Release Notes May 2020-January 2021

<u>Order & Quote Entry System</u>

1. New Fields added to Report- The Open Orders by Order Number report now has the following fields: Pick Printed By, Pick Printed Date, Pick Printed Time, Picking Message, Extra Shipper Description. The Open Orders by Order Number report is located in Order & Quote Entry System, Order Reports, Open Order Reports, Open Orders by Order Number

2. New Optional Field- The Enter & Edit Order Heading screen and Detail Line screen will now show the Customer Classification as an optional field.

3. New Flag- There is a new System Flag that will determine if your Packing List is emailed to your Customer when it is printed. When this flag is set to Customer Packing List Auto Email an additional field in the Customer Master File will be available under Output Defaults where you can add the email address in which the Customer would like the packing list for every Order to be emailed to.When this flag is set to Order Contact Email the system will E-mail the Contact that is associated to the Order in Enter & Edit Orders.

   This flag is located in Entity & System Flags, Order Entry, Page 3 and can be set to Customer Packing List Auto Email, Never or Order Contact Email.

4. New Fields added to Report-The Ship Schedule by Cust-Part-Date now has fields for Order Contact and Order Contact phone number.

   The Ship Schedule by Cust-Part-Date is located in Order & Quote Entry System, Order Reports, Scheduling & Expediting Reports, Ship Schedule by Cust-Part-Date

5. New Options on Report-The Order Booking Activity Report now has summary values in the heading with the total number of orders and total number of order lines.

   The Order Booking Activity Report is located in Order & Quote Entry System, Order Reports, Order Booking Reports, Order Booking Activity Report

6. New Inquiry-The Branch Schedule Inquiry will include all Open Orders that have a schedule date equal or earlier than the end date. In the Branch Schedule Inquiry you can drill in to see the detail that the summary value came from. There are many fields that can be viewed once you click on a particular branch.

   The Branch Schedule Inquiry is located in Order & Quote Entry System, Order Reports, Scheduling & Expediting Reports, Branch Schedule Inquiry

7. New Fields Added to Report- The Open Orders by Salesperson report now has the following fields: Picking Printed By, Picking Printed Date, Picking Printed Time, Pack Printed By, Pack Printed Date, Pack Printed Time.

   The Open Orders by Salesperson report is located in Order & Quote Entry System, Order Reports, Open Order Reports, Open Orders by Salesperson

8. New Optional Information- The heading screen for Allocate Inventory now has optional information boxes containing address and shipping method. The Allocate Inventory screen is located under Actions/Allocate Inventory

9. New Optional Information-The detail lines of Enter & Edit Orders now has an optional information box for competitive pricing.

Purchase Order System

1. New Fields Added to Report- The What we Buy from Who report now has fields with product availability. The What we Buy from Who report is located in Purchase Order System, Purchase Order Reports, PO Receipts Journals, What We Buy From Who

Accounts Receivable

1. New User Flag-There is now an optional user override for the salesperson when entering new customers. If this is filled in it will override the default in Enter & Edit Customer Defaults. The user flag is located on the ToolBar under Edit, Enter and Edit User Flags-Accounts Receivable, Default Salesperson

2. New Feature - When printing bin labels via the Print Customer Bin Labels menu The Business Edge will keep the customer selected and loop back to the product code until you are finished. The Print Customer Bin Label is located in Accounts Receivable System, Customer Bin System, Bin Labels, Print Customer Bin Labels

3. New Optional Field-There is now a column for Date Requested on the Customer Open Orders grid within a Customer Inquiry.

4. New Feature-There is now a Retry message when sending invoices in process and a record lock is present. When the Retry message appears you do not need to resend invoices in process. The invoices just need to be updated here: Accounts Receivable System, A/R Invoice Routines, Update Invoices

5. New Option-There is now a menu item to Edit Existing Periodic Invoice. This will allow users to add/edit the purchase order number on existing periodic invoices.

The Edit Existing Periodic Invoice option is located in Accounts Receivable System, A/R Invoice Routines, Invoice Output Options, Periodic Invoices, Edit Existing Periodic Invoice

6. New Feature -The Customer Default Classification can now be blank instead of defaulting to a general value that does not always get updated. The Default Customer Classification is located in Accounts Receivable System, A/R File Maintenance, Enter & Edit Customer Defaults. This is a required field when entering a new Customer.

7. New Fields added to Report- The Send Invoices in Process screen now has optional fields for Customer PO and Job Number. The Send Invoices in process is located in Accounts Receivable System, A/R Invoice Routines, Invoice Output Options, Invoices in Process, Send Invoices in Process

8. New System Flag- The Address Contact field in the Customer Address Screen enables users to type in a contact for a particular address. In the past it was only a free form field where you could type whatever you wanted.

   There is now a system flag that will force users to select a contact from the list of contacts in the Customer record. This means the contact must exist first.

   This flag is located in Utilities, System Administrator System, System Set Up, Miscellaneous Setup, Enter & Edit Entity Flags, Accounts Receivable Flags page 2, Use Contact for Customer Addresses.

9. New Field- There is now a field for Average Days to Pay in the Credit Warning pop up in Customer Inquiry. Average Days to Pay is a calculated field that can be reset periodically. Some companies reset this annually so you are viewing relevant information. This can be done in the menu below: Utilities, Miscellaneous Utilities, Reset Customer Average Days to Pay

10. New Feature-The Accounts Receivable Aging report now has an option to include Customer note category and an oldest date which defaults to one year prior to the day you are running the report. The customer aging grid will show the most recent customer note for the selected note category if it is not older than the "Oldest Customer Note to Include" date. If you leave the Customer Note Category blank, the system will show the most recent customer note in any category. The Accounts Receivable Aging report is located in Accounts Receivable System, Accounts Receivable Reports, Aged Analysis Reports, Aging by Customer

Accounts Payable System

1. New Inquiry- AP Check Detail Inquiry - This new Inquiry can be used to send your bank a detailed list of invoices you would like to pay via ACH.

   There are options to select a Cash Account and Date Range. The columns include Check Number, Check Date, Total, Cleared Amount, Cleared date, Cleared, Payee, Address, Gl Discount Account, GL Discount Description, Vendor Code, Vendor Name, Vendor Invoice Number, Applied Amount, Discount and Balance.

   The AP Check Detail Inquiry is located in Accounts Payable System, Accounts Payable Reports, Disbursements Journals, A.P. Check Detail Inquiry

2. New Option in Report-There is now an option to choose General Ledger accounts included in the Accrued Payable by Vendor report. If you blank out the General Ledger code in the report parameters, the report will use all accrued accounts. The Accrued Payable report is located in Accounts Payable System, Accounts Payable Reports, Accrued Payables Reports, Accrued Report, Accrued Report by Vendor

Processing Purchase Order System

1. New Option in Report-There is now an option to choose the branch on the following PPO reports: Open Processing P.O.s by Product and Open PPO by Product Detail Report. These reports are located in Processing P.O. System, Processing P.O. Reports, Open Processing P.O.'s

2. New Optional Information- There is now an option to see open documents and recent product notes in the PPO detail lines. The Optional Information is located at the bottom of each detail line in the Processing Purchase Order system.

Inventory System

1. New Fields added to Report-The Expired Lots Report now has the following fields: Last Customer, Sale Date, and Price. The Expired Lots Report is located in Inventory System, Inventory Reports, Inventory Balance Status Reports, Tracking Balance Status Reports, Expired Lots Report

2. New Fields added to Optional Information Grid-In Product Inquiry Expert, in the Substitute Products grid there are now optional columns for Default Cost, Cost Per, List Price and Per Price

3. New Fields added to Report- The List Inventory by Location report now has the following fields: Vendor Code and Vendor Name. The List Inventory by Location report is located in Inventory System, Inventory Reports, Inventory Lists, Lists by Locations, List Inventory by Location. If you are not tracking lot numbers the location can contain products from multiple vendors so the Vendor information will be blank.

4. New Fields added to Report- The Adjustment Report by Date report now has the following fields: Branch Code and Branch Name. The Adjustment

Report by Date is located in Inventory System, Inventory Reports, Adjustment Reports, Adjustment Report by Date

5. New Field added to Inquiry-The Product Inquiry now has a column and grid tip for total available in the Bill Of Materials screen. This is located in Inquiries, Product Inquiry on the right hand side under Processing & ISO, Bill of Materials

General Ledger

1. New Fields added to Report-The GL Detail Transaction Report now has the following fields: Posted By, Posted Date and Posted Time. The GL Detail Transaction Report is located in General Ledger System, General Ledger Reports, Detail Transaction Report by Acct #

Sales Analysis System

1. New Option added to Report-The Customer Inventory Class Sales Report now has the option to Summarize by Class Family and Summarize Customers. Additionally, on the right-hand side you can clear dates, run the report for TTM Comparative, Prior Month Comparative or YTD Comparative. The Customer Inventory Class Sales Report is located in Sales Analysis System, Customer Sales Analysis, More, Customer Inventory Class Sales

CRM System

1 New User Flag- There is now a user flag that will allow you to select the default CRM Action type by user. This flag is located in User Flags-Accounts Receivable, Default CRM Action Type

Wireless Warehouse

1. New Information added to Report-Wireless Warehouse Picking Report – Status Field now has more statuses to show why a specific detail line is not pick-able. The Code and respective meaning are as follows: N – Need (detail line does not have enough inventory to fill the quantity ordered and more inventory needs to be brought in) S – Set P0 (detail line is waiting for a specific po detail line to be received, in order to allocate) D – Do not use (all available lots have been marked Don't Use) C – Cert (all available inventory is missing the required certificates) ? -Unknown (this could be due to inventory not residing in a pick-able location or the inventory is viewed not-pickable due to parameters set in an allocation rule, more research is required) I – Incoming (available inventory is incoming on a PO or PPO) No symbol means the detail line can be picked. The Status field is viewable through Warehouse Management Warehouse Sales Order Maint Wireless Warehouse Picking Report. After running the report highlight a detail line and select F4 Detail lines

Graphical User Interface Features

1. New Feature-Any note in the system that contains a URL will now be displayed as a hyperlink. Now things like www.google.com in the middle of text in The Business Edge will automatically turn into a hyperlink.

2. New Feature-Popup notes wrap length is now customizable by user. This allows users to determine how many characters to wrap pop up messages so they don't have to click on them. This user flag is located under Edit/User Flags-General, Popup notes wrap length.

3. New Feature-Customer and Vendor Contacts now have a note field which can be viewed in any of the email output screens. The system also has a general comment field for each contact that will show up in the Contact grids.

Credit Card Integration

1. New Feature-The CardConnect Integration will now require the 3 digit CVV number on any credit cards entered into The Business Edge. Any credit card already in the rolodex can still be used without re-entering the card/CVV number

Fastener Supply Chain Network

1. New Feature-The Lindstrom connection now allows you to associate an alternate product code from within the Lindstrom Product Inquiry tab. The Lindstrom Product Inquiry is located under Inquiries, Supply Chain Network, Lindstrom Product Lookup

2. New Feature-The Brighton Best connection now allows you to set the default package type to best guess. Best guess means if the sales order line item has a quantity that is less than Brighton Best's Bulk quantity the system will use Brighton Best's package quantity, if the quantity is equal to or greater than Brighton Best's bulk it will use package type "Bulk." This flag is located in Utilities, System Administrator System, Entity System, Edit Entity on the right hand side under Supply Chain Network, Brighton Best, Default Package Type from Order Entry

3. New Feature-The Brighton Best Purchase Order Suffixes for branches have changed. They are now as follows: A=ATLANTA, C=CHICAGO, V=CLEVELAND, D=DALLAS, N=DENVER, H=HOUSTON, L=LOS ANGELES, P=PORTLAND, K=SALT LAKE CITY, J=SAYREVILLE (NJ), S=SEATTLE, T=TAMPA
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