Computer Insights, Inc.
The BUSINESS EDGE

Upgrade Notes March 2007 through September 2007

Order & Quote Entry System

1. New Feature – Customer Additional Addresses – When entering a Sales Order you have the option of entering a One Time Ship to Address to the Sales Order. This is done through the F5- Bill & Shipping Addresses on the final screen. When you enter a One-Time Ship to Address you now have the ability to Save the Address. If you answer Yes to Save Address the One Time Ship to Address information will be added to the Customer Master file.

2. New Feature – Only available with PDF Forms - Packing List – We now have a new option to print out generic certifications along with packing lists. To set this up, we need to first need a copy of your generic certification and then we can create a new PDF form that will be generated when your packing list is printed. The system knows to print this certification for the order by the User entering a Miscellaneous Charge on the order. This Miscellaneous Charge would be linked to the certification form. This will be used when all items on a customer's order are to be certified the same way (with text something like "we hereby certify that the products listed below were made to PO specification"). If you missed putting the miscellaneous charge on the order, and it is not editable anymore, you can use the menu item Print Packing List Certificate found in the Print Orders & Packing Lists menu.

If you need to list specific properties about the products, you will still need to use the Print Certificate of Compliance that is specific for each detail line.

If this form is customized it is billable at our normal hourly rate.

3. New Total on Report – The Shipping Schedule by Customer will now print a total for the Orders.

4. New report information - Open Orders by Order Number – This report now gives statistics about the orders the number of lines, the number of lines that can ship, and the number of lines that need purchasing.

5. New Feature – Email Packing Lists automatically. If you have PDF Forms and you fill in a valid e-mail address in the Packing List Auto Send field in the Customer Master File, the system will automatically e-mail a Packing List when you print a Packing List in The BUSINESS EDGE. You can setup the Packing List Auto Send E-mail in Enter & Edit Customers, F5-Additional, F6-E-mail. The PDF will only get e-mailed when the Packing List is printed, it will not be e-mailed when the Packing List is sent to a PDF on the screen, e-mailed or faxed.

6. New Customer Flag – Show Prices on Sales Order – In the past this was a system wide flag. It is now controlled on a Customer by Customer basis. In order to utilize this flag your forms would need to be formatted to do so. This flag is located in Enter & Edit Customers, F5-More.

7. New Customer Flag – Show Negative Avail Items on Sales Order – If you only want to show items that are in stock and ready to ship on the Order Acknowledgement (Sales Order) you can set this flag to No. When this is set to no, items that are not in stock will not appear on the Sales Order Acknowledgement. This flag is located in Enter & edit Customers F5-More.

8. New Form Option – Show Order Total Only? When printing an Order Acknowledgement if you would like to only show a Total at the bottom of the Order you can set this flag to Yes. This flag can be defaulted in Enter & Edit Customers, F5-More, F7-More – Default Show Order Total Only. If you would like to use this feature on your forms the changes will be billable at our normal hourly rate.

9. New field for Customer Package Labels – Order Tracking Number. This field can be printed on Customer Package labels when the Customer Package Labels are printed before the inventory is allocated in the system. This prevents having to hand write information. The Order Tracking Number is the Order Number and Line Number. The actual Lot Number of the system can then be located after the allocation takes place by viewing the cardex.

10. New Feature - Customer Mandatory Miscellaneous Charges

Customers can be setup to be charged a Mandatory Miscellaneous Charge. This means that every order they place will include the Mandatory Miscellaneous Charge that is setup in their account.

To set this up for a Customer a Miscellaneous Charge needs to be entered if it does not already exist. Miscellaneous Charges can be added in Accounts Receivable File Maintenance or Order Entry File Maintenance.

Then in Enter & Edit Customers go to F5-More, F7-More, F8-Mand Chgs you can select the Miscellaneous Charge that you would like to add to the Orders for the Customer that you have selected. You can so this with the F3-Enter Misc. Charges Function Key.

Then your choices when adding this Miscellaneous Charge are below.

Allow changes to Mandatory Misc Charges?
Allow Deletion of Mandatory Misc Charges?
Include Mandatory Misc Charges on Back Orders?

If you answer Yes to Allow Changes to Mandatory Misc Charges, then the User can change the amount on the Sales Order.

If you Answer Yes to Allow Deletion of MandatoryMisc Charges thene the User can delete it from an Order. If you anwer No, it can not be deleted until this flag is changed in the Customer Master File.

If you answer Yes to Include Mandatory Misc Charges on Backorders a Miscellaneous Charge will automatically be added to all Backorders for this Customer. If you answer No then there will not be an automatic Miscellaneous Charge added to the Backorder but you could add it manually.

Counter Sales System

1. A field for freight has been added to the heading screen in Counter Sales. These freight charges will be added to the invoice. This is for a customer who is picking up goods when they need to pay the in-bound freight on the shipment from the Vendor.

Integrated UPS Shipping System

New Feature – Add automatic handling charge to UPS Shipments – If you have The BUSINESS EDGE integration with UPS Worldship, you have the ability to add a Handling Charge to your shipments. The choices are None, Percentage, Flat Rate or Percentage & Flat Rate. This is setup in Enter & Edit Company Information, F4-Shipping Accounts.

* NOTE – In order to use the Handling Charge Feature the files on your server must be checked to be sure that field 17 in the file is the Package Charge from UPS and not the Full Shipment Charge.

Purchase Order System

1. New Feature – A total has been added to the top of the screen when viewing the Purchase Orders by User inquiry.

2. Wording Change – PPO Definition has been re-named to be Bill of Material.

3. New field for exporting – When exporting PO Detail Lines from within Enter and Edit Purchase Orders, the Alternate Part Number will now be included in the exported data.

4. New Feature – If you are shipping the items on you Purchase order to another Vendor for a secondary service you will now have the ability to select not only the

primary Vendor Address but you can choose from all of the Vendors additional addresses.

5. New Function Keys available – If you are viewing the Cardex for a Product and you drill into a Purchase Order Receipt the F3 – Vendor Inquiry and F4- P.O. Inquiry keys have been enabled. The Vendor Inquiry will pull up the Vendor that that the PO was received from and the P.O. Inquiry will show you the entire P.O. that the particular receipt came in on.

6. New Feature – Update Promised Dates on PO Detail Lines – When Users change either the Original Promise Date or the Current Promise Date on the Heading of a P.O. in Enter & Edit Purchase Orders, they will be prompted to change all of the Line Items.

Accounts Receivable System

1. New Feature – When a Salesperson is set to inactive, Users can not assign them to a Customer or selected them on a Sales Order. A Salesperson can be made inactive in Enter and Edit Salespersons. Customers that are currently assigned inactive Salespeople can be assigned a new Salesperson in Enter & Edit Customers.

2. New Feature – You can now select a range when listing Customer Classifications, in the past all classifications were included in List Customer Classifications.

3. New Feature – Customer Credit Cards - When entering Customers Credit Card information into the Customer Master File the Customers address information had to be manually typed in each time. Now when you are entering a new Credit Card you can use the F3 and F4 keys to select the Customers Billing or Shipping Addresses from the Customer record.

4. New Feature – Sales Journal by Salesperson with Detail will now be presented in a scrolling box when presented to the screen.

5. New Customer Report – Customer Scorecard Report – This report will go through a range of customers for a range of dates and calculate the on-time delivery performance. It will also show the number of returned items and also how many problem documents (see new ISO 9001 module) have been assigned to that customer.

6. New Flag – Show Prices on Sales Order – This was a system flag that applied to all customers, it is now controlled on a Customer by Customer Basis. This flag can be changed in Enter & Edit Customers, F5- Additional Information. There may be a billable charge for changes to utilize this new flag.

7. New Feature - When the Salesperson Open Commission Report is presented to the screen you now have the option to present them in a single scroll box. Totals have also been added to the top of the Salesperson Open Commission Report.

8. New Report Feature – When printing the Deposit Report by Date you now have the ability to print the Deposit Detail on this report. In the past only check totals were provided.

9. New Feature – When faxing Orders, Picking Ticket, Packing List and Invoices the sysem will default to the Ship To Fax Number when there is one. When faxing documents you can also press space bar and enter to get a list of Contacts from your Customer file.

Accounts Payable System

1. Menu Re-named – Check Routines is now called Check Routines & Reconciliation. The menu has not been changed functionally.

2. New Menu Item – G.L. Cash Account Transaction Inquiry – This inquiry is located in the Check Reconciliation menu. The only accounts that can be accessed through this inquiry are Cash Accounts. This makes it more convenient to access this information when you are reconciling your check book.

3. New Feature – The Accounts Payable Aging will now go to a scroll box when presented to the screen. Any information that is presented in a scroll box can be exported to Exel, a text file or e-mailed if you server is configured for e-mail.

4. New Display Field – When viewing the Check Inquiry located in the Check Routines & Reconciliation Menu you can now see the date that a check was cleared in the system.

5. New Vendor Report – Vendor Scorecard Report – This report will go through a range of vendors for a range of dates and figure their on-time delivery performance of PO's and PPO's. It also will show how many problem documents (see ISO 9001 module) and debit memos have been assigned to that vendor. You can drill into each vendor for more details and receipt lists.

6. New Feature – F4-Contacts has been added to the Vendor Notes function key, so anywhere you can enter or view Vendor Notes you have convenient access to entering and editing your Vendor Contacts.

Inventory System

1. New Report – Adjustment Report by Lot Number – This new report will present items that were adjusted using Inventory Manual Adjustments as well as Processing Purchase Orders. The detail on this report will be by Lot Number. Since it is by Lot Number, a single adjustment could have multiple entries if the Adjustment included

multiple lots. This is located in Inventory Reports, Adjustment Reports, Adjustment Report by Lot Number.

2. New Function Keys – When you are in the Cardex and you double click or press enter on a particular transaction, the system provides you with more detail about that transaction. When viewing the detail of a Purchase Order transaction you can now Press F3 to go into a Vendor Inquiry for that Vendor. You can press F4 to go into a P.O. Inquiry where you can view the entire Purchase Order.

3. New field for exported report – Primary Vendor has been added to the Price Discount Table Inquiry. The Price Discount Table Inquiry is located in Inventory Reports, Cost & Price Table Lists. This report will provide a listing in a scroll box of any range of products. The fields that are included are Product Code, List Price, Price Level, Quantity Break, Discount Percentage, Sell Price, Default Alternate, Description, Package Quantity and Primary Vendor.

4. New User Flag – Product F3 Inquiry - The F3 Key in Product Inquiry is Product Notes by default. If you are using Price Tables in the system you now have the option of putting the Price Table key on the first screen of the Product Inquiry in place of the Product Notes. The Product Notes will then be where the Discount Tables were. Currently to view the Price Table users press F12-More Choices and then F7-Show List Price Discount Tables. This new Flag is in Enter & Edit User Flags – Inventory, it is on the second screen.

5. New Feature – Inventory Cost Status Report will now go to a scrolling box when presented to the screen. Any information that is presented in a scroll box can be exported to Exel, a text file or e-mailed if you server is configured for e-mail. The totals for this report will be presented in the heading.

6. New Inquiry – Location History Inquiry – After selecting a Location and a Date Range this inquiry will display products that were in the selected location along with the last date they were there.

7. New Feature – When viewing Alternate Part Numbers in Enter & Edit Inventory or Product Inquiry a column has been added to show the Customer, Vendor or Multiple if you have more than one Customer or Vendor using the same Alternate Part Number.

8. New Feature – Substitute Products can now be viewed through a Product Inquiry. It is located under F12-More, F6- Processing & Manufacturing, F3- Bill of Materials, F3-Substitute Products

9. New Feature – The Inventory Cost Status Report will now be presented in a scrolling box when the screen option is selected.

10. New Feature – Import Vendor Contract Pricing – this new option makes it easy to initially populate Vendor Contract Pricing as well as update the pricing when there are price changes.

11. New Feature – Remove un-used Inventory Classifications – This new feature will check your Inventory Classifications. If there are no Products assigned to a Classification that Class will be presented in a scroll box. If you see a Class that you do not want to remove, you can highlight it and press F3-Do Not Remove. When you press Esc the system will ask you to confirm that you would like to remove the un-used Classifications.

This new option is located in Inventory System, Inventory File Maintenance, Product Properties System, Remove Un-used Product Classifications.

12. New Feature – Duplicate Products – If you are adding an item to inventory and it is just slightly different than an existing Product you can now duplicate the original Product and Create a new Product Code. Once you confirm that you would like to duplicate a Product you will be prompted to enter a new Product Code. You can then change the description or any of the other fields that you need to change for the new Product. This is located in Inventory File Maintenance,

13. New Screen Pop – If you have the Integrated Able Label System the system will now automatically prompt the Product Properties Screen when you are entering a new Product.

14. New Report Option – You can now select a range of products in the menu selection Delete Products Without History, in the past it considered all Inventory records. You can select a range by Product Code, Description, Alternate or Classification.

15. New Feature – Change Multiple Product Locations – This will enable you to select a Range of Products from one Location and move them to a different Location. The system will present the on hand items that are in the Location you selected. You can remove items from the scroll box with the F3-Remove From List key. When you are happy with the products in the scroll box you can press Esc. The system will prompt you for the posting date and the new location. All items that were in the scroll box will now be in the new location you choose. If your flags are setup to print labels automatically after moves, you will be prompted to print a new label for each Product that was moved.

In the Past the first selection in the Location System was Change Product Locations. There is now a Menu Change Product Locations where you can access changing a single location or this new feature Change Multiple Product Locations.

16. New Field – Primary Vendor has been added to the Price Discount Table Inquiry when the information is exported to Excel or a text file. The Price Discount Table Inquiry is located in Inventory Reports, Cost & Price Table Lists.

17. New Warning – When entering an Alternate Product Code that already exists for another product, the system will give the User a warning.

18. New Feature – The Internal Product Alert Message in Enter & Edit Products currently will Pop up when you are in a Product Inquiry, it will now Pop up when you select that Product in a Purchase Order and Processing Purchase Order.

19. The function key for Fax History has been replaced with Outbound History. This will include documents that were printed, sent to Adobe PDF, Faxed, E-mailed, sent to a text file or XML.

20. New Feature – Import Locations – You can now import locations into the Location File. This new feature is available in the Import Inventory selections.

21. Menu Change – Import File Data – The Enter File Relationships and Update Inventory Data Menus have been consolidated. They are now in two sub-menu's – Product Definitions and Quantity Price & Locations.

General Ledger

1. New Feature – A function key has been added to Enter & Edit G.L Accounts – F3-Lookup. If you would like to search for an account in Enter & Edit GL Accounts, press F3.

Sales Analysis

1. New Feature – Sales Journal by Salesperson with Detail report will now be presented in a scroll box when Output to Screen is chosen. Any information presented in a scroll box can be put into Excel, a Text file or e-mailed if your server has been configured for email.

Utilities

1. New Export Field - Total Billed Amount has been added to the Sales Journal export options.

2. New Feature - Sent Fax History inquiries have been replaced with Outbound History inquiries. These inquiries will now contain history of all types of outbound activities.
These include Print, Adobe PDF, Fax, E-mail, Text, XML

3. New User Security Feature – Use My Menu Only flag – Found in Edit User Security (on page 3) – If this is selected as Yes, they user will be brought into their My Menu directly when they enter the system and will not be able to edit their My Menu. To change their My Menu, change this flag to No and then go in and edit the My Menu. Existing and new users will default to No. This is an additional level of security so that low level users cannot change their My Menu.

4. New Features – Find Command – There are two new options available when using the Find Command – Find any Sequence and Find any Word. If you say Yes to Find any Sequence you can type in multiple words and it will locate any item that includes all of the words whether or not they are listed in the same order. Find any word will select records that have any one of multiple words you are searching for.

5. New Feature – Import Vendor Contract Pricing – You can now import new or updated Vendor Contract Pricing. After defining your catalog the relationships and

update programs are located in the AP import menus. The fields that can be imported is Vendor, Product Code, Start Date, End Date, Cost, Minimum Qty, Minimum Line Charge, and Vendor Package Quantity. The only mandatory fields are Vendor, Product Code, Start Date and Cost.

6. New Feature – Import Multiple Vendors into Inventory Records. After defining your catalog and relationships, the relationship and updates are located in the AP import menus. The fields that can be imported are Product Code, Vendor Code, Cost and Comment. The Product Code and Vendor Code are mandatory fields.

7. New Security Option – Allow Change Salesperson in Orders – If this is set to No for a User they will not have the ability to change the salesperson on a Sales Order. The default Salesperson that comes from the Customer Master file will be defaulted.

8. New Security Options – Allowed to Enter Re-Order Points and Allowed to Enter Max Qty to Stock. If these flags are set to No for a User, that user will not have access to changing this information in a Product. Users will also not be allowed to go into the menu item – Calculate Re-Order & Max Quantity to Stock.

9. New Feature – Re-assign User Documents – You can now re-assign ALL of a users inbound faxes and scanned documents to another User. Simply select the User you want to Re-Assign and the New User you want the documents assigned to. This is only available in Live Data and can only be done by the Fax Administrator. You can find this new feature in 9. Utilities, 3. Image & Fax System, documentConnection Maintenance.

10. New Feature Faxing Options – Priority and Send Within. When sending a fax you can now specify a priority. The choices are Normal, Bulk, Low and High. The default priority is Normal and Faxes will go out in the order that they are sent. If you are faxing something urgent and would like a particular fax to go before other documents in the queue you can specify a high priority. If you are faxing a large batch such as statements that are not time sensitive you could make the statements Bulk priority so that other documents such as Quotes and Purchase Orders can be faxed out quicker.

If Statements are faxing as bulk and you fax a Quote as Normal the Quote will be sent out before all of the statements. If both the Statements and a Quote were to be faxed as Normal and the Statements were sent first the Quote would not go out until all of the Statements were completed.

Send Within is the amount of time you would like to document to sent within. The default is set to 3. If your fax does not go out within 3 hours it will fail.

* This is only available for PDF Forms. Priority and Send Within will not work with Daemon Magic.

11. New Feature – Remove Documents by Date Range – If you are using documentConnection for In-Bound faxing or Scanning Documents you now have an option available to remove documents by Date Range. Only the Fax Administrator has the ability to remove documents.

12. New Feature - Blast Fax To Customers – You can send a pdf file that is saved in your user directory to any range of Customers. This feature is located in Accounts Receivable, Accounts Receivable Reports, Miscellaneous A.R. Reports.

13. Menu Change – Import File Data – The Enter File Relationships and Update Inventory Data Menus have been consolidated. They are now in two sub-menu's – Product Definitions and Quantity Price & Locations.

Branch Related Features

1. New Field – A final Message can now be put on a transfer document. 2. New Feature – A function key for Print, Fax and E-mail has been added to the final screen of Enter & Edit Transfer and Send Transfer.

3. New Feature – Transfer System – A function key has been added to the final screen to Print, Fax & E-mail Transfer documents. In the past users had to go to the Print Menu.

4. New Feature – Transfer System – A final message has been added to the Transfer Document. From the final screen press F5 for the Final Message. If you would like to utilize this message your Transfer Forms need to be changed.

5. New Feature – If a transfer has been received and a User attempts to print a Transfer Pick Ticket, they will get a message asking them to verify that they really want to re-print a received transfer.

6. New Inquiry Information – The Branch information has been added to the PO and PPO Inquiries in the F4-Basic Information Key.

7. New Branch Report – Customer Variance Report can now be generated by Branch. The Customer Variance Report is located in Sales Analysis, Customer Sales Analysis, Customer Activity Variance Report.

New Optional System now Available

ISO 9001 System

Computer Insights, Inc.
The BUSINESS EDGE

Below are some highlights of this new optional system. Please call for further details and pricing.

- **Maintaining Measuring Devices and Calibration Schedules/History** - When your QA Manager logs into The BUSINESS EDGE, they are immediately warned if any measuring devices are coming due for calibration. You can calibrate the device yourself (and record the in/out measurements) or use an outside vendor to do the calibration and you simply record that it was done.
- **Inspections / First Article Inspections** - This is where you can save the most time. You can setup each product with its own specification (which are created, reviewed, and when revised, the revisions are maintained for ISO compliance). When a first article inspection is needed, you can simply pull the product, record the dimensions and analysis in The BUSINESS EDGE and then print out the first article inspection. The best part is that since it is in the system, you can easily find the last time one was one on a product.(
- **Problem Documents** - You can easily record customer complaints, non-conformances, corrective actions and preventive actions. The system is used for both in-house corrective and preventive actions, vendor answers to their problems. You are able to link the documents to Vendors, Products, Purchase Orders, Processing POs, Customers, and Customer Orders. You also can group the problems into different categories and run a Pareto Analysis of the problems you are having. You can then focus on your largest problems. Another benefit is that your QA manager gets a list of all documents that need attention so that you don't accidentally forget to close a document or review it after the solution has been implemented.
- **Scorecard Reports** - We have new customer on-time shipment reports that give you a great summary of how well you are satisfying your customer needs. The Vendor Scorecard reports help you analyze your vendors on-time delivery performance along with what problems are on-going at the vendor.
- **Maintenance Schedules and Logs** - The BUSINESS EDGE helps you plan and record maintenance events of your machines. Your maintenance staff (and their supervisor) are informed on a daily basis of what machines are due for maintenance.