The BUSINESS EDGE
Upgrade Notes March to June 2009

Order & Quote Entry System

1. New fields for export – When exporting the Detail Lines of a Sales Order the document specific Comments and Default PO Cost will now be included in the exported information.

2. New Flag in Enter & Edit Customers – Change back to Default Shipper on BO? Yes/No. If this flag is set to Yes, the system will change the shipper back to the default shipper of the customer's address record when there is a backorder. This is extremely helpful for customers that require contacting a freight forwarder on every shipment. Users can enter a shipper of "See Instructions" or "Check Customer Instructions" and then when the order is ready to ship the user can change the shipper to the actual shipper that the freight forwarder wants them to use. The backorder get set back to Check Customer Instructions each time.

This new flag is located in Enter & Edit Customers, F5-More. This flag will default to No on existing and new customers.

3. New Feature - On the first screen of E&E Orders and E&E Invoices, there is a new selection - F2=Cntct (in the new UI it will be Order Contact or Invoice Contact). This new screen will enable Users to do the following:

Select an existing Customer Contact to assign to the order (as the "Ordered By").

Enter a new Contact to assign to the Order to. If it is a new contact, the system will ask the User if they want to save it permanently in the Customer file.

If you change a contact on this screen that is also in the Customers contact list, the system will ask if the User wants to save the changes permanently in the Customer file.

When a contact is selected, their information is used when e-mailing or faxing a sales order.

There is also a new default flag for customer contacts - E-Mail Copy of Invoice - if this is set to yes, then when the contact is selected on an order or invoice, this will be copied to the order/invoice flag. When the order/invoice flag is set to yes and when the client uses "Send Invoices in Process," the contact person will be e-mailed a copy of the invoice, no matter what the default output for that customer is.

Just like editing customer addresses, when editing customer contacts, if a User changes the contact information, they will be prompted to update the open orders and invoices assigned to that contact with the current contact information.

There is also an option in the system to have this screen pop-up automatically after the first order entry screen (if the information is not filled in). If you would like this screen to pop up automatically for all Users this new flag - Show Order Contact Screen before Detail? needs to be set to Yes. This flag is located in Entity & System Flags – Order Entry - screen 5 of 5.

4. New Flag – Orders – Warn if No Contract Price? – If it is standard practice for all of your Customers to be setup with Contract Pricing for all of their products Users can now receive a warning if they add an item to an order that does not have a contract Price. This new flag is located in Entity & System Flags – Order Entry.

5. New Feature – Order Audit Inquiry – The system now keeps track of each time information changes on an order. It keeps track of the Date, Time, User, Information changed as well as the old and new values. This information can be viewed in Order Inquiry, F4-Basic, F2- Change History.

6. New Inquiry – Deleted Sales Order Inquiry – This new inquiry replaces the old inquiry that was changed due to the Order Audit information that is being created and referred to in the note above. The Deleted Sales Order Inquiry is located in Order Reports, Lost Sales Reports.

7. New Flag – Allocations – Show Customer Instructions – When this flag is set to Yes and an Order Number is entered to be allocated the Customer Instructions (Picking Instructions, Packing Instructions and Order Heading Instructions) will be automatically displayed on the screen.

If you would like all Users to see the instructions when they are allocating you can change this flag which is located in Entity & System Flags – screen 5 of 5.

8. New Export Field – When exporting the Ship Schedule by Cust-Part-Date the field Pick Ticket Printed will now be included at the end of the data. If a Pick Ticket had been printed for the particular order. This will include the User that printed the Pick Ticket along with the Date and Time.

Purchase Order System

1. New Flag - Show in Purchase Order Detail – When entering a Purchase Order Detail line the system default is to display the Stocking Unit of Measure information on the screen. You can now alternately view the Stocking Quantities with this new Flag. This flag can be changed in Entity & System Flags – Purchase Orders on screen 1 of 3. The stocking quantities that will be displayed when this flag is set are Re-Order Point, Max Quantity to Stock and Minimum Purchase Quantity.

2. New Feature – When updating Purchase Order Receipts, your system is defaulted to either Update the Default PO Cost from the Raw Cost, Landed Cost or not to update it at all when updating receipts. You can now over-ride the system default on a line by line basis when entering a Purchase Order by pressing F8-More. When you press F8 you will see your system default. You can press Spacebar to see and change the selection.

Most companies update their Default PO Cost from the Raw Cost on a Purchase Order. If you happen to make a purchase at a higher or lower cost than usual, you can now on a line by line basis change this option and not update your Default PO cost.

3. New Feature – Ship Via on Purchase Orders and Processing Purchase Orders – You can now use the same Shipper System that is used for Sales Order for the Purchasing documents. This enables the User to select from a drop down selection that is entered into the system.

The Shipper can also be defaulted in the Vendor Master File and can populate this field automatically.

If you would like to Use this new feature the flag Use Shipper List for PO/PPO/Work Orders needs to be changed to Yes in Entity & System Flags – Purchase Orders - screen 3 of 3.

4. New Security Flags – Access to Hold and Pending Orders. If there are Users that you do not want to have access to Hold and Pending Orders which were added recently as options you can now take away access in Enter & Edit Security Levels,

Processing Purchase Order System

1. When exporting the Detail Lines of a Processing Purchase Order, the Default PO Cost will now be exported. This could be helpful in estimating the cost of a kit based on the default costs of the components.

2. New Feature – Users will now receive a warning when they receive in more finished product on a Processing Purchase Order than the raw material quantities that were sent out. In the warning the system will show the user the maximum quantity that they can receive based on the BOM in the PPO. This warning comes up when the user enters the quantity received.

If the user needs to send more products they can exit the receipt process and send additional products to cover the quantity received.

3. New Feature – You can now Use the Shipper File that is used for Customer Orders to select a valid Ship Via on Purchase Orders and Processing Purchase Orders. If you would like to select Ship Via's from a drop down selection box the flag Use Shipper List for PO/PPO/Work Orders Y/N needs to be set to yes in Entity & System Flags – Purchase Orders. When you turn this flag on the Ship Via on previous Purchase Orders will be maintained but all future shippers must be valid.

If you are currently not using the Shipper System in Order Entry we can fill the Shipper file and then you can add and or remove Shippers as you like through Enter & Edit Shippers found in Accounts Receivable Maintenance.

Shippers can be defaulted in the Vendor Master Record. If you have Ship Via's currently setup in the Vendor this information will no longer be valid since it is not the correct format for the Shipper file.

Accounts Receivable

1. New Feature – Customer Specific Forms – The BUSINESS EDGE can now print custom Quotes, Sales Orders, Packing Lists, Invoice and Statements on a customer by customer basis. There are five flags in the customer record where a specific code can be entered calling out a specific format. These flags are located in F5-More, F2-Forms.

This is helpful if you have a customer that requires a format that is different than the format you use for your other customers. The generation of these forms is billable at our normal hourly rate. This feature is only available with PDF forms.

2. New Feature/Flag – You now have the option to edit and allocate existing orders that are assigned to a customer that is on Credit Hold. When a Customer in on Credit Hold the system still stops the user from creating new orders and creating invoices for the Customer on hold, but with this flag set to Yes Users are still able to process existing orders without removing the credit hold.

This new flag is located in Edit Security Levels – Entry and Deletion Access – Allowed to Edit / Allocate Orders on Credit Hold. The default is set to No.

3. New Feature – If you are using the Credit Card feature in The BUSINESS EDGE this feature has been enhanced. There is a new User Security Flag in Enter & Edit User Permissions - Allowed to See Full Credit Card Information? When a User has permissions to see full credit card information they can now see the full set of numbers for the Customers Credit card. If this security flag is set to No then users can only see the last 4 digits of the Credit Card number.

4. New Feature – When entering a Sales Order if your Customer's Payment Terms are setup to use a code CC for Credit Card – the system will automatically pop a screen where a User can select from the Customers Credit Card or enter a new Credit Card on the fly.

When on the final screen of a Sales Order the Credit Card information can now be viewed and/or edited from the Totals Screen, F5-Credit Card. Only Users with permissions to view full credit card information can edit this information. Other Users will simply see the last 4 digits for the Card for verification purposes.

Also, when on the final screen of an Invoice the Credit Card information can be viewed through the Totals key. Only Users that have permissions to see complete information, others will simply see the last four digits.

5. New Field – Customer Contract # - This new field is in the Customer Contract Price record. If you have Customers that have a Contract Number, Purchase Order Number or some other number that they need to you to print on their documents on a line per line basis, this is where that information can be maintained. This information can be formatted to print on the documents you send your customers. Form changes would be charged at our normal hourly rate.

There is also a flag associated with this field.

6. New Flag - Allow Overlapping Dates in Contract Pricing? If this flag is set to No the system will not allow contract pricing to be entered for the same customer with different over-lapping dates.

Accounts Payable

1. New fields for Export – When exporting Vendor information the Default Output options are now available choices to export through Export Vendor Information.

Sales Analysis

1. New field for export – Customer Contract Price has been added to the Customer Detailed Sales by Product when this report is presented to the screen for export. This report is located in Customer Sales Analysis.

2. Report now goes to Excel. Salesperson Sales by Product will now be presented in a scroll box when screen is selected as the output options. This report is located in Salesperson Sales Analysis.

3. New Feature - Customer Scorecard Report - currently shows the total number of returned items and now has an Fkey F2=Returned Items that gives the list of returned line items. This can be dropped into excel to see the details of quantity, product, description, extra description and line comment. They can also drill into the line to get an invoice detail line inquiry.

4. New Feature - In Enter & Edit Deposits, when selecting a customer or an invoice, if the customer is on credit hold, the system will present you with a scrolling box listing all open orders for that customer along with the credit hold information. If there are no open orders, it will just display the credit hold information.

5. New fields for Export – When in a Customer Inquiry, F4-Basic, F10-Parts, your Customers Parts will be listed. When this information is exported it will now include the Average Cost and Total Value fields.

6. New Feature – Automatically copy salespeople via e-mail on Customer Invoices - Salespeople can now automatically receive an e-mail copy of an invoice they are assigned to when Send Invoices in Process is used.

In Enter & Edit Salesperson, the Salesperson's e-mail address must be filled in and the Question E-mail Copy of invoice needs to be set to Yes. This feature is only functional with Send Invoices in Process. Fax invoices in process and/or Print Invoices in Process will not e-mail a copy of the invoice.

7. New Credit Card Features – If you are using the Credit Card feature in The BUSINESS EDGE, there are some new screens where you can add, change or view the Credit Card information on an Order.

If the Use Credit Card System flag is set to Yes and the Payment Terms on a Sales Order are CC, Users will be prompted upon completing the first screen in Enter & Edit Orders to either Pick an existing Credit Card or enter a new Credit Card.

You can now view and or change the credit card information on the Final Screen by selecting Order Totals and then Credit Card. If you enter a new Credit Card from these new screens you also need to select it after entering it.

Accounts Payable

1. When printing documents for your Vendor such as the Purchase Order, Processing Purchase Order or Debit Memo you can choose to print Your Product Code, Alternate Product Code or both. This selection is setup in Enter & Edit Vendors, F9-Print Options. If this requires a form change our normal hourly charge of $150 will apply.

2. When processing checks by Date and Editing Prepared Invoices the system will now display a running total of all invoices selected for Payment on the Heading of the screen. When a check is de-selected the total will decrease, if it is re-selected it will increase.

Inventory

1. New Feature – When adding an Alternate Product Code to the system by default the system would copy the Internal Product Description to the Alternate Description. You can now specify which Description you would like the system to copy to the Alternate upon entry of a new Alternate Product Code. You can choose the Internal Description or the Selling Description. This option can be setup in Entity & System Flags - Description to Copy to Alternate Description. This is located on Screen 3 of 3.

2. New Feature – You can now specify which Product Description to print on your Vendor documents – Product Code, Alternate Product Code or Both. This can be setup for the Purchase Order, Processing Purchase Order, Debit Memo and Merchandise

Receiving Document. This can be setup on a Vendor by Vendor basis. If you would like to utilize this new option, there could be associated form changes, depending on your current format. These would be billable at our regular hourly programming rate.

3. New Feature – When using the +/- to select the next product in the General Product Inquiry or Order Entry you can now choose the next Alternate when at the Alternate prompt.

4. New Feature – Select Next Product By – This flag has the options of Product / Alternate Product Code or Product Class. If you choose the Product / Alternate Product Code the system will work just as it has in the past. If you choose Product Class then the system will select the next product within the last class that you selected. If you press + or – when selecting a product, you will be given a scrolling box with the entire class' product in it starting with the last product selected.

This new flag is located on screen three of Entity and System Flags – Inventory. The default setting is Product / Alternate Product Code.

5. New Flag – If you have default locations for Products this new flag will make it easier to update the default location stored in a Product. If this new flag is set to Yes you will have the opportunity to change the Default Location when moving product from one location to another. Ask to Change Product Default Location during Move.

6. Screen Change – The final screen of the Inventory Manual Adjustment has changed slightly.

7. New User Flag - Show Vendor Code/Name in "Expert" Product Inq. If you are using the Expert Product Inquiry Screen option, the last three purchases are shown on the first screen. The default is to show the Vendor Code. You can now choose to see the Vendor Name instead by changing this flag. This flag is located in User Flags – Inventory, F7- Inquiries.

8. New Lookup Feature/Flag – Select Next Product By – This new flag has the options of Product/Alternate Code or Product Class Code. If you choose the Product/ Alternate Code, the system will work as it always has. In a product inquiry if you press the + or – at the Product Code or Alternate Code Prompts you will automatically pull up either the next or last alpha numeric code.
If you choose Product Class then the system will select the next product within the last Product Class that you selected. If you press + or – when selecting a product you will be presented with a scrolling box with the entire class' products in it starting at your last product. You can then scroll up and down through all products in the chosen classification.

This flag can be changed in Entity and System Flags – Inventory on the third screen.

9. New feature – Remove Un-used Price Tables – If you have Price Tables in the system that are no longer being used this feature will enable you to remove them. This program will check the price tables against your inventory file. Any tables that are not in use will be displayed.

General Ledger

1. New Feature – If you have Cost Centers for Branch Locations you can now have the system post to separate General Ledger Accounts by Branch for Accrued Accounts Payable, Inventory Adjustments and Customer Deposits. The system will choose the correct General Ledger Account based on the Cost Center that is setup in the Branch File. If there is not a valid Cost Center in the Branch File the system will post to the Master General Ledger Account without a suffix. This requires having the Optional Branch System along with Cost Centers setup in the system. There must be a main General Ledger Account without a Cost Center suffix and then a General Ledger Account for each Cost Center.

When you receive a Purchase Order or Processing Purchase Order the system will check the branch and if there is a valid Cost Center in the Branch the receipt will be credited to the appropriate account. When paying the Invoice for the receipt the system automatically applies the invoices to the General Ledger Account that the Purchase Order was received into.

When you apply a Customer Discount through Cash Receipts the system will automatically apply the discount to the appropriate General Ledger Account assigned to the Branch on the invoice.

When you do a Manual Adjustment the system will default to the Inventory Adjustment Account that is assigned to the Branch the Adjustments are being made for.

Cost Centers can be defaulted by Branch or on a Customer by Customer basis. If a Cost Center is setup in a Branch and a Customer, the Branch setting will over-ride the Customer Setting. Your company should choose which way they would like to use the Cost Centers and set your data up appropriately. If you choose to use the Cost Center Feature by Customer there is a flag in the system - Force Customer Cost Centers? When this flag is set to Yes, the will force Users to select a Cost Center when adding a new customer. This flag is located in Entity and System Flags – Accounts Receivable.

2. New Feature/Flag - Force Customer A/R Account? If your company has multiple Accounts Receivable Accounts for Customers you can now default the Customer Master Record to automatically select the desired General Ledger Accounts Receivable Account when invoicing your Customer. If you set this new flag to Yes, the system will not allow a new customer to be saved without selecting a valid Accounts Receivable Account for the new Customer.

Sales Analysis

1. New field for export – When exporting the Customer Detail Sales by Product report, the current Contract Price will now be included in the exported data.

2. New fields for export – When exporting the Salesperson Sales by Customer the Customers Billing Address, Shipping Address and Default Pricing level will now be included in the exported data.

Utilities

1. New Feature – There is a new menu item Enter & Edit Fax Defaults located in the documentConnection Maintenance menu. This will allow you to set whether you want to have a selected Machine ID auto assign faxes or not. If the 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. This is so we can avoid collisions if the sender is not setting up their fax properly and another fax machine sends the same Machine ID.

In the same screen you can now select a user to automatically send the fax to.

2. The BUSINESS EDGE now can backup to multiple rsync servers. This means that we can backup to a local extra Linux server as well as to the on-line backup server if you are setup for rsync backups. There is a configuration charge to set up the backups.

3. New Feature - Save outbound PDF's into documentConnection when they are printed, faxed, e-mailed or viewed from The BUSINESS EDGE. This can be setup on a document by document basis as this will take a lot of hard drive space. If you would like to keep images of particular documents you can set this up in Document Flags, Document Form Numbers, F4-Form Options, Select the form by clicking on it or pressing Enter, F2-Save Copy Options.

4. New Feature – Customer Document Output options have been added as fields that can be exported through the Export Customer Information.

5. New Feature – Enhanced Print Job Control – Users can now cancel single print jobs or all print jobs sent to a particular printer. Either by pressing F2 from the Menu or in Utilities, Print Control System, Printer Status and Job Control. Users can highlight the printer they sent their print jobs to, Press enter to see all of the print jobs waiting to print. If you would like to cancel a single print job highlight it and press Enter to cancel a particular print job. To cancel all of your print jobs to that printer, press or click on F2 – Cancel all of My Jobs. This will not cancel other Users Print jobs, only those belonging to the User logged in.

6. New Feature – Users can now choose a default printer for Merchandise receiving documents.

7. New Security Setting - There is a new User Security Flag in Enter & Edit User Permissions - Allowed to See Full Credit Card Information?

Branch Features

1. Branch option has been added to the Customer Sales 12 Month Report.

2. Branch Option has been added to the import of locations to the location file.

3. When exporting – Customer Sales History from the F5 in Customer Inquiry the Branch qty on hand by branch will be included for the Products your Customers has purchased.

4. Branch Option has been added to the Shipping Schedule by Date. This report is located in Order Reports, Scheduling & Expediting Report.