The BUSINESS EDGE
Revision Notes July through September 2009

Order & Quote Entry System

1. New fields added to be exported from report – Open Orders by Order Number – when this report is presented to the screen and put into Excel, any Sales Order Notes that are attached to the order will be included in the exported data. If there are multiple notes they will be joined together into one cell within Excel.

2. New Flag for Report – Show Prices on Open Order Report by Order Number – This flag will default to Yes. If you do not want to show prices on the Open Order Report by Order Number you can change this flag to No in Entity Flags – Order & Quote Entry.

3. New Report Options - Open Order Report by Date – You can now select a date range and choose to select orders by Order Date or Date Requested. When there is a schedule associated with an order the system will consider the schedule date when running by Date Requested.

4. New Flag option – There is a flag in the system, that if set to Yes, will warn Users when adding an item to a Sales Order, that it has created a negative availability. This flag has been expanded so that there are now three options – No Warning, Warn when there is negative availability, and the newly added option – Warn when the order quantity causes stock to go below the re-order point. The flag is located in Entity & System Flags – Order Entry on the 4th screen - Orders- Warn if Qty Ordered changes Available to – NO Warning, Negative Availability or Below Re-Order Point.

5. New Feature – New flags for Customers when printing PDF forms. You can now have forms sort the detail lines differently by Customer without affecting the order of the line items in the system. If you use the sort feature on the final screen the line items of an order are permanently sorted and cannot go back to the way they were originally. With these new flags the Order and Invoice formats can be sorted by Line #, Product Code, Product Description or Classification. The default is Line #. The forms that can be sorted are the Quote, Sales Order, Packing List and Invoice.

   This means that if you have a customer that wants their Packing List in order by Product Code you can change their flags and only their Packing List will change. These flags can be changed in Enter & Edit Customers, F5-More, F2-Forms.

6. New User Flag - Show Recent Purchase Costs in Order Entry – When this User Flag is set to Yes the last three purchase costs will be displayed on the bottom of the screen instead of the first line of the Line Comment. Users can still enter a comment by going into the function button for Line Comment. This flag can be changed in F1=Help, F4-User Flags.

Purchase Order System

1. New report option – When printing the Open Po's in Vendor Order there is a new question – New Page for each Vendor. The default answer to this question is No. This can be helpful if you would like to send the report to Vendors for expediting.

2. New Feature - Product Notes have been added to the receiving screen in Receive P.O's and Post Accrued. These are internal notes that are also available in Enter & Edit Products and Product Inquiry.

Processing Purchase Order System

1. New information on report - When printing the PPO Receipts in Process report it will now include open PPO's that need products received in the batch on the report if the system flag is set to include detail on the In-Process report. In the past only Sales Orders were included on this report.

Accounts Receivable

1. New Customer Flags – The output options for invoices and statements have now been separated. In the previous version Invoice output also applied to Statements. Now there is a screen to enter the Invoice Information and a separate screen to enter the Statement Information. Initially the invoice information will copy over to the statement flags. They can be changed in Enter & Edit Customers, F2-Default Output, F2-Invoice Output and F3-Statement Output.

2. New Feature – Minimum Finance Charge - If you charge your Customers Finance Charges you can now set a Minimum Finance Charge. If the Finance Charges calculated by the system are less than the minimum, the system will automatically charge the customer the minimum amount. This can be setup in Entity & System Flags – Accounts Receivable.

3. New Feature – Merge Customers – This new feature enables Users to combine two customers in The BUSINESS EDGE. After selecting the Primary Customer the one you want to keep, the User will be prompted for the Customer to be absorbed. There are options to merge Alternate Product Codes, Contract Prices, Notes and Addresses. After confirming the merge only the Primary Customer will be in the Customer Master file.

   This new feature is located in Accounts Receivable File Maintenance, Customer Miscellaneous Maintenance, Merge Customers.

4. New Flag – Use Master Customer for Alternates – If you are utilizing the Master Customer for Customer Contract Prices you can now also link an Alternate

Product Code to the Master Customer so that you do not have to maintain separate Alternate Product Codes for each account when there are multiple accounts using the same information. If you would like to utilize this feature the Customers need to have two flags set in Enter & Edit Customers – F5-Additional Info, F8-Master Customer – Select the Master Customer and answer Yes to Use Master Customer for Alternates.

Accounts Payable

1. New Feature – Remove Vendor Alternates – This selection enables you to remove some or all Alternate Product Codes on a Vendor by Vendor basis. After selecting a Vendor the system will present a list of Alternate Product Codes assigned to that particular Vendor. All Alternates will be marked for deletion. The User can then choose not to delete specific Alternates by pressing F2-Toggle Delete or by clicking on the Toggle Delete key. Upon exiting the screen the system will ask for the User to confirm that they would like to delete the Alternates that were selected for deletion and they will be removed.

   If there are other vendors or customers assigned to the same Alternate Product Code the selected Vendor will be removed and the Alternate Product Code will remain. If the selected Vendor is the only record assigned to their Alternate the Alternate Product Code will be removed from the system.

   This new feature is located in Accounts Payable File Maintenance, Vendor Miscellaneous Maintenance, Remove Vendor Alternates.

Sales Analysis

1. New report option – Customer Detail Sales by Ship Address/Product Report – this report is located in Customer Sales Analysis, More. This report will enable you to report on up to 3 User defined periods. If you run this report to the screen, you can click the Excel button and modify it to satisfy almost any Customer need.

Inventory

1. New flag - New Product Force Standard Info – This flag is in Enter & Edit Product Defaults – If you are using the Standard Cost or Standard Price fields you may want to set this new flag to Yes. Each time a new product is entered and this flag is set to Yes the User will automatically be prompted with the Standard Cost/Price screen. If you do not want to go into this screen each time you enter a Product, you can set it to No and then just select it when you need to. Enter and Edit Inventory defaults are located in Inventory File Maintenance just below Enter & Edit Products.

2. New Feature – Duplicate Products – This new feature will enable a User to select a Product and have the system create a new Product copying over selected information from the original Product.

   After selecting the Product you would like to duplicate the system will prompt the user with Yes/No questions to duplicate the following information which is optional: Contract Prices, Substitute Products, Bill of Materials / Process Definitions (for Manufacturing Clients), Stocking Values, Able Label Values and Document Groups. The User will then be prompted to enter the new Product Code. Once the new Product Code is entered the User will be in Enter & Edit Products for the new Product where they can change the Description and any other pertinent information.

   The following information is automatically duplicated: Product Description, Product Classification, General Ledger Accounts, Product Category, Standard and Default Costs, List Price, Units of Measure and the Product Default settings.

   Duplicating a product does not duplicate the following information – Vendor Contract Costs, Alternate Products, UPC Code, Product Notes, Product Lost Sales, Product Specification (this can be done in the manufacturing system) or Customer Bins.

   This new feature is located in Inventory System, Inventory File Maintenance, Duplicate & Merge Products.

3. New User flag related to Duplicating Products – When in a Sales Order and or Purchase Order when on the Detail Lines screen there has always been a feature to enter a new Product on the fly without leaving the document. Users can now choose to have this function be either Enter & Edit Products or Duplicate Products. This flag can be changed in User Flags – Inventory Prod+ Fkey Function – choosing either Enter & Edit Products or Duplicate Products.

4. New Feature – Merge Products - This feature will enable Users to combine two products. This is useful if different Users entered the same part using slightly different Product Codes. Once you have history on a Product you cannot remove it. This new feature solves that problem by combining the two Products into one.

   After selecting the Primary Product that you want to retain, you are prompted for the Product to be absorbed. There are options to merge Notes and Alternate Product Codes. After confirming, the information from both products will be reflected in the Primary Product. This is located in Inventory File Maintenance, Duplicate & Merger Products.

5. New Feature – RoHS and DFARS Compliance can now be tracked on a lot by lot basis. When the flags to track this information are set to Yes Users can set the

RoHS and DFARS flags on a lot by lot basis to either Yes, No or Unknown. When this flag is initially turned on all parts will be defaulted to No.

If you would like to use this feature the flags are in Setup Miscellaneous, 8. Enter & Edit System Tracking Flags. Track RoHS and Track DFARS. If your practice is to track this information by Part Number you would not use this feature.

General Ledger

1. New User Flag – Financial reports – Show GL Code – This new User Flag will default the question to Show GL Code when printing the Balance Sheet and Income Statement. This flag can be set in User Flags – General Ledger.

2. New Feature – Import Journal Entries has been integrated with Enter & Edit Journal Entries. Instead of importing Journal Entries as a separate menu choice Users can import them directly into the Enter & Edit Screen through the F3 key. This allows editing of the Journal Entry after it has been imported and before it is updated.

Utilities

1. New fields for export – When exporting Vendor Master File information you can now include the default output fields in your export format. These are the different e-mail addresses for documents. You could then update the information and import the information back into their system. This makes e-mailing documents such as PO's, PPO's RFQ's and Debit Memo's easier since the proper contacts will come up automatically.

2. New fields for export – When exporting Inventory Master File information you can now include the last PO Receipt Date and the last Sale Date to your format.

3. New Security Level Option – When setting up Security Levels one of the options was to allow a Level of Employee's permission to Fax documents from the system. This flag has been expanded to include both Faxing and E-mailing with PDF forms and reports.

4. New Export Option - Export Sales Journal Detail by Invoice Number – this new selection will enable users to export invoice detail information on an invoice by invoice basis. After setting up a format the User simply types in the invoice number or range of invoice numbers to include in the export. The data can then be exported to excel, a file on the server or e-mailed. This new selection is in Export AR Information, Export Sales.

5. New Export Option – Export Order & Quote Detail by Order Number – this new selection will enable users to export order detail information on an order by order basis. After setting up a format the User simply types in the Order number or range of Order numbers to include in the export. The data can then be exported to excel, a file on the server or e-mailed. This new selection is in Export Order & Quote Information, Export Order Detail by Order #.

Branch Features

1. New Report - Re-Order Point Usage Report this report provides detailed information on products within a product range within a branch. This includes similar information to the Re-Order Point by Branch. Usage figures and Previous Vendor purchases are also included.

2. New Feature – Edit Product Default Locations. If you are using Default locations that are tied to individual products you can update the default locations through a new menu item instead of going into Enter & Edit Products. This new selection is located in Inventory File Maintenance, Location System, Change Product Locations.