The BUSINESS EDGE
Revision Notes September 2012 to January 2013

Graphical Interface

1. New Feature – Multiple Window support – Users that have multiple monitors or would like to run multiple copies of the graphical interface at the same time can now do this with this new feature. Any item in the menu or tool bar can be launched in its own window by right clicking on the item and selecting "Open in New Window".

2. New Feature – Re-organizing My Tasks – Users can now re-organize their My Tasks Menu. Click on My Tasks to display the items you selected to be in your personal Menu. Right Click on an item and choose Move Up, or Move Down to change the Order of your tasks. Users can also right click on and item and drag it to a different location in their My Tasks.

3. New Inquiry and additional information. There is a new version of the Product Inquiry called Product Inquiry-Expert. This new inquiry is available under Inquiries from the Tool Bar. The first screen of this inquiry has different information including Stocking and Usage information. In both Product Inquiries, users will now have additional information available which is optional. This includes Product Sales History, Recent Sales, Recent Receipts, Open Documents, and Lot Tracking Availability. Users may have to adjust screen resolution to view all of the information easily. Next to each of the categories there are (+) that users can click on to see all of the transactions in each category. This additional information can be turned on or off with a User flag found in Edit, General Flags, Show Additional Information Grids. Users that do not have a large screen may not want this flag turned on.

4. New Information added to Customer Inquiry - The system will now display additional information on the first screen of the Customer Inquiry. This includes Sales History, Recent Invoices, an Aging of their Open Invoices as well as Recent Payments. Clicking on the + in the top right hand corner of each category will show additional detail for each category. This is an option and can be turned on and off by changing a User Flag. To change this flag, click on Edit, General Flags, Show additional Information Grids can be set to Yes or No. This additional information can be turned on or off with a User flag found in Edit, General Flags, and Show Additional Information Grids. Users that do not have a large screen may not want this flag turned on.

5. New Information added to Vendor Inquiry - The system will now display additional information on the first screen of the Vendor Inquiry. This includes Recent Invoices, Aging and Recent Payments. Clicking on the + in the top right hand corner of each category will show additional detail for

each category. This is an option and can be turned on and off by changing a User Flag. To change this flag, click on Edit, General Flags, Show additional Information Grids can be set to Yes or No. This additional information can be turned on or off with a User flag found in Edit, General Flags, Show Additional Information Grids. Users that do not have a large screen may not want this flag turned on.

6. New information added to Sales Order Detail Lines – The system will now display on the detail line – Customer Recent Product Sales, Lot Tracking Detail, Product Notes and Recent Sales to all Customers. Clicking on the + in the top right hand corner of each category will show additional detail for each category. This additional information can be turned on or off with a User flag found in Edit, General Flags, Show Additional Information Grids. Users that do not have a large screen may not want this flag turned on.

7. New Feature – My Options - The My Options menu is a feature recently added to The BUSINESSEDGE 2.0 which allows you to create your own options menu for quicker access to your commonly run options. The My Options menu is located at the far right area of every task/tab and is always the last menu in the list. You can add any of the options on the right to the My Options by simply dragging the item and dropping it on the My Options menu or right clicking on the option you would like to add.

   You can view your My Options menu by clicking the My Options bar on the right or by pressing the Hot Key combination ALT-0. This will expand the My Options menu and display all the available options.

   When you add an item to the My Options menu the item is automatically added to the bottom of the My Options menu and assigned a Hot Key combination from F1 – F12. You can organize the My Options menu items to appear in the order you want by dragging and dropping items on one another. The dragged item will appear above the item that it was dropped on and the Hot Key combination will be updated. You can also reorganize your list by right-clicking on a item and selecting “Move Up” or “Move Down”. To remove an item from the My Options menu right-click on it and select “Remove Item”.

8. New Options for new information added to screens – Many screens now have optional additional information available as explained above. Some of the information may not apply to all Companies. Users can now re-organize the information by dragging and dropping with their mouse. Users can hide information they do not want to see. If your company does not use Price Tables for instance, that information can be removed, by right clicking on the heading and clicking on Hide. On the bottom left of each screen there is a button for Optional Information, Users can check or

un-check items here as well. If an area was set to hide, it can be displayed again by clicking on the box in the Optional Information. Each of the information grids can also be customized as in other areas by sizing the columns as well as choosing which columns you would like displayed.

Order & Quote Entry System

1. New System – Customer Promotional Pricing – This new system enables you to select Customers that are eligible for Special Pricing on select Products for a defined time period.

   There is a new Question in the Customer Master File as well as the Customer Default file for new Customers. In Enter & Edit Customers, Additional Information the new question is Allow Promotional Prices. If this is set to Yes the Customer will receive special pricing based on the Promotional Prices entered.

   Promotional Prices are entered in Inventory File Maintenance, Selling Price Maintenance, Promotion Price Maintenance. There are two menu items, Enter & Edit Promotions and List Promotions.

   In Enter & Edit Promotions a Promotion Code is entered. An example might be a Nov2012, the description would be November 2012. Items are then entered along with the Price, Beginning Date and Ending Date. The list can be edited at any time by selecting the Promotion Code. Customers that are set to receive the Promotional Pricing will automatically receive the special price for the time period indicated in the Promotional pricing. The promotional pricing is based on the Order Date.

   Multiple Promotions can be maintained with different Promotion Codes. If you have a new promotion starting in the future you simply make the Beginning Date a future Date.

   When an Order is entered the system checks to see if there is a price table for the specific Customer and Product, if so they will get that price. Then the system will check to see if there is a promotion, if there is the price table price will be over-ridden by the Promotional Price. The system will then check to see if the Customer has contract pricing for the item and if they do that will over-ride the Promotional Price.

2. New System Flag – Show Customer Pick/Pack Inst in Order Entry? When this is set to Yes Users will see the following:

In a detail line in F6=Comments (GUI F3=Comments), you will see three lines of the customer's Picking Instruction and 3 lines of the Packing Instruction. In the GUI, you will see both in their entirety, as well as the Order Heading Instructions.

In Final Order and Pick Instructions, you will see two lines of the customer's Picking Instructions and Packing instructions in the TUI. In the GUI, you will see both in their entirety and also the Order Heading Instructions.

There is also a new Fkey in the Detail Line Comments and Final Comments that will let you view the Customer's Comments (Order Heading Instructions, Picking Instructions, and Packing Instructions).

3. Report Addition – When running the Open Orders by Customer Report to the screen, totals will now be presented in the heading.

4. New Feature – There are now new options to change the One Time Ship to Address on a Sales Order. These options are located in Addresses, One Time Ship To – the new selections are Entity and Vendor.

5. New Feature - Re-Price Orders – Sales Orders can now be re-priced based on current selling prices based on price tables, contract prices or special prices. This can be useful if an Order is duplicated or imported and the current prices are not up to date. When in an Order at the Detail lines there is an fkey/button to Re-price/Update Sell Prices.

6. New Flag – Limit Lot Tracking on PDF Picking Ticket to – For companies that are Lot Tracking and Printing available lots on the pick ticket, this new flag will limit the number of Lot/Location's printed on the Picking Ticket. The default is to Show All and a percentage such as 10% can be entered here so that products with an abundance of stock locations will be limited. This new flag is located in Entity & System Flags – Order Entry – Screen 7 of 7.

7. New Flag – Orders – Price Change Option – When a quantity is changed on a Sales Order some companies would like the price to reflect the new quantity, other companies do not want to change the price automatically. This new Flag enables companies to choose how they want the system to handle pricing when the quantity on an order is changed. The choices are Confirm Change, Don't Change or Change Automatically. This flag is located in Entity & System Flags – Order Entry Screen 4.

8. New Flag - Send Shipping Confirmation to Contact after Invoice Created – This new flag only applies to companies that have the Integrated UPS feature. If this flag is set to Yes the Contact assigned to the Sales Order

can receive a copy of the Packing List with the UPS Tracking Numbers. This only applies to PDF forms and regular orders; it is not used for Counter Sales Orders. If you would like to utilize this new feature the Packing List format will need to be changed to include the UPS Tracking Information – normal hourly charges would apply to the form changes.

Purchase Order System

1. New Warning – When in Print Purchase Orders if the User chooses to print more than 24 Purchase Orders at one time they will not receive a warning.

2. New System Flag – Warn Zero Quantity on PO? When this flag is set to Yes Users will get a warning when they do not enter a Quantity on a Purchase Order. This new flag is located in Entity & System Flags Purchase Orders.

3. ARS – The graphical interface will now work the same way as the text interface when pulling up existing batches. After preparing documents when a User goes into Select Documents for Products they will automatically go into the batch they most recently created. If a User wants to go into a previously prepared batch they can do so by going into Auto Replenishment Maintenance, Open Batch Inquiry. Click or enter on the batch you would like to make the active batch. When the user returns to Select Documents for Products the selected Batch will now be the Active Batch.

4. New Report Feature – Open Request for Quote Report – There is a new option to include detail on this report. This report is located in Vendor Request for Quote System, Request for Quotes Reports.

5. New System Flag – Show PO Message Screen before Final Screen – If this flag is set to Yes, Users will have an additional screen in Enter & Edit PO's before proceeding to the final screen. This new screen will provide the opportunity to type in a Final Message, Special Note Comment or enter a Receiving Location for that particular PO. This flag is located in Entity & System Flags – Purchase Orders screen 4. The default answer will be No.

6. New System Flag – P.O's Change Vendor-Update Detail Alternates – When this flag is set to Yes and a User changes the Vendor on a PO the system will update the Alternate Product Codes to match the new Vendor. This flag is located in Entity & System Flags – Purchase Orders screen 4. The default answer will be No.

7. New System Flag – P.O's Change Vendor-Update Detail Costs – When this flag is set to Yes and a User changes the Vendor on a PO, the system will update the Costs on the PO based on the new Vendors Contract Costs. This flag is located in Entity & System Flags – Purchase Orders screen 4. The default answer will be No.
8.

Processing Purchase Order System

1. New Report Location – The PPO Receiving Document can now be accessed from the Processing PO Menu, Print & Fax Processing PO's. The Faxing options have been consolidated to allow for this menu addition. In the past you could only print a PPO Receiving Document from within the document.

Accounts Receivable

1. New Inquiry – Customer Inventory Report – This report enables Users to select a specific customer and list all products that have an alternate product code for that customer. There is an option to only include items that are either on hand or on PO. The fields included are Customer Code, Customer Name, Product Code, Quantity On Hand, Quantity on PO, Description and Alternate Product Code. This report can be viewed on the screen or exported to Excel. This new inquiry is located in Customer Sales Analysis, More Customer Sales Analysis. This report was created custom for a client so it cannot be changed.

2. New Feature – You can now send a Packing List to Order Contact during the Invoicing process. There is a new System flag - Send Shipping Confirmation to Contact after Invoice Creation – When this flag is set to Yes, and the order has a contact assigned to it with a valid e-mail address, then the system will pop-up an e-mail screen after the invoice is created to send the packing list to the order contact. If there is no valid e-mail address, but the fax is valid, then the user will be prompted to fax the packing list to the order contact. If there is no contact, or the contact has no e-mail or fax, then the system does not prompt to send the packing list. This flag is located in Entity & System Flags – Accounts Receivable.

3. New Flag - Print Invoice Detail on Invoice in Process Register? If you normally would like the Invoices in Process Register to include the Detail this flag can be set to Yes. This way the User does not have to remember to change the answer each time the report is generated. This flag is located in Entity & System Flags – Accounts Receivable.

Accounts Payable

1. New Field – Graphical interface only - When selecting Accrued Documents while entering a Vendor Invoice the Vendor Sales Order field will now be a column that Users can chose to see on the screen. This may be helpful when matching up Invoices with Purchase Orders that have Backorders.

2. New Feature – The System can now e-mail and/or instant message specified Users when a check run or deposit is updated. The e-mail will come from the User logged in the system when the check or deposit is updated. The Users that receive the email are setup in Enter & Edit Entity – Notifications.

3. New System – Send ACH Payments – If your company is sending Vendors ACH payments this new system will enable you to Fax, E-mail or Print ACH Advices to send to your Vendors. The Vendors method of delivery is setup in Enter & Edit Vendors. After creating a batch of checks the advices can be sent out in the new ACH Remittance Advices Menu below. They can be sent individually or in a batch similar to the way Customer Invoices are sent. Detailed instructions can be found in our tips located at www.ci-inc.com/tips under Accounts Payable.

   Accounts Payable System
   - Check Routines & Reconciliation
     - Process Individual Checks
       - Print AP Checks
         - ACH Remittance Advices

4. New Feature – Merge Vendor History – This new feature will enable Users to merge history for two vendors into one. This is useful if you would like to combine two vendors into one or if you would like to merge old vendors you do not want to have in the system anymore into one obsolete vendor. All Purchase and Payment History will be merged into the Main Vendor. Optionally Alternate Product Codes, Unique Contact Prices, Notes, Addresses and Contacts can be merged into the Primary Vendor. This process cannot be reversed.

   This new feature is located in Accounts Payable, Vendor Misc. Maintenance, Merge Vendor History.

Inventory

1. New Column in Open Documents (Graphical Interface Only) – When viewing Open Documents there is a new column that can be included by clicking on the Heading screen and then Columns. The new field will represent the Total Quantity on Orders – this will include Open, Allocated and Reserved Quantities.

2. New Field in Inquiry – In a Product Inquiry when viewing RFQ's there is now an additional field that can be chosen in the graphical interface – Vendor Reference from the heading of the Request for Quote screen.

3. Menu Change – There are multiple menu items that can be used to increase/decrease Cost and List prices in ranges. These five menu items have been consolidated into a single menu located in Inventory File Maintenance, Selling Price Maintenance, Assign Changes to Inventory.

4. New Flag for Expert Product Inquiry – Text interface only – Expert Product Inquiry Qty Shown as - When viewing product that is on documents due to ship or be received the system can present this information either grouped by document or as In/Out and Available Quantities. This is a system flag located in Entity & System Flags – inventory, Screen 4.

5. New Menu Options – Adjust Using License Plate & Split License Plate. The License Plate is the internal tracking number used with the Wireless Warehouse. These options were only previously available on the Wireless scanners. They will enable users to type in a License Plate and either adjust or split it into two license plates. These options are available in Inventory File Maintenance, Lot Tracking Maintenance.

6. Menu Change – Edit Product Lot Cost has been moved to Inventory File Maintenance, Lot Tracking Maintenance. This item was previously in the Inventory Menu.

7. New information – When Product is Reserved with the new Order Reservation System, the reserved quantity will now be included along with any allocated quantity when looking at Lot Tracking Detail or Allocated Inventory screens.

8. New Flag - Comment to Use for Open Documents – When viewing Open Documents in a Product Inquiry there are now options of what information to show for Open Purchase Orders in the Comment column. The choices are Final Message, Line Comment or Schedule Line Comment. This flag can be changed in Entity & System Flags – Inventory. The default is the line comment for the Order line.

Sales Analysis

1. New Report – Customer Inventory Report – This new report can be generated for a specific Customer and will only include Product that has an Alternate Product Code for that Customer. After selecting the Customer there is an option to only include Products that are either on-hand or on P.O. The columns included are Customer Name, Customer Code, Product Code, Customer Product Code, Product Description, Quantity On Hand, and Quantity on Po.

Utilities

documentConnection

1. New Feature – Vendor Documents can now be scanned into the Vendor Record in Vendor Inquiry – Choose Images & Faxes and then Scan Vendor Documents.

2. New Feature – Default Output method is now available for all Documents. Each document can be defaulted the most common way you sent them out. If you typically Fax Order Acknowledgments and Email Purchase Orders the system can be setup to default with those selections.

   The System default is Paper and each document can be changed in the document setup which is located in the menu below.

   Utilities
   - System Administrator System
     - System Set Up
       - Miscellaneous Setup
         - Entity & System Flags
           - Document Flags
             - Document Form Numbers

   Once in Document Form Numbers, click on Form Options and select the document you would like to change. Enter or Click on the document type and the first question is Default Output to. You can choose from Paper, Adobe, Fax or E-mail. If you would like assistance making these changes simply call our Customer Support team.

ISO / Quality System

1. New Feature – Users can now enter a reason the Customer Order was late. There is a new input screen where possible reasons for being late

can be entered. This is located in Quality Assurance System Setup, Scorecard Setup. Then when viewing the Customer Scorecard report, Users can drill into a late entry and choose the reason that it was late. This might be that the product was out of stock for instance.

There is also a "Late items" button from the main Customer Scorecard Report screen that shows all late items for all customers for the time period.Users can drill into each of those to enter the reason why the item was late and also use the Pareto Report Button to analyze why orders are late: