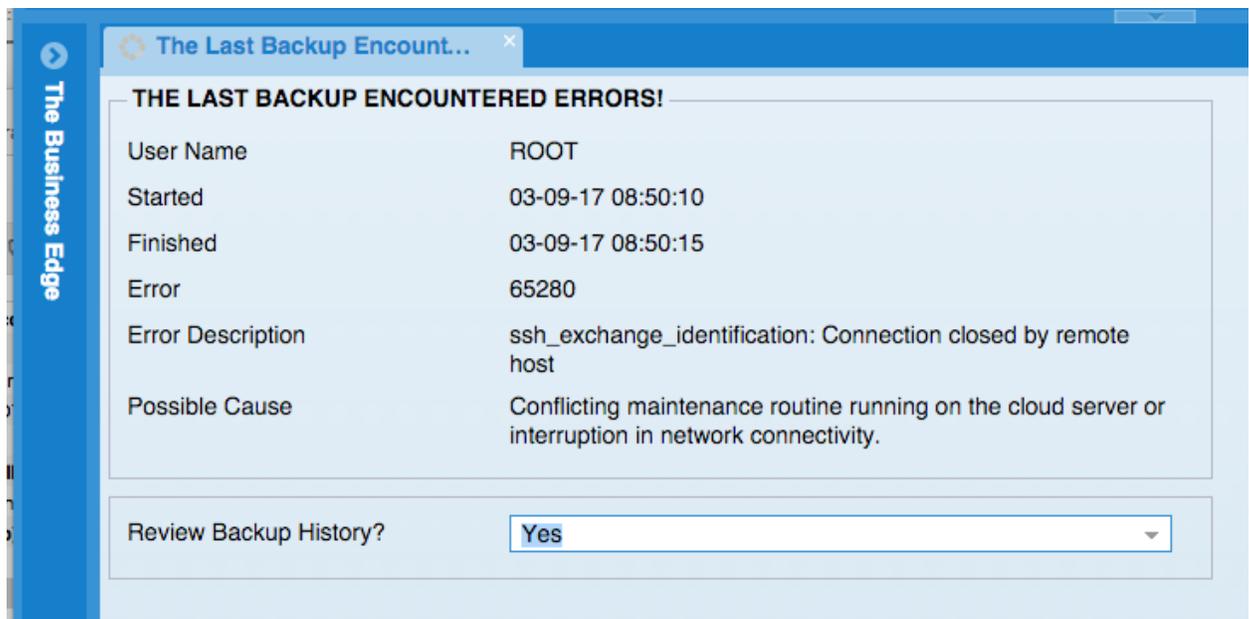
1. New Fields- Customer Group Code, Group Name, Department, Master Customer for Invoice, Master Customer for Alternates and Master Customer for Contracts. added to the

Customer Sales & Profit report located in Sales Analysis System, Customer Sales Analysis, Customer Sales & Profit.

2. New Column- Salesperson Code added to the Salesperson Comparison report located in Sales Analysis System, Salesperson Sales Analysis, Salesperson Comparison Reports, By Salesperson
3. Report Change- The “Customer Sales 12 Month Report” has been renamed “Customer Sales By Month” and now asks how many months to include. It is located in Sales Analysis System, Customer Sales Analysis, Customer Sales By Month.

Utilities

1. New User Flag- Include recent notes next information next to code. When this is set to YES, the system will join the recent notes information next to product codes, customer codes, vendor codes, etc.
2. New Feature- In the Back Up system there is now a full error message and a possible cause description added to the backup failure warning screen located in Utilities, Backup System, Review Backup History.



3. New Report- User Security Inquiry. This new Inquiry enables a User to see the User Security Level, Level Name and Full Name for the Users in The Business Edge. It is located in Utilities, System Administrator, Employee System, User Security Inquiry.

Graphical Interface Changes

1. New User Flag- “Button Alignment”, allows users to select left or right alignment for the buttons on the lower screen. Some people have asked them to be moved away from the part of the screen where Microsoft notifications popup and hide our notifications.

E&E User Flags

ENTER & EDIT USER FLAGS - GENERAL

Full Name: Dennis Cowhey

Title: PRES President

Password:

E-mail: dennis@ci-inc.com

Default Report Printer: F. HP 4050 - Blue Room

Default Report Output To: Adobe PDF

Default Note Category: Default

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 Alingment: Right|

Enable Key Buffering?: Yes

Run in Debug Mode?: Yes

Options

- Help
- dC Settings
- Scanner Settings
- E-Mail Settings

Optional Fields Delete Cancel Ok

E&E User Flags

ENTER & EDIT USER FLAGS - GENERAL

Full Name: Dennis Cowhey

Title: PRES President

Password:

E-mail: dennis@ci-inc.com

Default Report Printer: F. HP 4050 - Blue Room

Default Report Output To: Adobe PDF

Default Note Category: Default

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 Alingment: Left

Enable Key Buffering?: Yes

Run in Debug Mode?: Yes

Options

- Help
- dC Settings
- Scanner Settings
- E-Mail Settings

Optional Fields Delete Cancel Ok

Brighton Best

1. New System Flag- Override BBI Price-This override screen will show you the current Brighton-Best Price and allow you to enter a different price. You can click the “Delete” button to remove the override and go back to using the price supplied by the Brighton-Best system. The screen will show who over-rode the price and when. It will also show the price that was overridden. This flag is in the final screen of Enter & Edit Purchase Order.
2. When the PO is submitted, it will have an asterisk in the remarks to indicate to you that the BBI price was overridden. This not used by the BBI system, it is only for your visual reference. The remarks are limited to 40 characters. You will have to call your sales representative and follow the same procedures you use now when prices are being overridden. If your sales representative does not make a change on his side then BBI will use their system’s price.
3. New System Flag- “Electronic PO Pkg Qty Rule” will tell the system what to do with quantities that don’t divide evenly with master distributors’ package quantities. All existing systems are set to round up. “Round Up” will be the default setting for new installations. If the quantity is less than half of a package quantity it will round down, if it is half or more it will round up. This flag is in Utilities, System Administrator System, System Set Up, Miscellaneous Setup, Enter & Edit Entity Flags, Purchase Orders Flags.