Order & Quote Entry System

1. New Feature: Now, when you change an Order Type from Quote to something else and the customer on the order is set to Customer Type: Prospect or Lead the system will now ask you if you would like to change the customer type to Customer. If you are sending a sample to a prospect with order entry you might not want to change them from Prospect.
2. New Feature: Only customers set to Customer Type: Customer will show up in lists when in Enter & Edit Orders unless the Order Type is set to Quote
3. New Feature: Only active customers will be included in lists when in Enter & Edit Orders.
4. New Optional Column: The following columns have been added to the Open Orders by Customer – All Detail. These columns include: Internal Comments, Customer Quote Comments, Acknowledgment Comments, Picking Ticket Comments, Packing List Comments. This report is located in Order & Quote Entry System, Order Reports, Open Order Reports, Open Orders by Customer – All Detail
5. New Optional Column: The following columns have been added to the Shipping Schedule – Show Documents report: Extra/Non-Stock Desc, Internal Comments, Customer Quote Comments, Acknowledgment Comments. The Shipping Schedule-Show Documents report is located in Order & Quote Entry System, Order Reports, Scheduling & Expediting Reports, Shipping Schedule – Show Documents
6. New Optional Column: The following columns have been added to the Ship Schedule by Cust-Part-Date: Extra/Non-Stock Desc, Customer Quote Comments, Acknowledgment Comments, Picking Ticket Comments, Packing List Comments, Function, Inside Salesperson, Inside Salesperson Description, Group, Group Name, Cost Center, Cost Center Name. The Ship Schedule by Cust-Part-Date report is located in Order & Quote Entry System, Order Reports, Scheduling & Expediting Reports, Ship Schedule by Cust-Part-Date
7. New Optional Column: The following columns have been added to the Open Orders by Shipper report: Extra Shipper Description, Packing List Printed, Delivery Log Number and Status, Ship to Address. The Open Orders by Shipper report is located in Order & Quote Entry System, Order Reports, Open Order Reports, Open Orders by Shipper
8. New Feature: Now, in counter sales when in the payment screen you will no longer use F6=Cancel Invoice. Now, you will use the delete button at the bottom of the screen. When the counter sales invoice is deleted, the system will take you back to the screen that the invoice was created from. This should allow you to change the order lines easier without having to go back into the order from the beginning. The output options screen will show the total, amount tendered and change amount when printing the invoice.

Purchase Order System

1. New Feature: Quick Purchase Order Entry is available as a user flag in Enter & Edit User Flags-Purchase Orders

2. New inquiry- The Receipts Journal by License Plate will show each product receipt by license plate. The inquiry can be shown by date range and product code. The Receipt Journal by License Plate is located in Purchase Order System, Purchase Order Reports, PO Receipts Journals, Receipts Journal by License Plate.

3. New Optional Column: New columns have been added to the Open P.O. Not Confirmed List report which include: Total Value, Total Weight, Total Quantity, Received Amount. The Open P.O. Not Confirmed List is located in Purchase Order System, Purchase Order Reports, Open P.O. Reports, Open P.O. Not Confirmed List.

Processing Purchase Orders

1. New Optional Column: New optional column for Line Comment added to Enter & Edit PPO detail line grid.

Supply Chain Network

Inventory

Accounts Receivable

1. New Option added to Report: The “Customer Last Activity Report” can be used to change the customers’ to Inactive/Active state with new buttons and right-click options. Accounts Receivable System, Accounts Receivable Reports, Customer Activity Reports, Last Sale Activity, Customer Last Activity Report

2. New Feature: In Customer Inquiry each user can choose what customer types will show up in lookup lists. The default will be All.

3. New Optional Column: A column for Credit Hold has been added to the Customer Aged Analysis grids. This will show the user name who put the customer on credit hold along with the date & time.
4. New Optional Column: The following columns have been added to the By Salesperson with Detail: Function, Inside Salesperson, Inside Salesperson Description, Group, Group Name, Cost Center, Cost Center Name. The by Salesperson with Detail report is located in Accounts Receivable System, Accounts Receivable Reports, Sales Journals, By Salesperson, By Salesperson with Detail
5. New Feature: The system will now warn when you enter a note with a Note Category that you are filtering out. If your settings do not include the note category that you are entering a note for, the system will warn you that the note will not be visible to you based on your settings

Accounts Payable

6. New Optional Column: There is now an optional column for PO Status in Vendor Inquiry, Open PO Inquiry.

Fastener Supply Chain Network

7. New Feature: The Parts Base connection is an inventory sourcing site that helps people find parts to buy and allows people to upload their inventory for people to find. You can now take advantage of these features without leaving The Business Edge.

Utilities

8. New Feature: A new security flag will hide prospects and leads from certain users. This will override the user’s flag if they do not have permission to see Prospects and Leads. This is located in Utilities, System Administrator System, Security System, Enter & Edit User Permissions.

Quality

9. New Feature: The Certificate Management system has been enhanced to be utilized with RFQ's and with PPOs. Now, the RFQ's have the default certificate requirements for the product automatically added to them and then the user can change them on an RFQ by RFQ basis. The certificate requirements on the RFQ will be transferred to the PO if they use the RFQ to PO function. PPO's can also have certificate requirements associated with them. The difference here is that each certificate requirement has an option: Vendor Provides Cert – the PPO vendor sends a cert in with the material Raw Material Certificate Required- the raw material allocated to the PPO needs the certificate in order to be allocated. When receiving the PPO, the certificates from the raw material flow up to the new lot automatically, and then the user is prompted to scan in the certificates from the vendor. There is now also an option to enter default certificate requirements for the product class. If the product is part of a class that has default certificates, those certificates will be brought into the RFQ/PO/PPO. There is also a new option in E&E Customers for their Default Order Certificates – that only requires a certificate IF the product requires the certificate when Purchasing

Graphical Interface

10. New Feature: There is now a button in send documents via email to CC yourself on the right-hand side.
11. New Feature: There is a new feature that will list all of the menu items a user has access to inside the Menu Tree. Since it looks at the user's security settings different users can have different lists. Lists can also be different on different systems based on how system and entity flags are set. If you select an item it will open the program in a new tab.