Software Enhancements

Highlights:

- **Order Entry Sales Code and tax enhancements**

- **Purchase Order Terms enhancements**

- **Order Action Report enhancements**

Sales and Service

ORDER PROCESSING

Sales Order Entry:

● Two new fields have been added to the Sales Code for use with Order Entry: Override Minimum Charge and Override Minimum Value. These will override the Minimum Charge fields on the Sales Order when any line on the order contains that code.

●The ability to change the Priority of a Sales Order is now controlled via User security.

●The ability to change the Taxable Status of a Sales Order header is now controlled via User security.

Shipment Priority Regeneration:

●Optionally, The Regeneration can be run so that the inventory Minimum Quantity is used to calculate availability of product. Product will no longer be allocated to a customer whose Priority is not Level 1 if the availability goes below the minimum requirement.

Sales Code Maintenance:

●Two new fields have been added for use with Order Entry: Override Minimum Charge and Override Minimum Value. These will override the Minimum Charge fields on the Sales Order when any line on the order contains that code. This change also affects EDI imported orders.

Tax Code Maintenance:

● The Tax Codes have several new fields for tying together of multiple tax codes. For example: The state requires a county tax and possibly a local tax. These 3 can be tied together and required as part of Customer maintenance, ship-to maintenance and Order Entry. Tax Code Maintenance has 3 new fields to define which level a tax pertains to, an option to require the next lower level of tax and a tie to the parent tax code for the lower level taxes.

Customer Maintenance:

● The new Tax Authority requirements will apply when a new customer is entered or when the Tax Code is changes is changed.

Ship-To Maintenance:

● The new Tax Authority requirements will apply when a new Ship-to is entered or when the Tax Code is changes is changed.

CUSTOMER SERVICE

Inventory Profile:

●The Minimum and Maximum Quantity are now displayed.

●The S/O tab will now display the open sales order lines in Priority Order then Will-Ship date.

Customer Profile:

●The Finance Code will now be displayed. This code will be displayed in red. Optionally, the end of day can look at open receivables to apply Finance Codes.

Financial

ACCOUNTS RECEIVABLE

Customer Maintenance:

● The new Tax Authority requirements will apply when a new customer is entered or when the Tax Code is changes is changed.

ACCOUNTS PAYABLE

Invoice Entry:

●The invoice terms will now default from the Purchase Order. Verbal Invoices will continue to default from the vendor.

●The invoice lines can be re-sorted during entry to display in the sequence in which they were entered or in line sequence.

GENERAL LEDGER

G/L JOURNAL ENTRY:

●The Currency for each line can now be selected as part of entry of a new journal.

Material

PURCHASE ORDERS

Purchase Order Entry:

●The P/O terms has now been expanded. The default will come from the Vendor but can be changed at the P/O level. These terms will default on the invoice for this P/O.

●The ability to change the Terms on a Purchase Order is now controlled via User security.

INVENTORY CONTROL

Part Master Maintenance:

●The Weight and Volume can now be changed for a User that is defined as being a Purchasing Department User.

Order Action Report:

●There is now a date option on the report criteria. This date actually is a mini MRP process and will calculate requirements and replenishments scheduled on or before that date.

●The job number created is added to the Order Action Report journal which is generated after either Create Released Jobs or Create Planned Jobs is selected.

Systems

End of Day

●Optionally, the end of day can now apply a Finance Code to a customer based on their late status.

●Optionally, the end of day can now apply a Hold Code to a customer based on their late status. This Hold Code can be applied to open Sales Orders.

User Security

●The End of Day user is now controlled via User Security. This will allow for the End of Day to be run by multiple users. This is a good option for hardware outages or changeovers and is not recommended to be used outside of these circumstances.

●The ability to change the Priority of a Sales Order is now controlled via User security.

●The ability to change the Taxable Status of a Sales Order header is now controlled via User security.

●The ability to change the Terms on a Purchase Order is now controlled via User security.

NOTES: