

Order & Quote Entry System

1. New fields added to report – The following fields have been added to the Orders In Excess of Stock report - On PO Current Promised Dates, On PO Numbers and On PO Vendor Names. These fields will be included when the report is put into Excel as the last fields on the report.
2. New Feature – Recording reason Orders were closed. When a Sales Order is closed, Users will now be prompted for a Reason. This reason will be stored in the Order File and the Lost Sales Record. When doing an Order Inquiry the Reason can also be viewed in the final Message field.
3. New Inquiry Options – Open Orders by User. Users can now select what types of documents they would like to include in this Inquiry. In the past all Order types were presented. Users can now choose to include or omit particular Order types.
4. New Flag – Allocate Orders in Order Entry – If it is your practice to allocate and print a packing list before picking the product this flag will automatically prompt users to allocate each line as they are entered in a Sales Order.

If you are in Enter & Edit Orders – Detail Lines and drill into an allocated line, it will go directly into the allocation screen.

If you are in Enter & Edit Orders and drill into an unallocated line, it will go into the Enter and Edit screen.

In the graphical interface there are allocate buttons available on the screen. In the text interface users must drill into the line to change allocations. The flag to turn on this feature is located in Entity & System Flags – Order Entry.

5. New Feature – Days can Ship Early on Sales Orders. Users can now input the number of days they can ship an Order early. This field can also be left blank or press spacebar and ASAP will fill in the field. This field applies to Sales Orders, Order Schedules, Purchase Orders and Purchase Order Detail Lines.

Defaults can be entered in the Customer and Vendor Master Files. This field can be added to existing forms. Our normal hourly charges apply to form changes.

This is a standard feature in the graphical interface and it is optional in the text interface. There is a flag for the text interface located in Entity & System Flags – General, Use "Days Can Ship Early" in TUI. The default answer to this flag will be No for existing clients.

In the text interface, if this flag is set to Yes adjustments will be made to accommodate the extra field due to lack of space. Those adjustments would be possibly losing a User Defined Field or the Entered by line. In the Purchase

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Order it would be losing the PO Entered by or line comment on the first screen. This information would still be stored, just not displayed on the first screen.

This flag is located in Entity & System Flags – Order Entry, Use Order Shipping Option in TUI?

6. New Report formats – Most reports have now been converted so that the information goes into a scroll box. This makes the information easily available to export to Excel or E-mail. In some cases due to the format of the report if it was not logical to present them in a scroll box/grid then the Screen function was disabled. If a User would like to view a report on the screen and they do not have an Output Option for screen Adobe should be selected and the complete report can be viewed in Adobe on the screen.
7. New Flag – Use Order Internal Reference in TUI – (Text User Interface). The Order Reference field is standard in the graphical interface and can be used as an extra field to store data on the Heading of an Order. In the Text Interface it is an optional field that may be used to move current User Defined fields to if clients would like to move to the graphical interface. This flag is located in Entity & System Flags – Order Entry.
8. New Flag – Skip Backorder Screen with Tracked Products. After allocating lines on an order the system automatically brings the User to a backorder screen where the Unit Price or Line Comment can be changed. This creates an extra keystroke or click when allocating an order. If you never change this information on the backorder screen this flag could be set to skip the backorder screen. This new flag is located in Entity & System Flags – Order Entry.
9. New Feature – Gross Profit Margin Warning – Currently Inventory Classifications can be setup to have a warning Pop up in a Sales Order if the Gross Profit is lower than a defined percentage. There is a new Flag that can be set to pop-up a warning if the Gross Margin is too high. This is an optional feature and must be setup in the Product Classifications. The new field is called Maximum Allowable Gross Profit.
10. New Flag – User Job # in TUI – (Text User Interface). The Job # field is standard in the graphical interface and can be used as an extra field to store data on the Heading of an Order. In the Text Interface it is an optional field that may be used to move current User Defined fields to if clients would like to move to the graphical interface. This flag is located in Entity & System Flags – Order Entry screen 6.
11. New Feature – Order Discount – When this new flag is set to Yes Customers can be setup to get a flat discount percentage taken off all Orders. This flag is in Entity & System Flags – Order Entry – Use Order Discount – the default is set to No. The discount is setup in Enter & Edit Customers, Additional Information. If

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you would like to use this new feature your forms will need to be changed to reflect the Order discount. Normal hourly charges apply to form changes.

12. New Options to show Customer Instructions. There are Picking and Packing instructions that can be assigned to Customers in Enter & Edit Customers. There are new options to automatically pop up these instructions when Users select an Order. They can pop up automatically when Users are in Order Entry, Allocating, Both Order Entry & Allocating or Never. This flag is located in Entity & System Flags – Order Entry, Show Customer Instructions.

13. New Feature – Order Shipping Options – This is a standard option in the gui interface and is optional and based on space availability in the tui. The four options are partial shipments as available, ship complete lines, backorder partials, consider complete ship available and one shipment when all lines complete. These options will be defaulted based on the two existing customer flags in Enter & Edit Customers – Allow Back Orders and Ship Complete and can be changed from Order to Order. When the flags are set to One Shipment when all lines are complete and the User prints a Packing List without all lines being allocated the User will get a warning but it will not prevent them from printing a packing list. Forms can be changed to include this new field, normal hourly charges will be billed for form changes. Below is how the defaults will come up based on the way the two customer flags are set:

Allow B/O Flag	Ship Complete	
Y	Y	Ship Complete lines, backorder partials
Y	N	Partial shipments as Available
N	Y	One Shipment when all lines complete
N	N	Consider Complete – Ship Available

The flag to turn this on in the tui interface is in Entity & System Flags – Order Entry.

14. New Flag - Force UPS Collect Customer Acct. # - If this system flag is set to Yes and a Customer is setup with a Collect Ups Shipper a UPS Account Number must be setup in the customer record before the order is entered. This flag is located in Entity & System Flags Accounts Receivable, Screen 3.

Purchase Order System

1. New Entity Flag - Use Vendor Name as Manufacturer for Lot. When Lot Tracking if this flag is set to Yes the Vendor Name on a Purchase Order Receipt will automatically get copied to the Manufacturer field in the lot tracking information. This flag is located in Entity & System Flags – Purchase Orders. When receiving the User also has the ability to change the information.

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2. New Feature – Blanket PO's – If a User is entering a Blanket PO, they can leave (or blank out) the Current Promise Date field and instead fill in the Earliest and Latest Blanket Dates. The Earliest Blanket Date is the earliest date that your Vendor can ship product to you. The Latest Blanket Date is the latest date that you vendor can ship product to you.

When using the Automatic Replenishment System (ARS) it will look at the incoming inventory as coming in based on the earliest date so that you do not accidentally place another PO for the same product. All other inquiries will show the inventory as expected to be received in as of the latest date (Product Inquiry and Open Documents)

When a release date is received the Original Promise Date or Current Promise Date need to be filled in either on the Heading of the Purchase Order or on the Detail Line(s) to indicate that a firm date has been received and the PO will be treated as normal.

3. New Report - Blanket Purchase Order Report – This report will provide a listing of which Purchase Orders have Blanket Purchase Order Dates so that Users can see what PO's need to be released. This report is located in Purchase Order System, Purchase Order Reports, Open PO Reports, Blanket Purchase Order Report.
4. New Feature – Split Purchase Order Line – This is an alternate method of dealing with multiple Vendor lot numbers on a single PO Receipt. When receiving a Purchase Order if you would like to split one line into 2 separate lines while receiving you can now do so with the new Split Line Feature. The procedure is to highlight the line and then either clicking on or pressing the option Split line. The system will prompt the User for the quantity to split out of the original line item. This would then create a unique lot number for each quantity since the line number is part of the lot number.
5. New Flag –Force Manufacturer's Lot during Receiving – This new flag can be defaulted in Entity & System Flags to either Yes or No. All products will default to whatever the system default is set to. On a Product by Product basis this flag can be over-ridden. The options on a Product Level are System Default, Yes or No. When set to Yes, Users can not complete the receipt of a line on a Purchase Order unless a Manufacturers Lot Number is entered.
6. New Flag – Force Country of Origin – This new flag can be defaulted in Entity & System Flags to either Yes or No. All products will default to whatever the system default is set to and then on a Product by Product basis this flag can be over-ridden. The options on a Product Level are System Default, Yes or No. When set to Yes, Users can not complete the receipt of a line on a Purchase Order unless a Country of Origin is entered.

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7. New Feature – Mark Purchase Order Delivered. If the receiving department gets backlogged a Purchase Order can be marked as delivered so that Users can see that it has arrived and is just not checked in yet. A location can also be assigned to indicate where it is being stored.

This new selection is in PO Receipt Routines, Mark Purchase Order Delivered. Users simply type in a PO Number and enter a location. If for some reason it needs to be unmarked as delivered the Delivered status can be changed back to NO.

In the PO Inquiry the Document Status Line will show Delivered, the Location and the Date it was marked as delivered.

8. New System – Expedite Purchase Orders – this new system is located in the Purchase Order system, Purchase Order Reports, Expedite Documents System, there are six menu items.

Late Documents Report – This report will go through the Open Purchase Orders to find the dates that incoming Purchase Orders are due. It will show which documents already have expedite requests. You can drill into each line item to create a new expedite request. This report can be generated for any range of Products and there is also an option to Traverse Bill of Materials. There is an indicator before the PO Number so Users can tell if it has been selected to expedite, sent to the Vendor or if the Vendor has already responded. Those indicators are + = Open Expedite; * = Sent to Vendor; > = Responded. A comment can be added to the line item and printed on the expedite request to the vendor. Users can also view Open documents for a particular line item by selecting the Open Documents option.

Open Expedite Request Report – This selection will show any Expedite Requests that have been setup but not yet submitted to the Vendor.

Send Expedite Requests – This selection is where you will send the Expedite Requests to your Vendor. Expedite Requests are only available in PDF format. If you have a default E-mail address setup for your vendor the system will default to E-Mail Yes. Through the buttons on this screen, Users can select to Print, Fax and or E-mail the Expedite Requests. After the selections have been made the next screen will prompt the User for the Output options such as time to fax, printer to print to and return E-mail Address.

Enter & Edit Expedite Request – This selection enables a User to enter an Expedite Request by selecting the Purchase Order and expediting the individual Lines. After selecting the Lines the User can choose how they would like to Output the individual Request.

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Expedited Documents not confirmed – This inquiry lists all of the line items that Vendors have not confirmed. Users can drill into each line item and enter the new Date that the Vendor has confirmed. This will be updated on the PO Detail Line as the Current Promise Date. There will also be an indication that the particular line item has been confirmed. The indicators a User will see on a PO line are + = Open Expedite; * = Sent to Vendor; > = Responded.

Expedited Documents Report – This report can present a list of PO Line Items that are Open, Sent or Confirmed. If you are viewing the Closed Documents you can clear the confirmed status – this can be used if a line item was confirmed in error.

9. ARS Enhancements – The Cut-Off Date is now the date that the system will look at when calculating the available to test against the Re-Order Point. There are also new options where the system could suggest a higher order quantity if the incoming Purchase Orders are considered late. The User can specify how many days past due is considered late. There is also new optional forecasting logic based on past usage. There is a flag in the ARS Maintenance Menu in Edit Auto Replenishment Options - Use Usage for Qty Needed & Date Est – if this is set to no the system will not project future usage. If it is set to Yes the ARS will suggest ordering extra stock to cover future usage based on past usage.
10. New Feature – Sort Lines in Request for Quote. When on the final screen of Enter & Edit RFQ, there is a new option to Sort Detail Lines. The lines can be sorted by Product Code or Description.

Processing Purchase Order System

1. New Flag - Skip Tag Detail in Quick PPO – This flag when set to Yes will speed up the Quick PPO option Enter & Receive PPO. If there is no need to enter manufacturer information such as Manufacturers Lot Number, County of Origin etc changing this flag to yes will decrease the number of screens that a User is brought to for each receipt. The Product is automatically updated, there is not an in process report or update questions.

Accounts Receivable

1. New Credit Hold Options – In the past when Customers were past due or over their Credit Limit they had to be manually put on Credit Hold. The Credit Hold System has been enhanced with the following options:

Customer Credit Test - System Flags

There are 5 system/entity flags that can be used to prevent users from printing pick tickets/pack lists, allocating sales orders and/or creating invoices for customers who are

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on credit hold, over their credit limit or past due. These flags are located in Accounts Receivable Flags. They include:

- Allow Printing of Pick Ticket?
- Allow Printing of Packing List?
- Allow Allocations?
- Allow Wireless Warehouse Allocations?
- Allow Creation of Invoice?

These flags will be tested at the appropriate times and if they are set to “No”, the corresponding action will not be allowed unless the sales order has an override stamp on it.

Credit Test Override

When a sales order has a credit test override stamp on it, the system will bypass the customer credit test for that order and allow all actions.

There is a flag in Enter & Edit User Security to give users access to override the customer credit test: Allowed to Override Customer Credit Test?

Users who are set to Yes have 2 ways of overriding the customer credit test/stamping the sales order:

If while trying one of the above actions, a customer fails the credit test, the user will get a message that the action is not allowed and a question asking whether they would like to override the credit test. If the user answers yes to override, that will put an override stamp on the sales order and allow the user to continue with the action. Once the order has been stamped, all users will be allowed to perform all actions on that order no matter how the five system/entity credit flags are set.

There is also a menu item in the Order Entry File Maintenance menu to Override Sales Order Credit Test. In this program the user can select a sales order # and switch the credit override stamp on or off for that particular order.

2. New options on Customer Credit Report – When running the Customer Credit Report there are two new options – Include Only Over Credit Limit/Credit Hold? If this is answered Yes it will only include customer that are Over their Credit Limit of on Credit Hold. Print Order – If this is being generated to paper a copy of their Open Orders will be automatically printed.

This will enable companies to be pro-active with customers when utilizing the new credit hold features. This report is located in Accounts Receivable Reports, Customer Status Reports, Customer Credit Report.

3. New Feature – Pop-Up Notes are now for the user that created the not, or based on the security level of a user. When creating a pop-up note, when a users

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chooses Security Level List, it will bring them to a screen to choose which security levels to pop-up the note on. By default they will all be set to see the notes so the system will continue to work as it does now. In the gui interface there are also new icons / mouse over messages informing users what the notes are set to do.

Security Levels are setup in the Security System and assigned to each User.

4. New Feature – F9-Undo in the check application screen in Enter & Edit Deposits will now prompt the User to confirm that they would like to un-do the payments in the check being processed.
5. New Report formats – Most reports have now been converted so that the information goes into a scroll box. This makes the information easily available to export to Excel or E-mail. In some cases due to the format of the report if it was not logical to present them in a scroll box/grid then the Screen function was disabled. If a User would like to view a report on the screen and they do not have an Output Option for screen Adobe should be selected and the complete report can be viewed in Adobe on the screen.
6. New field available for editing. Users have the ability to edit certain fields on a Customer Invoice after it has been updated. These are fields that do not affect the Inventory, Customer or General Ledger information. The Shipper information is now available for editing in Edit Posted Invoices which is located in Accounts Receivable Invoice Routines.
7. New Flag – Prompt for Update in Send Invoices in Process. A new flag has been added so that Users can be prompted to Update their Invoices after Sending Invoices in Process. There was an existing flag to Prompt for Update when Printing Invoices in Process. If you are transitioning from mailing invoices to faxing and emailing them you may want to make the Prompt for Update in Printing Invoices No and Sending Yes. This way if you print an in-house copy you will not inadvertently update before sending your invoices. This flag is located in Entity & System Flags – Accounts Receivable.
8. New Flag – Update Invoices by Branch – Companies with multiple Branches can now update invoices individually by Branch. The Update screen will prompt the User to update a single branch or all branches.
9. New Display feature – When entering a Customer Deposit if any check in the batch is out of balance, meaning all of the funds were not applied to invoices the screen will now show an * next to the check amount in the tui or a red information display in the gui. This makes it easier to see if there is a check that needs further attention before updating.

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10. New Fields in Sales Journal Report – When the Sales Journal Report is put into Excel the customer class code and class description will be included in the data. This enables Users to sort the sales for a period of time and subtotal by classification.
11. New Sales Journal report – Sales Journal by Salesperson/Customer Class – Summarized – After selecting a date range, a range of Salespeople and a Customer Class this report will present each customer in the selected customer class along with their Total Sales broken down by merchandise, freight, tax and miscellaneous charges along with Cost and Profit.
12. New Fields added to A/R Aging when exported. When the Accounts Receivable Aging report is exported to Excel the Customer State and Country will be included in the Excel data.
13. New information on Invoices in Process Report when printed with Detail. If a User answers Yes to include Detail on the In-Process Report and a line item has a current Contract price the letter “c” will print after the price.
14. New Flags for Enter & Edit Customers – Force Customer Contact Screen and Force Customer Instruction Screen. If these flags are set to Yes, then when entering a new Customer these additional screens will pop up automatically. If these flags are set to No, the User can simply click on the option or press the Fkey to enter the information when it is available. These flags are located in Entity & System Flags Accounts Receivable.
15. New Flag for Enter & Edit Customers - Force Edit Sales Order Tax Screen? When entering an address for a Customer there is a separate screen for Sales Tax. If you do not charge Sales Tax and have the Tax fields defaulted, Users can avoid this screen by setting this flag to No. If you do charge Sales Tax you want this set to Yes to be sure the User is prompted for the correct tax for each address. This flag is located in Enter & Edit System Flags – 2.
16. New Feature – Periodic Invoices – The periodic invoicing system is designed for customers who would like to receive one bulk invoice at the end of each month. During the month you will create and update invoices as usual, but the system will not prompt you to send them during the Send Invoices in Process procedure because they will be sent altogether as a periodic (or summary) invoice.

The first step to periodic invoicing is to set up the customer to use periodic invoices. The customer flag can be changed in Enter & Edit Customer, Output. Currently the options include By Customer, By Ship to Address or No. If the customer would like one summary invoice each month that includes all ship to addresses, select By Customer. If the customer would like one summary invoice for each ship to address, select By Ship To Address. If the customer

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would like to receive regular invoices, select No. The system will default new customers to what you have selected as the default in Enter & Edit Customer Defaults.

Each order and invoice that is created will be flagged to either Yes or No to Use Periodic Invoices based on the customer's flag. Users can change an individual order/invoice's flag during Order or Invoice Entry. For instance, if there is an order/invoice that you don't want to be included in the periodic invoice that month you can change the flag to No and the system will treat it as a regular invoice and send it individually. Then when they go to create the periodic invoice for that customer, that single invoice will not be included. Users will find the Use Periodic Invoice flag inside the Tax fkey in order entry and invoice entry. If the flag is changed on an order it will carry over into the invoice when it is created (and override the customer flag).

The periodic Invoices Menu is located in Accounts Receivable, A/R Invoice Routines.

Create & Send Periodic Invoices

When Users are ready to create the periodic invoices for the month they need to make sure all of the invoices from the month have been updated. The program will not include in process invoices when creating the periodic invoice. They will be prompted for a "Report Date". This date is used as a cut-off date for invoices to be included in the periodic invoice. It is also used as part of the periodic invoice #. If you enter 06-30-11, the system will create a periodic invoice numbered 110630-##### (##### represents the customer code) and it will include all invoices flagged "Yes" for the customer that have not yet been included on a periodic invoice and are dated on or before 06-30-11.

Creating Periodic Invoices simultaneously creates periodic invoices for all customers set up to use periodic invoices. When the invoices have been created it will pop-up a message letting you know how many were created. Then it will bring the User to the "Send Periodic Invoices" screen. If you are not ready to print/send the periodic invoices at this time, simply tab and Cancel Request. The periodic invoices have been created, just not sent. Send Periodic Invoices functions similarly to Send Invoices in Process in that it uses the customer's default output settings to decide whether to print, email or fax each periodic invoice.

Print Periodic Invoice

Use this option to send individual periodic invoices. You have the option of selecting a customer first or skipping the customer and hitting space/enter on the Periodic Invoice # to get a list of all customers' periodic invoices. If you select a customer, space/enter on Periodic Invoice # will give you a list of only that customer's invoices.

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Cancel Periodic Invoices

Cancelling a Periodic Invoice does not affect the individual invoices created throughout the month. It only un-links the individual invoices from the periodic invoice and clears out the periodic invoice # for that customer.

For example, if you create a periodic invoice and forget about one sales order that needed to be invoiced that month, you can cancel the periodic invoice.

Then, after the order has been invoiced and updated, you can go back and run Create & Send Periodic Invoices and it will create a brand new 110630-### invoice for that customer which will include all of the previous invoices along with the missed invoice. The cancel option acts very much like the Print Periodic Invoices screen in the way you can select the Periodic Invoice.

Accounts Payable

1. New Entity Flag - Use Estimated Freight in Receive and post to Accrued. This new flag when set to Yes will enable Users to enter the actual or estimated freight at the time a Purchase Order is being received. The freight amount will then be added to the Raw Cost to create a landed cost based on the value. The vendor invoice for the freight must then be applied to the Accrued Receipt and any discrepancy would be put into the Over/under account. This flag is located in Entity & System Flags – Accounts Payable.
2. New Check Reconciliation routine – Reconcile Cash – This new option enables the User to clear all types of transactions – Checks, Deposits and Journal Entries through a single interface. The system displays the difference between the General Ledger and the Bank Statement as transactions are cleared.

On the first screen the User is prompted for the Statement Date, General Ledger Account Number and Statement Balance which is taken from the monthly Bank Statement. There are options to include Checks, Deposits and or Journal Entries. There is also an option to include transactions that have already been cleared. Depending on the format of the bank statement users may choose to clear all of the checks first and then come back and clear other types of transactions.

All of the selected transactions are presented in a scroll box and the Fkeys/Buttons are used to Clear/Unclear entries. Mark/UnMark entries. The feature to Mark Entries is a way of grouping several transactions into one total. If for instance 3 deposits were made in the system and only 1 deposit went to the bank the system can accumulate the 3 deposits in the system to be sure they equal the bank deposit. The User clicks on Clear All Marked when the total is verified.

This new feature is located in Accounts Payable, Check Routines & Reconciliation, Check Reconciliation, Reconcile Cash. The first time this is used a Prompt will ask for the Earliest Un-cleared Date and it will then clear everything before that date in the system.

Sales Analysis

1. New Report formats – Most reports have now been converted so that the information goes into a scroll box. This makes the information easily available to export to Excel or E-mail. In some cases due to the format of the report if it was not logical to present them in a scroll box/grid then the Screen function was disabled. If a User would like to view a report on the screen and they do not have an Output Option for screen Adobe should be selected and the complete report can be viewed in Adobe on the screen.
2. New Field for Export – A column representing the Customer State has been added to the Sales Report – Major Accounts which is located in Customer Sales Analysis.
3. New Field added for exporting. In Customer Sales Analysis, Customer Sales and Profit Ranking reports – the default Salesperson Code from the Customer Master file has been added as a field that can be exported and sorted. This includes the Customer Sales Ranking by Net Sales, Gross Profit and Percent Gross Profit.

Inventory

1. New Report – Open Documents Report – This report was created to provide a listing of Products that are on Sales Orders along with the Open Purchase Orders. It is presented in Product Code Sequence and can be generated by Product Code, Class, Alternate or Description. Based on the report options this can list only products that are on Sales Orders or all Products in the selected group of Products. If Sales Order documents are included (this is an option) then all Purchase Orders and Sales Orders will be listed for each product along with a Quantity balance in date order. This will reflect the projected balance as of the document date.

If Sales Orders are not included only Purchase Order documents will be listed.

2. New information in Product Inquiry – When using the gui interface fields have been added to the main screen of the Product Inquiry – Package Quantity, Master Quantity and Bulk Quantity. Theoretical Weight has also been moved to the main screen.
3. New Feature – Track Package Quantity on a lot by lot basis – When the flag to track package quantities by lot is set to yes, Users will be prompted for Lot Package Quantity when receiving PO's, Entering or Receiving PPO's as well as when doing a manual adjustment. Each tracking tag can have one package quantity associated with it. If there are different package quantities for one internal lot the lot will need to be split into multiple tags. This flag can be setup in Enter & Edit System Tracking Flags from the Setup Miscellaneous Menu.

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Once the flag is setup existing lots can be edited in Inventory File Maintenance, Location System,. Enter & Edit Product Mfg Info. The Package quantity is displayed by lot in the lot tracking detail screen. In the tui it is available by pressing or clicking F5-Mfg.

General Ledger

1. New Feature - Distribution Detail information can now be viewed when Users are in the GL Account Transaction Inquiry. When viewing the transactions on the screen, when the transaction is highlighted, users can click on or press the Fkey Distribution Dtl. The System will show all Accounts involved in the transaction along with the Debit and Credit Amounts.

2. New Feature – When viewing an Accounts Receivable Invoice, Purchase Order or Vendor Invoice or Check in the General Ledger transaction inquiry, you can now enter or click on the transaction to view the Inquiry for the selected document. This gives you complete visibility to all details of the transaction as well as the ability to re-print it when it is a printable document.

Utilities

1. In many areas of the system such as reports Printer Options has been changed to Output Options. This provides more options such as sending a report to Adobe or a Text file.

ISO

1. The ISO System has been re-named Quality Assurance System. The ISO and Certificate Management Systems are optional modules. If you have interest in either or both of these modules please contact us.

2. New Feature - Quality Assurance Certificate Management System. The Certificate Management System is an optional system that can be used with or without the ISO system. After setting up Certificate Types such as Test Reports and different types of Certifications along with default costs, these Certificate Types can be assigned to Products. They can also be added on the fly as a product is being added to a Purchase Order. When entering a line on a Purchase Order if there are required certs that are setup in the part they will automatically appear on the Purchase Order going to the Vendor. The user can edit the default cost associated with the Certs.

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If you have documentConnection Scanning, Users can be prompted upon receipt of product to scan in the required documents.

If a customer requires specific Certificates for Products the system can also be setup so that only lots with the proper Certificates can be allocated to their Orders. The certificates can also be setup to automatically print with the Customers paperwork.

There are indications in the system showing users what certificates are available as well as which lots are missing required certificates. Use of the new Certificate Management system will also require form modifications to include the Certs information with the individual line items on Orders and or Purchase Orders.

3. New Feature – Enter & Edit Certificate Type – This entry screen enables the User to setup a new Certificate Type such as a Physical/Chemical Certification. There are flags to include the particular cert on the PO Form when assigned to a product. A default Cost and Sell price can be setup in the Certificate type along with the General Ledger Account to Post to. The cost and price can be over-ridden on an individual line of a Purchase Order or Sales Order. This is located in Inventory File Maintenance, UOM, Category & Certificate System, and Enter & Edit Certificate Type.

documentConnection

1. New Feature – Document Groups – This new feature enables Users to scan in a document and attach it to multiple products. If there is a document that needs to be attached to a group or range of products a Document Group can be created and tied to the multiple products. Document Groups can be setup in Utilities, Image & Fax System, Document Groups, Enter & Edit Document Groups or in Enter & Edit Products, Additional Information, Doc Groups, Edit Document Groups. If the group of products all have the same prefix choose Product Ranges when adding the new group and all products with that prefix will be linked.

Documents can be scanned into a document group in the Scan Manager Menu in Scan Document Group Document. The scanned documents can be viewed in a Product Inquiry the same way a product specific document is viewed. In the gui interface it is under Drawings and Images tab. In the tui it is located in F12-More Choices, F12 – Product Images, F4-Product Drawings.

2. On the final screen of Enter & Edit Orders there is a new set of choices for documentConnection where a user can scan a Customer PO or a Pick Ticket or assign scanned documents to print with the invoice for the Order.