The BUSINESS EDGE
Release Notes October 2009 through February 2010

Order & Quote Entry System

1. New Feature - Clear Pick Ticket Printed. If you are using the Print Pick Tickets not printed report – this new feature gives you the ability to mark a particular order so that it will show up the next time you run the Print Pick Tickets not printed report. Some companies use this report as a way to decide which Pick Tickets they would like to print based on order size and stock status.

You can mark a Pick Ticket as not printed in Order Entry File Maintenance, Clear Pick Ticket Printed Info.

2. New Flag – Pop-Up Customer / Vendor Notes in Document Selection – When this flag is set to Yes and there is a Note set to popup for a Vendor or Customer, the notes will pop up when a related document is selected. The default for this flag is No. This flag is located in Enter & Edit System Flags 2.

3. New fields - When adding a One-Time Ship To on a Sales Order you can now also enter the Federal Express Account Number and Special Instructions for that shipping address. If you choose to save the new address in the Customer Master File you will not be allowed to Edit the Shipping Address from the order. Changes need to be made in Enter & Edit Customers or Enter & Edit Customer Addresses. This way any other orders with the same address will get updated.

4. New fields for Export. When exporting the Past Due Order Inquiry you now have the option to include Order Notes to the Excel format. If there are multiple notes they will be combined in one cell of data.

5. New Field for export - When the Salesperson Booking Report is exported the data will now indicate Order Type. If you chose to add Quotes to the Booking Report, it is helpful to know the type of Orders were booked.

6. New Feature – Add Alternate Product Codes – You can now allow users to add Alternate Product Codes to Products without going into Enter & Edit Products. In Order Entry File Maintenance there is a new option Add Alternate Product Code. Users must have permissions to use this new feature. The permissions are setup on the last screen of the security level setup, the default is No.

7. New Feature – Contacts can now be assigned to individual Sales Orders. When setting up the contact for the Order, Users can also choose to automatically send them a copy of the invoice. User can select the contact screen by clicking on or pressing F2. There is also a system flag that will cause the Customer Contact Screen to pop up each time a User enters an order.

When entering Contacts users can add a new contact or select a contact from the Customer record.

8. New Feature – When setting up Substitute Products you can now have the system automatically Substitute a Product on an Order. When entering the Substitute a new option has been added to the question Type of Order / PO Replacement – Auto Substitute. When this option is set and an order is entered for the original product the system will automatically change the order to use the substituted product. The user will also get a message so they are aware the Order was changed.

This is handy if you are permanently replacing a product. Orders imported through the Import Orders menu option will also make the substitution.

Product Substitutes can be entered in Enter & Edit Inventory, F5-More, F8-Subs.

9. New Feature – In the past users could set a flag that would warn them when the order that was being entered would create a negative availability. This flag has been expanded to include three options, Negative, Below Re-Order Point or None.

In addition, when using the warning options the messages will now be more informative. If there is not enough inventory available and there are not enough already coming in on a PO or PPO the message will say Not Enough Available!
If there is not enough available but there is enough coming in on a PO, PPO or Work Order it will show (Inventory Incoming) next to the warning. Using the Re-Order Point Option will display This Quantity Takes the Inventory Below Re-Order Point! The Re-Order Point message will only show if the first two options do not show.

When displaying the message that there is not enough inventory the message will also indicate if there is a Substitute Product setup in the system so the User could change offer their customer another option that may be in stock.

10. New Feature - Move Unallocated. Lines to New Order – If you have a Sales Order that is partially allocated you can now move the unallocated line items to a new Sales Order. The line items that are moved to the new order will be removed from the original order. Partially allocated lines will not be moved, only line items where no inventory has been allocated. This new feature is located in Order & Quote Entry, Duplicate Orders Menu.

Counter Sales

1. New Features – You can now add a New Customer on the fly in Counter Sales using the F3 Key. Customer Notes have also been added to the first screen in Enter Counter Sales and can be accessed with the F4 key.

2. New Feature – Price table information can now be viewed in Counter Sales when entering an order. On the Line item screen F9-$ will show the price table information.

Purchase Order System

1. New fields – Business Type is a field in the Vendor Master file. Some new options have been added to the existing Business Types – Domestic, Overseas, Secondary Process and Consumables. The Business Type is not used functionally in the system but it used for reference. It has also been added to the export of the Open PO Report with Detail when this report is exported to Excel.

2. Report functionality expanded – Open P.O. Not Confirmed List – This report will present a listing of Purchase Orders that have not been confirmed in The BUSINESS EDGE. In the past the only place you could confirm a P.O. was on the final screen of Enter & Edit Purchase Orders.

You can now mark a P.O. as confirmed by pressing or clicking on F2-Confirm while the PO is in the scrolling box. You can also drill into any PO to view the information in a PO Inquiry. When selecting this report there is also an option to show either the Phone Number or the Ship Via in the scroll box.

3. Changed screens – Some of the screens have changed slightly when receiving Purchase Orders. This was due to the addition of a new optional Container System that has been added to The BUSINESS EDGE for companies that import. In making these changes improvements were made to insure that the accrued account is maintained more accurately.

4. New Feature – Purchas Order Blanket Dates – If an Original Promise Date is not entered on the Heading of a Purchase Order the system will Prompt the User for a Beginning and Ending Blanket Order Date. Once the Purchase Order is created the Blanket Dates can be edited with the F2-Blnkt key.

The Earliest Blanket Date is the earliest date that the vendor is expected to ship product. The Latest Blanket Date is the latest date that the vendor is expected to ship product.

When using the Automatic Replenishment System the system will look at the incoming inventory as coming in on the Earliest Blanket Date. This will prevent users from accidentally placing another PO for the same product. Other inquiries such as the Product Inquiry and consolidated Documents Inquiry will show the inventory as expected to be received in at the Latest Blanket Date. When the system shows the Blanket PO as coming in there will be a + before the PO Number indicating that it is a Blanket PO.

When the Vendor releases product to be shipped Users must then fill in the Original Promise Date or Current Promise Date fields either on the Heading of the Purchase Order or if it is certain line items on the Detail Lines and then the system will treat those products as normal.

5. New Report – Blanket Purchase Order Report – This report enables users to view what Products are on blankets Pos and what Date the Po needs releasing. This report is located in Purchase Order Reports – Open PO Reports, Blanket P.O. Report.

6. New Flag Option – Auto Select Alt Part Code on PO flag now has 3 options.

No – If you answer this way it means that the system will not use an Alternate Product Code unless the Users selects the Product by the Alternate.

Only if Not Entered by alternate – If you answer the flag this way and you select a Product by Alternate (even with the ! recent feature) the PO will use the alternate you chose the Product by. If you do not select the Product by Alternate and there is an Alternate assigned the Vendor you are entering a PO for the system will automatically make that Vendors Alternate fill the Alternate field. (These were the results when this flag was previously answered Yes)

First Assigned Alternate – If you answer the flag this way if there is no alternate assigned to the Vendor no Alternate will be used. If there is an Alternate assigned to the vendor the system will automatically use the assigned alternate.

7. New Feature – When printing a Merchandise Receiving Document the system will now warn Users if the Purchase Order they have selected has already been received in the System.

8. New Feature – You can now use the Shipper File that is used on Sales Orders for Purchasing documents. When the flag - Use Shipper List for PO/PPO/Work Orders is set to yes the Ship Via field will force Users to select a valid Ship Via on the heading of Purchasing Documents. Default Shippers can also be assigned to Vendors in Enter & Edit Vendors if you would like that field to automatically populate.

Sales and Purchasing documents use the same shipper file. When adding Shippers to the Shipper File, a generic shipper could be setup to handle odd shipping companies that you may not want coming up in the Shipper list. You can do this by assigning a generic name such as LTL and then in the Shipper file designate that the Extra Shipper Description be sent to the form instead of the Shipper Name.

If you would like to start using this feature, the flag is located in Entity & System Flags – Purchase Orders on the third screen.

Processing Purchase Order System

1. New Feature - When viewing a Cardex Inquiry for an Item that came in on a PPO, Users now have the option to view the PPO Inquiry. If you enter or click on the transaction where the Quantity is Received there is now a key to view the PPO.

2. New Feature – When using the Quick PPO option Enter & Receipve PPO's where you can Enter, Send and Receive all in one step a flag has been added to further speed up the process. This can only be used by companies that do not need multiple tags, do not need to enter the weight, manufacturing information and label comments.

When the flag - Skip Tag Detail in Quick PPO is set to Yes the system will create one tag for the quantity received and skip two screens, the In Process and Update screens will also be eliminated as the product will be automatically received. This flag is set in Entity & System Flags on the last screen.

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4. New Feature – PPO Receipts can now be updated by User. Multiple Users can be Receiving and Updating PPO Receipts at the same time. When a User goes to Update their PPO Receipts the system will default their user name as the batch to update.

5. New Feature – PPO Auditing – PPO's are now audited to track when fields on the document change. In a PPO Inquiry, F3-Basic Info, F2-Change History will display this information.

Accounts Receivable

1 New Inquiry fields – when in a Customer Inquiry and viewing Customer Addresses there are now options to see Tax, Shipping Info and UPS

2. Changed Screens – Enter & Edit Deposit. When entering a check for a customer the Unapplied Balance is now accessed by clicking on or pressing F2-UB instead of being presented as a line with the open invoices.

Accounts Payable

1. Changed Screens – Enter & Edit Vendor Invoices - When entering Vendor Invoices some of the screens will appear slightly different as this module was re-written to accommodate a new Container System. All of the same information is entered but in a slightly different order. When entering invoices for Inventory Vendors all accrued documents will now be selected under F5-Accrued Documents. Once you select Accrued Documents the first prompt will be the Type of document and will default to Purchase Order, you can change the type by pressing spacebar enter to select a Processing Purchase Order for instance. You can then enter the document number you would like to select.

There is a very handy option that you can use without changing the document type – F2-Document Inquiry. If you select the Document Inquiry the system will automatically show you all Open Accrued Items for the Vendor you have chosen. You can then use the F2 and F3 in that screen to add an remove documents. You can drill into a specific document if you need to adjust the values.

Other options that changed on the main Vendor invoice Screen include F6 which is now used to apply Container documents, F7 is now Laid in Cost and F8-Images will bring you to any documents you have tied to the Vendor you have chosen via inbound faxes or scanned documents.

2. New Feature – Stricter Date Control when entering Vendor Invoices for Accrued Documents. The system will no longer allow an invoice to be entered with a date in a prior month to an inventory receipt. This will ensure that the Accrued Document List does not get out of line with the general ledger. In the Past the system would allow an invoice to be entered in January and applied to a Purchase Order received in February. The result being inaccurate Accrued figures in January.

Sales Analysis

Inventory

1. When importing new or updated Inventory Records there is now an option to import the Price Table Code into the Inventory Master File. The Price Table that is referenced must exist in The BUSINESS EDGE.

2. New field – You can now enter Contract # when entering or importing Vendor Contract Costs. This is an open field that can be used for any type of reference back to the Vendor. Vendor Contract Costs are entered in Enter & Edit Products.

3. New Feature – When setting up Substitute Products you can now have the system automatically Substitute a Product on an Order. When entering the Substitute a new option has been added to the question Type of Order / PO Replacement – Auto Substitute. When this option is set and an order is entered for the original product the system will automatically change the order to use the substituted product. The user will also get a message so they are aware the Order was changed.

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General Ledger
Utilities

ISO System

1. New Feature – Users can now manually mark documents as on time or late or even revert back to calculated for the purpose of reporting on the Scorecard Reports for Customers and Vendors.

To change the status of documents Users can run the Scorecard to the screen displaying the documents. Drill into a specific document by clicking or pressing enter on the line. Then either click of press the function key to change the status of the selected document.

Users must be give permission in Enter & Edit User Permissions in order to edit these documents.

Branch Features