The BUSINESS EDGE
Revision Notes August through October 2011

Graphical Interface

1. Grid Tips will now stay on the screen for 30 seconds or until you click the [x] button in the top right corner. Some of the grid tips have a lot of information and it was too difficult to read all of the information in the few seconds they were previously displayed.

   An example of a grid tip is for instance when you do a Product Inquiry and do a partial lookup. If you have a product with activity there is an icon next to the Available Quantity that will change in color based on the type of activity. Blue means there are open commitments or product coming in. Yellow indicates negative availability that has been put on a PO or PPO. Red indicates negative availability that has not been covered with a PO or PPO. When you move your mouse over the grid tip the system will display the values for that product.

2. New button on Tool Bar – Reload. If you are in a tab that is not responding to anything, the Reload button will re-sync the workstations application with the server which may fix the problem.

3. New Feature – Process recovery – If a workstation loses power or connectivity, the next time the application all of the tabs that were open will re-appear. This feature is tied to the login name so it is important that each workstation has a unique login. If a user logs in as a user on another machine the application will be closed on the other machine and the newly logged in User will take over their tabs.

4. New Feature – when a record is locked by another user the system will now show an icon of a lock. When you mouse over the lock icon it will indicate the User Name, Date and Time of the lock.

5. New Feature – The application on the workstation can now detect changes on the server and will only download what is needed. This will increase the speed of starting the application.

6. When using the recent list where the system will show your recent documents or records that were previously selected a new icon will appear if the record is locked. The icon is a yellow padlock. If you see this icon that means that the record is being changed by another user or you possibly have it open in another tab. Two Users can not be editing the same record/document at the same time.

Order & Quote Entry System

1. New Inquiry - Open Orders by Type with Detail – This new report can be generated for all Order types or an individual Order type. Some companies want to isolate quotes for instance. There is also a question which will enable both open and closed orders to be included. The heading will include a summary including the Number of Orders, Number of line items and the value of those Orders.

   Each line item on an order will be included in this Inquiry. When put into Excel the order and line items are included including Salesperson information, Product information and more detailed customer information.

2. New Feature – If a user clicks on Create Invoice and the Order has not been allocated the system will now prompt the user to confirm that they really want to create an invoice.

3. New Flag – Warn User if Printing Packing List for Un-Allocated Order. When this flag is set to Yes, Users will get a warning if they attempt to print a packing list before an order has been allocated. The default setting for this flag will be No since not all companies allocate before printing a packing list.

4. New Options – Print Pick Tickets not printed – Two new options have been added to this program. Include Allocated Orders and Skip Orders without stock Available. This program will show all order that a Pick Ticket has not been printed for. These new options enable users to create a more useful list based on their procedures.

5. New Flag – Allow Backorders on an Order Detail Line. On a line by line basis users can over-ride the Order Shipping Option on the heading screen of sales orders. In the graphical interface this can be found in the Detail Flags and in the text interface it can be found under the F7-More options.

6. New Inquiry/Report – The first screen of this new report will present Sales Orders for a specified date range in a grid. There will be a summary on the heading showing Booked Sales, Booked Costs, Booked Gross Profit and Gross Profit %. The Costs are based on the Unit Cost in the Order Line when the Order was entered. If the Order is immediately allocated which is not common then the allocated cost will be used. This is not necessarily an accurate cost since actual cost will be dependent on the on hand inventory at the time of allocating and invoicing.

   There are buttons on the bottom of the screen representing Changed Orders, Deleted Orders and a Salesperson Summary.

Purchase Order System

1. New Feature – When viewing a Purchase Order Inquiry for a Purchase Order that has already been received the system will now show the Raw Cost, Landed Cost and Extension based on the values the Purchase Order was received at. Previously the inquiry displayed the original values on the PO.
2. New RFQ Detail Line options – When using the graphical interface there are additional inquires now available – Under the Inquiries button users can now view Purchase History and a Cardex Inquiry.

Accounts Receivable

1. New report Option – When running the Customer Last Activity Report users can now select a specific sales person to generate this report for. This report is located in Accounts Receivable Reports, Customer Activity Reports, Customer Last Activity Report.

2. Report Change – Sales Journal Report – In the past this report would include Invoices that were created but not updated. Un-updated invoices will no longer be included in this report. Un-updated invoices could report incorrect costs if a lot cost was changed between the time the invoice was created and updated.

3. New User Flag - A/R Invoices Range Sequence By – Each User has new options when viewing invoices in a Customer Inquiry. The new choices are Newest to Oldest by Invoice Date or Newest to Oldest by Due Date. This flag can be set in User Flags – Accounts Receivable on the second screen.

4. New Feature – Accounts Receivable Checks will now be presented with the most recent check on the top of the grid. In the past the oldest was presented first causing users to scroll to the bottom to see the most recent payments.

5. New pop-up box – Clear UPS Worldship Info on Order. If you have the integrated UPS Worldship and an invoice is canceled the system will now prompt the user to clear the UPS Worldship information on the order. If they select yes the system will consolidate the shippers into one and when a new Picking Ticket is printed the system will re-write the information to the tbeinfo file on the server for UPS to read the next time the order is processed in Worldship.

Accounts Payable

1. New Feature – When using the new Reconcile Cash System there is a new button to enter a journal entry while clearing the transactions. The entry will automatically assume the cash account that is being reconciled is part of the entry. The journal entry will be dated the same as the Bank Statement Date. After updating the entry it can be immediately cleared in the listing of un-cleared transactions.

Inventory

1. New Feature – When viewing detail lines in document inquiries such as the Order Inquiry, Invoice Inquiry, Po Inquiry, PPO Inquiry the system will now display the available information for that product on the screen.

Utilities

1. New Feature – Customize Forms Default E-mail/Fax Subject Line. The subject line can now be customized when E-mailing and Faxing documents from The BUSINESS EDGE. Each document can have a different subject line. The choices are Document Type and Document Number which is the current default, Document Type from Company Name, Document Type, Document Number from Company Name or Blank so users can type in their own subject line.

   This is setup in Utilities, Document Flags, Document Form Numbers. Once in the Forms Number setup click on Form Options which can be selected by clicking on the button or pressing the Fkey. After highlighting the document i.e. PO format make your selection at the E-mail/Fax Subject line. No other settings should be changed on this screen as they will affect the printing of your forms.

2. New fields for export – When exporting Customer Master File information from the Export Menu the following fields have been added as choices to export -Order Heading Instructions, Picking Instructions and Packing Instructions.
3. New fields for export – Shipping and Quality Flags have been added to the system for exporting Order Detail Lines and Inventory records.