



by Walter Muma, CGA
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SAGE BUSINESSVISION

What's new in v7.1

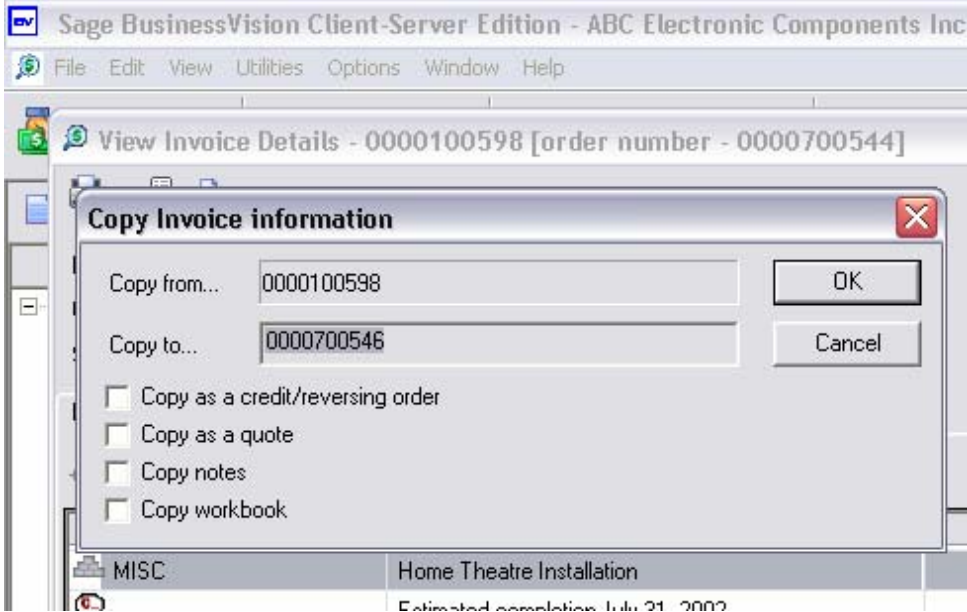
Click the new button, "Copy as a new order (Ctrl+Y)"



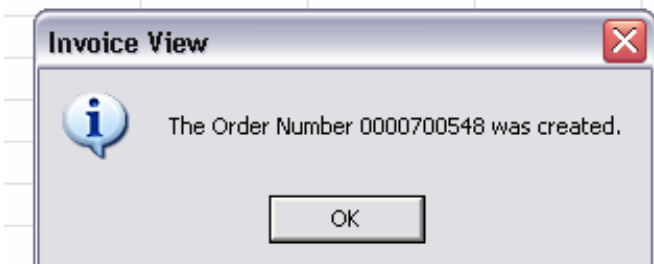
Select one of the options to:

- Copy as a credit/reversing order, or
- Copy as a Quote

If you select neither a duplicate of the Invoice will be created in Order Entry as a regular Invoice. There are also options to copy the Notes and Workbook fields attached to the original Invoice.



A new Order/Quote will be created in Order Entry from the selected Invoice.





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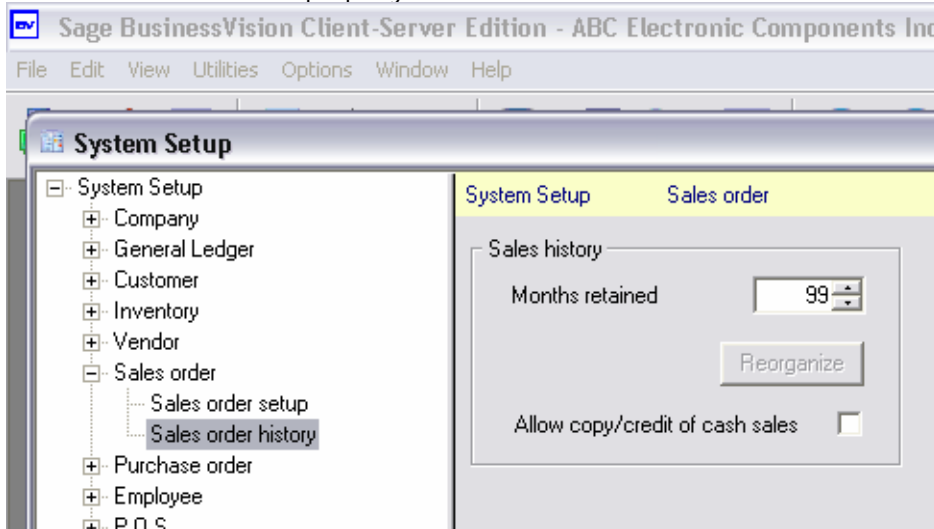
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- Copy as an order (neither option selected) creates a duplicate of the Invoice in Order Entry with the same Customer and inventory items as the original Invoice, with positive quantities. The Order Date and Invoice Date change to the current BV Date. This function is useful for duplicating an order that has been placed in the past. If you make a mistake and create a duplicate by mistake, you can delete the new order. The new order can also be edited just like any other Order.
- Copy as a credit/reversing order creates an Order in Order Entry with the same Customer and inventory items as the original Invoice, but with negative quantities. The Order Date and Invoice Date change to the current BV Date. If you make a mistake and create a reversing order by mistake, you can delete the new order. The new order can also be edited just like any other Order.
- Copy as a Quote creates a Quote with the same Customer and inventory items as the original Invoice, with positive quantities. The Order Date and Invoice Date change to the current BV Date. The Quote can then be edited just like any other Quote.

Remember there has always been a "Standing Order" function available in Order Entry. This allows you to create a template from which orders may be created. It can be used over and over.

System Manager: There is one new option pertaining to this new feature in System Manager, System Setup, Sales Order, Sales Order History, "Allow copy/credit of cash sales". Select this option if you want to allow this. This issue with allowing this, of course, is that you can potentially cause your cash receipts to get out of balance if used improperly.



And there are two new options in System Manager, User Details, Sales Analysis Options pertaining to this new feature: "Copy as new order" and "Copy as credit order". If these are not turned on the selected user will not be able to perform these functions.

Options	Permission
View sales analysis	Yes
View historical selling prices	Yes
Reprint invoice	Yes
Reprint shipping labels	Yes
Copy as new order	Yes
Copy as credit order	Yes



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What's new in v7.1

Purchase Analysis, Purchase Order

Now you can create a new Purchase Order or Credit Note by duplicating a past transaction from Purchase Analysis. This allows you to reverse a Purchase Order after it has been posted and closed. It also allows you to duplicate a past order, and allocate it to the same or a different customer. The created Order can be edited and processed (or deleted if you change your mind) just like any other Order.

Search for the posted and closed Purchase Order in Purchase Analysis:

P.O. Number	Vendor Name	Received date	Currency	Buyer
0000300262	Complete Containers	2002/06/05	CAD	
0000300263	Amtron Components	2002/06/05	CAD	
0000300265	Evolution Planet	2002/06/10	CAD	
0000300266	CNCP Music	2002/06/10	CAD	
0000300267	International Sound Systems	2002/06/10	CAD	
0000300268	Great Audio Equipment	2002/06/10	CAD	
0000300269	Davidson Electronics Supply	2002/06/10	CAD	
0000300270	TXR Components	2002/06/10	CAD	
0000300272	Clairons Specialty Supply	2002/06/11	CAD	
0000300273	Roslev Aurlin Sunlv	2002/06/11	CAD	

View the Purchase Order:

P.O. Number: 0000300262 Order Number: CC2670 Status: Closed

Vendor No.: COMCON Vend Name: Complete Containers

Part number	Description	Order qty.	Unit price	To-date qty.	Received qty.	Buy UOM	Sales tax 1	Sales tax 2
SBX-250	Cardboard container for SP-250	80.00000	1.70000	80.00000	80.00000	ea	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



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Click the new button, "Copy as a new order (Ctrl+Y)"

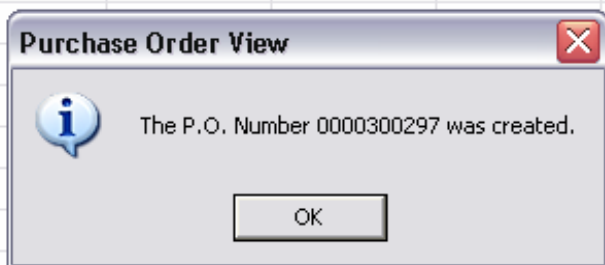


You may select "Copy as a Reversing Order" to create a reversal of the closed Purchase Order. If you do not select this, a duplicate of the closed Purchase Order will be created.

There are also options to copy the Notes and Workbook fields attached to the original Purchase Order.



A new Purchase Order will be created in the Purchase Orders module from the selected closed Purchase Order.



System Manager: There are two new options in System Manager, User Details, Purchase Analysis Options pertaining to this new feature: "Copy as new purchase order" and "Copy as credit purchase order". If these are not turned on the selected user will not be able to perform these functions.



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Options	Permission
View purchase analysis	Yes
Copy as new purchase order	Yes
Copy as credit purchase order	Yes

More Flexible Discounts

Payment Terms now give you the option of applying discounts on net or gross invoice amounts, and the option to discount freight charges.

Check the box labeled "Apply discount to net amount" to turn this feature on. If unchecked, discounts will be applied to the gross amount as in prior versions. You can only check the option to apply the discount to freight if the "Apply discount to net amount" choice is also selected. This is done in Edit, Terms.

% Terms Details - 01

Terms Code: 01
Description: Net 30 days

Detail | Customers | Vendors | Accounts Receivable | Accounts Payable | Notes

Days for discount: 030
Discount rate: 0.00%
Days before due: 030

Apply discount to net amount:
Apply discount to freight:



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What's new in v7.1

Order Entry, Sales History

Now you can look up an item's entire sales history while entering orders in Order Entry.

There's a new button on the Item Details tab of Order Entry, "History browser". While on a detail line of Order Entry that has an Inventory Item, the button is available. No options need to be turned on in System Manager for this feature to be available.

Sage BusinessVision Client-Server Edition - ABC Electronic Components Inc. - [Order Details - 0000700549]

File Edit View Utilities Options Window Help

Order Number: 0000700549 P.O. No. Status: Okay
 Customer No.: ACE Name: Ace Electronics
 Ship-to ID: Same as bill-to Name: Ace Electronics

Item Details Order Details Bill-To Ship-To Notes

Part number	Description	Order qty.	Unit price	Cmdt. qty.	B.O. qty.	Sell UOM	Cost price	Sales tax 1
CD-204	Compact Disk Player with Autoskip	0.00000	313.70000			ea	200.07000	

Click the button to bring up a Sales History mini browser for that particular item.

Order Details Bill-To Ship-To Notes

er Description: History browser (Ctrl+H)
 4 Compact Disk Player with Autoskip

And the History window pops up:

Inventory - Sales History Mini Browser

Start at: 0000100001

Invoice number	Customer No.	Order Date	Order qty.	Unit price	Extd. price	Discount amt.	Total	Cmdt. qty.	B.O. qty.
0000100001	ACE	16-Jan-2001	2.00000	317.22	634.45		634.45	2.00000	0.0000
0000100006	BCAUDI	16-Jan-2001	2.00000	323.70	647.40		647.40	2.00000	0.0000
0000100007	LBSTER	16-Jan-2001	2.00000	323.70	647.40		647.40	2.00000	0.0000
0000100016	SEHIFI	16-Jan-2001	2.00000	323.70	647.40		647.40	2.00000	0.0000
0000100033	ACME	01-Feb-2001	2.00000	317.22	634.45		634.45	2.00000	0.0000
0000100036	CANSPK	01-Feb-2001	2.00000	323.70	647.40		647.40	2.00000	0.0000
0000100060	SNDMCH	28-Feb-2001	4.00000	323.70	1,294.80		1,294.80	4.00000	0.0000



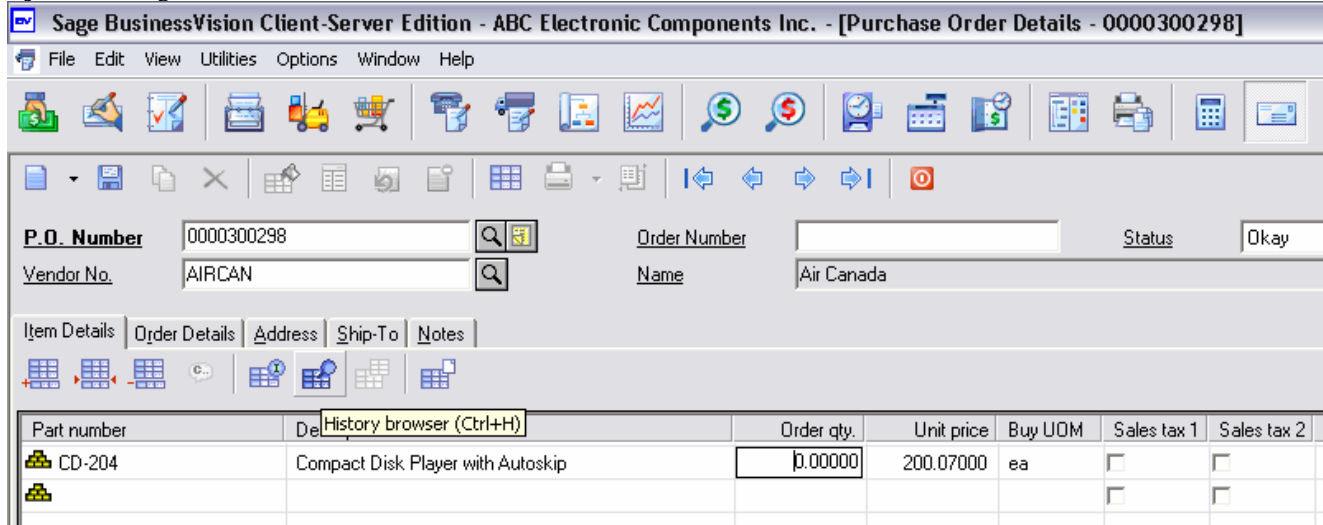
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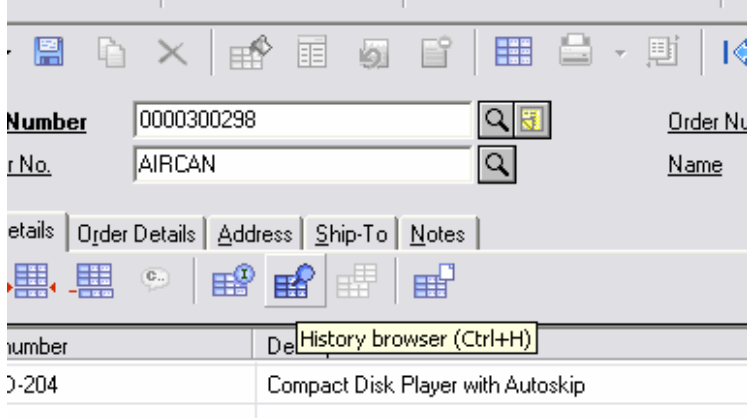
Purchase Order, Purchase History

Now you can look up an item's entire purchase history while entering purchase orders in the Purchase Order module.

There's a new button on the Item Details tab of Purchase Order, "History browser". While on a detail line of Purchase Order that has an Inventory Item, the button is available. No options need to be turned on in System Manager for this feature to be available.



Click the button to bring up a Purchase History mini browser for that particular item.



And the History window pops up:

P.O. Number	Vendor No.	P.O. date	Line #	Status	Order qty.	Unit price	Extd. price	Discount	Line total	Received
0000300008	GRTAUD	01-Jan-2001	001	Closed	20.00000	185.25	3,705.00		3,705.00	20.000
0000300009	GRTAUD	02-Feb-2001	001	Closed	15.00000	185.25	2,778.75		2,778.75	15.000
0000300031	GRTAUD	08-Mar-2001	001	Closed	15.00000	185.25	2,778.75		2,778.75	15.000
0000300043	AMCOMP	01-Mar-2001	001	Closed	15.00000	179.33	2,689.95		2,689.95	15.000
0000300053	GRTAUD	17-Mar-2001	001	Closed	30.00000	185.25	5,557.50		5,557.50	30.000
0000300064	GRTAUD	02-Apr-2001	001	Closed	30.00000	185.25	5,557.50		5,557.50	30.000
0000300066	CLASND	27-Mar-2001	001	Closed	10.00000	200.07	2,000.70		2,000.70	10.000



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What's new in v7.1

Order Entry, Inventory, Bill of Materials

Look up alternate items in Order Entry for items that are not in stock.

Alternate Part Numbers must first be set up in Inventory. One Alternate Part Number per item may be specified on the "Info" tab. If you want to have several alternates available, you need to "link" them in sequence. An item can have an alternate item that in turn has an alternate item, and so on. The last item in the chain should link back to the first item, creating a "group" of items that are alternates for each other.

Part number CD-204 On hold
Description Compact Disk Player with Autoskip

Details Pricing Extended **Info** Summary Image S.O.s S.O.s History P.O.s P.O. History Receipts Customer Pricing Vendor Pricing

Sales
 Sales dept. 004
 Sales tax 1
 Sales tax 2
 Discountable
 Serialized

Properties
 Location Row23
 Unit/measure ea
 Weight 0.000

Purchase Order
 P.O. number
 P.O. due date 00/00/0000

Miscellaneous
 Alternate CD-800
 Notes

While in Order Entry, Item Details, you may click the "Alternates" button to view Alternate Part Numbers that are in stock. If the Alternates are out of stock (On Hand Quantity is zero or less), they will not be displayed.

This button is only available if Alternate Part Numbers have been set up for the Inventory item. But, it is still available even if the Inventory item currently on the Order is in stock.

Item Details Order Details Bill-To Ship-To Notes

Alternates (Ctrl+L)

Part number	Description
CD-204	Compact Disk Player with Autoskip

You can also make use of Alternate Part Numbers in Bill of Materials.



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Alternate parts do not automatically replace a part that is out of stock in Order Entry. You must click the "Alternates" button in Order Entry to view the status of Alternate Part numbers. You may then select one of them to replace the part number on the line of Order Entry you are working on.

Part number	Description	Order qty.	Unit price	Cmtd. qty.	B.O. qty.	Sell
CD-204	Compact Disk Player with Autoskip	11.00000	308.00000		11.00000	ea

Part number	Description	Available qty.	Unit price
CD-800	Compact Disk Player - 5 disk capacity	418.00000	528.30000
TP-350	DVD Player/Hi-Fi VCR Combo	161.00000	359.70000

System Manager: This feature is enabled or disabled by user in System Manager, User Details, Order Entry Options: "Suggest alternate part"

Modify selling price	Yes
Apply line discounts	Yes
Display cost price and margin	Yes
Allow returns	Yes
Suggest alternate part	Yes
Prompt for shipping labels	Do not prompt
Show gross profit	Yes
Edit description	Yes
Edit tax details	Yes



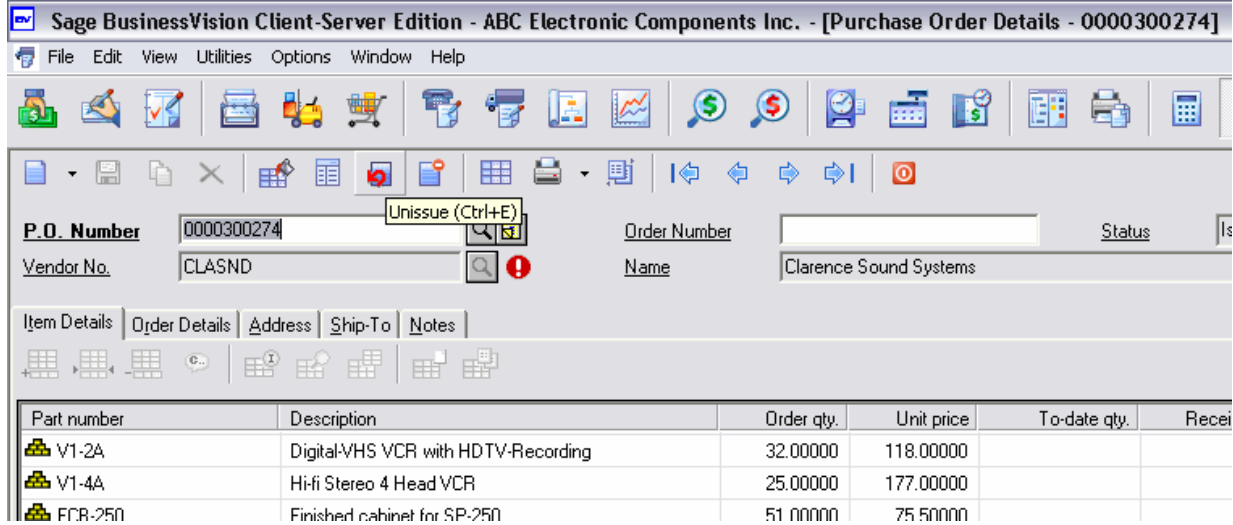
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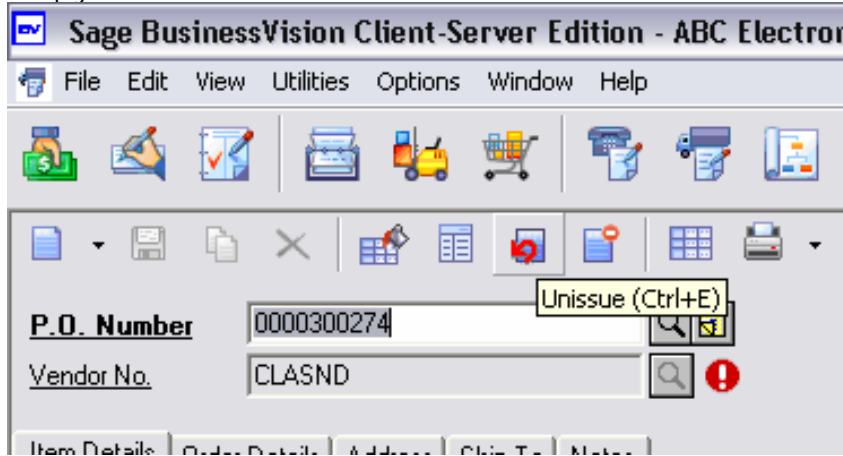
Purchase Order

Purchase Orders can now be Unissued!

As long as there are no receipts for the Purchase Order, you may unissue it.



Simply Click on the "Unissue" button while in Purchase Order.



System Manager: This feature is enabled or disabled for each user in System Manager, User Details, Purchase Order Options:

Allow reprint purchase order	Yes
Allow receive purchase order	Yes
Order number required	No
Clear screen after saving	Yes
Auto-generate purchase orders	Yes
Unissue purchase orders	Yes



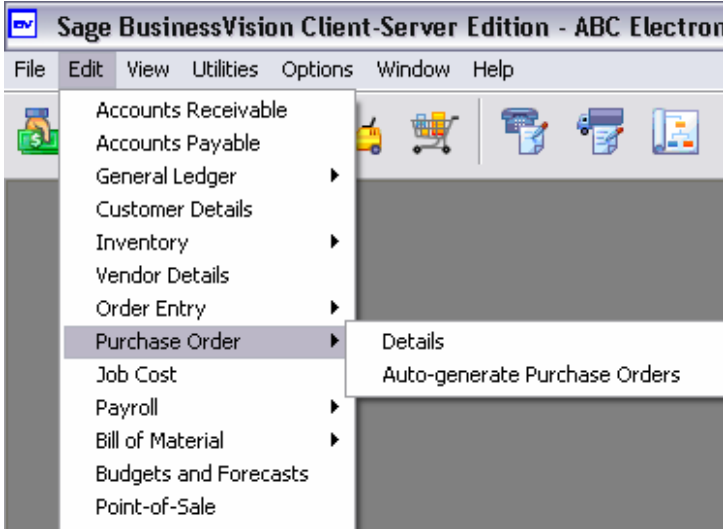
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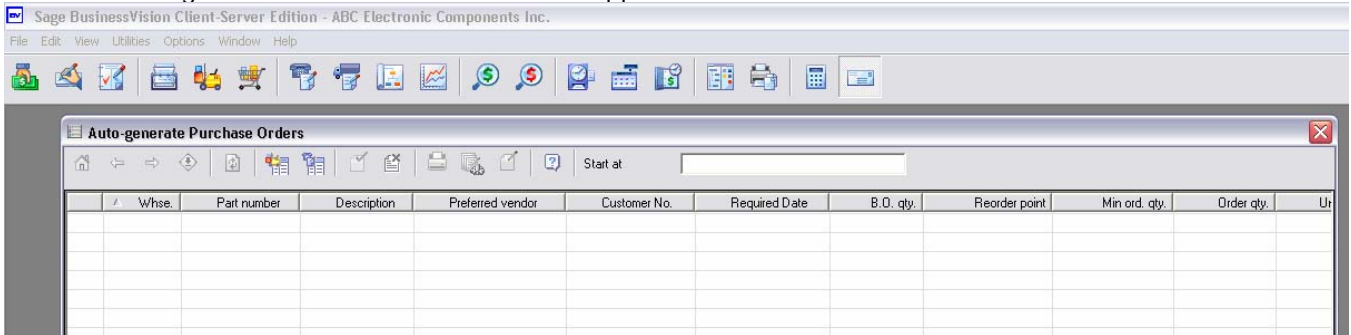
Purchase Order

Now you can automatically generate purchase orders based on inventory levels, reorder quantities, customer demand, or backorders. You can also consolidate multiple items from the same vendor onto one purchase order, or create individual purchase orders from larger, grouped P.O.s.

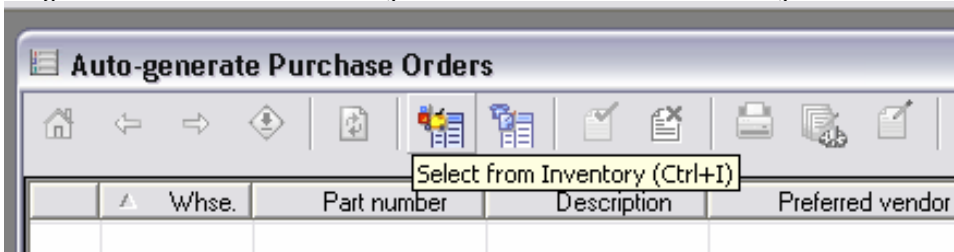
Access this function via the menu: Edit, Purchase Order, Auto-generate Purchase Orders



The new Auto-generate Purchase Orders screen appears:



Purchase Orders may be generated from Inventory or from Order Entry. To generate PO's from Inventory click the "Select from Inventory" button:





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The following dialog box appears, with numerous options for generating PO's:

The 'From Inventory' dialog box contains the following fields and options:

- P.O. date: 06/17/02
- P.O. status: Okay
- Start at vendor no.: First
- End at vendor no.: Last
- Start at part no.: First
- End at part no.: Last
- Product code: All
- Warehouse: 00
- Items on back order
- Items with insufficient quantities
- Consolidate all items into one P.O. per vendor per required date
- Use min order qty. to calculate requirements
- Use re-order point to calculate requirements

Buttons: OK, Cancel, Help

Alternatively, you can choose to "Select from Open Orders" (Order Entry):

The 'Auto-generate Purchase Orders' window features a toolbar with icons for home, navigation, and printing. A tooltip for the 'Select from Open Orders (Ctrl+O)' icon is visible. Below the toolbar is a table with the following columns:

Whse.	Part number	Description	Preferred vendor



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In which case, the following dialog box appears with many options:

From Open Orders

P.O. date: 06/17/02

P.O. status: Okay

Start at order no. First

End at order no. Last

Start at customer no. First

End at customer no. Last

Start at vendor no. First

End at vendor no. Last

Start order date: 06/17/02

End order date: 06/17/02

Items on back order

Drop-ship items to customer

Consolidate all items into one P.O. per vendor per required date

Use min order qty. to calculate requirements

OK Cancel Help

When you click "OK" provisional PO's are generated in a temporary file. These provisional PO's may be edited. Individual provisional PO's may be selected or deselected, as well as all or none. When you are satisfied with your provisional PO's, actual Purchase Orders can then be created. Once created, these Purchase Orders can be edited, processed, or deleted within the Purchase Order module as usual. The details of this entire process are beyond the scope of this document. Please utilize ABC Electronics to experiment with this powerful new feature, or contact Wildwood Canada for further guidance.

System Manager: This feature is enabled or disabled by user in System Manager, User Details, Purchase Order Options:

Allow close purchase order	Yes
Allow issue purchase order	Yes
Allow reprint purchase order	Yes
Allow receive purchase order	Yes
Order number required	No
Clear screen after saving	Yes
Auto-generate purchase orders	Yes
Unissue purchase orders	Yes



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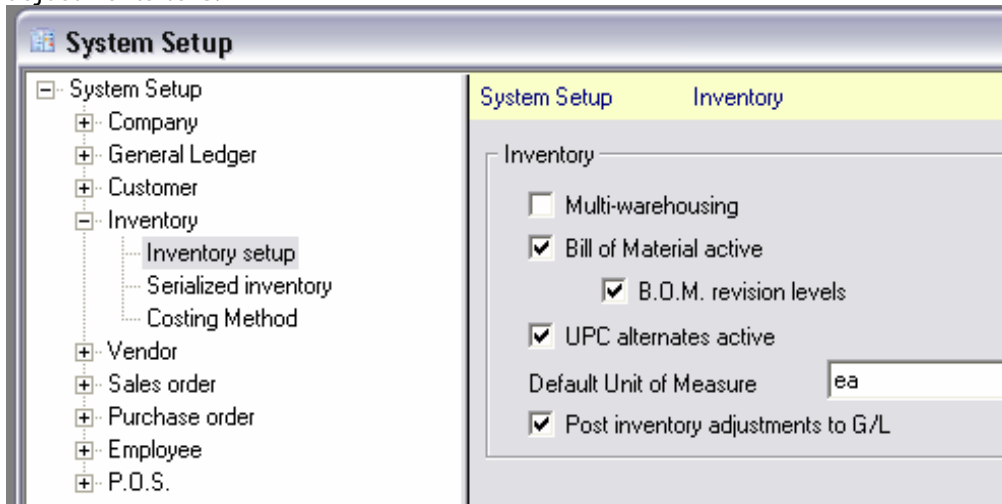
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Inventory

More inventory functions are now integrated with the General Ledger. For example, when you make adjustments to stock levels via Inventory Receipts, an entry will now be posted from the item's asset account against the inventory variance account in the GL. Physical inventory will now post both quantity updates to Inventory Receipts as well as cost updates to the General Ledger.

System Manager: This option must be turned on in System Manager, Inventory setup: "Post inventory adjustments to G/L".

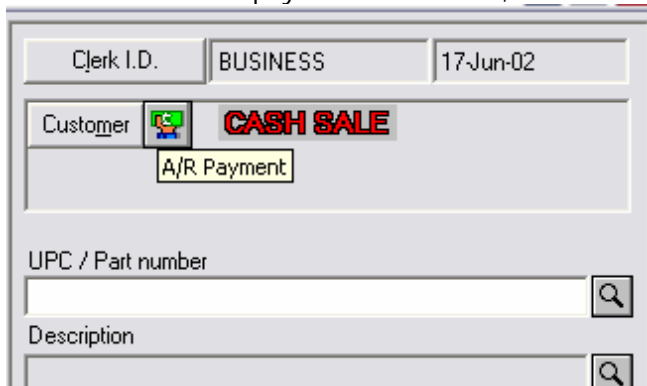


Please note that the option to directly modify Inventory quantities is still available. Please remember that if this is done, there will be no record of the adjustment anywhere. The ability to make these direct adjustments to quantities is still enabled or disabled by user.

Point of Sale

Unapplied customer payments may now be recorded through Point-of-Sale. There is a new printed summary of daily sales by clerk ID. Credit and debit cards can now be processed directly from within BusinessVision with a new integrated processor (third-party credit card software is required).

To take a Customer payment on Account, click the new button beside the Customer while in Point of Sale:



A new "A/R Payment" screen comes up:



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Enter the details. You are then taken to the usual Methods of Payment screen. When complete, a "Receipt for Payment on Account" is printed.

```
24-Mar-07      2:45:32PM

                ABC Electronic Components Inc.
*** RECEIPT FOR PAYMENT ON ACCOUNT ***

Customer:   Ace Electronics
Reference No.   chq 3345

                Cash and Cheque Receipts      150.00
                -----
                A/R Payment                    150.00
```

System Manager: The ability to record Customer on-account payments is enabled or disabled by user in System Manager, User Details, Point of Sale Options:

Point of Sale	Permission
Change unit prices	Yes
Enter line discount	Yes
Modify taxes	Yes
Default mode	Normal
Allow process returns	Yes
Allow non-stocked items	Prompt for confirmation
Allow A/R payments	Yes



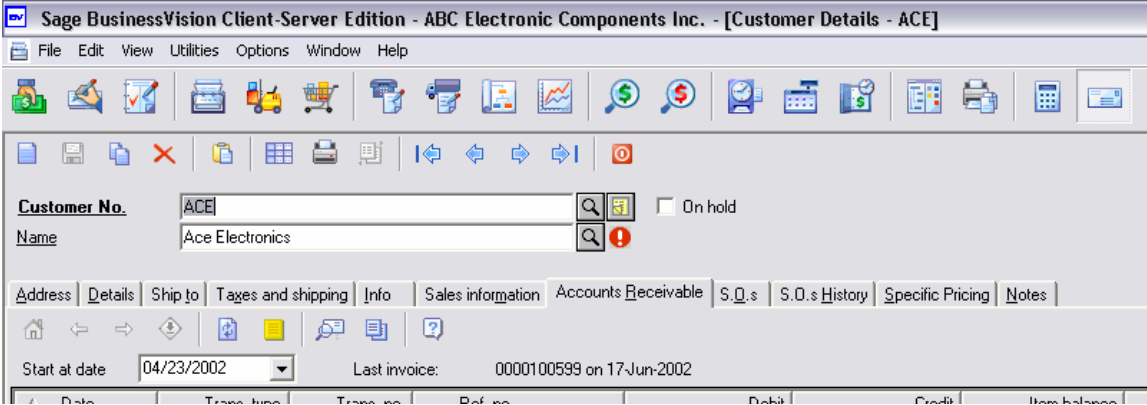
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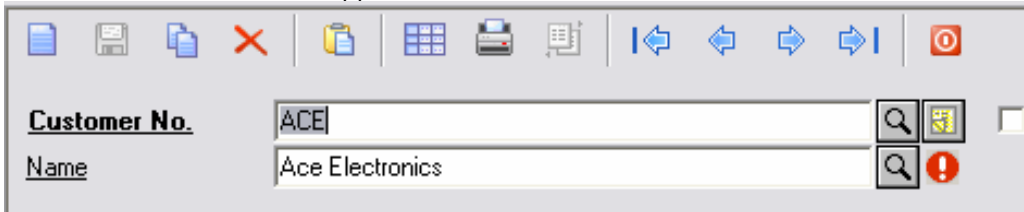
Accounts Receivable

Accounts Receivable can now notify you when a customer has overdue items in their account, in addition to when they are over their credit limit.

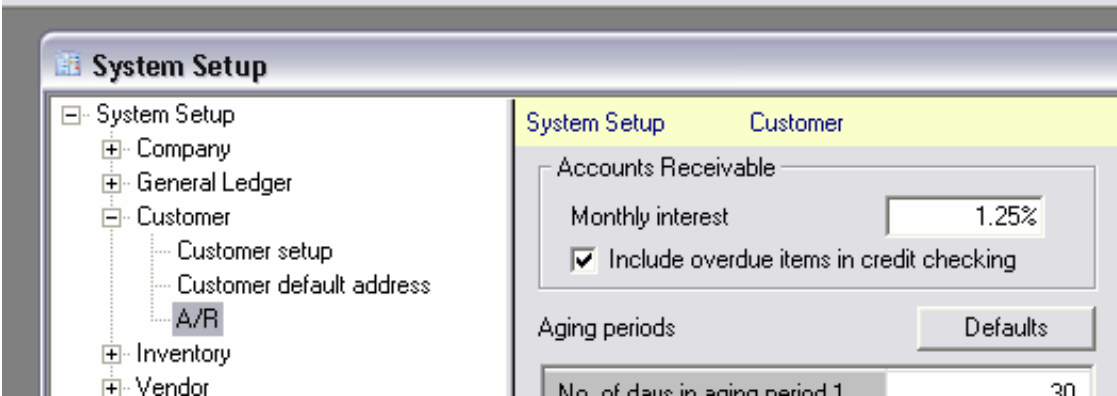
The system notifies you of Customer credit check problems with the usual exclamation mark in a red circle.



The red exclamation mark appears beside the Customer Name in the Customer Screen and in Order Entry.



System Manager: This option must be turned on in System Manager, System Setup, Customer, A/R: "Include overdue items in credit checking". This is a global setting that applies to all users.





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Accounts Payable

Now you can change the default expense account when posting Accounts Payable invoices without having Autopost turned off.

The G/L Account field is now available for you to select a G/L Expense Account to which to post this transaction. If you have more complex changes to make to the posting of the A/P Invoice, you may of course still do so by having Autopost turned off.

A/P Transaction Entry - New Item

Type: Invoice
Date: 06/17/02
Transaction No.: 0000203132
Invoice No.:
P.O. No.:
Amount: 0.00
Due date: 06/17/02
G/L Account: 82386-
Travel
 Place on hold

Buttons: OK, Cancel, Flag, Help

System Manager: There is a new Option in System Manager, User Details to turn this feature on or off by user:

Modify currency rate	Yes
Modify posting date	Yes
View transaction	Yes
View purchase order	Yes
View balances	Yes
Modify expense account	Yes



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Payroll

Each employee may be paid either by cheque or by Direct Deposit, selectable by employee. No need to turn direct deposit "on or off" at the company level.

Check the "Direct deposit" box to turn on direct deposit by employee.

Name		Adams, Robert S.		[Search]	
Status		Active			
Address		Details		Amounts	
Deductions		Benefits		Timecard	
Image		Notes			
Personal			Job		
Dept. code		01		Job title	
Sex		<input checked="" type="radio"/> Male <input type="radio"/> Female		Tax table	
Date of birth		06/18/1951		NL	
S.I.N.		123-456-782		Pay periods	
Union I.D.				24	
Health No.		02-17-7767		Date hired	
Bank acct.		18284520 0234433		02/22/1992	
Language		E		Review date	
Direct deposit		<input checked="" type="checkbox"/>		02/22/2003	
				Termination date	
				00/00/0000	
				Notes	
				2 children	
				Search key	
				ADAMS	