

## Inform 1/6/2010 (Version 20.0.1.1) Upgrade

### New Features and Enhancements

#### Financial Reporting

Inventory Value Report	Our Customer Care team has been working with users to reconcile their General Ledger inventory values with the Physical Inventory Value report. The team has isolated a number of workflow issues that contribute to out of balance conditions, including the sale of negative inventory, average cost discrepancies from post-invoice AP posting, un-invoiced but received purchase orders, and more. Additional report options provide a General Ledger Reconciliation report that calculates these values for G/L adjustments by journal entry. A new option includes zero quantity on hand items.
Invoice Variance Report	Invoice Average Cost Variance report reveals differences in the COGS on a customer invoice, and the discrepancies in G/L inventory values resulting from Accounts Payable postings done after the customer was invoiced.
New G/L Workflow	Consumable item and SP item transactions can create financial reporting problems, because these sales reduce your general ledger inventory value, while having no effect on your physical inventory value. To eliminate these discrepancies in inventory value, these transactions can now post to a separate General Ledger account. To enable this workflow, create a new general ledger account to capture and isolate these non-inventory value transactions, and add the account to the General Ledger Control Table screen.
Warehouse G/L	New field defines Cost of Goods Sold G/L Suffix, enhancing multi-location financial reporting.

#### Price Quotes

Margin price update is now available for Price Quotes. Previously margin price update affected only sales history items. To enable a price quote with automatic margin update, use the new checkbox in the quote section of the header screen. To default all price quotes to have this box checked, use the new Company Master File switch.

A new overnight job reviews all price quotes overnight, checking for quoted items that need sell price increases. Quoted items on price and cost contracts are not changed by this process.

#### Physical Inventory Screen and Worksheet

For more precise cycle counting, a new option selects either inventory Committed or inventory Ship Confirmed on the Physical Inventory screen and cycle count worksheet. By switching to the Ship Confirmed number, it is easier to identify what material is actually in the bin and what material is already picked and in transit to the customer. Set this option in the Company Master File under the Purchasing / Inventory tab.

### Projected Purchase Order

Enhanced multi-location purchasing, including automated stock transfers upon stock receipts. This workflow, referred to as Consolidated Purchasing, is enabled in the Company Master File. Consolidated Purchasing modifies the Projected PO to enable a series of features:

- The Projected PO will cycle through each warehouse, one-by-one, enabling the buyer to review inventory and demand exceptions in each location before purchasing.
- Warehouse Overstock and Transfer logic reveals in red every item that is overstocked in another company location. Right-click on an overstock item to access the warehouse overstock analysis and transfer screen.
- After each warehouse's individual purchasing requirements are evaluated and saved, the projected PO applies minimum purchase quantities and box quantities to the consolidated order quantities.
- Right-click on the consolidated purchase quantity for a grid that reveals the purchase quantity for each individual warehouse. Edit quantities as desired.
- Stock Transfer Orders are generated at the time of PO creation, and held until stock receipt. At the time of receiving, the receiver is prompted to print the stock transfer orders.
- The Open PO Receiving report is enhanced to print linked stock transfer orders and quantities as well as linked sales orders.
- The Purchase Order screen gets an additional tab that reveals linked stock transfers, allows drill-down access and editing.

Projected PO has newer version of chart, with smoother lines and high resolution colors.

### Pricing

Price Contract - Create price contracts for all customers using a new check box to apply this contract to all customers.

### Opportunity Pipeline

The Opportunity Pipeline, found in the CRM menu, is a sales management tool that helps you identify your important, most significant price quotes, and manage the sales process more effectively. In this update, layout changes improve your ability to quickly see existing opportunities, their value, and the follow-up scheduled in your and your sales teams calendars. The new opportunity forecast chart provides insight into the predicted close dates and forecasted value by month.

### Sales Order

- New Customer Master File option flags customers who expect a sales order confirmation by fax or email with every order. With the Fax S/O box checked in the Customer file, the 'Send' button in Sales Order entry flashes.
- During Sales Order entry, an entire order's inventory status is more easily reviewed in the Inventory tab. revised split-screen view allows you to scroll through every line on the order and view inventory information for every warehouse.
- During Sales Order entry, when an item is not available, the backorder quantity dialog box appears. The enhanced dialog box now includes on hand, committed, available, on-PO and expected arrival date data.

### **Print Screen**

New Print Screen button on the **inform** toolbar prints the current screen.

### **Sales Order Inquiry**

Added option to search for expired quotes.

### **Inventory Inquiry**

New fields to select customer Ship To and display correct prices for selected Ship To.

### **Enhanced Bookkeeping workflow accommodates multiple simultaneous users and multiple bank accounts for accounts receivable, accounts payable, and end-of-month reporting**

#### **Accounts Receivable**

Cash Receipts Posting	Can now post more than one bank per batch.
Daily Cash Receipts Journal	Added selection by branch and bank account.

#### **Accounts Payable**

Check Print	Print checks from multiple banks accounts per batch print run.
Schedule Checks	Schedule payments to multiple banks per batch check run.

#### **End of Month Closing and Journals**

Added G/L Bank to selection criteria for Cash Receipts Journal.  
Added G/L Bank to selection criteria for Cash Disbursements Journal.  
Branch is now available for selection criteria in Finance Charge Journal.  
Branch is now available for selection criteria in Cash Receipts Journal.

#### **AFFLINK Buying Group Integration**

Data Segmentation AFFLINK export and data transfer.

## Miscellaneous Corrections and Fixes

### System-Wide

Corrected issue that prevented users from editing existing records when the reference ID exceeded the maximum number of characters allowed. This affected multiple screens, including Customer and Vendor Terms, Categories, and Sources, as well as Ship Via's, Trucks, Product Bin Locations, Product Lines, Price Groups, and Buy Lines.

### Accounts Payable

Check Print	Now requires Bank G/L in order to process.
Check Print	Now populates default bank when loading form.
Non Vendor Check	Now validates that a check date is passed in before printing
Non Vendor Check	Will not save with blank Check Date.
Cash Disbursements Journal	Now validates bank correctly
Invoice Entry	Validates all required fields at Save.
Invoice Entry	Displays the G/L Account with Branch suffix if it exists.
Invoice Entry	Editing not allowed if invoice period is not in current list of valid fiscal periods.

### Accounts Receivable Menu

Cash Receipts Posting	Corrected issue with record locks during Miscellaneous Cash Receipts.
Cash Receipts Posting	Corrected issue with display of batch total.
Cash Receipts Posting	Can now enter adjustments when no invoices in system.
Cash Receipts Posting	Corrected issue when credit card entry was enabled and customer was already in the CR batch. For a single customer, you cannot process both credit cards and checks in the same batch or process more than one credit card per customer in the same batch.
Cash Receipts Posting	Corrected issue error cancelling credit card screen when no data entered.
Cash Receipts Posting	Fixed locking problem with Miscellaneous Receipt.
Cash Receipts Posting	Fixed problem trying to post to A/R.
Customer Ledger	Now shows salesman name on top of screen.
Customer Ledger	Added Monthly Breakdown tab.
A/R Collection Letters	Fixed several issues causing display and performance problems.

### Bank Reconciliation Bank Ledger

Fixed problem with totals display on some reports.

### Company Settings

FastWeb	Could not add user to Notify Users grid.
Company Master Settings	Ability to configure SMTP server to send <b>inform</b> HTML email without requiring a secure connection.
Branch	Corrected issue with Critical Inventory Notification getting cleared.

### CRM

Contacts	Changed validating behavior of phone number fields.
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Opportunity Pipeline	Fixed Error assigning a Task to a Quote.
Salesperson Dashboard	Corrected issue that caused some of the values to not match the Salesman Reporting screen.
Salesperson Dashboard	Corrected issue not showing the current months information on Performance tab.
Salesperson Dashboard	Corrected 'See Cost and G/P' permission display issues.

#### Customer Order Pad

Corrected issue, writing Hide flag to the wrong file.  
Corrected issue with viewing cost and G/P in tool tip.

#### Customer Master File

New checkbox field to require Sales Order confirmation via fax or email.

#### Customer Sales History

Fixed validation for cost and gross profit based on View Salesman Cost permission.

#### End of Month Closing and Journals

Fixed problem with some journals not returning any data when only one month requested.  
Fixed problem with totals on Sales Tax Journal

#### General Ledger Journal Entry

Fixed problem entering with a blank reference number.

#### Invoicing

Corrected issue, last invoice was becoming unchecked after returning from Inquiry.

#### Invoice Inquiry

Corrected issue on the scrolling prices grid.

#### PO Delivery Confirmation

Fixed problem, Estimated Delivery Date could not be cleared.  
Removed message for -0- records returned when search fails.  
Added Estimated Delivery Date to populate in P/O search box.

#### Pricing

Price Contract	Restored Current or Future price date inside Net Pricing screen.
Price Contract	Added functionality to switch view between Future and Current in Net Pricing screen.
Price Contract	Fixed issue, Customer grid had an extra blank row.
Price Contract	Corrected extra row added with drop down instead of search button when adding a customer by clicking the search button in the grid.
Price Matrix	Display unit of measure was showing instead of price unit of measure when adding an item.

### **Inform News Feed**

Timeout failure for news feed is now configurable in COMPANY file.

### **Product**

Bin Locations	Can now edit existing bin if ID length greater than that allowed for new Bin.
Product Master	Access levels control user view of Last Cost in 'Vendors' tab.
Product Master	Salesman cost displayed in Rollup History if the user does not have View Cost and G/P permission.

### **Product Analysis**

View Salesman Cost corrected in main form and other tabs.  
New version of chart offers improved graphics and potential for more advanced charting features.  
Fixed display problem with Minimum Stock Quantity.

### **Purchase Order**

Corrected PO numbers getting created with trailing blanks.  
Now limits the number of allowable digits to 8. This length is not configurable as are some other IDs in the system.  
Added display of requested stock transfers for projected purchase orders.

### **Projected Purchase Order**

Now uses newer version of chart, with smoother lines and high resolution colors.  
Fixed problem with incorrect minimum quantities.  
Added functionality to request transfers for consolidated projections.

### **Release Orders On Hold**

Added Job ID.

### **Shipping Confirmation**

Fixed tab order and some issues with signature required validation.

### **Sales Order**

Allows price quotes for customers on hold.  
Fixed problem with populating the default warehouse based on Ship Via master file settings.  
Fixed issue with Co-Op Percent.  
Manual sales order number is limited to 7 digits. This fixed length is not configurable as are some other IDs in the system.  
Found solution to font resolution issue on some Vista and Windows 7 machines. See blog for resolution.  
Fixed validation for changing G/P % in price detail.  
Fixed intermittent issues with Recalculate Prices.  
Fixed problem with Recalculate Prices, which was disabled for orders in billing.  
Improved performance of Recalculate Prices feature.  
Added functionality to use USB signature pad over terminal server.  
Fixed intermittent problem with CCV not being available.  
Fixed problem, the Inventory grid was not showing the correct quantities when a SP product entered.

Fixed problem, the Inventory tab was not displaying quantities for the current unit of measure on the corresponding line item.

Fixed intermittent problem with display of quantities in Inventory tab.

Fixed issue, Web orders were not showing Web Price as price method.

Fixed some issues updating the warehouse on header when Ship-to, Ship Via or Branch changed.

Fixed problem, a quote converted to POS order was not allowing line deletion before the order was saved.

Fixed issue that prompted user to change warehouses on individual line items to blank warehouse when the warehouse on the header changed.

No longer allows Cancel for point-of-sale orders with existing deposits.

### **Sales Order Inquiry**

Fixed problem with View Cost permission for report.

### **Stock Transfer Receiving**

Duplicate access key assignments are corrected. Alt+E was set for Exit and Edit. Now is set for Edit, Alt+X for Exit.

Header fields are now editable.

Fixed tab behavior leaving transfer number field.

### **Stock Receipts**

Fixed problem with Vendor info area.

Fixed intermittent system error saving A/P Invoice.

Corrected issue that prevented Inquire on product on an invoiced receiving.

Several improvements to the workflow related to being able to save a receipt and creating the invoice.

### **Un Invoiced PO Report**

Data now populating in Un Invoiced PO Report.