New Features and Enhancements

Improved Attachments Handling

New Attachments functionality in the A/P Invoice, Cash Receipts, and Stock Receipts screens allow you to attach documents to eliminate paper-filing. Save and attach emailed invoices or scan and attach paper invoices, customer checks and receiving slips. As in other attachment screens, local files are automatically copied to the Attachments folder on your server so that they are accessible to other **inform** users.

- *A/P Invoice* Entry - Click the Attachments button in the bottom toolbar after entering the vendor and invoice number.
- *Cash Receipts* – Click the Attachments button in the bottom toolbar after entering the customer, check number, and amount received.
- *Stock Receipts* – After entering the P/O number, click on the Attachments tab, click the New button, and select the file to be attached. You can also attach documents to the invoice by clicking the Attachments button under the A/P Invoice tab, after the receiving has been saved.

General Ledger Account Validation

Selecting the appropriate General Ledger account when posting in **inform** is vital to G/L reconciliation. Mistakenly posting to accounts reserved for system use (ex. Accounts Payable, Accounts Receivable, etc.) can result in out of balance G/L accounts and may require research and adjusting journal entries at end of month closing.

To ensure that your G/L accounts reconcile, Customer Care has identified accounts that are reserved for system posting only and now restricts these accounts from being selected for use when you have the option to choose a General Ledger posting account or General Ledger Bank.

For adjustments in these areas, you should create a standard system transaction, such as a credit, or use a user-defined General Ledger account designated for this purpose.

Inform Marketing Manager

- Easily choose which contacts should be included or excluded from your mailing using the new Contact Selection window. After you enter your Selection Criteria, click the OK button in the Inform Marketing Manager screen to view a list of your selected contacts. Simply uncheck those that you don't want to include to remove them from the list.
- New **Send Test** button sends the user currently logged in a copy of the email, allowing you to check your formatting, spelling, and composition before sending it to your customers.
- Expanded composition window gives greater visibility when creating your email. The **Less/More** button in the upper left corner allows for additional space.
- Notifies the user that the email sent successfully.

Accounting

- **A/R Aging Report** – Now displays customer terms.
- **Customer Ledger** – users without permission to "View Cost and Gross Profit" can now only access the Sales option under the Sales Analysis tab. Additional reports are disabled.

CRM

- **Configure Google Synchronization** – automatically searches for contacts when the user clicks on the Contacts tab.
- **Salesperson Dashboard** – users without permission to "View Cost and Gross Profit" can now only access the Sales option under the Performance tab. Additional report options are disabled.

Purchasing

- **Purchase Order** – Removed the "Recalculate" from the right-click menu for Line Items. The order can still be recalculated using the "Recalculate Order" tab.

Sales and Pricing

- **Customer Master** – The "Min S/O Charge" field, under the General tab, now reads Min S/O Threshold. The functionality remains the same; it allows you to specify the minimum Sales Order dollar amount required for the Miscellaneous Charge to be automatically applied to the order.
- **Price Matrix** – For Future pricing: now only asks for a Future Date in the Net Pricing screen if there are items without an Effective Date when the user saves.
- **Customer Order Pad** – Now displays discontinued items.
- **Sales Order** – Users can no longer enter a vendor that is on hold for a linked Purchase Order or Drop Shipment.

Miscellaneous Fixes and Adjustments

Accounting

A/P Invoice Entry

-Corrected issue that disabled the void button for invoices that were otherwise not able to be edited.

Customer Statements

-Resolved problem that prevented zero-balance invoices from printing.

Executive Performance Summary

-Corrected A/R Aging calculation.

CRM

Configure Google Synchronization

-Corrected problem that showed deleted contacts as available in the selection grid.

-Fixed problem, contacts were not clearing between searches.

-Removed message for no contacts found.

Opportunity Pipeline

-Fixed system error when Probability left blank on quote.

Price Change

-Fixed problem with clearing Price Rollups.

Purchasing and Stock Receipts

Projected Purchase Order

-Fixed display issue with Demand, was showing the dollar sign for units.

-Resolved rounding problem that was causing higher projection quantities.

Purchase Order

-Corrected miscellaneous issues caused by new Stock Transfer consolidated processing.

Stock Receipts

-Resolved system error that occurred when tabbing out of the Freight field.

-Fixed problem, some controls were editable when form was cleared.

-Corrected problem that prevented the system from updating the Landed Cost if there was no freight on the receiving. System now updates landed cost if there is no freight.

Sales Order

-Resolved problem that caused the Line Item warehouse to change back to the default warehouse when the Ship Qty was updated.

-Fixed intermittent system error that occurred when a comma was entered into the Qty Ordered field.

-Corrected problem that disrupted the functionality of the prompt to change the warehouse for Line Items on the order.

-Fixed issue with the population of the Available Qty field.

-Fixed intermittent system error that occurred when a user clicked on the Inventory tab.

-Corrected issue that prevented the “Price Override Below Min G/P” from working for Net Price items.

-Resolved problem that re-priced overrides on line 1 when the quantity changed.

-Corrected duplicate column header printing when hazmat items were printed on an order.

From 1/6/2010 Release Only – Corrected problem that prevented orders from being truck scheduled.