Order & Quote Entry System

1. New Feature - When entering and editing orders, if there are no products on the order, the system now takes you directly into the detail form to put in a new product - this will save the user from having to click on New Line on every order. This is a universal change to the system.

2. New Feature/Flag – There is now a way to enter multiple lines on an Order/Quote without having to press Enter or click on New Line. In the graphical interface this is a separate Program found under Documents called Quick Enter & Edit Orders. In the text interface there is a new flag – Use Quick Order Entry in tui found in Entity & System Flags – Order Entry screen 7 of 7.

   When using the new program or when the flag is set to Yes, Users will continually be automatically brought into a New Line. If a User is editing a line in the system it will bring them back to the detail lines. Once done with all of the line items Esc or Ok will take the user back to all of the line items. This speeds up the entry of an order significantly.

3. New Comment Field – An Internal Comment field has been added to the Enter & Edit Delivery Log. This comment can be viewed in the Delivery Log Inquiry.

4. New Feature – If your company has the flag set to automatically pop-up open Quotes, it will no longer do so if a User is entering an Order for a Product that has a contract price. This eliminates the possibility of overwriting the Contract Price with a Quoted Price.

Counter Sales System

1. New Feature – Convert Allocated Order to Counter Sales – In the past Counter Sales would only allow direct entry into the Counter Sales System. This new feature will enable Users to start an Order in Enter & Edit Orders and then convert it into a Counter Sales Order. This enables Users to enter an order and print a pick ticket for later pick-up by the Customer. Once the Order is converted into counter sales it will finish processing like all other counter sales Orders where the payment is integrated into the counter sales system. Payments made by Cash, Check or Credit card get automatically posted to the invoices.

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Purchase Order System

1. New Report - Vendor 12 Month Receipt History – This new report can be generated for any range of Vendors. Users enter a Date representing the 12 Month ending date. Users can choose to sequence the columns from Oldest to Newest or Newest to Oldest. When presented to the screen it can be put into Excel.

Processing Purchase Order System

1. New Flag - Default P.O. Cost during PPO Receipt Updated – In the past both Purchase Orders and Processing Purchase Orders shared the flag indicating how to update the Costs of the receipts. This new flag enables companies to change the Update default for PPO's so it can be different than PO's. The choices are to Update the Default PO Cost with the Raw Cost, Landed Cost or Do not Update. The setting that your company had for PO's was copied to the new PPO flag. This can be changed in Entity & System Flags – Purchase Orders, screen 1 of 4.

2. New Feature – Reverse PPO Status added to Reverse PPO's. When reversing a PPO there is now a new question on the first screen which enables to User to choose what to do with the PPO that is being reversed. The choices are Received, Sent, Open or to Delete the PPO. This saves extra steps of un-sending for instance if you need to change the PPO before re-sending and re-receiving.

Accounts Receivable

1. New fields available – The Salesperson Paid Commission Report will now include the Check Number and Date Paid when presented to the screen making it available in Excel.

2. Default Output change. The flags in Enter & Edit Customers, Invoice and Statement Output have been changed so they are more logical. There is a new question on the screen Batch Processing Output Option replaces the old Send During Batch Processing question.

   The Choices are None, E-mail, Fax, Print, E-mail and Print, Fax & Print, E-mail & Fax. The E-mail addresses and Fax number are still stored in the same screen. All Systems will be upgraded to send invoices that same way you have in the past for each Customer.

3. New Field – Customer Default PO number in Ship To Address. Default PO Numbers can now be stored in the Customer Address record, enabling Customers to have multiple Default PO Numbers. The Default PO can be

entered on the first screen in the Address record. If there is a Default PO in the chosen address it will over-ride the Customer Default PO in the main Customer record. If you would like to utilize this feature you will also want to change the flag below so that the PO gets filled in while the User is on the first screen.

4. New System Flag - Save One-Time Ship to Address as New Address? When entering a One-Time Ship to Address for a Customer this default answer Yes or No will be defaulted for all users. This new flag is located in Entity & System Flags Accounts Receivable.

5. Flag Change / New Flag – Previously there was a System Flag called Prompt for Ship Address before Order Detail, this has been changed to “when to Prompt for Ship Address”. The choices are Never, When No Default Ship Address or Force for every order.

   There is also a new Flag Where to Prompt for Ship Address, with two options: Customer Selection pop-Up or After First Screen in Order Entry. Selecting an Address before proceeding into the Order insures that the Shipper associated with the Ship to Address is filled in ahead of time as well as the Default PO Number if Uses are utilizing these fields in the Address record.

   The two flags together determine if and when the User gets the automatic screens.

6. New Flag - Invoice in Process Register-Separate Reports by Branch? If your company has multiple Branches and you answer Yes to this flag, the Invoices in Process Reports can be generated separately for each Branch. This flag is located in Entity & System Flags – Accounts Receivable.

Accounts Payable

1. Flag activated – The flag in Enter & Edit Vendors - Vendor Part # Required will now prevent Users from selecting an Alternate Part Number on a PO, PPO or Debit Memo if that Alternate Product Code is not related to that Vendor in Enter & Edit Alternate Product Codes. This is a strict flag that can be customized from Vendor to Vendor. If this flag is set to No any Alternate Product Code can be selected on the Vendor Documents.

2. New Feature – Change History in Vendor Inquiry – Changes made to Vendor Master records can now be viewed in Vendor Inquiry – Basic information – Change History.

Inventory

1. New Options – The newly re-written Non-Tracking Physical Counts can now be done by Product Code, Descriptions, Class or Alternate Product Code.

2. New Flag - Allow Deletion of Used Contract Prices? By Default the system does not allow Users to Delete Customer Contract prices that were used. This is so that Contract History can be maintained for your Customers. This new flag will allow Users to removed Contract Prices that have been used. If the contract pricing is removed reporting based on old Contract Prices will not be available. This new flag is located in Entity & System Flags – Inventory – Screen 3 of 4.

3. Menu Items moved to Tool Bar in graphical Interface. Enter & Edit Transfers has been added to Documents on the Tool Bar. Send and Receive Transfers has been added to Actions on the Tool Bar.

4. New Feature – Cost Estimates – This is an optional feature that is available at a cost. The new Estimating System

5. New Feature – Prompt Update of Alternate Descriptions when Product Description is changed. If a User changes the Internal Description on a Product the system will now Prompt with a question – Update Alternate Descriptions. If the User answers Yes all Alternate Descriptions will be updated with the same Description as the Product.

General Ledger

1. New Inquiry - G.L. Account Trans Inquiry by Update – This new Inquiry will show all transactions in a particular General Ledger Account with the Posting Date and also the Transaction Date. This is very useful if you find that a balance changed and suspect something was back dated.

Utilities

1. New Security Level Flag - Allowed to Duplicate Products? If this is set to No Users will not be able to use the Duplicate Products feature.

2. New Feature – Graphical Interface only. Lock Users after failed login – The system will now lock a User out of the system if they login incorrectly nine times. An e-mail will be sent to the User setup as the System Administrator in Enter & Edit Entity – Notifications. The Administrator can unlock or lock workstations in the Workstation Inquiry found in System Administrator.

3. New Report - Failed Outbound Document History – The report options include User (choose a specific user or all) and a Date Range. It will show all the documents that were e-mailed or faxed that do not have "Sent" as their status. This will include submitted documents. It will not include failed faxes/e-mails when the document was successfully re-sent.

4. New – Pop-up Notification When logging into the text interface, this report will show the user their failed documents for yesterday and today. When logging into the GUI, this report will open a new tab to show the user their failed documents for yesterday and today. "Yesterday and Today" on Monday means Friday, Saturday, Sunday, and Monday.