Computer Insights, Inc.
The BUSINESS EDGE

Upgrade Notes November 2006 through February 2007

Order & Quote Entry System

1. New Flag - Orders-Warn if Qty Ordered causes (-)Avail? When entering an Order if the quantity on the order will cause the available quantity to go below zero a message will come up once the quantity is entered. The message will state that the quantity ordered will create a negative availability. The User can the press Escape to clear the screen and continue.

This new flag is located in Entity & System Flags – Order Entry. The default answer will be No.

2. New Display – When in a Product Inquiry and viewing the Open Sales Orders through the Show Sales Orders Function key, the system will now show scheduled line items as individual lines. In the past Users had to highlight the Sales Order and press F3 to see the individual schedules. You can still highlight a schedule line time which is indicated by no * on the end by highlighting any line and pressing F3.

3. New field on report – Orders in Excess of Stock – This report will now include the Primary Vendor if there is a Primary Vendor setup in a Product that is included on the report.

4. New Display – When doing an Order Inquiry you can no see the User Name that entered the Order along with the date and time. This is displayed next to the Customers Phone Number.

Purchase Order System

1. New field – When in a Purchase Order Inquiry, you can view Sales Orders that are tied to Purchase Orders through Set PO in Order Entry. The Product Code has been added to each Sales Order Line item.

2. New report Option – PPO Component Expediting Report - by Product. There is now a question Print On Hand Lots & Locations. If this is answered Yes, the on hand lots and locations for each item will be included on this report.

Accounts Receivable System

1. New Feature – When printing or faxing Customer Statements in a batch, the system will prompt the User to confirm that they are printing more than 25 Statements.

2. New Feature – When printing or faxing Customer Invoices in a batch, the system will prompt the User to confirm that they are printing more than 25 Invoices.

Accounts Payable System

1. New Field - A message field has been added to the Vendor Master File. This message can be formatted to print on your Purchase Order, Processing Purchase Order or RFQ forms. Messages can be entered or edited in Enter & Edit Vendors, F5-More, F7-Msg. Changes to forms are billed at our normal hourly rate. If you would like to utilize this field on your forms please call our Customer Service Department for a quotation on changing your forms.

Inventory System

1. New Field and Feature – There is a new field in the Inventory Master file – Order Entry Message. This is a text field where any type of note pertaining to that particular product can be entered. This new field is on the Additional information screen. If there is an Order Entry Message in a Product, a Message screen will automatically pop up when the product is selected.

2. New Fields for Exporting – When exporting Inventory information from the Export system three new fields have been added as optional fields to export to excel or a text file. Average Monthly Sales, Quantity Sent to Processor and Average Quantity Sent to Processor. When setting up an export format, these new fields are possible selections at the bottom of the list of fields.

3. New System – The physical inventory system has been re-written for systems that are tracking lots and or locations. They physical can be generated for any range sequenced by Location, Product Code, Product Description or Classification. The Physical System is located in Inventory System, Inventory File Maintenance, Location System, Physical Inventory System.

When performing a physical count there should not be any products allocated to Sales Orders or Sent on Processing Purchase Orders.

Once a sort has been selected for the entity, it cannot be changed until all of the records in the worksheet file have been removed (updated or cleared) for that entity. Multiple users can input counts as long as their ranges that they are inputting do not overlap. If you have the multiple branch system, a user can only work on their selected branch. During the update, the change in inventory is applied to the current lot. If the change cannot happen due to allocations, the user is warned right before the update and the change will be limited to the maximum change that can happen without effecting the allocations.

3. New feature – In the physical Inventory system on systems that have tracking enabled, there is now an option to print each Classification on a separate sheet of paper when performing a physical count by Classification.

4. New Feature – When using the Figure Inventory Stocking Criteria feature, the system will now also show the overall financial impact of the proposed changes. The current, suggested and change in the value of the stocking objective, the re-order point, and the max quantity to stock (based on the Default PO Cost).

5. New Feature – Vendor Contract Pricing can now have quantity breaks.

6. New fields for exporting – When running the What Who Buys Inquiry and or the Who Buys What Inquiry the Customers Alternate Product Code will now be included in the data. The Customers Alternate needs to be related to the Customer in the Inventory Master File. These inquiries are designed to be exported to Excel or a text file. They are located in Accounts Receivable Reports, Customer Activity Reports.

7. New Feature – Unit of Measure can now be tied to an Alternate Product Code. If you normally sell a product in one Unit of Measure but have a Customer that has their own Product Code that would like to be billed in a different Unit of Measure you can now specify that Unit of Measure in the Enter & Edit Alternate Products function key in Enter & Edit Products. Then when you select that Customers Alternate their preferred Unit of Measure will be defaulted to the Order or Quote.

8. New Export fields – When exporting inventory through the Export Menu the following fields are now available – Average Sales Per Month, Average PPO's Sent Per Month and PPO's Sent.

Sales Analysis

1. New report option – When printing the Customer Sales and Profit by Product Report there is a new option. Show Qty Decimals. Answering No to this question will allow more space for the information, particularly if you are including multiple periods.

Utilities

1. New Security Flag – Allow Salesperson Change in Orders – This new flag is setup on a User-by-User basis. If you do not want a User to have the ability to change the Salesperson on a Sales Order or Quote, answer No to this flag. If the User attempts to change the Salesperson, they will see an Access Denied message. This new flag is located on the third screen of Enter & Edit User Permissions, the default answer is Yes.

2. New User History Options – If you have the system setup to keep track of Users History the option to Show Users Activity has been replaced with a new menu option – User History System. This new menu option has two choices.

Show Users Activity – this selection will enable you to view the activity for All Users or individual Users. This inquiry will show the date and time each User logged in and logged out of The BUSINESS EDGE. The information will be presented in a scroll box in Date Order.

Report History Inquiry – This new Inquiry will show reports that were generated in The BUSINESS EDGE. The information includes the Report Name, Date, Time and the User that ran the report. This information is presented in date sequence in a scrolling box.

3. New flag – Keep Tracked Time History for – You can now specify how much user history you would like the system to retain. By default, this flag is set to 14 days. Any information older than 14 days will be purged from the system. If you would like to

Branch Related Features

1. New Option – Customer Variance Report can now be produced by Branch.