Order & Quote Entry System

1. New Feature – Lot Tracking Only – When allocating a Credit for a Customer if the User puts in the Original Lot Number that was sold to the customer they will be prompted with a question – Put the historical lot information into the Tracking?   If the User answers Yes to this question the original lot information will be coped to the lot tracking information for the quantity going back into stock

   If there is more than one lot for an item being returned, separate lines must be entered for each lot number.

2. New Order types – The system now has a new set of Order Types – VMI Orders, these are typically used for Orders imported with the Vendor Managed Inventory System. VMI Orders can be Firm, Hold, Pending or Quotes. Order Reports and some historical reports used with the new Contract System can isolate orders of different types.

3. New Optional Information – graphical interface only – Recent Product Receipts will now be an optional information screen that can be chosen in the Detail Line of Enter & Edit Orders. It will be limited to the information in the first grid, it cannot be expanded.

4. New Inquiry – Order Detail Line Inquiry – this new inquiry will show by Month or Year the number of Orders/Quotes that were entered along with the number of Line Items, an average line item count as well as how many orders had over 100 lines. It also includes a total for the detail lines as well as an average. This report can be found in Order Reports, Order Analysis Reports.

5. New Feature – Prepaid Orders – If a Customer Pre-pays for an Order that payment can be entered into the Sales Order in the Totals Screen located on the Final screen of an Order. Prepayments will be accumulated and can be added to a Deposit by clicking on F5-Prepaid Orders from within a deposit. When the deposit is updated the prepayment will post to the Customers Account as an unapplied balance. When the order is eventually allocated and invoiced, the payment will be automatically posted to the Invoice when the Invoice is updated.

6. New System Flag - Quotes-Set Unit Cost to Average Cost? When entering a Quote by default the system copies the Default PO Cost to the Cost field in the Detail Line of the Quote. Users have the ability to over-ride the Cost in a Quote by simply typing in a new Cost. When this new flag is set to Yes the system will automatically copy the Average Cost to the Detail Line of the Quote.

7. New Feature - Enter & Edit Customer Item Instructions is now a Menu Item. In the past Customer Item Instructions could only be entered through Enter & Edit Customers. This new menu item enables Users that do not have permissions to

be in Enter & Edit Customers to be able to add or edit Customer Item Instructions. This is located in Order & Quote Entry System, Order Entry File Maintenance.

Purchase Order System

1. New Flag Option – The system flag to update the Default Po Cost – has two new options - Update Default Po Cost with Raw Cost when Editing a PO or Update Default PO Cost with Landed Cost when Editing a PO. In the past Default PO Cost was only updated when PO Receipts were updated. Choosing one of these options will update the Default PO Cost upon entry of the PO. . This flag is located in Entity & System Flags – Purchase Orders screen 1 of 4.

2. New Flag - PO.s - Change Vendor-Update Detail Alternates? If a Vendor is changed on a PO and this flag is set to Yes the system will Update Alternate Product Codes to be those associated with the new vendor on the PO. The system will have the User Confirm before making the change. This flag is located in Entity & System Flags – Purchase Orders screen 4 of 4.

3. New Flag – PO's - Change Vendor-Update Detail Costs? If a Vendor is changed on a PO and this flag is set to Yes the system will Update Costs to be those associated with the new vendor on the PO. If you use the Vendor Contract Pricing this should be set to Yes. The system will have the User Confirm before making the change. . This flag is located in Entity & System Flags – Purchase Orders screen 4 of 4.

4. New Feature – Duplicate PO – A menu item has been added to the Purchase Order System to Duplicate a PO. The next numeric PO Number will be assigned to the Duplicated PO. The system will prompt for a Promise Date for the New PO. After the PO is duplicated the User will automatically be in Enter & Edit PO and can make any changes that are needed.

5. New Flag - Use Vendor Contacts for Salesman Lookup – When this flag is set to Yes the system will only allow the Salesperson field on the Heading of a Purchase Order to be populated from an existing Contact in the Vendor Contact file.   If this is set to No any information can be entered in the Salesperson field on the Heading of the PO. This flag is located in Entity & System Flags – Purchase Orders screen 4 of 4.

6. New Feature – Duplicate PO Line – Graphical interface only - When entering a Purchase Order there is a new button to duplicate a line on a PO. Highlight the Line you would like to duplicate and click Duplicate (F9) under options.

Alternatively you can right click on the line and choose duplicate. The new line item will be at the end of the PO Lines.

This is helpful if you have multiple dates for the same item. You also have the ability to sort the line items if you want to be sure they are grouped together. The sort options are on the right side of the Detail Line screen.

7. New field available – Open PO Report will now include a field that can be selected for viewing on the screen – Last Output. This will indicate the last time a PO was printed, faxed or emailed. Users might check this report to make sure all PO's were sent out.

8. New Field available – Vendor Comment on RFQ Line. When in Enter & Edit RFQ's a vendor comment can be added to each line item. The comment is then viewable in an RFQ Inquiry in the Detail Line. The comment can be added in the Comment Screen under Options in the graphical interface and under F6-Comment in the text interface when on the line item.

9. New field on PO Heading – Vendor Phone Number will now be displayed on the heading of a Purchase Order when in Enter & Edit Purchase Orders. This is only available in the graphical interface. In the text interface the phone number can be viewed under F5-Vendor Inquiry on the same screen.

10. New Feature – Add Alternate Part Number on the Fly in Purchase Orders. When in a Detail line of a PO an Alternate Product Code can be added while editing a PO Line by selecting Add Alternate Product under Options in the graphical interface or by pressing F8-More and then Add Alternate Product in the text interface.

Processing Purchase Order System

1. New Flag - Default P.O. Cost during PPO Receipt Updated – In the past the options to update the cost for PPO's was combined with PO's. PPO's can now be set differently than PO's – the choices are to Update the Cost with Raw, Landed or Do not Update. The default is how they were originally set. Most companies update the Default Cost with the Raw Cost. . This flag is located in Entity & System Flags – Purchase Orders screen 1 of 4.

2. New screen totals – The values seen under the Totals screen in a PPO Inquiry have been expanded. The system will now show the Value of the Products Needed for Process and the value of the Raw Material Sent. Once a PPO has been received it will then show the Accrued Value Received, Raw Material Value Used and a total.

3. New Feature – New warning – when entering a Bill of Material if a component is entered that already exists in the bill of material the system will pop up a warning

message for the user. This is helpful when entering Kits with a lot of components.

Accounts Receivable

1. New Customer Flag – VMI Import Order Type – When VMI Orders are imported this new flag will designate how the Orders will be imported. Some companies want to differentiate Order types for Tracking and or Pricing. This new flag can be changed in Enter & Edit Customers.

2. New Feature – Change History to Customers Salesperson – this new program will re-assign sales history for any date range to the Salesperson that is currently assigned to the customer in the Customer Master file. After entering a beginning and ending date the system will go through the order and invoice files and change the records. A screen will then display the number of Order and Invoice lines were changed.

   This can be found in Accounts Receivable Maintenance, Miscellaneous Customer Maintenance, Change History to Customers Salesperson. Once this is done it cannot be reversed.

3. New Export – Customer Part Information – This new export provides options to isolate products purchased or on Order for a specific customer. The fields that can be included are Customer, Product Code, Product Description, Alternate Product Code, Alternate Description.   This new export is located in Utilities, Export File Data, Export A/R Information.

4. New Report – List Contacts by Customer – This will enable Users to put all Customer Contacts in the system into an Excel spreadsheet – it will include the Customer Code, Customer Name Contact Name, Phone, e-mail as well as the other fields in the contact file. If you were trying to locate a person and were not sure which company they were with you could find them here if they were entered as a contact in the Customer record.   This is located in Accounts Receivable Reports, Customer Lists & Labels.

5. New Flag - Save One-Time Ship to Address as New Address? When entering a One-Time Ship to Address on an order the Default answer to this question has always been no. There is now a system flag if you would like to default it to yes. This flag is located in Entity & System Flags – Accounts Receivable screen 4 of 4.

6. New Flag - Invoice in Process Register-Separate Reports by Branch? – This new flag enables companies that are branch enabled to set a default for the Invoices in Process Report. This flag is located in Entity & System Flags – Accounts Receivable screen 4 of 4.

7. New Feature – CC Salespeople on Customer documents. When sending out a document such as a Quote or Order Acknowledgement via e-mail to a Customer you can easily copy the default salesperson assigned to the customer. On the output email screen there is now a button under options CC Salesperson. If something is already in the CC field the salesperson will be joined to the end of it.

8. New Optional Information in Customer Inquiry – Customer Product Class Sales History – this new optional information screen will display YTD and LYR Sales, Cost, Profit and Profit % for each Product Classification in your Inventory.   Users can select from 18 available fields by clicking on the arrow on the Heading and then clicking on Columns.

9. New Customer Contract System – The new Contract System cannot be used at the same time the current Contract System is being used. If your company would like to use the new contract system, the data can be loaded and then after it is complete, a flag is changed to switch to the new system.

   New Customer Contracts – The new Customer Contract system has extra flags that enable Companies to force a minimum line quantity and track min and max obligations. A Customer might have multiple Contracts due to different contract dates or Order Types. They may have once Contract for VMI Orders and/or Regular Orders and then third for Work Orders. Some companies might only offer Contract Pricing on VMI Orders. Parts / Contract Prices cannot be duplicated for the same Customer / Order Type in different Contracts.

   Customer Contracts are assigned an internal number and a Description – a good practice might be Customer Name-some type of description when a customer has multiple Contracts. This could be ABC-2013 or ABC-LINEA. Beginning and Ending Date are entered on the Heading of the Contract entry. There are then Yes/No questions as to whether the contract prices are used for Firm Orders, VMI, Orders and or Work Orders. This enables a Company to offer Contract Prices on VMI Orders and not on other types of Orders.

   When entering Contract Prices manually – Select the Product, enter the Contract Price – optional fields are Minimum Quantity per Order, Estimated Usage, Estimated Usage Period, Customer Liable for Stock, and Maximum Liable Quantity.

   If there is a Minimum Quantity per Order the system will not allow the User to enter a quantity less than the minimum in the contract on an Order.

   Estimated Usage can be used for Contract Analysis Reports – and if the flag on the heading of the contract - Warn if Order Goes over Est. Usage is set to Yes Users will get a warning if the customer Orders over this quantity.

Min Obligation will be used for Contract Analysis Reports.

Products can be marked as In-active if they have not been ordered for a period of time or based on some criteria. If they are marked in-active the customer will not get the contract price. They can later be marked as active from within the contract detail line.

When you are at the New Line screen there are options to Import parts into a particular Contract or Delete all Records in a Contract. The File layout for importing is a Text Tab Delimited file with the following Fields –

Product Code	Mandatory
Alternate Code	Optional
Contract Price	Mandatory
Commission %	not currently used but must be a column
Min Quantity Per Order	Optional – zero if none
Estimated Usage	Optional – zero if none
Max Liable Quantity	Optional – zero if none
Estimated Usage Period	CAQMW
Liable for Stock	Y/N to indicate if the Customer is liable for the Stock.

The new Contract System is located in Accounts Receivable, Accounts Receivable File Maintenance, Customer Contract System

10. New Customer Contract Reporting – There are a number of new reports for the new Customer Contract System. These reports can be found in the Customer Contract Menu which is only visible when the new contract system is being used.

Contract Inquiry – after selecting a Customer Contract the information will be displayed in a grid on the screen and can be exported to Excel.

Contract Over Estimated Usage Report – This report can include all products on a contract or only those that are over the Estimated Usage. The flag- Warn if Order Goes over Est. Usage must be set to yes on the first screen of a contract to produce this report. The information will be presented in a grid and can be exported to Excel.

Customer Contract Analysis – This report will show Products on a particular contract along with the contract fields and the sales within the contract period. Parts that are in-active or were not sold while on Contract can be omitted. The information will be presented in a grid and can be exported to Excel.

Customer Contract Consumption Date Report – This report will provide similar information as the report above but will allow the User to define the Date Range instead of automatically using the contract beginning and ending dates. The information will be presented in a grid and can be exported to Excel.

Customer Production Cell Bin Detail Report – When using Production Cells with the VMI System this report will include all Products that are on a Production Cell and also in a VMI Bin. This includes an extensive amount of data and is presented in a grid for exporting.

11. New Feature – When using Production Cells with VMI Bins there is now a feature to Delete Bins by Production Cell in Enter & Edit Customer Bins. There is a button on the right under options in the graphical interface and F3 in the text interface.

12. New Feature – Credit Hold notifications to Salespersons. When a Customer is put on Credit Hold or taken off of Credit Hold the system will now e-mail the Salesperson that is setup in the Customer Master file. The Salesperson's e-mail address must be entered in Enter & Edit Salespersons to take advantage of this feature.

13. New Option in Tax Authorities – Tax Authorities can now be marked as in-active. If a tax authority is inactive it cannot be assigned to a Customer. If it is already assigned to a customer when it is made inactive it will not be affected, this will prevent Users from selecting a Tax Authority that is no longer in use. This can be changed in Enter & Edit Tax Authorities which is located in Accounts Receivable Maintenance.

14. New Report – Salesperson Overview – After selecting a Date range and Salesperson Range the system will produce a report showing each Salesperson along with the number of invoices, Sales, Cost, Profit, Gross Profit % and YTD Sales. This report is located in Accounts Receivable Reports, Sales Journals, Sales Journals by Salesperson.

15. New Inquiries – Invoice History and Invoice Detail History – These inquiries will provide invoice information for all invoices created in The BUSINESS EDGE. The Invoice History Inquiry provides summary invoice information including Customer information, User that created the invoice, and when the invoices were sent out. The Invoice Detail History will give detail down to each individual line item. These new Inquiries are located in Accounts Receivable Reports, Sales Journals, and Invoice History.

16. New Functionality with Credit Card Integration - While in the CREDIT CARD TRANSACTIONS screen of Enter & Edit Orders there are options to either "Refund" the entire transaction or do a "Detail Refund" at the invoice or order level. A "Refund" will credit the entire transaction amount and all orders or invoices will be credited the original applied amounts. A "Detail Refund" can be for any amount equal to or less than the original transaction amount and applies

the amount you enter to the individual invoice or order you are currently drilled into or have selected in a grid. Users can also access these options from within the Credit Card System menu in the Accounts Receivable System. This is what you would do if the invoice has been updated and you can't access it through Enter & Edit Invoices.

17. New Flag in Miscellaneous Charges – Copy to Backorder. If you are not using Mandatory Miscellaneous Charges this flag can be used. When this flag is set to Yes Miscellaneous Charges will copy to Backorders. This is helpful when using Miscellaneous Charges for Certifications when you want them to go with the original Order as well as backorders.

18. Deposit System has been re-written – There are some changes in the New Deposit System. Some fields that are no longer needed or rarely used were removed or re-arranged; therefore some screens may look a little different.

    On the Detail Screen where all of the checks are entered, Non-Accounts Receivable Checks can be added to the deposit by Clicking on Add Dist Check or F3 in the text interface. There is also a new button for Pre-paid orders which will be explained below.

    On the check screen there are fewer fields since the Non-A/R information is no longer needed there and two flags were moved. The ability to scan a customer document typically a check has changed positions. Two flags – Sequence Invoices by and Ignore Check Amount can now be changed on the fly under the Options button (F4). These two flags pick up the Users Default settings and can be changed on individual checks.

19. New Feature – Prepaid Orders – If a Customer Pre-pays for an Order that payment can be entered into the Sales Order in the Totals Screen on the last screen of an order. Prepayments will be accumulated and can be added to a Deposit by clicking on F5-Prepaid Orders from within a deposit. When the deposit is updated the prepayment will post to the Customers Account as an unapplied balance. When the order is eventually allocated and invoiced, the payment will be automatically posted to the Invoice when the Invoice is updated.

20. New Flag - Confirm Worldship Data during Invoice Creation – This new flag will provide Users with a warning if they are creating an invoice for an Order that requires information from UPS Worldship if the Order was not yet processed through Worldship.   In the past if an invoice was created before the shipment was processed the tracking and billing information could be missed.

21. New features in Customer Aged Analysis Report – When a Customer Aged Analysis is presented to the screen it is now interactive. If all of the invoices are listed Users can drill into a specific invoice by clicking on it or pressing enter.

This puts the User in an Invoice Inquiry for that specific invoice, where you could look at the detail or email it to your customer.

When running the Aging and answering Yes to Summarize, entering or clicking on a Customer on the screen will put the User into a listing of all of the Customers open Invoices. Options on this screen include Customer Notes, Marking an invoice as Contested and Send Statement.

These features, along with the ability to run the Aging for only past due accounts makes collection calls quick and easy. There is no need to print out reports; Users should be entering follow up notes into the system as they make the calls. They can enter a follow up date so the system will remind them to check and make sure the Customer followed through with any payment commitments.

Accounts Payable

1. New Feature – Vendor Item Instructions – Instructions can now be setup by Vendor and Product. If you have special instructions that you would like to print on forms such as the PO, PPO or Merchandise Receiving Document that are Vendor specific you can now set those up in the Vendor Master File.

   These are entered and editing in the graphical interface under Document Parameters and then Vendor Product Instructions. In the text interface they are located under Additional Information, F4-Instructions, F2-Vendor Item Instructions.

   If you would like to incorporate these instructions into your forms, the changes are billable at our normal hourly rate. Documents can be marked up and faxed or emailed to us to make changes.

2. New fields – Two new fields have been added to the Vendor Remit to Address Screen. Bank Routing Number and Account Number.

Inventory

1. New Feature – Updating Alternate Descriptions – When the system detects that the Internal Description for a Product has been changed it will now prompt the User if there are Alternate Product Codes asking if they would like to update the Alternate Descriptions. After answering yes all Alternate Descriptions will be updated with the same Description as the Internal Product Description.

2. New Flag – Track Expiration Date on Lots – This new Flag is in Products and only applies to lot tracked Products. The choices are Yes, No and Optional. If a Product is set to Yes, an expiration date must be entered when receiving

inventory. If it is No the field will not be shown and if it is Optional it can be entered or left blank when receiving.

This flag can be changed in Enter & Edit Products, in the graphical interface it is under Kits & Specifications and then Shipping & Quality. In the text interface it is located in Stocking Information, Shipping & Quality. The flag is also available for importing and exporting.

3. New Report – Expired Lots Report – This report can be generated for any range of Products. Report Options include a Date – Show Lots that expire before Date as well as an option to Include Lots with Missing Optional Expiration Dates. This report is located in Inventory Reports, Inventory Balance Status Reports, Tracking Balance Status Reports, and Expired Lots Report.

4. Product Flag change – Track Melting Country is now a System level and Product Level Flag. If the System Level Flag Track Melting Country is set to No, Melting Country will not be seen in the system. This is setup in Enter & Edit System Tracking Flags.

The flag Default Force Melting Country during Receiving is the default Yes/No flag on the Product Level and can be over-ridden in the Product Records. If you company only wants to force the Melting Country to be filled in on select Products, the System Default should be set to No. Then specific Products can be set to yes. The System Flag for the Products is located in Entity & System Flags – Purchase Orders screen 2 of 4.

To change the flag on a part by part basis, in Enter & Edit Products, in the graphical interface it is under Kits & Specifications and then Shipping & Quality. In the text interface it is located in F6 Stocking Information and then F2 Shipping & Quality. The flag is also available for importing and exporting.

5. New fields on report for export – Date of Manufacture and Expiration date have been added to the Current Tracking Status Report. This is a very detailed report by Product, Location and Lot Number. It is located in Inventory Reports, Inventory Balance Status Reports, Tracking Balance Status Reports, Current Location Status Inquiry.

6. New Menu Item - Enter & Edit Customer Item Instructions – In the past Users needed access to Enter & Edit Customers in order to add Customer Item Notes – these are notes that can be setup for a specific Product by Customer. A new menu selection has been added so that Users can add these notes without being in Enter & Edit Customers. This is located in Order Entry File Maintenance, Enter & Edit Customer Item Instructions. Forms must be formatted to include these notes. Form changes are billed at our normal hourly rate if you are not using these and would like to add them to your customer's documents.

7. New Optional Information Grid in Product Inquiry – Vendor Contract Pricing is now available as an option to view on the first screen of the Product Inquiries and Enter & Edit Products.

General Ledger

1. New Inquiry - G.L. Account Trans Inquiry by Update – This new Inquiry will show transactions by GL Account Number with the Posting Date and the Date the transaction was actually entered. This is useful when trying to find out why a particular balance changed back in time. If posting date ranges are left open and a transaction is done back in time it can be difficult to figure out why balances change. This new Inquiry will enable you to find those types of transactions. This report is located in General Ledger Reports, G.L. Account Trans Inquiry by Update.

Sales Analysis

1. New field for export – When running the Customer Detailed Sales by Product to the screen, the Extra Non Stock Description is now an available field when the data is put into excel.

2. New Report - Salesperson Sales by Product Class – After selecting a Date Range, a Range of Salespeople and a single Product Classification the system will present a listing of Sales and can include Quantities, Costs, as well as optionally including Customers with no Sales in the selected Class. This report is located in Sales Analysis, Customer Sales Analysis, More, Customer Inventory Class Sales.

Utilities

1. New import – Salesperson Import – If a large amount of customers need the Salesperson changed in the Customer Master file there is now an import that will accomplish this. A text tab delimited file with Customer Code and Salesperson Code can now be imported in the Accounts Receivable Import Menu.

2. New Security Level Flag - Allowed to Duplicate Products? Duplicating Products is quick and convenient; this new flag enables you to limit this ability by Security Level. There are 10 possible Security Levels that are assigned to Users in the Security System located in System Administrator.

3. New Security Level Flag - Allowed to Assign Price Table to Inventory? Assigning Price Tables to Inventory is a powerful program that will enable you to

assign Price Tables to any Range of Inventory. If you are using Price Tables in The BUSINESS EDGE this flag should be set to No for any levels of employee's that have access to inventory but do not have authority to change tables on Products.

4. New Security Flag – Graphical Interface only – Allow Edit Tool Bar Menu – the default is Yes – when this is changed to No the User will no longer be able to change their preferences. If something does need to be changed, such as a default report printer, they need to be granted permission to make the change and then the permissions can be removed again.

5. New User Flag – Graphical Interface - Include Hidden Columns – This new User flag enables Users to only consider selected fields when using the Find feature or sending data to Excel from a grid. In the past the system automatically included every possible column. When this new flag is set to yes the Find (Ctrl-F) and exporting of grids to email or Excel will only use the columns you have set to be visible. If this flag is set to No there will be no change. This flag is located in, Edit, General Flags.

6. New Feature – Graphical Interface - Grids will now use each User's column sequence in the exported information when sending information to Excel.

7. New Feature – Graphical Interface - Optional Information Selection – Optional Information screens that display information between the main screen and the Options on the far right can now be managed company wide.   Optional information Grids that are not needed by Users can be turned on and off freeing up memory on the individual PC's. This can be changed in the menu below:

    Utilities
       System Administrator System
          System Set Up
            Miscellaneous Setup
               Optional Information Inquiry

8. New System Flag – Graphical Interface - Allow Users to Change Themes? When this flag is set to No, Users cannot change their Themes. This new flag is located in Entity & System Flags – General.

9. New Feature – Graphical Interface - My Menu – Users can create a My Menu at the bottom of the Standard Menu on the left side of the screen. This makes it easier to organize the items that are used on a regular basis. My Tasks on the Tool Bar is handy to store items but it can get unorganized once several items are stored there.

If you right click on My Menu, you will have an option to Create Folder. You can name the folder anything you would like.   You might have a folder called

Inventory Reports, Financial Reports or Accounting. Once you create sub-folders you can then drag items from either the Tool Bar or other Menu's into your sub-folders. Once you have items in your folders you can right click on them to move them up or down or simply drag them with your mouse.

10. New Feature – Graphical Interface - My Options - Users can setup a custom set of Options on every screen where there is more than one section of choices on the right side of the screen. Setting this up enables Users to quickly get to the items they use on a regular basis with fewer clicks.

    Example - When Users are at the final screen of a document there are always sections for things like Addresses, Output Options and documentConnection. When in a Product Inquiry there are sections for Availability & Activity, History and documents to name a few.   When there are more than one set of choices the last section is called My Options.

    Items can be added to My Options by right clicking on an item or by dragging it down to My Options with the mouse. Once there are multiple choices in My Options they can be re-arranged by dragging with the mouse or right clicking on an item and choosing Move up, Move down or Remove.

    Many Users would benefit by having – Heading Screen, Detail Lines, Final Message, Shipping Address, Output Order/Quote, and Output Picking Ticket all grouped together on the final screen of an Order. Give it a try and add the other items you use on a regular basis to see how much more efficient you will be

11. My Menu Only – You can now setup Users so that they only have access to a custom My Menu. An Administrator can log in as a User and create a My Menu which can include custom sub-folders. Any items from the Tool Bar or the Menus can be inserted into a My Menu. Then in Enter & Edit User Security you would change the flag Use My Menu Only to Yes. The User will only see their My Menu; they will not have access to the standard Menu or the items on the Tool Bar.

12. New Logic for Reload button – The reload button in the past would close the application and log users back in. This was causing problems when the button was used in situations where it should not be. The reload button will now close the most recently used tab and clear any associated locks. Computer Insights will also get an e-mail indicating the User that clicked on reload.

    a. New Optional Information Grid in Invoice Inquiry – Order Notes can now be viewed when in an Invoice Inquiry

13. New Feature – My History – There is a new Toolbar option My History, this will show the User the last 9 things they did in the system. Users can double click on

an item and it will open it in a new tab. Administrators can also view what employees were in via the same inquiry by Use found in Employee System, User History Inquiry.

14. New User Permission Flag - Allowed to Export Grids? When this flag is set to No, the User will not be able to export information from Grids throughout the system. This can be changed on a User by User basis in Security System, Enter & Edit User Permissions Screen 4 of 5.

15. New Security Level Flags – The following flags have been added to Security Levels. Each User is assigned one of ten possible Security Levels. The flags below are located in Entry & Deletion Options screen 2 of 2.

Allowed to Duplicate Products? In the past Duplicating Products used the same security as Enter & Edit Products, now they can be individually set.

Allowed to Assign Price Table to Inventory? If this flag is set to No Users in the selected Security Level will not be able to run the Program Assign Price Tables to Inventory. This is a powerful program that can change Price Tables to a range of Products.

Allowed to Edit Costs in Receiving? Some users may have access to Costs in Enter and Edit PO's and Inquiries but you may not want them to have the ability to change Costs when Receiving PO's. If this flag is set to No they will not be able to accidentally change costs while receiving.

Allowed to Add Alternates on the Fly – Alternate Product Codes can be entered while in a Sales Order or Purchase Order. If this flag is set to No Users will not have access to this feature.