The BUSINESS EDGE
Upgrade Notes January –February 2009

Order & Quote Entry System

1. New User Flag – Sort Allocate Order by – Line Number or Default Location – If your company is using Default Locations – assigned locations by Product – Users can now choose to sort the Allocation Screen by this default location. This is helpful if your Picking Ticket is sorting and printing by these same locations for easy picking. The Allocation screen can now match the order that the Pick Ticket is printed.

2. New User Flag – Use Document Notes for Orders/Invoices – When in Enter & Edit Orders and or Invoices there is an F3-Notes key on the first two screens. If a User would prefer the F3-Notes key can be document notes instead of Customer Notes. If a User makes this selection then once they are in the document notes they can still access their Customer Notes through the F8 key. If they leave the default to the Customer Notes, the F8 when inside the Customer notes will be the document notes.

This way each user can customize their screens so that they can get to the notes they use most frequently with the fewest key strokes.

3. New Order Types – Two new Order types have been added to the system. You can now have a Pending Order or a Hold Order. The regular Order is now called a Firm Order so there is no confusion.

A Pending Order does not commit inventory to the Order. This can be used if you customer is waiting for approval and you do not want to commit the Inventory until you have that final approval.

A Hold Order commits the inventory to the Order just like a Firm Order; however it can not be allocated until someone changes it to a Firm Order. This could be used for a serious Order that may require a Purchase Order or some other formality before you can ship it. A Hold Order is treated just like a Firm Order which in the past was simply referred to as the Order. A Hold Order must be change to a Firm Order so that it can be Allocated and Invoiced.

All of the Order Reports have been changed to reflect these new choices as they can be included or excluded on an Order Type Basis.

4. New Feature – You can now use the Automatic Replenishment system while in Enter & Edit Orders in the Detail Line the similar to using Set PO. The system will bring up the item as if you were in Select documents for Products in the Automatic Replenishment system. The User can choose to create documents at that time or build a batch and send them all at once.

Purchase Order System

1. New Feature - You can now select the ARS product range by Alternate Product Code. When looking at the products that were selected by the ARS, it will be in product code order (and only the product code will show). This is just a convenience to run the ARS for a range of products using the alternates.

2. New Feature – When using the Automatic Replenishment System, Users can now create and empty batch. If you choose 2 Select Documents for Products and there are no open batches the system will prompt the User to create an empty batch. Items can then be added to the batch.

3. New Feature – When in the detail line of Enter & Edit Purchase Orders, F2 is now a Cardex for the product you have selected. This was previously available as an option for the F3 key, so you can now view more information about the product you are ordering.

Processing Purchase Order System

1. New Feature – When receiving a PPO the system will now warn the User if they are receiving more of a product than they have sent components for. This is a warning and will allow the user to continue with the process if needed.

Accounts Receivable

1. New field in Customer Master file - Grace Days for On-Time Delivery. This new flag is used in the Customer Scorecard which provides delivery statistics for your Customer. The grace days for on-time delivery will be added to the Date Requested or Schedule Date of the line items before calculating on-time versus late deliveries. The default setting is 3 days which allows for the billing cycle and or a weekend.

This field for the Grace Days for on-time delivery can be changed in Enter & Edit Customers, Additional Information. A default can be setup in Enter & Edit Customer Defaults for New Customers.

The Customer Scorecard compares the invoice date to the Order Date Requested on the Heading of an order, or the line item schedule date if there is one. This report is located in Accounts Receivable Reports, Customer Status Reports.

2. New display fields – When in Enter & Edit Invoices, in a Detail Line the system will now display the last price the Customer paid and the Average Cost the same way it is displayed in the Enter and Edit Orders, Detail Line.

Inventory

1. New Feature – Users can now view Substitute Products from a Product Inquiry by pressing F2-Subs while in the Stocking information screen. Substitutes can be entered in Enter & Edit Products, F5-More, F4-BOM, F3-Substitutes. When a user is in a Sales Order Detail Line or a Processing PO Detail line they can view and or select a substitute product.

With a branch enabled system, the first screen shows the list of substitute products, the available for the entire entity and the available for the branch. You can drill into each product to get the availability for all the branches. With a non-branch enabled system, the first screen shows the list of substitute products, the available and on hand quantities and drilling into a product takes you to its product inquiry.

2. New Feature – Delete Un-used Price Tables – If you are using the List and or Cost Tables in The BUSINESS EDGE you can now remove old tables you are no longer using. This function is located in Inventory Report, Cost and Price Table Lists.

3. New User Flag – Product Tracking Sorting – Users can now choose what order they want their F10- Lot Tracking Detail sorted in. Options include – Location, Lot Number (the default), Lot Number/Location, Mfg Lot Number/Location, Location/Mfg Lot Number, Date Received/Location/Lot Number, Date Received/Lot Number/Location.

The Allocation screens and many of the lot selection programs will also follow the same order. This new User Flag can be changed in F1-Help, F4-User Flags, 5. User Flags Inventory, F7- Inquiries, Sort Product Tracking Information.

If you are using the branch system there is also an option to Group Tracking by Branch – Options include Code, Name or not grouped. This will be a primary sort for when tracking information for all branches is shown.

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4. New field added for export – the Customer Usage Report will now include the current Quantity On Hand for Products when exported to Excel. The Customer Usage Report can be generated for any range of Customers, Products

and Dates. This report is located in Inventory Reports, Usage Reports, Customer Usage Report.

Utilities

1. New Menu item – Enter & Edit Fax Defaults – This will allow companies to set whether they want to have a selected Fax Machine ID auto assign faxes or not. If this flag is set to No, the next time a fax comes in with that Machine ID it will not set the Related to field in Document Connection. If you have companies that do not setup their fax machines with the proper Machine ID it will not collide with another company with the same Machine ID. This new feature is located in the Image & Fax System, documentConnection Maintenance.

2. New Security Flag - Allowed to Close Sales Orders? If you do not want to allow all Users to Close Sales Order you can Answer Yes to this flag in the particular Users Security settings. This question is located on the third screen of Enter & Edit User Permissions.

3. New Security Flag – Allocate Orders on Credit Hold – If Users are allowed they can not edit and allocate existing orders that are assigned to a customer that is on Credit Hold. When a Customer is on Credit Hole, the system will still stop Users from creating new orders and invoices for the Customer on Credit Hold, but this flag allows them to change the existing orders without having to take them off of Credit Hold first.

Branch Features

1. Printing Batches of Sales Orders, Pick Tickets, Packing Lists and Purchase Orders are now branch sensitive.