The BUSINESS EDGE
Revision Notes February 2013 to August 2013

Graphical Interface

1. Additional Information Grids have been added throughout the system. Users can choose which information grids they would like to see on their screen by clicking on Optional Information button on the bottom left side of the screen. The Product Inquiry now has 20 different choices.

2. Displaying Optional Information Grids – The system will now check the screen resolution before displaying the Optional Information Grids. If the resolution is too low or the screen is too small the Optional Grids will not display, the system automatically sets the User Flag – Show Optional Information Grids to No.

   If there appears to be room the system will attempt to guess at how many columns can fit. Users can then change the column width and or choose what columns to view. When an optional information grid is created for the first time (per user) it makes a guess at when it will run out of space and hides columns after that.

3. New Feature - Enable/Disable Auto-Expanding Columns - Users now have the ability to enable and disable auto-expanding columns within informational grids. This feature allows users to choose to auto-expand the informational grid columns to take up all available space (default behavior), or to display grid columns at the exact width the user specifies.

4. New Feature – My Menu – Each Users My Menu is located on the bottom of the system menus on the left side of the screen. Users can now customize their own menu adding Individual programs and or sub-folders. This enables Users to categorize their often used programs in their own Menu System.

   When you right click on My Menu there is an option to Create New Menu, after clicking on this a window will pop up to Add New Folder – type in what you would like to name the folder. Some examples might be Order Reports, Sales Reports, A/R and A/P. Once the new folders have been created, folders or programs from within the main menu system can be dragged into the appropriate folder. When dragging an item to your folders look for the green check to indicate that your mouse is in the right position to release the mouse click.

   Someone in accounting might want to put the Cash Receipts System and Checks by Date and the Customer and Vendor aging reports in their Accounting Menu. Someone in purchasing may have their own Purchasing Menu that has the ARS System and purchasing reports that they use on a regular basis.

Order & Quote Entry System

1. New Flag – Internal Reference Required. If you are utilizing the Internal Reference field on the Heading Screen of a Sales Order, this new flag can enforce that users put in the required information. The options for this flag are Not Required, Always Required and Required in Allocation. The default is Not Required. This flag is located in Entity & System Flags Order Entry, screen 7 of 7.

2. New Option– Customer Blind Drop Shipments – In the past when you wanted to ship product to one of your Customers Customer as a blind shipment you would enter your Customers name and address in the entity file.

   This new procedure does not require editing the entity file. On the Final screen of an Order in the graphical interface - Click on Order Options under the Options section and change the Blind Ship Order for Customer Flag to Yes. This will automatically print the Customers Bill to Name on the Heading of the Packing List.

   In the text interface Order Options are located in F5-Addresses.

3. New Flag - Automatic Mark Delivery Log Out/Delivered? When using the Order Delivery System and when this flag is set to Yes the system will allow you to skip two steps in the delivery system. Deliveries will no longer need to be marked as out on Delivery or as Delivered. This allows you to go directly to Close Delivery Log and Create Invoices. This new flag is located in Entity & System Flags Order Entry – screen 7 of 7. If this process works within your procedures it will speed up the billing process significantly.

<u>Purchase Order System</u>

1. In the ARS System, when you create a P.O. for Brighton Best and you are setup with the Brighton Best Connection the P.O. will no longer print, fax or e-mail their P.O.s when you complete the ARS process. The system will tell the User to submit the P.O. to Brighton Best and put the P.O. in the Users recent list. If the User has a Brighton Best P.O. as part of a list of P.O.'s being processed the BBI P.O. will be skipped when sending the others. If the user uses Create 1 PO they will not have the options of Printing, Faxing or e-mailing the BBI P.O.

   Then, the user can then go into E&E Purchase Orders, bring up the PO, and then use F10=CV BBI / Convert BBI PO to convert it to a BBI PO and then submit the PO electronically.

2. New Feature – If your company has the documentConnection scanning feature in The BUSINESS EDGE, documents attached to Products can now be attached to an RFQ. In the graphical interface the button for dC Attachments is in the Options. In the text interface it is F9 on the Detail line.

3. New Feature – Use FOB File for PO's/PPO's. If you would like Users to select an FOB on a PO from a file of pre-setup options versus typing in whatever the User wants to type that is now possible. There is a flag located in Entity & System Flags – Purchase Orders screen 4 of 4 – Use FOB. Before changing this flag clients that are live on the system will need to have Computer Insights run a program to preserve the FOB's in existing PO's. Please call Software Support to have this done.

   FOB's are stored in the same file used for Customer Orders and can be Entered and Edited in Accounts Receivable File Maintenance, Shippers, FOB's and Package Sizes.

4. New Flag - Use Vendor Contacts for Salesman Lookup – on the Heading screen of Enter & Edit Po's there is a field for Salesperson. If you would like the system to store the contacts that can be selected here from the Vendor Contact file this flag should be set to Yes. If this flag is set to No, Users can type in anything they would like and it will only be stored in the PO record.

5. New Feature – When a User Closes a Purchase Order, the system will now prompt the User for the reason it was closed. When in a PO Inquiry, the Document Status will

indicate that it was closed and the user that closed it. The reason can be viewed in the Final Message screen.

6. New Feature – Open Closed PO – In the past when a Purchase Order was closed it could not be re-opened. The system will now prompt the User to open a new revision. If PO 1000 was closed and the User chooses to Open it again the system will create PO 1000-01 as a duplicate of PO 1000.

7. New Field on report – Re-Order Point Report – When this report is presented to the screen to export to Excel it will now include the last Vendor your company received a PO from.

Processing Purchase Order System

1. New Flag – Non Tracked Products Only - Create/Rcv Auto PPOs in Alloc All when Needed. When this flag is set to Yes the system will automatically create and update PPO's for products on Sales Orders that have Bill of Materials setup when the Allocate All option is used in Allocate Inventory. There has to be enough stock on hand to create the Product. After the Automatic Send and Receive of the Product the system will then allocated the line item. This new flag is located in Entity & System Flags - Screen 7 of 7.

Accounts Receivable

1. Menu Change – The Print & Fax Invoice Menu has changed – All of the In-Process routines are now consolidated in a single menu – Invoices In Process. This is where you will find Print Invoices in Process, Fax Invoices In Process and Send Invoices in Process. This change was made to accommodate some new EDI processes.

2. New Feature – Commission Minimum Gross Profit - When paying Commission based on percentage of Sales. Salespeople can now be setup so that they will only receive commissions if the gross profit is over a certain percentage. The commission is figured on a line by line basis. This new field is in Enter & Edit Salespersons - Commisisons and can be setup differently for each Salesperson if needed.

3. New Feature – Contested Invoices – Customer Invoices can be marked as Contested – indicating there is a problem/dispute with a particular invoice. When an invoice is marked as contested the User can type in a note as to what the issue is with that particular invoice. Then when viewing the customer invoices in a Customer Inquiry or Cash Receipts there will be and indicator (!) to the left of the invoice so Users can easily identify contested invoices.

   Invoices can be marked as Contested in two places. In a Customer Inquiry, Open Invoices, highlight the invoice and in the graphical interface the Contested button is under Options, in the text interface it is F4. This can also be done in Edit Posted Invoices located in AR Invoice Routines.

   When choosing the contested option there are 4 choices – None, Mark Contested, Remove Contested, Remove Contested/Notes.

4. New information on Sales Journal – When producing the Sales Journal by Date and choosing Screen as the output, it will be presented in a scroll box/grid. Columns have been added for Number of Line items per order and Total Weight. If you are using the graphical interface you may choose these columns when viewing the information on the

screen. In both interfaces when the information is sent to Excel you these columns will be included.

5. New User Flag - Aging Date to Age By – Users can default how they would like the Accounts Receivable Aging to default. The choices are Invoice Date or Due Date. The normal default is Invoice Date. This new flag is located in User Flags – Accounts Receivable – Aging Flags.

6. Menu Consolidation – A new Menu was created in the Customer Activity Report Menu. The new Last Sale Activity Menu now contains the Customer Last Activity Report, Customer Last Sales Detail Report and Product Last Sale Inquiry.

7. New Report – Salesperson – Customer – Inventory Analysis – This new report was customized for a particular client so it cannot be changed. This report is designed to provide Salespeople with information pertaining to their customers. It gives visibility to what their customers are purchasing as well as the stock status – On hand, On PO, Lead Time and Usage. This report can be generated for any range of Salespeople and Customers. The report asks for an As of Date and will include products the customer purchase in the 12 previous months.

8. Additional information on Aging – Extra fields have been added to the Accounts Receivable Aging Report. Payment Terms and Accounts Payable Contact have been added next to the Customer Name. A new column was also added for Days which is the number of Days the Invoice Date is open from the date the report is generated.

Accounts Payable

1. New report option – When using Process Checks by Date the Invoices Prepared for Payment report now has a new question – Print Accrued Documents. If this is answered yes when the report is printed to paper it will list the Accrued PO Documents that were selected on the invoices you have chosen for payment. This will only show when printed to paper.

Inventory

1. New Feature – Sort Transfer Lines – If you have multiple branches and transfer Products between branches – this new feature may be helpful. After entering a Transfer in the system there is a new option on the Final Screen – Sort Detail Lines. This works the same way as sorting other documents like the Order. Line items on the Transfer can be re-numbered or sorted by Product Code, Description, Classification, Alternate or Default Location. Once a Transfer has been “sent” it cannot be re-sorted.

2. New Flag - All Product Partial Matches During Selection? When this flag is set to Yes and Users are looking up a product the system will show all items that begin with the characters typed in even when there is an exact match. The default to this flag is No so that the system operates as it did previously – when an exact match it entered that Product is selected. This new flag is located in Entity & System Flags – Inventory.

Sales Analysis

1. New Report feature – Salesperson Sales and Profit report will now be presented in a scroll box/grid when selecting output to Screen. If you would like to view the full report on the screen simply choose Adobe as output and it will appear in report format on the screen.

2. New Report feature - Customer Activity Variance Report – This report will now be presented in a scroll box/grid when selecting output to Screen so that it can be exported to Excel.

Utilities

1. Previously forms had an option to include an attachment to be sent along with the form when utilizing PDF forms. An example might be including the signed Packing List with the Invoice after it is scanned into the system using documentConnection. There are now flags with each document where the system can be setup to include the attached document when different output is selected. The attachment could be included when the document is faxed or e-mailed but not when it is printed.

ISO / Quality System

1. The Country file has been replaced with a more sophisticated file structure. This was done so that Users can put the ISO Code for the country in the file which is a requirement for EDI transactions. There is now a recent list options for countries as well.
   Vendor Managed Inventory

VMI/Mobile Application

1. New Feature – When using the VMI Scanning system Users can now do a partial lookup on Products if they are looking for a product manually instead of scanning a barcode.

2. New Feature – The system can now be setup so that Salespeople can only view their customers. This is setup in VMI Mobile User Access to Customer located in Web and VMI Flags.

Credit Card Integration

1. The BUSINESS EDGE now offers secure Credit Card Integration with Marathon Systems. Click on this link for more details:

   http://www.ci-inc.com/marathon-credit-card-integration/