The BUSINESS EDGE Release Notes 01-15-15 through 04-30-15

Order & Quote Entry System

1. The optional information grid that displays previous line items on an Order will now include Quantity, Price and Units of Measure.

2. New columns available – When viewing the Detail Lines in Enter & Edit Orders Tax Authority and Tax Amount are now available columns. This is helpful if you have customers that pay tax on some items and not others. If you would like to see these fields, mouse over the heading screen, click on the down arrow and then click on columns to choose your fields.

3. New field – When in the Detail line of a Sales Order you can now see the Item Extension. In the past you had to be at New Line to see the total value of each line.

4. New Fields in Shipping Schedule – Show Documents. In the graphical interface Users can now select columns for On Hand and Available Inventory when viewing this menu item. Shipping Schedule – Show Documents is located in Order Reports, Scheduling & Expediting Reports.

Purchase Order System

1. New Sort – Open PO's shown in the optional information grids will now sort by Date Requested.

2. New information on screen – Vendor Phone Number is now visible on the Detail lines screen for convenience.

3. New Fields Added – When viewing the Detail Lines of a Purchase Order in the graphical interface there are new fields that can be chosen. These include Landed Cost and Branch Values.

Inventory

1. New Feature/Changes to Editing Lot information – There have been a few changes to the Lot Tracking Maintenance Menu. Enter & Edit Product Mfg Info is now called Enter & Edit Lot Information. This will allow for editing and updating on hand lots as well as lot history. The following fields can be edited: Manufacturer, Manufacturer's Lot Number, Date of Manufacturer, Country of Origin, Heat Number, Country where Melted, RoHS Compliant, DFARs

Compliant and Expiration Date. This is located in Inventory System, Lot Tracking Maintenance.

2. New Feature/Menu Item Name Change - Edit Product Label Comments is now called Edit License Plate Information. In addition to enabling the updating of the Label Comment, Weight and Package Quantities can be edited here. This will only change on hand lots.

3. New Report Option - Product Sales Activity Report can now be generated by Branch. This report is located in Inventory Reports, Usage Reports.

4. New Sort on some inquiries – Systems that have branches may see a difference in how some of the inquiries sort. Some screens were sorting by branch name and others by branch code. All inquiries will now sort by branch code.

5. Report Branch enabled – The Detailed Inventory Report will now show Branch Values on Branch enabled systems. This report is located in Inventory Reports, Inventory Lists, Detailed Inventory Report.

6. View Change – Text Interface Only – The F4-Basic Information screen in Product Inquiry has been changed to make it easier to read while adding some new sub-totals. The Quantities On Hand, Coming in and Going out have been organized so that Users can get a quick view of what inventory is Available for Sale as well as Available to Promise based on all of the incoming and outgoing documents. Costs, List Price and Total Value can now be viewed in F10 – Lot Tracking Availability on tracked Products or F10- Detail Cost Availability on non-tracked Products.

7. Columns added to Product Selection grids for Non-Branch enabled systems. When Users are looking up a part in the graphical interface the Product Selection Grid appears with the parts in the range they are searching. Additional columns have been added as optional columns for Users to view. The available fields now include On hand, Allocated, In Warehouse, Going out and Coming In. On Hand minus Allocated equals In Warehouse. Going out equals Available if your system is not set to add PO's coming in to the Available. If your system is set to add PO's coming in to the Available then they will be included in the Coming in value.

8. Additional columns available for Substitute Products – In the graphical interface Substitute Products can be viewed as an Optional Information grid. Additional fields have been added so you can customize what you would like to see. On Hand, Available to Sell, Allocated, Reserved, Coming in and Available to sell are now options.

9. New Optional Information Grid – When in Enter & Edit Transfer for Branch enabled systems, Users can now choose to see the Branch Stocking Values when in a detail line.

10. New Fields in Inquiry – While in a Product Inquiry and viewing Customer Quotes or Sales Orders under the Documents Section, Users can now choose to see the Salesperson code and or Salesperson Name in the graphical interface.

11. New Default in Enter & Edit Product Classifications. If your company pays commission based on profit you can now set a default percentage of profit for new classifications. In some cases it is the same for every class, setting it up in this new default ensures you do not omit adding the commissions to new classifications.

Accounts Receivable System

1. New Feature – When the Ship Via on an Order/Invoice is set to Customer Pays freight, the system will force the User to add Freight to an Invoice. If freight is not being added to the Invoice, the Ship Via needs to be changed. Customer Pays freight is a flag that is setup in each individual Shipper record. Enter & Edit Shippers is located in Accounts Receivable File Maintenance as well as under Master Files on the toolbar.

2. New Inquiry – Graphical Interface only – Customer Sales by Class Family - When in a Customer Inquiry there is a new screen available under the History Tab – Product Class Families. After choosing a range of Class Families and Dates the system will provide a grid by Class Family showing Sales, Cost, Profit, Percent of Profit and Percent of total Sales. When Summarize is answered Yes it will be a summary by Family, when it is set to No each Class will be displayed with the Family.

3. New Inquiry – Salesperson Sales by Class/Family - When in a Customer Inquiry there is a new screen available under the History Tab – Product Class Families.

After choosing a range of Class Families and Dates the system will provide a grid by Class Family showing Sales, Cost, Profit, Percent of Profit and Percent of total Sales. When Summarize is answered Yes it will be a summary by Family, when it is set to No each Class will be displayed with the Family.

4. New Flag in Miscellaneous Charges – Copy to Backorder. Miscellaneous Charges can be setup to copy to backorders on an individual basis. Mandatory Miscellaneous Charge flags will over-ride this flag. When the flag in the Miscellaneous Charge is set to Yes, the Miscellaneous Charge will copy over to every revision of an Order.

   This is very helpful when using Miscellaneous Charges for Certificates.

Sales Analysis

1. New Column in Sales by Product Classification Family – A column has been added that represents the % each line represents from the entire report. This makes it easier to see which products are the largest portions of sales.

2. New Column in Product Sales and Profit – when this report is presented in a grid a column has been added for Product Classification.