Inform Upgrade 8/12/10 Version 20.0.28.28

New Features

Redesigned Price Contract Screen

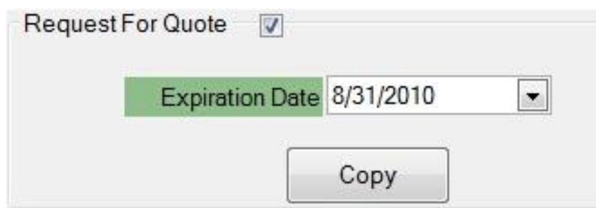
The new Price Contract screen moves the Pricing and Future Pricing buttons to tabs, while adding the functionality to attach files to contracts under the Attachments tab. Now sorts customers by name to allow for easier maintenance.

New! Truck Manifest Summary Mass Pick Sheet

Now print a Summary version of the Mass Pick Sheet, which includes the product, on hand quantity, quantity to pick, and bin location. The Detail Mass Pick Sheet also includes the order number and customer name. Reformatting of the Mass Pick Sheet now allows for more items to print per page. The description of the HazMat code was also updated on the manifest.

New! Send a Quote Request to a Vendor

Instead of sending your vendor a Purchase Order, send them a Request for Quote to compare pricing. Check off the “Request For Quote” box under the Header tab in the Purchase Order screen to create a request and set the expiration date.

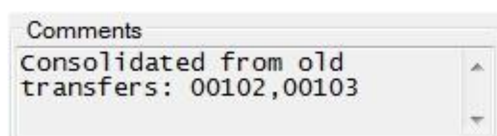


Once the RFQ is saved, you can copy it to another vendor by clicking the Edit button then clicking the Copy button under the Header tab and entering the next vendor that you want to request a quote from for the products.

You can also create a custom message to display at the bottom of these requests under the Document Message, Terms and Conditions screen (File > Company > Document Message, Terms and Conditions).

Finally, search for and track your requests through the Purchase Order Inquiry screen by using the new “Request For Quote” and “Expired Request For Quote” filter options.

Consolidate Open Stock Transfers by Warehouse



Now consolidate all open Stock Transfers from one warehouse to another into a single transfer with the click of a button. Click the “Consolidate” button in the Stock Transfer Entry screen then choose the “To” and “From” warehouses. Products and quantities from all open Stock Transfers will be consolidated on to one transfer. The Comments on the consolidated transfer will reference the transfers that have been included in it for additional tracking (shown above). The old transfers will be marked as completed so that no changes can be made retroactively.

Consolidated transfers also maintain all links to Sales Orders, and update the Sales Order with the new transfer number.

Accounting

A/P Invoice Entry	-Now displays the subtotal on the Audit Log screen.
Cash Receipts Posting	-Users can now print the audit trail for the entries made by the user who is currently logged in using the “Print User Audit” button.
	-When entering an On Account payment, the user can now enter a note in the pop up window.
Customer Ledger	-On Account Invoices now display the note in a tooltip under the Invoice tabs.
Vendor Ledger	-New option to filter on Request For Quote added to the Open P/O tab.
	-The screen now always refreshes even if the vendor is not changed.

Company Master Files

Company Branch	-Added auditing tab to track changes.
Company Document Message	-Added new message for Request For Quote.
Company e-Commerce	-New input area for meta tags.
	-New field for option to display ship via only. Checking this box only displays the customer’s default Ship Via (Customer Master > General tab) for online ordering. If they would like to request an alternate shipping method, they can enter their preference in the Special Instructions for the order.
Company Master	-Added auditing to track changes.
Company User Master	-Now validates that initials are not already assigned to another user as they are entered.
	-Changed to not show required field errors until after the user tabs through the form.
	-Now sorted by user name
Customer Master	-Removed unused “Invoice Discount %” field.\
Email	-New phantom process purges emails after a certain number of days to prevent system slow down.

Purchasing/Inventory

Inventory Inquiry	-Products that are non-stock, inactive, discontinued or consumable now display in red. Hover over the item to view the stock status.

PO Delivery Confirmation	-Prevents the user from loading a Request For Quote into this screen.
Product Analysis	-Changed to ensure that RFQs would not show on Purchase Orders or Vendors tabs. Only vendors that the product is actually purchased from will display under the Vendors tab.
Product Master	-Now ensures that Vendors Last P/O does not include Requests For Quote.
	-Web documents can now be entered along with their URLs.
Product Import	-Can now import multiple Units Of Measure.
Projected Purchase Order	-Now checks if there are any open Purchase Order screens in Edit mode and will not create the Projected P/O until the open P/O is saved.
Purchasing Matrix	-New Company Master setting (under the Pricing/Costing tab), allows the Vendor Last Paid Cost to override the Purchasing Matrix.
Purchase Order	-Now shows the date received with serial numbers.
Purchase Order Inquiry	-Now allows for a search by Job Number.
	-Can now search for Requests For Quote.
Purchase Order Report	-Added Request For Quote to Header Criteria options.
Special Purchase Requisitions	-Now ensures that a Request For Quote cannot be selected for a requisition.
Stock Receipts	-System now uses P/O price instead of landed when processing the receipt.
	-Changed to ensure that the user cannot try to receive a Request For Quote.

Sales

Sales Order	-Now gives the option to place an order on same day's manifest when removed from credit hold.
	-Changed caption "LI" to "Line" on Shipments grid.
	-Now gives box quantity prompt as soon as a product is entered.
	-Now allows users to overship or undership an order.
Salesperson Dashboard	-The Accounts Receivable tab now uses the sort order set in the Company Master (under the Information tab): Sort Customers by (N)ame or (A)ccount number.

Miscellaneous Corrections and Adjustments

Accounts Payable Invoice Entry

-Corrected issue that blocked EDocs availability in Add mode.

Accounts Payable Purchase Journal

-Fixed problem with the Discount Amount field.

Critical Inventory Report

-Resolved issue that did not include warehouse minimum quantities in calculations.

Company e-Commerce

-Fixed locking problem.

End of Month Closing and Journals

-Corrected issue that was not processing tax for Canadian companies correctly on the Sales Tax Journal.

Executive Performance Summary

-Fixed problem with the Month To Date Variance.

General Ledger Inquiry and Financial Reporting

-Now clears data when the dates are changed.

General Ledger Re Index General Ledger

-Corrected issue that caused consumable products to post to a null G/L account.

Purchase Order Inquiry

-Now returns to the correct row after leaving the screen for Inquiry.

Sales Order

-Fixed problem with Commit All button for line items.

-Corrected issue that caused recurring orders to be scheduled for the original ship date.

-Fixed error message on 64 bit systems about missing graphics file.

-Resolved issue that was displaying the header warehouse for assemblies instead of the line item warehouse and recording the sale of the assembly to the wrong warehouse.

-Corrected issue that allowed users to override pricing below the minimum Gross Profit by changing the Discount Percent without checking the access level.

-Fixed display issue that showed the unit cost as factored by unit of measure intermittently.

-Resolved issue that was resetting the cost when the price was reset.

-Fixed problem that cause the price to be set to 0 when the quantity changed.

-Fixed issue with access level when selecting Last, Margin or Quoted price.

-Corrected problem that was displaying the calculator tooltip when the mouse was not over the button.

Sales Order Inquiry

-Fixed problem with the cursor changing rows when a hyperlink was clicked.

Salesperson Dashboard

-Corrected display issues with adding a new contact.

-Fixed problem that displayed the event start date in the wrong column of the grid.

-Resolved system errors that displayed when clicking on blank grids.

Special Purchase Requisitions

-The Inventory grid now clears when the screen clears and updates after deleting a line.

Stock Receipts

-Corrected issue that allowed A/P Invoice number with trailing spaces to be entered.