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# Current Attractions: Get in the Know on Sage BusinessVision v7.2

Session Code: VAL04

Product Line: Sage BusinessVision

**Presenter:** Edward Klapatiuk, Sage BusinessVision

## Description

Sage BusinessVision v7.2 is here! Attending this session will ensure that you have the information needed to sell and support the new version of Sage BusinessVision. Join us as we take you through system requirements and the "nuts and bolts" of setting up the new product. Then explore the feature enhancements and discover how you can put this new functionality to work for your clients. With a lot of new enhancements, such as the ability to maintain and view unlimited years of General Ledger history, multiple units of measure, new system configuration options and more, you will not want to miss this opportunity to get "in the know".

# Initial Installation and Configuration of v7.2

## Overview

The installation of Sage BusinessVision v7.2 follows the same process as v7.1. During the installation, you will be prompted to enter the Product ID/Serial number, and Activation code for each product or add-on that you are installing.



**NOTE:** It is not necessary to reinstall CustomPack, e-BusinessVision, LAN Packs or Multiple Currency Manager if they have already been installed with v7.1. The existing licenses will continue to be honoured.



**FOR MORE INFORMATION:** For general information for clients upgrading from previous versions, refer to "Readme.rtf" which is located in the \Readme folder on the Sage BusinessVision CD.

## Data File Conversion

Existing sets of Sage BusinessVision data will be converted to v7.2 format when logging in for the first time.



**NOTE:** Once your data has been converted to be compatible with 7.2, it will no longer be compatible with prior versions.



**NOTE:** During the file conversion to v7.2, unprocessed entries in the Auto-generate Purchase Orders function will be removed. Please ensure that Purchase Orders are generated for all required entries prior to converting your data.

## Files converted

The following table lists data files that are converted, created, or reorganized during the v7.2 file conversion process.

FILE NAME	CONVERSION/NEW/REORGANIZATION
addrs.btr	Conversion – uppercase Ship-to ID's
ap.btr	Reorganization – index maintenance
ar.btr	Reorganization – index maintenance
billmtls.btr	Conversion – support for multiple unit of measure
bvcon.fil	Conversion – support for new system settings
country.btr	Conversion – update country list
customer.btr	Reorganization – uppercase Ship-to ID's
custpric.btr	Conversion – support for multiple unit of measure
employee.btr	Conversion – addition of new field
hstaddrs.btr	Conversion – uppercase Ship-to ID's
invent.btr	Conversion – support for multiple unit of measure
notes.btr	Conversion – uppercase Ship-to ID's
ordaddrs.btr	Conversion – uppercase Ship-to ID's
pchhistdtl.btr	Conversion – support for multiple unit of measure
prchordd.btr	Conversion – support for multiple unit of measure
pricing.btr	New – support for multiple unit of measure
receipts.btr	Conversion – support for multiple unit of measure
slshist.btr	Conversion – support for order required date
slshistdtl.btr	Conversion – support for multiple unit of measure
slsord.btr	Conversion – support for order required date
slsordd.btr	Conversion – support for multiple unit of measure
slstax.btr	Reorganization – index maintenance
uom.btr	New – support for multiple unit of measure
users.btr	Conversion – support for new user settings
userslog.btr	New – support for user log
userslv.btr	Conversion – support for new user browse settings
wbd_ship.btr	Conversion – uppercase Ship-to ID's
wbm_ship.btr	Conversion – uppercase Ship-to ID's
wbt_ship.btr	Conversion – uppercase Ship-to ID's

## Using Existing Customized Reports

If you are currently using Sage BusinessVision 7.2 and wish to re-use customized forms previously created for 7.1, they will need to be updated in order to be compatible with 7.2. If you do not use customized forms (i.e. you use the forms supplied with Sage BusinessVision) then you will not need to update your forms. The forms that require updating in order to be compatible with Sage BusinessVision 7.2 are:

- Invoice – Order Entry
- Invoice – Point of Sale
- Order Confirmation
- Packing Slip
- Purchase Order
- Quote

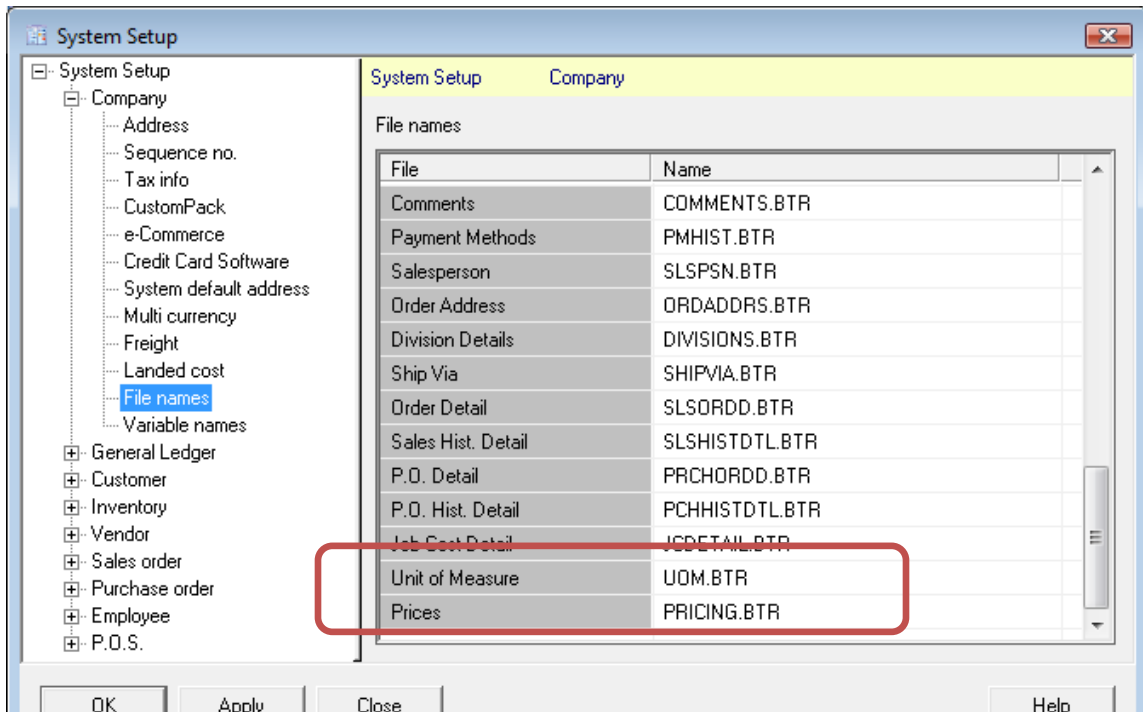
For details on how to update existing customized forms, refer to “BV72\_Customized\_forms.pdf” which is located in the \Readme folder on the Sage BusinessVision CD, and in the \BusinessVision folder on any workstations with 7.2 installed.

## System Setup Additions and Changes

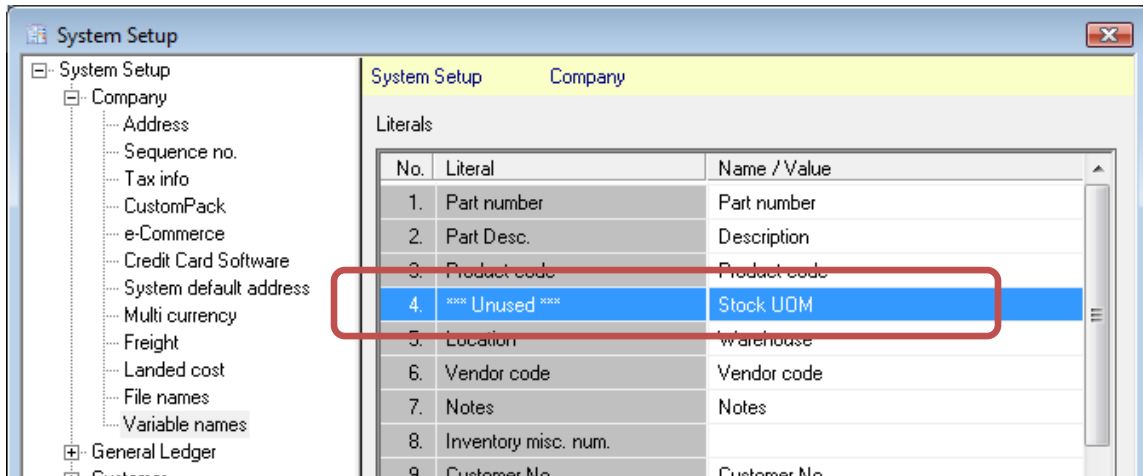
A number of changes and additions have been made to System Setup in order to activate and control some of the new features in version 7.2.

## Company

In File names, entries were added for “Unit of measure” and “Prices”.

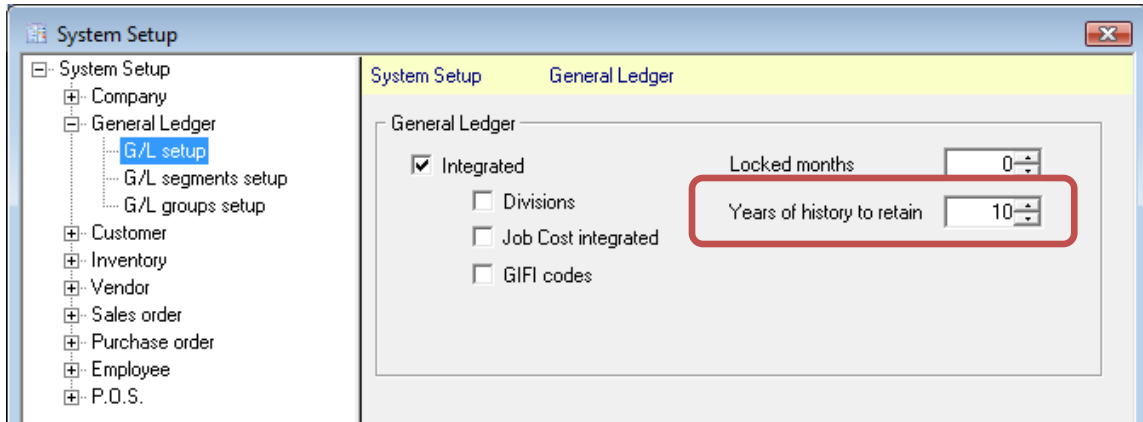


In Variable names, the entry for variable 4 is no longer in use.



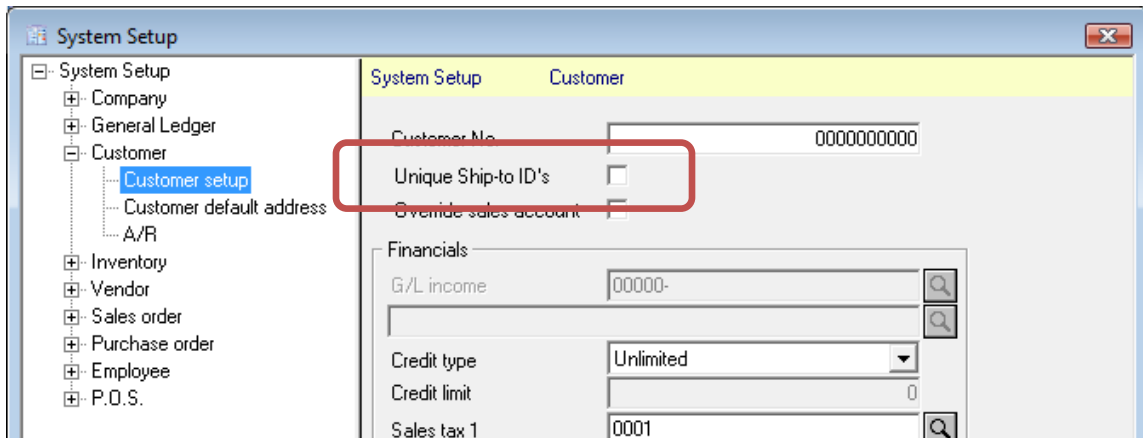
## General Ledger

In G/L Setup, an entry was added for “Years of history to retain”.



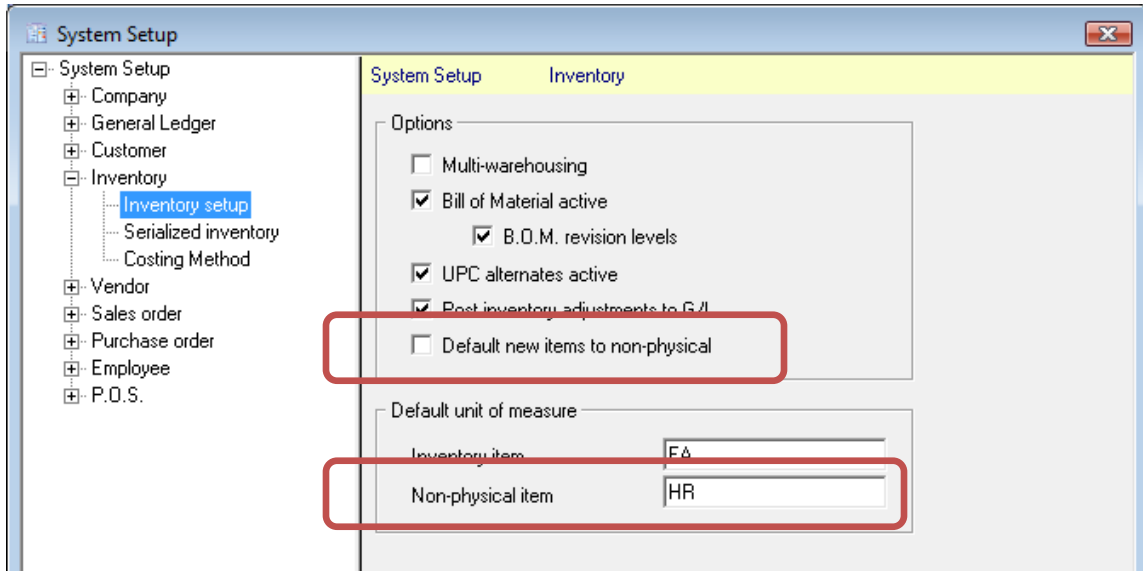
## Customer

In Customer setup, a check box was added for “Unique Ship-to ID’s”.



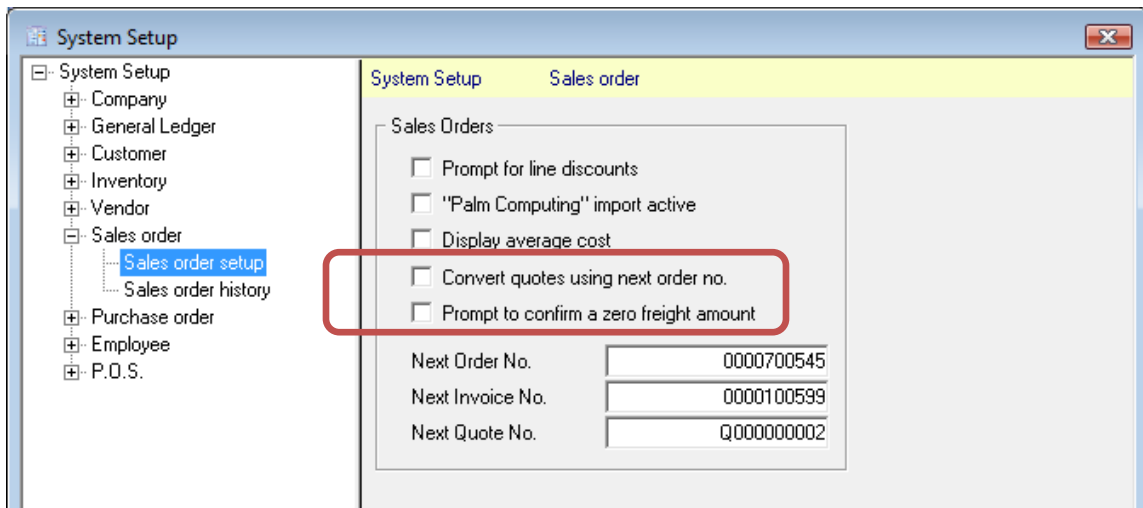
## Inventory

In Inventory Setup, a check box was added for “Default new items to non-physical”, and an entry was added for “Default unit of measure – Non-physical item”.



## Sales Order

In Sales order setup, check boxes were added for “Convert quotes using next order no.” and “Prompt to confirm a zero freight amount”.



## User Details Additions

A number of additions have been made to User Details in order to activate and control new and existing features in version 7.2.

### Details

The Application Background section was added to the Details tab.

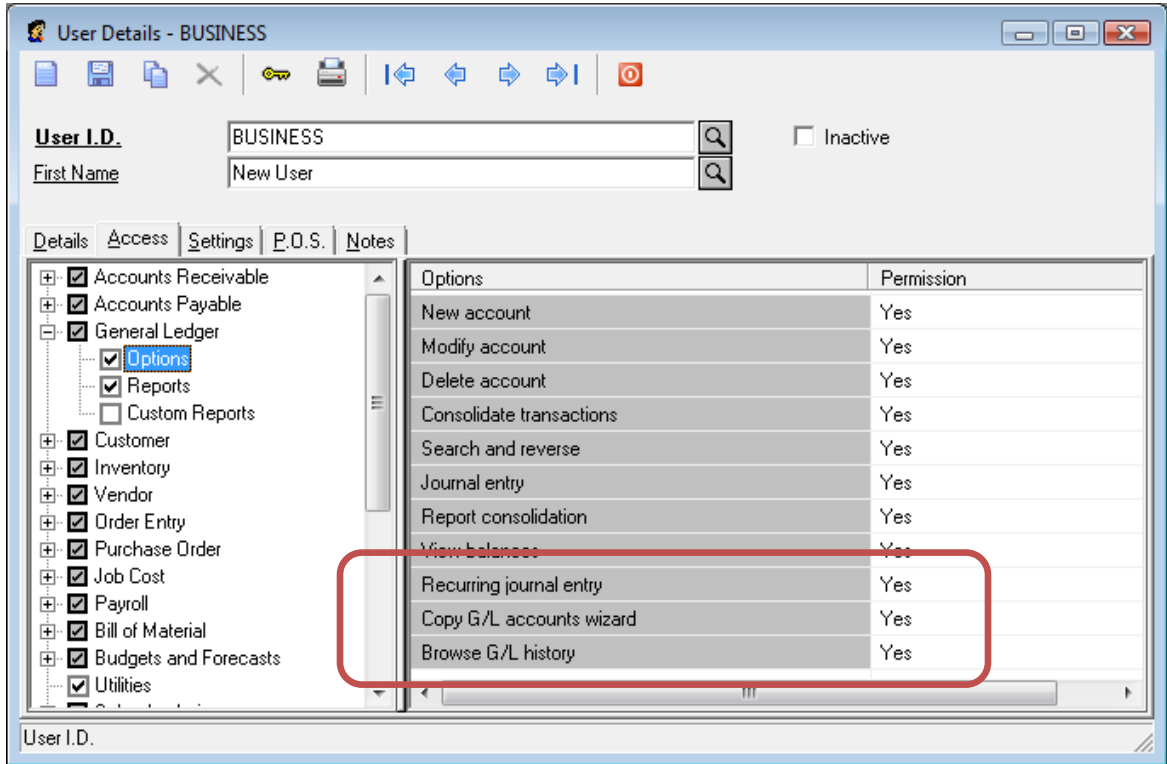
The screenshot shows the 'User Details - BUSINESS' window with the following fields and options:

- User I.D.:** BUSINESS
- First Name:** New User
- Inactive:**
- Details | Access | Settings | P.O.S. | Notes** (Tabs)
- Last Name:** [Empty]
- Initials:** BV\*
- Priority:** 9
- P.O.S. User Only:**
- Default autopost status:**
- Change autopost status:**
- Application Background (highlighted):**
  - Colour:** [Grey swatch]
  - Bitmap:**
  - Centered:**
  - Tiled:**
  - Stretched:**
- Created:** 07/07/2005 by BV\*
- Last modified:** 04/09/2008 by BV\*



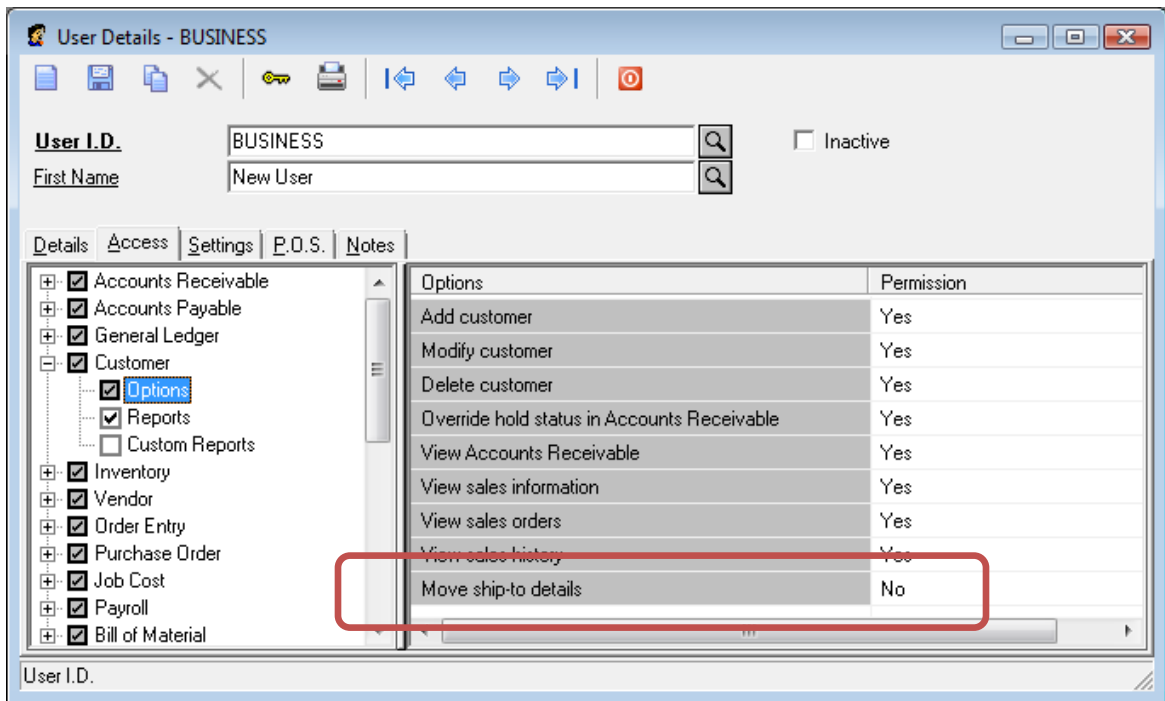
### Access – General Ledger

In General Ledger > Options, entries were added for “Recurring journal entry”, “Copy G/L accounts wizard”, and “Browse G/L history”.



## Access – Customer

In Customer > Options, a new entry was added for “Move ship-to details”.



## Access – Inventory

In Inventory > Options, entries were added for “Add UOM”, “Modify UOM”, “Delete UOM”, and “Change default stock UOM”.

The screenshot shows the 'User Details - BUSINESS' window with the 'Access' tab selected. The left-hand tree view shows the 'Inventory' folder expanded, with the 'Options' sub-folder selected. The right-hand pane displays a table of permissions for the selected options. A red box highlights the following entries:

Options	Permission
Add inventory	Yes
Modify inventory	Yes
Delete inventory	Yes
Edit sales departments	Yes
Receive inventory	Yes
Show cost price/margin	No
View summary	Yes
View receipts	Yes
View sales orders	Yes
View sales history	Yes
View purchase orders	Yes
View purchase history	Yes
Add UOM	Yes
Modify UOM	Yes
Delete UOM	Yes
Change default stock UOM	Yes

### Access – Order Entry

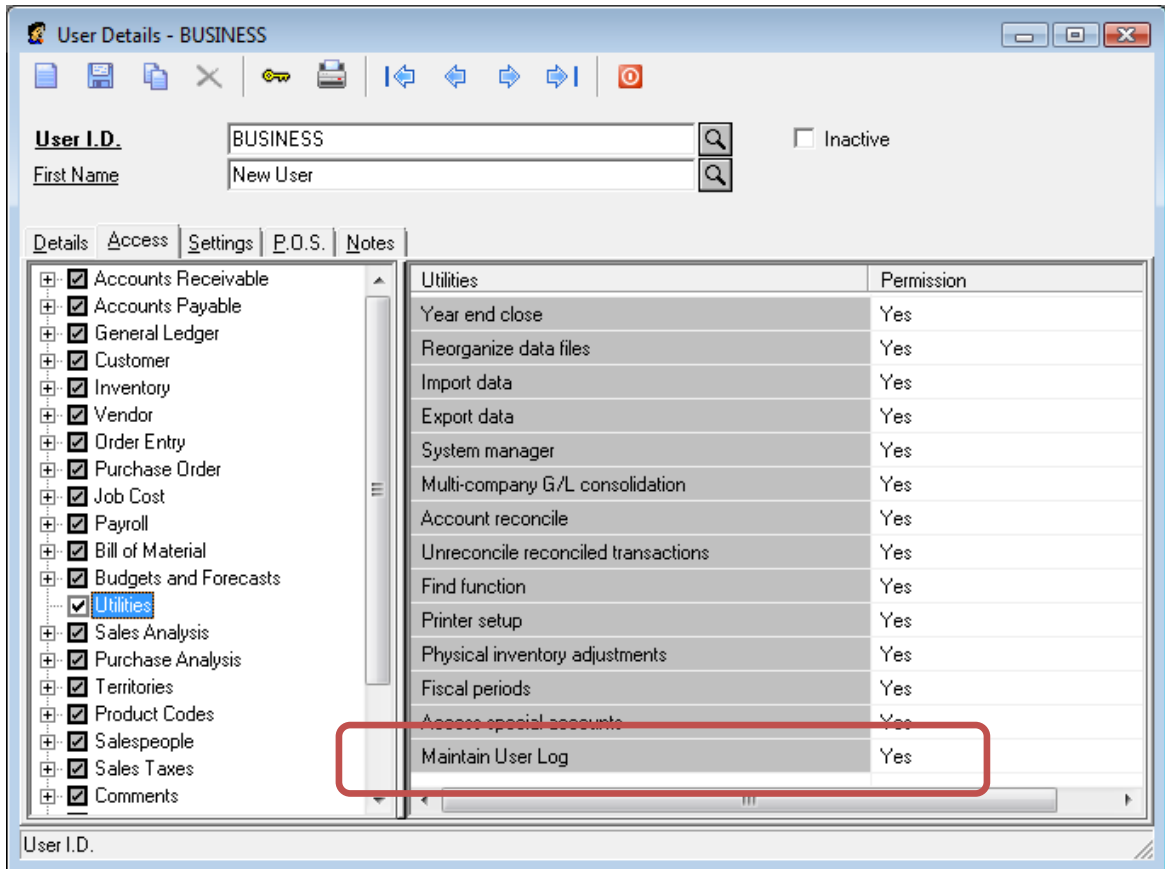
In Order Entry > Options, entries were added for “Prompt to override credit limit”, “Override credit limit supervisor”, “Override inventory returns flag”, “Prompt to create customer ship-to addresses”, and “Edit customer ship-to address details”.

The screenshot shows the 'User Details - BUSINESS' window. The 'User I.D.' is 'BUSINESS' and the 'First Name' is 'New User'. The 'Options' tab is selected, displaying a table of permissions. The following table represents the data shown in the screenshot:

Options	Permission
Add order	Yes
Modify order	Yes
Delete order	Yes
Batch billing	Yes
Hold invoicing	No
Prompt to override credit limit	No
Override credit limit supervisor	No
Invoice date	Always today's date
Default order status	Okay
Modify net discount	Yes
Prompt for packing slip	Do not prompt
Prompt for order confirmation	Do not prompt
Allow non-stocked items	Prompt for confirmation
Automatic order filling	Yes
Modify selling price	Yes
Display cost price and margin	Yes
Allow returns	Yes
Override inventory returns flag	No
Suggest alternate part	Yes
Prompt for shipping labels	Do not prompt
Show gross profit	Yes
Edit description	Yes
Edit tax flags	Yes
Create cash sale	Yes
Create layaway	Yes
Create quotes	Yes
Create standing orders	Yes
Clear screen after saving	Yes
Prompt to create customer ship-to addresses	Do not prompt
Edit customer ship-to address details	No

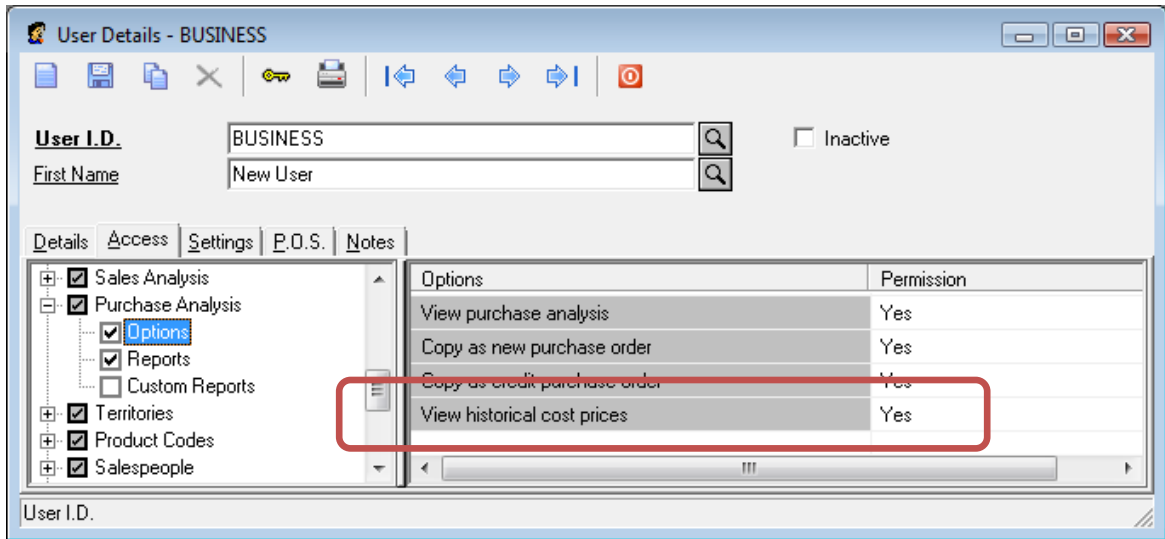
## Access – Utilities

In Utilities, an entry was added for “Maintain User Log”.



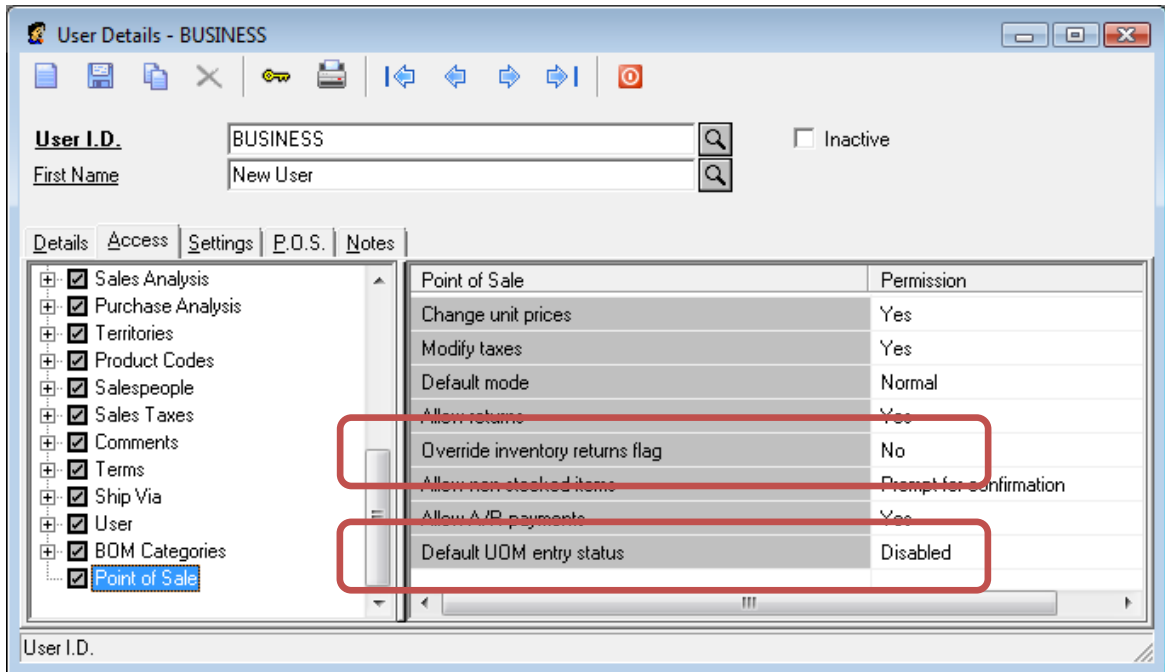
### Access – Purchase Analysis

In Purchase Analysis > Options, an entry was added for “View historical cost prices”.



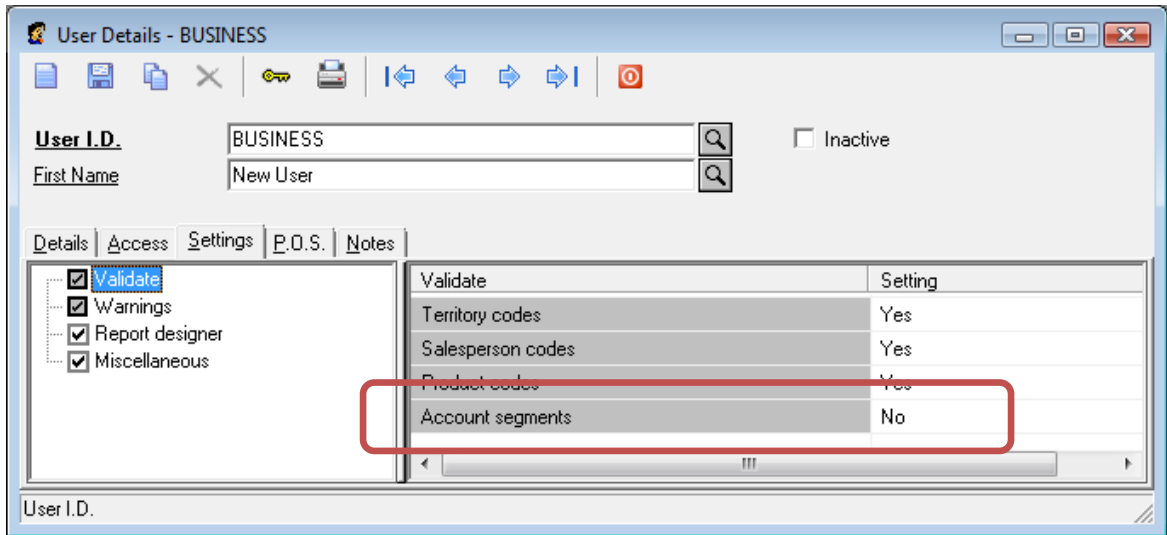
### Access – Point of Sale

In Point of Sale > Options, entries were added for “Override inventory returns flag”, and “Default UOM entry status”.



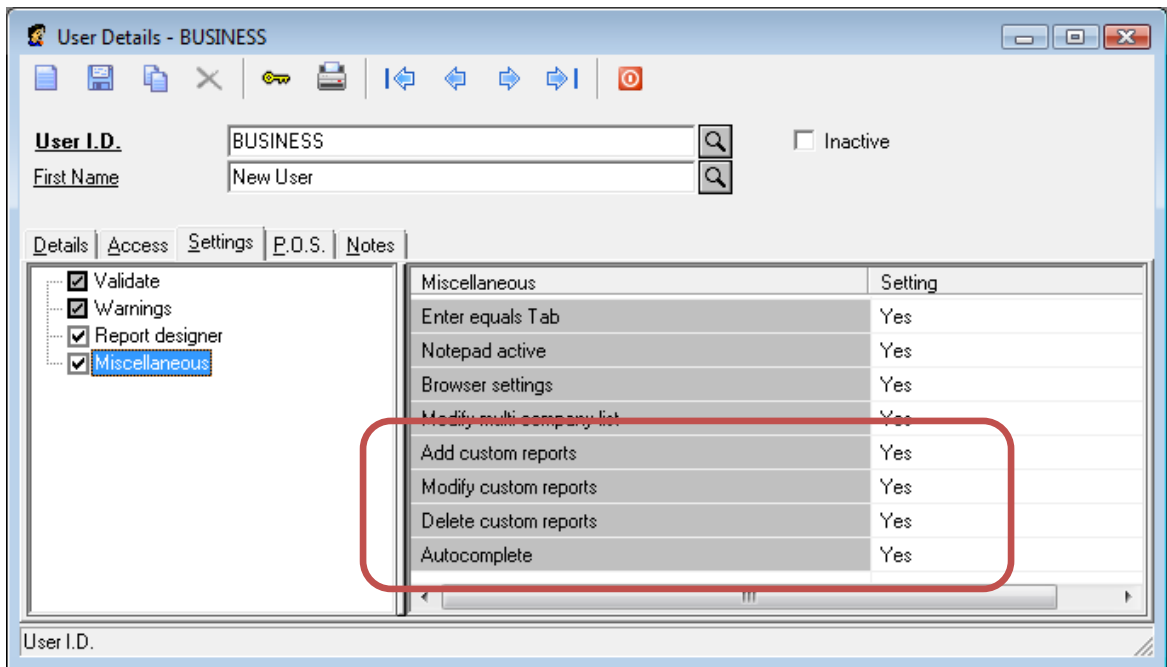
### Settings – Validate

In Validate, an entry was added for “Account segments”.



### Settings – Miscellaneous

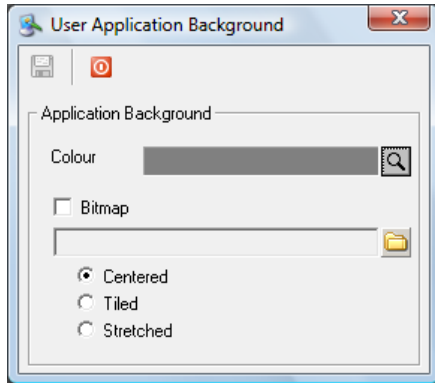
In Miscellaneous, entries were added for “Add custom reports”, “Modify custom reports”, “Delete custom reports”, and “Autocomplete”.



## Desktop Enhancements

### Application Background

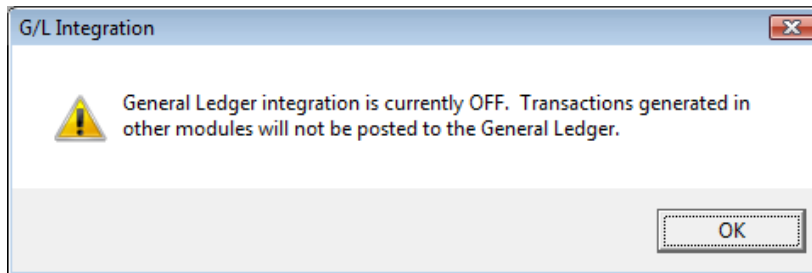
The application background can be customized by each user to display a different colour or image. This feature can be accessed by selecting **Options > Application Background** from the menu. This can also be performed from the User Details window using the Application background section of the Details tab.



## General Ledger Enhancements

### Integration Off Warning

A warning message appears during logon when General Ledger integration is turned off in System Setup.



### Validate Account Segment Values

Whenever a new account is created in the General Ledger module, the system can optionally check that all segment values entered by the user already exist in the segments file.

If this option is set to Yes and the General Ledger uses only one segment, the system will automatically add any segments that do not already exist. Also, when an account name



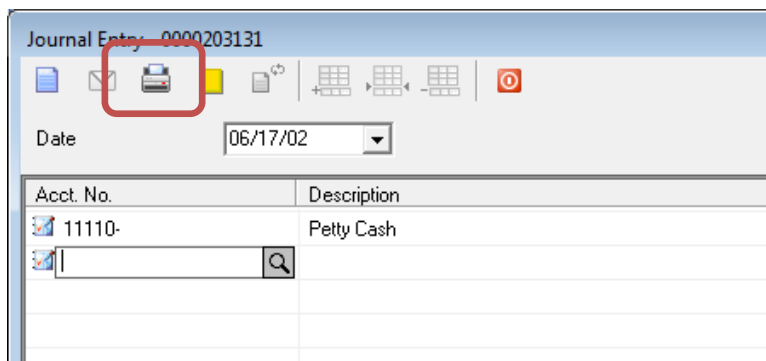
is changed, the system will automatically modify the description for the affected segment.

If this option is set to Yes and the General Ledger uses more than one segment, the user will be prompted to add any segments that do not already exist.

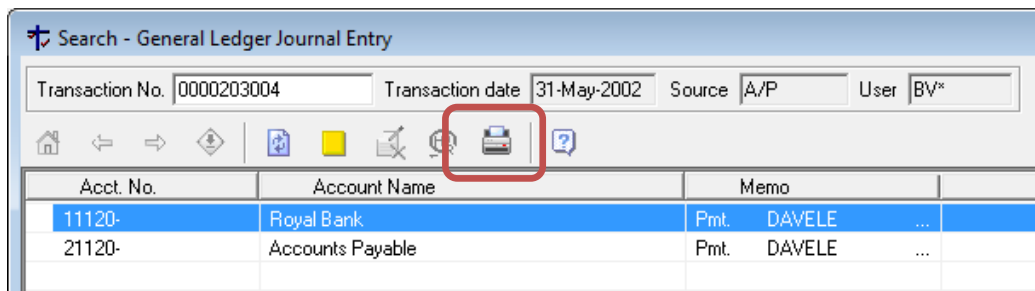
If this option is set to No, the user will not be prompted to add the new account to the segments file.

### Printing Journal Entries

Journal entries that have not been posted can be printed using the print button in Journal Entry window.



Journal entries that have been posted can be printed using the print button in Search and Reverse window.



### Import Depreciation Entries from Sage FAS 50 Fixed Assets

Sage FAS 50 Asset Accounting is a fixed asset management system. Starting with version 2008.1, it includes Sage BusinessVision in its list of supported accounting system links. The link allows Sage FAS 50 to export general ledger entries for depreciation that can be imported into the Sage BusinessVision G/L.

To import FAS Fixed Asset files:

Select File > Import > Sage FAS Import to display the FAS Import window.

Enter or browse to the location of the FAS file, which must be in standard data format (an .sdf file extension).

Click Import to start the process.

Confirmation appears after the process is complete for both successful and unsuccessful imports. Click View log in the FAS Import window to see a list of problems encountered with a failed import attempt.

### Import G/L Chart of Accounts and Transactions

The G/L Import Wizard allows you to import a chart of accounts or G/L transactions. In either case, the Import Wizard can append to an existing file (add new records) but cannot modify records that already exist.

The Import Wizard can be accessed from the File > Import menu. Alternatively, the Chart of Accounts import can also be accessed during the Segment Setup stage of the New Company G/L Wizard. This will allow you to import a chart of accounts into a set of data with no pre-existing accounts. Once the import is complete, you can then proceed to define your special accounts from the list of imported accounts.

**Segment Setup**

This page allows you to establish your segment[s] information. This information is needed in subsequent pages of the New Company G/L Setup Wizard.

**NOTE**  
After choosing Next, all the information entered on this page is saved to the Control file. Although you can come back to this page during this Setup procedure, any changes made to this Segment Setup may affect the other information already entered.

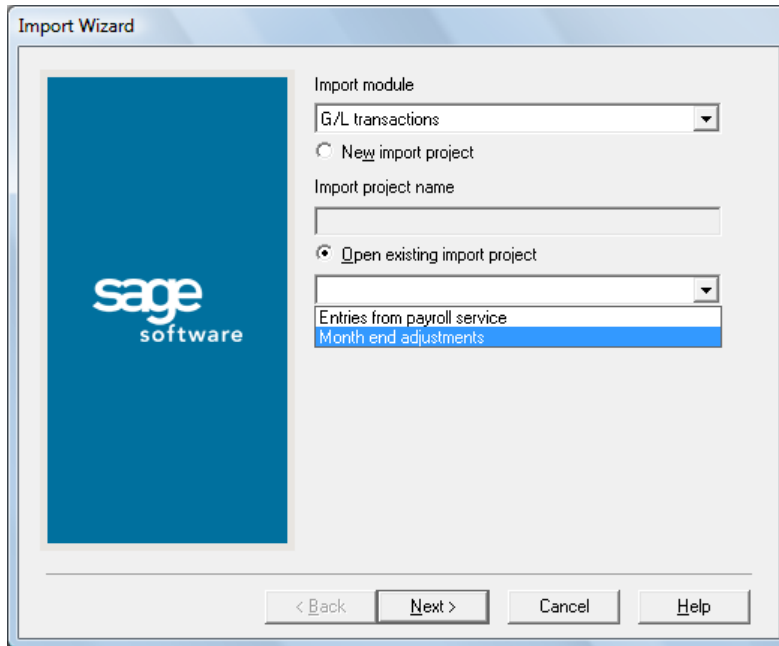
Segment	Length	Name	Type
1	5	Account number	Numeric

Attributes

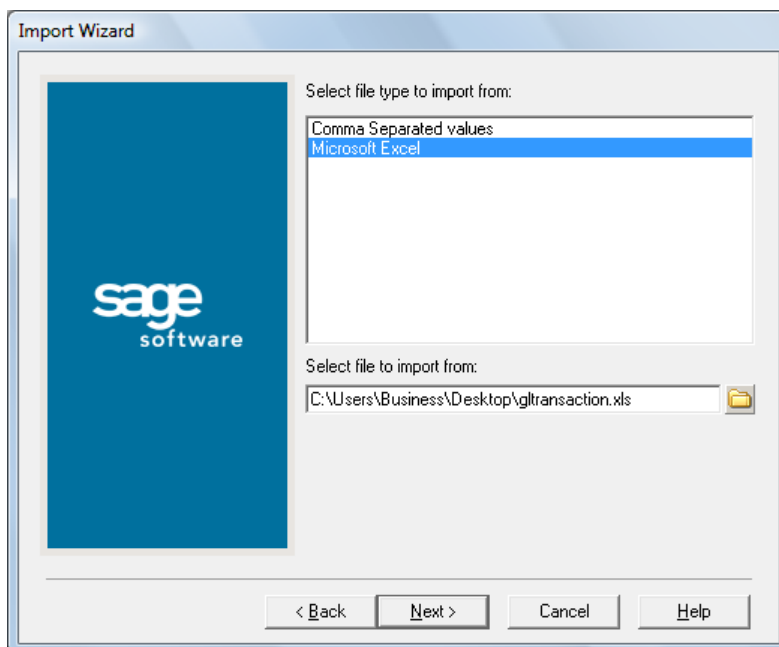
No. of segments: 1      Separator: /

Buttons: **Import** < Back Next > Cancel Help

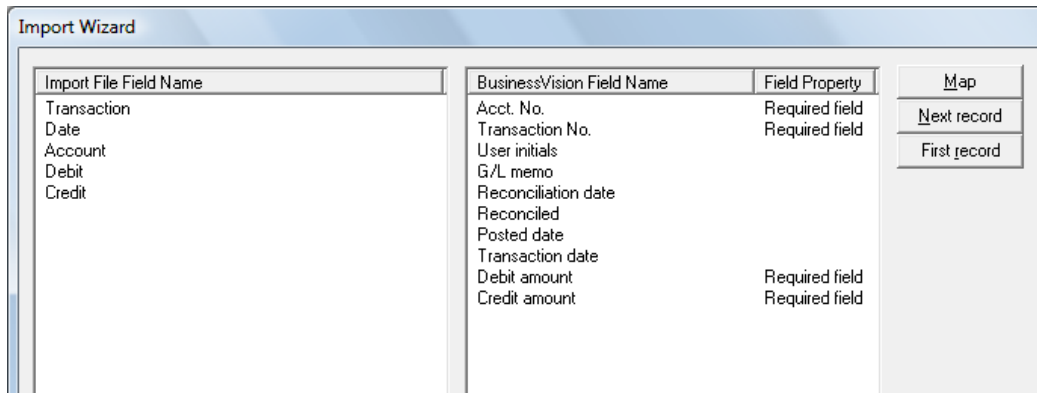
The Import Wizard allows you to define multiple import projects as templates that can be saved and then used when needed. This is particularly useful for importing transactions repeatedly over time, such as for month end entries.



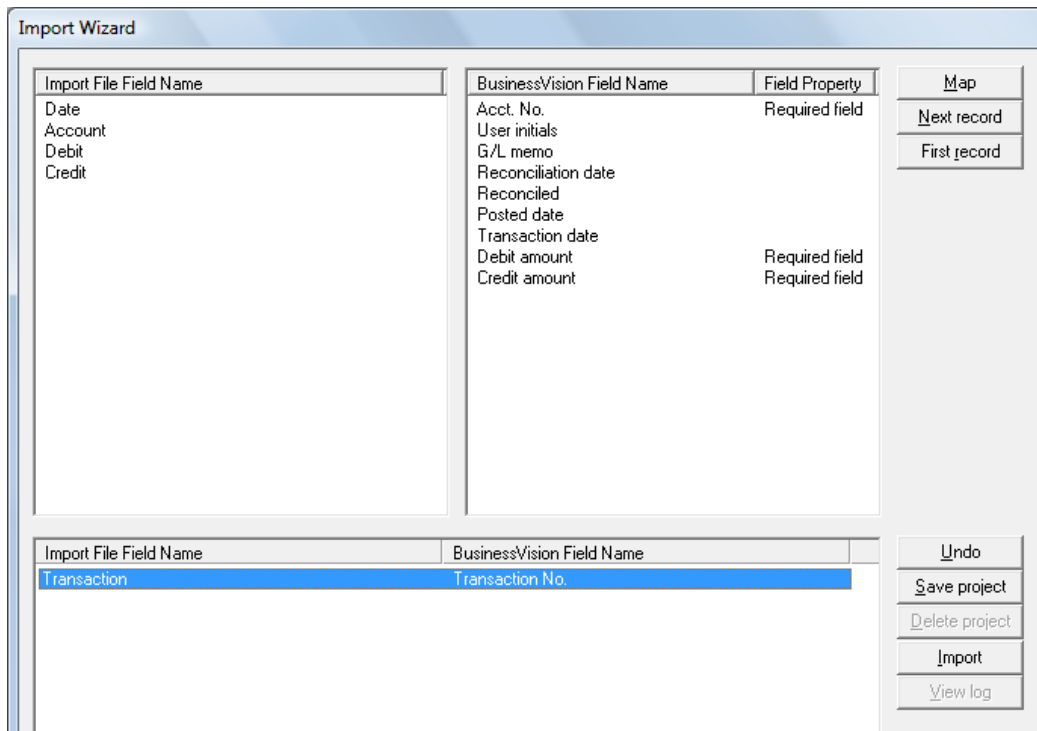
The Import Wizard recognizes Comma Separated Value text files, as well as Microsoft Excel files as input.



During the mapping stage of the Wizard, fields from the file to be imported are displayed in the left list view, and available fields from the BusinessVision data are listed in the right list view. BusinessVision fields that must be mapped are indicated as “Required field”.



To map a field from the import file to a BusinessVision field, first select the import field. Then, select the destination field in the BusinessVision field list. Finally, click the Map button. When a field has been mapped successfully, it will appear in the bottom list view.



Once you have completed mapping all desired fields, click Import to proceed with the import.



**NOTE:** If for any reason one or more records do not pass validation, the entire import will be halted without any changes being made to the BusinessVision data.



**NOTE:** When G/L Integration is enabled, you will not be able to import transactions into any G/L accounts in the Accounts Payable and Accounts Receivable groups. When G/L integration is disabled, transactions may be posted to accounts in any G/L group.



**TIP:** When importing a CSV file that has a header record, select the “Skip the first record” option before clicking Import.

### **Retain up to 99 Year of General Ledger History**

During the year-end process, general ledger transactions from last fiscal year can optionally be archived into G/L history files for later review and reporting. To enable this option, set the number of years of history to retain prior to last fiscal year in the “Years of history to retain” field in System Setup.

Once a fiscal year has been moved to history, no further transactions may be posted to that timeframe.



**NOTE:** Once a fiscal year has been moved to history, no further transactions may be posted to that timeframe. Additionally, Account Reconciliation and Multi-Company G/L Consolidation operate only on current files, not on history files.

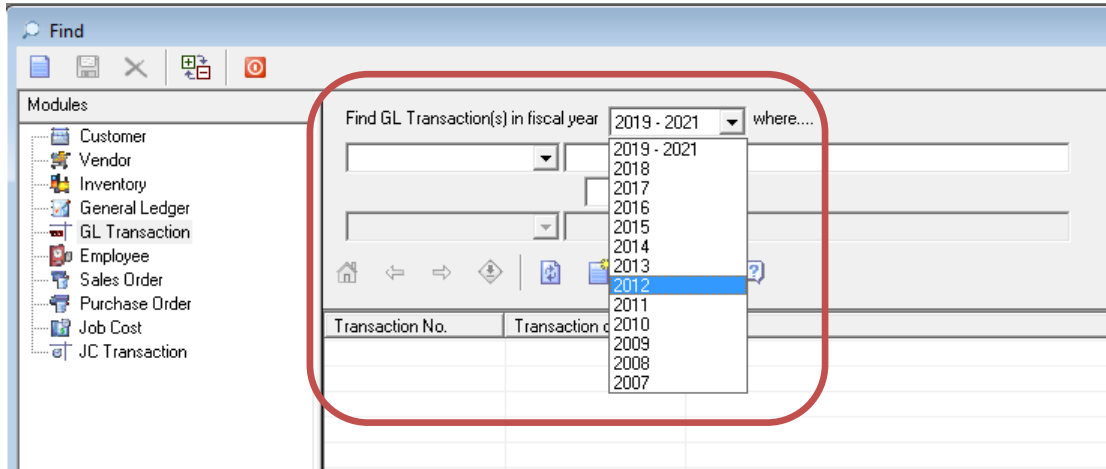
G/L history can be viewed in several ways. First, the History tab of General Ledger Account Details displays one entry for each year of history that is available for an account. The list allows you to drill down to period by period summaries, to transactions, and to journal entries.

Fiscal Year	Ending Balance	Net Change	Budget	Variance
2011	260,519.61	10,020.11		10,020.11
2010	250,499.50	10,020.10		10,020.10
2009	240,479.40	10,020.09		10,020.09
2008	230,459.31	10,020.08		10,020.08
2007	220,439.23	10,020.07		10,020.07

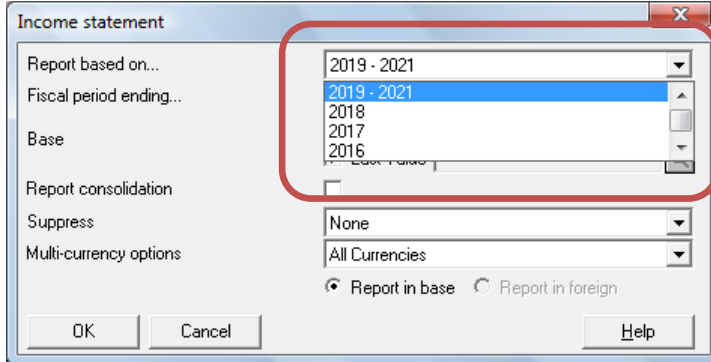
The Historical Chart of Accounts Browse lets you view the entire chart of accounts with balances for the historical fiscal year chosen. The browse allows you to drill down to period by period summaries, to transactions, and to journal entries. To access this browse, select **General Ledger > Browse G/L History** from the menu.

Account No.	Description	B. Balance	Group	Sub-group
11110	Petty Cash	0.00	100	
11120	Cash in Bank	0.00	100	
11130	Cash and Chequ...	0.00	100	
11140	American Express	0.00	100	
11150	MasterCard	0.00	100	
11160	Visa	0.00	100	
11210	Accounts Recei...	330,660.66	120	
11220	[Allowance - Dou...	0.00	120	
11280	Advances Recei...	0.00	130	
11300	Inventory at Cost	0.00	140	
11310	Supplies on Hand	0.00	140	
11315	Inventory Variance	0.00	140	
11320	Prepaid Insurance	0.00	150	
11330	Prepaid Deposits	0.00	150	
11340	Prepaid Rent	0.00	150	
12100	Office Furniture &...	0.00	180	A-OFFI
12110	[Accumulated A...	0.00	180	A-OFFI
12200	Machinery - Plan...	0.00	180	B-MACH
12210	[Accumulated A...	0.00	180	B-MACH
12300	Computer Equip...	0.00	180	C-COMP
12310	[Accumulated A...	0.00	180	C-COMP
12400	Automotive Equi...	0.00	180	D-AUTO
12410	[Accumulated A...	0.00	180	D-AUTO
13300	Incorporation Co...	0.00	195	E-INCO

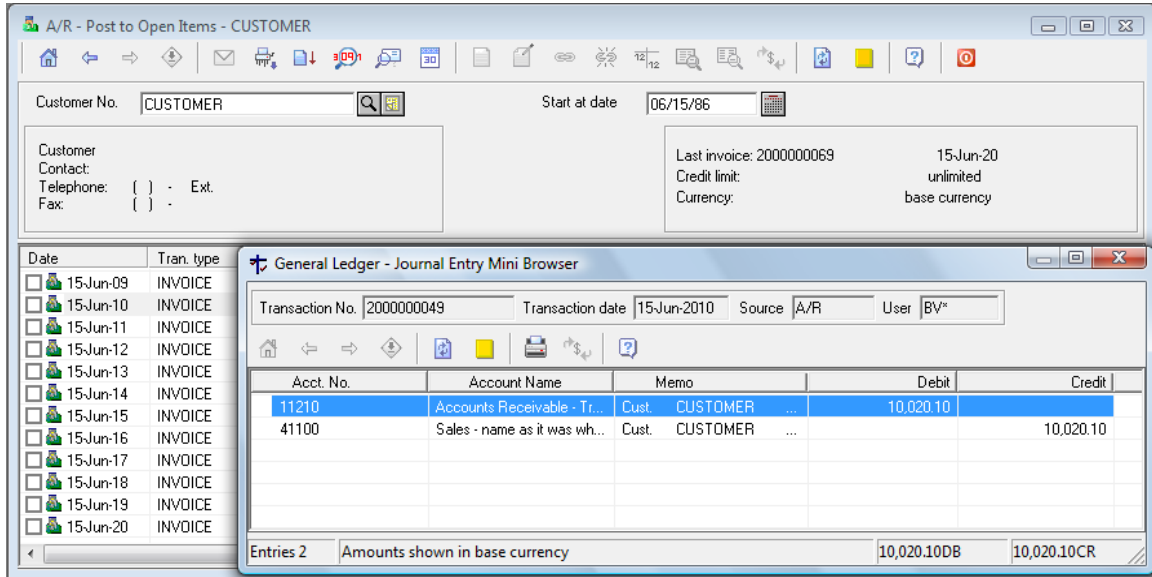
When general ledger history prior to last fiscal year is present, the Find module allows you to specify the fiscal year that you want to find information in. The first entry represents last, current and next fiscal years.



When general ledger history prior to last fiscal year is present, the Reporting Suite allows you to specify the fiscal year that you want to run general ledger reports for. The first entry represents last, current and next fiscal years.



Journal entries for transactions that are in general ledger history can be viewed from within Accounts Payable, Accounts Receivable, Employee Details, Job Cost, Purchase Analysis, and Sales Analysis.



## Customer Details Enhancements

The enhancements made to the Customer Details module are centered around Ship-to addresses.

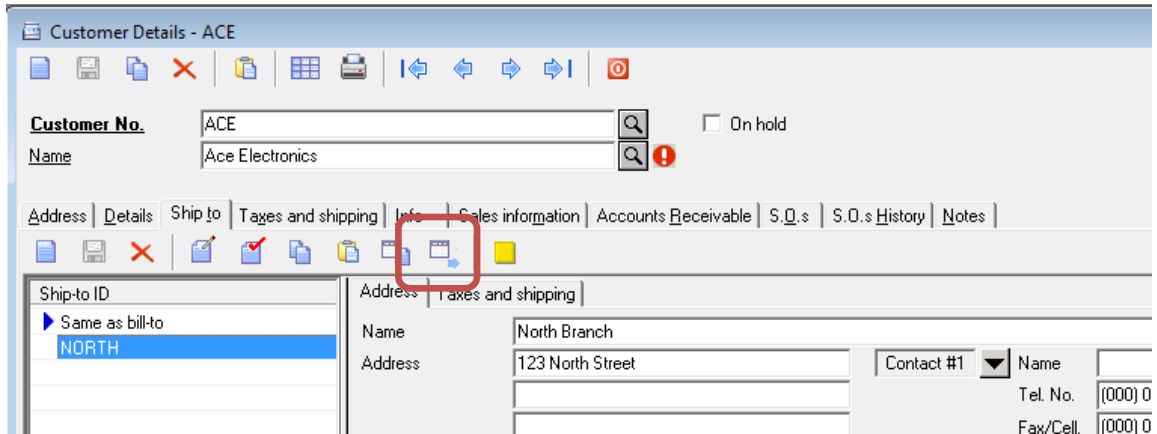
### Unique Ship-to ID's

A new System Setup option can be used to require that Ship-to ID's are unique across all customers. This new option is similar in behaviour to the requirement in versions prior to 7.0 that Ship-to ID's be unique.



## Move Ship-to ID to Customer

In Customer Details, on the Ship to tab, there is a new utility that allows a Ship-to address to be moved to another customer. The ability to use this utility is controlled by a User Details option.



**NOTE: Any existing invoices and open orders are unaffected when a Ship-to ID is moved from one customer to another. Only future orders and invoices posted from them will be based on the new parent/child relationship.**

## Use Bill-to Specific Prices

In Customer Details, on the Ship to tab, on the Taxes and Shipping tab, there is a new option that controls the source of customer specific prices for each Ship-to address. If the new option is enabled, the parent customer's specific prices will be applied to orders created for this ship-to address. If this option is disabled, you will be able to enter customer specific prices against this ship-to address.

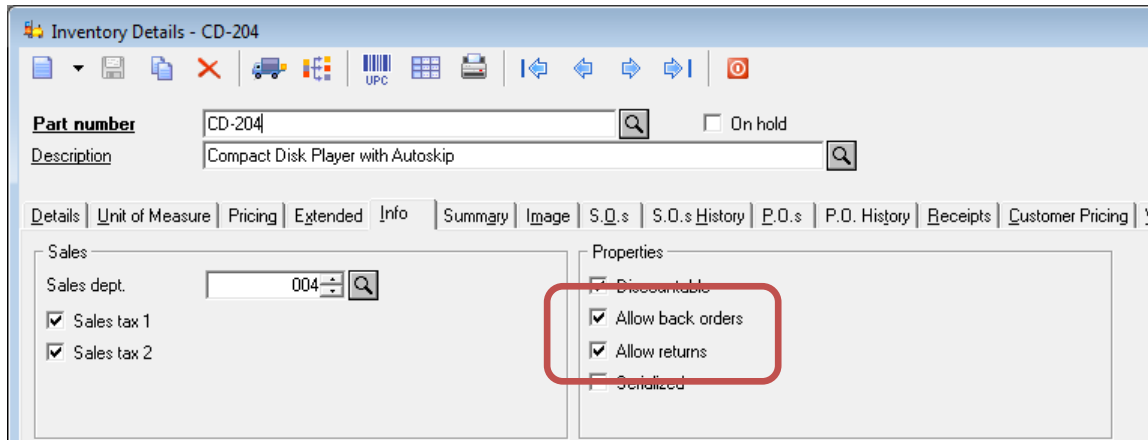
The screenshot shows the 'Customer Details - ACE' window. The 'Ship to' tab is selected, and the 'Specific Pricing' sub-tab is active. The 'Use bill-to specific prices' checkbox is highlighted with a red box. The window displays various fields for customer information, including 'Customer No.' (ACE), 'Name' (Ace Electronics), 'Territory Code' (AB1), 'Salesperson' (Alex Brown), 'Shipping method' (U.P.S.), and 'Sales tax' (0001 G.S.T., 0002 P.S.T.).

## Inventory Enhancements

### Allow Back Orders and Allow Returns

In Inventory Details, on the Info tab, two new options have been added. The "Allow back orders" setting controls whether or not an item can be back ordered in Order Entry. This option cannot be overridden.

The “Allow returns” setting controls whether or not an item can be returned in Order Entry or Point of Sale. This “Allow returns” setting is affected by two options in User Details. Depending on the user’s “Allow returns” and “Override inventory returns flag” options, the user may or may not be able to process returns, and may be prompted to override the inventory setting.



### Non-Physical Inventory Items

A non-physical inventory item is one that can not be warehoused and shipped like regular, tangible items. A service that is provided for an hourly cost can be considered a non-physical inventory item. Unlike normal inventory items, quantities for non-physical items are not tracked in the Inventory module. Additionally, the “Serialized” and “Allow back orders” flags cannot be set for non-physical inventory items.

The differences between a normal item and a non-physical item are:

- Quantities are not tracked for non-physical items
- Non-physical items can be assigned standard costs, rather than current or average costs
- Serialization cannot be enabled for non-physical items
- Non-physical items cannot be received using the “Receive Inventory” function
- Non-physical items cannot be transferred between warehouses using the “Warehouse Transfer” function
- Non-physical items are ignored by the “Physical Inventory” utility
- Non-physical items are ignored by stock status reports

All other attributes are shared between regular inventory items and non-physical items.

When creating a new item in the inventory module, press Ctrl + H to specify it is a non-physical item. The system will change or hide fields that only apply to physical items. You can use System Setup to default all new inventory items to non-physical, and to define the default unit of measure for new non-physical inventory items.

### Multiple Units of Measure

Multiple units of measure can be assigned to each inventory item. Unit of measure codes and quantity factors are defined at the item level, which means that several items may use the same unit of measure code, which have different attributes. (i.e. a BOX of golf balls may have 6 EACH's, while a BOX of socks may contain 10 PAIR's).

When creating a new inventory item, the stock unit of measure should be established. Note that once the item is saved, the unit of measure code cannot be modified.

Each item has a stock, default buy, and default sell unit of measure.

The screenshot shows the 'Inventory Details' window for item 'CD-204'. The 'Unit of measure' section is highlighted with a red box. It contains the following fields:

Inventory type	Normal
Product code	COM
Description	Compact Disk Players
Unit of measure	
Stock	EA
Default sell	EA
Default buy	EA

Other sections include:

- Quantities in stock unit of measure:** Available qty. 192.00000, On-hand qty. 210.00000, Committed qty. 18.00000, Backorder qty. 0.00000, On-order qty. 0.00000, Re-order point 15, Min. order qty. 0.
- Costing in stock unit of measure:** Average cost 206.69980, Current cost 200.07000, Margin % 38.19%, Selling price 323.70000.
- Metadata:** Created: 07/06/2005 by BV\*, Last modified: 04/30/2008 by BV\*



**NOTE: The Inventory Details module stores quantities ONLY in stock unit of measure. Any inventory transaction processed using a different unit of measure is converted to stock unit of measure.**

Units of measure have the following important attributes:

Quantity factor – used to determine the relationship between the current unit of measure and the stock unit of measure. This factor could be stated in a direct or indirect manner. (i.e. “2 HALF per EACH”, or “0.5 EACH per HALF”)

Buy unit of measure – whether or not this unit of measure should be available for use in the Purchase Order module

Sell unit of measure – whether or not this unit of measure should be available for use in the Order Entry and Point of Sale modules

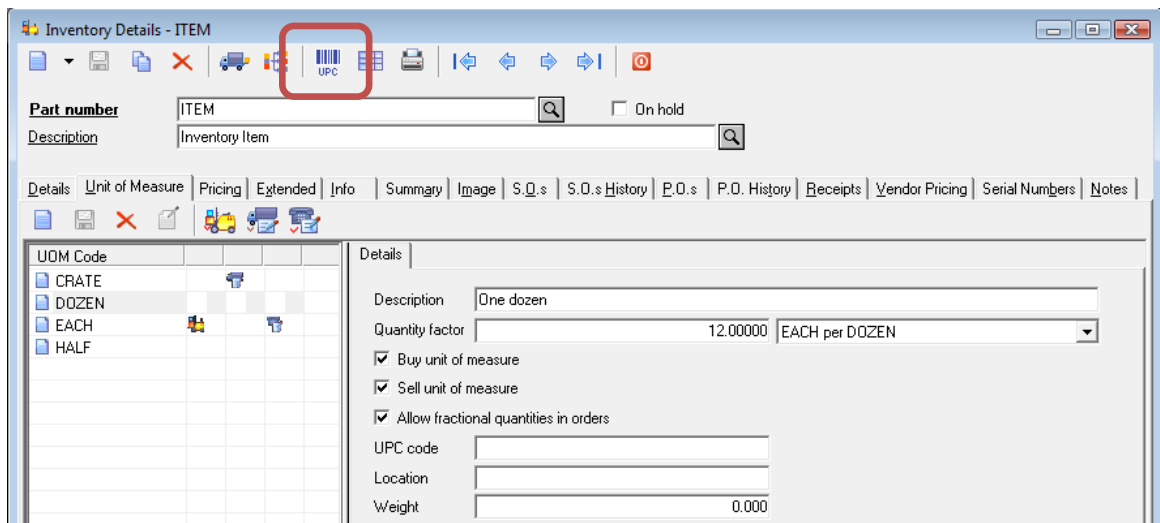
Allow fractional quantities in orders – whether or not this unit of measure should allow entry of decimal quantities in Order Entry, Point of Sale, and Purchase Order

UPC code – UPC codes have been moved from the item level, to the unit of measure level. Therefore more than one UPC code can be used with each item.



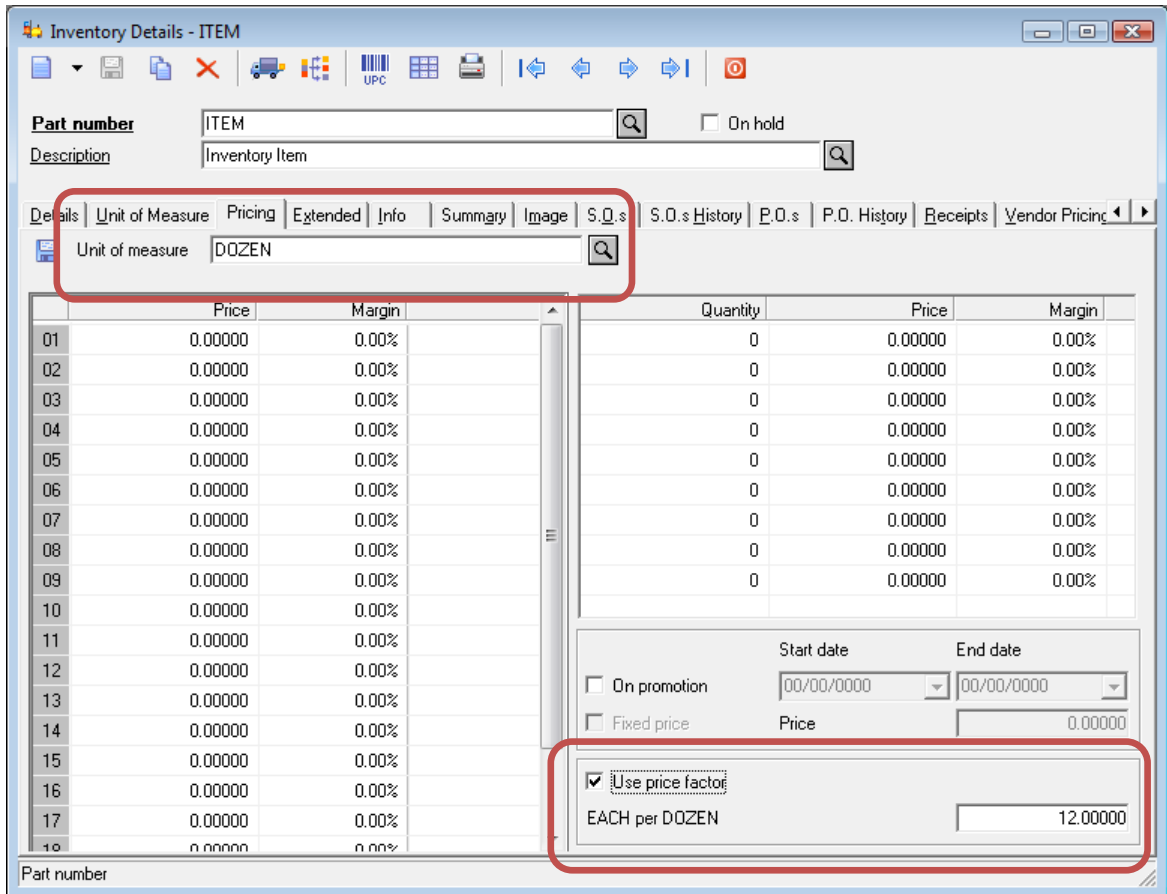
**NOTE: Changing the quantity factor may cause unexpected results when open orders for that item/unit of measure exist. Any open orders should be reviewed after changing a quantity factor.**

Due to the fact that UPC codes have been moved to the unit of measure from the item, UPC codes are no longer a navigation key. In order to find an item quickly by UPC code, use the UPC code mini-browser, which can be accessed via the UPC button in the Inventory Details toolbar.

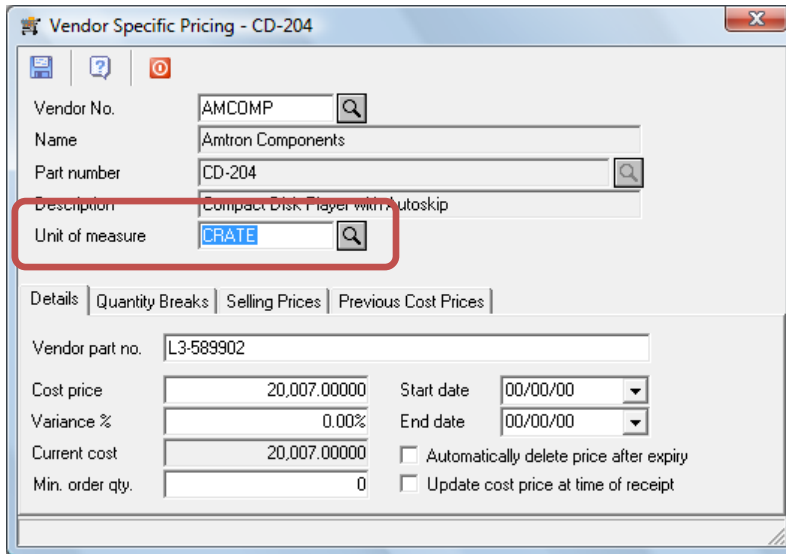


Pricing information is no longer attached directly to the inventory item, but instead is now attached to the unit of measure. Each unit of measure has its own list of twenty selling prices, quantity breaks, and promotional price that is independent of the prices of other units of measure.

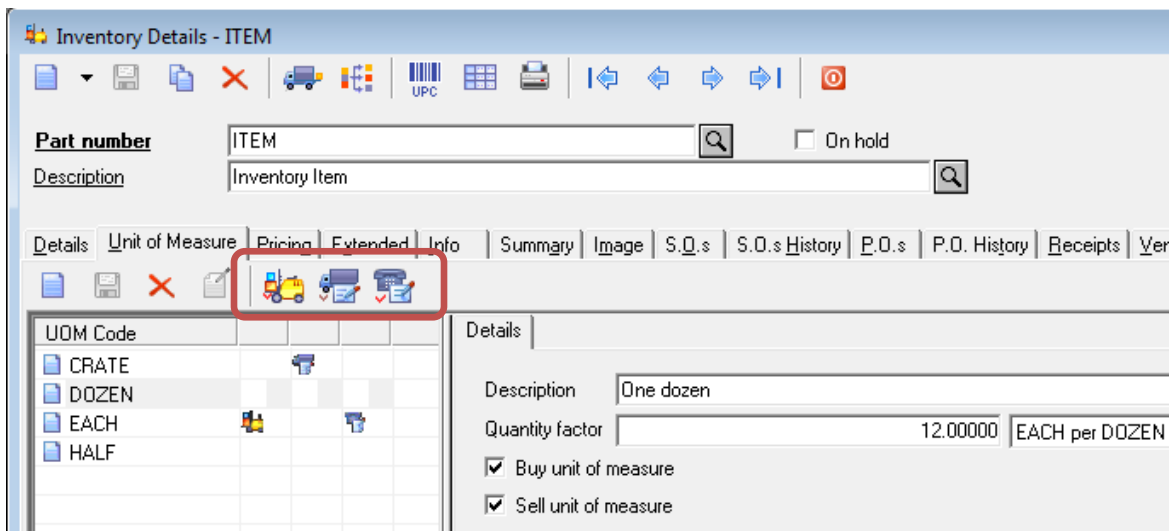
As an alternative to entering prices for each unit of measure, a price factor can be used. When the “Use price factor” check box is checked for a unit of measure, its price will be based on the price for the stock unit of measure, multiplied by the price factor entered. In the example below, once DOZEN will be sold for 12 times the price of an EACH.



Customer Specific Prices and Vendor Specific prices are also established at the unit of measure level.



The default stock, buy and sell unit of measure can be reassigned using the buttons on the Unit of Measure tab toolbar in Inventory Details. For example, in order to change the default buy unit of measure, select a UOM code that has “Buy unit of measure” enabled, and then click the “Set default buy unit of measure button”.



**NOTE:** The stock unit of measure can only be changed when the on-hand quantity is zero. If the stock unit of measure is changed, the quantity factors and prices of all units of measure for the item should be reviewed, as well as any open purchase orders and sales orders.

The Receive Inventory function allows you to specify the unit of measure in which the receipt is being made. Note that the backorder, on-hand, committed and available quantities are displayed in stock unit of measure only, just as they are on the Details tab of Inventory Details.

**Receive Inventory - ITEM**

Part number: ITEM  
 Description: Inventory Item  
 Unit of measure: CRATE  
 Inventory type: Normal item

Receive qty.	Location	Current cost	Selling price
3.00000	Aisle 12	5,000.00000	0.00000

**Quantities in EACH**

Backorder qty.	On-hand qty.	Committed qty.	Available qty.
0.00000	57.00000	0.00000	57.00000

Buttons: Receive, Exit, Clear, Trial Build..., Help

The Warehouse Transfer function allows you to specify the unit of measure in which the transfer is being made. Note that the backorder, on-hand, committed and available quantities are displayed in stock unit of measure only, just as they are on the Details tab of Inventory Details.

**Warehouse Transfer**

From Warehouse: 00 To Warehouse: WEST  
 Part number: ITEM  
 Description: Inventory Item  
 Unit of measure: DOZEN  
 Inventory type: Normal item

Transfer qty.	Location	Average cost	Selling price
4.00000	Bin 12	600.00000	0.00000

**From Warehouse (Qty. in EACH)**

Backorder qty.	0.00000
On-hand qty.	57.00000
Committed qty.	0.00000
Available qty.	57.00000

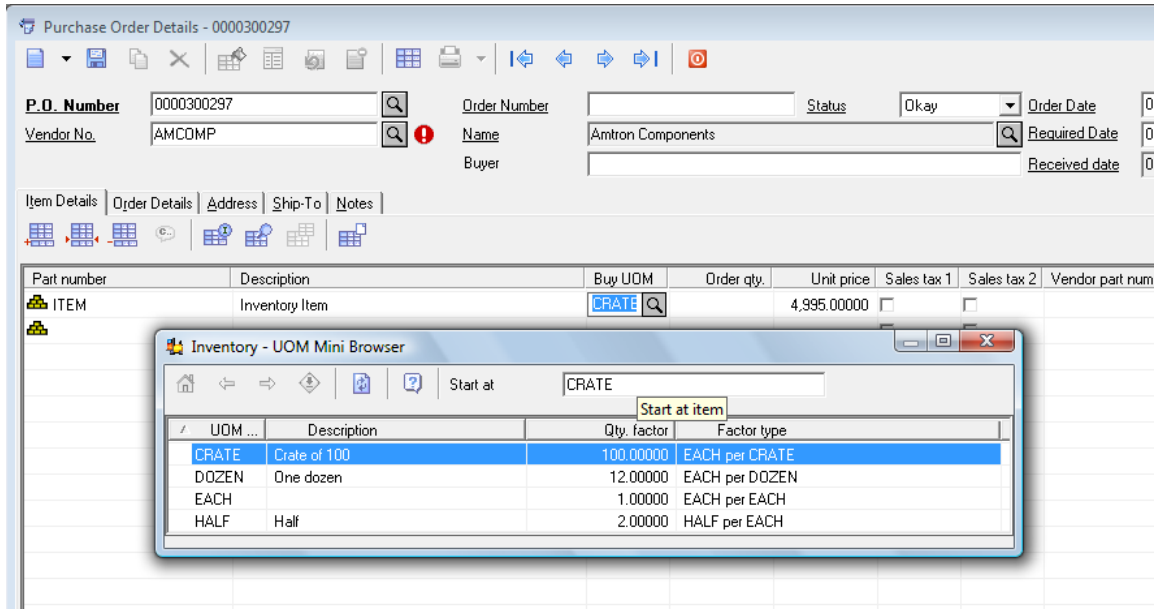
**To Warehouse (Qty. in EACH)**

Backorder qty.	0.00000
On-hand qty.	0.00000
Committed qty.	0.00000
Available qty.	0.00000

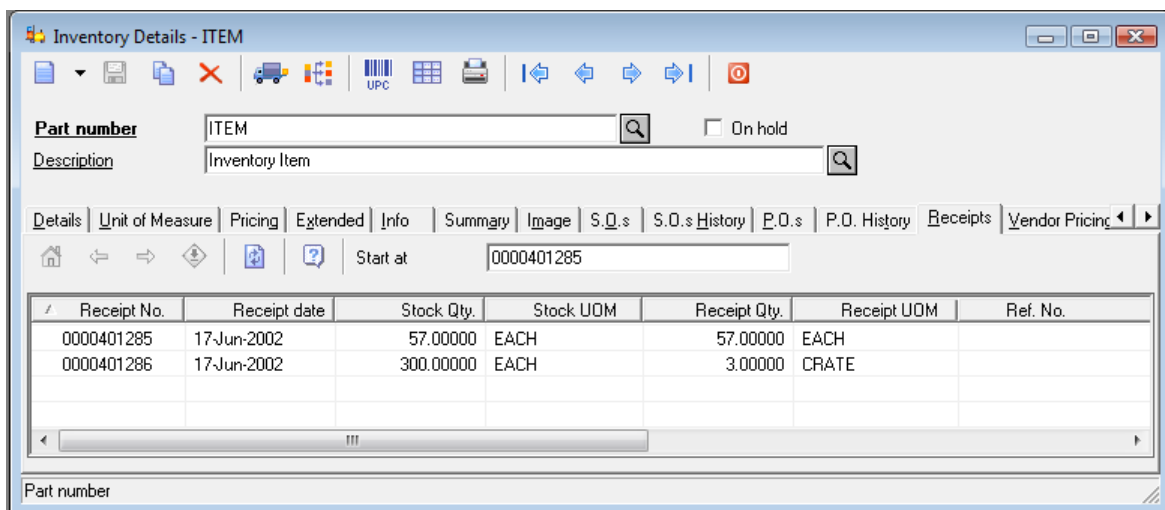
Buttons: Transfer, Exit, Clear, Help



Purchase Order Details allows entry of any valid unit of measure that has the “Buy unit of measure” setting enabled. Unit prices are based on either the vendor specific price for that item/unit of measure or are calculated based on the quantity factor and the current cost of the item in stock unit of measure. Purchase Analysis reports display the selected buy unit of measure.



When Receipts records get created by the Receive Inventory function, the Warehouse Transfer function, or the Purchase Order Details module, the quantities received are recorded in both stock unit of measure and receipt unit of measure.



Receipts reports can be run for either stock unit of measure, or receipt unit of measure. Other inventory reports are run for stock unit of measure.

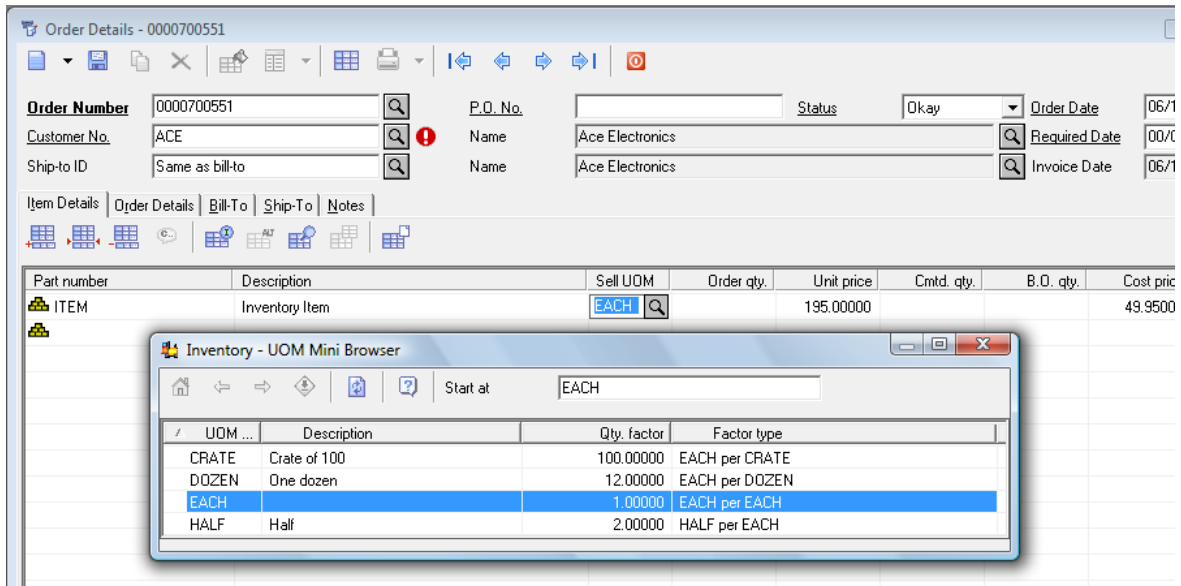
Bill of Materials support the units of measure established in inventory, and also the units of measure established within Bill of Materials itself. When entering a line on a bill of materials, if an unrecognized unit of measure is entered, you will be able to establish the conversion factor and usage quantities as in previous versions.

When entering a line on a bill of materials, if a unit of measure is entered that has already been established for that item in inventory, you will be able to establish the usage quantities, but the conversion factor will be drawn from inventory.

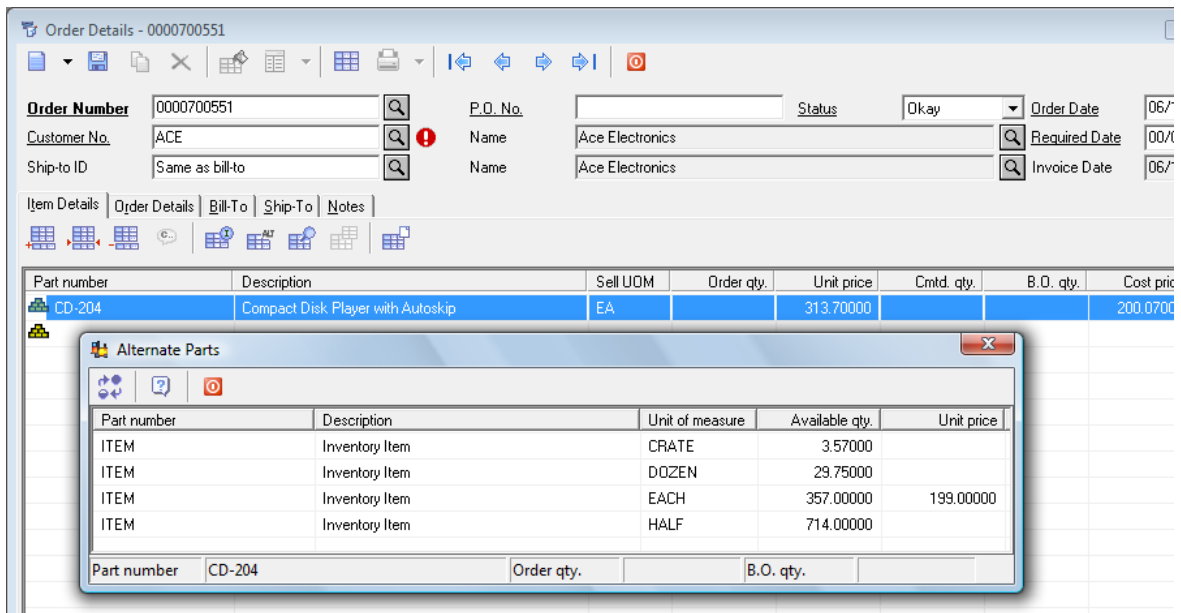


**NOTE:** If a line item on a bill of materials uses a unit of measure whose conversion factor is drawn from inventory, future changes to the quantity factor in inventory will NOT be reflected on the bill of materials.

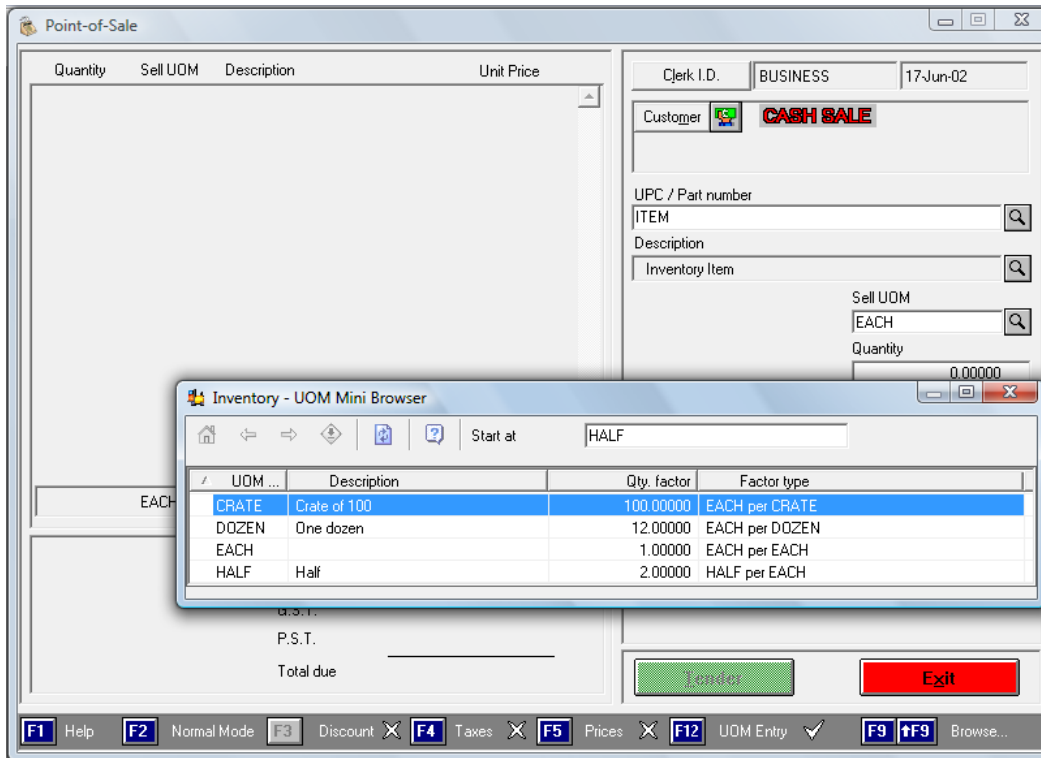
Order Entry allows entry of any valid unit of measure that has the “Sell unit of measure” setting enabled. Sales Analysis reports display the selected sell unit of measure.



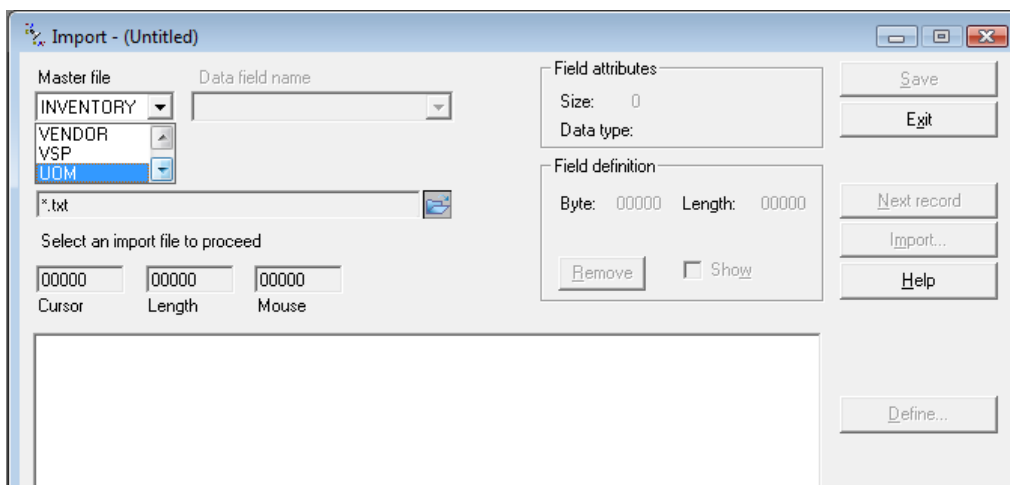
The Alternates browse in Order Entry displays all available units of measure for an alternate item. The available quantities listed in the browse have been calculated based on the actual available quantity in inventory, which is stated in stock unit of measure.



Point of sale allows entry of any valid unit of measure that has the “Sell unit of measure” setting enabled. “F12” is used as a hotkey to enable/disable entry in the Sell UOM field.



The standard Import utility allows units of measure to be imported for existing items.



The standard Export utility includes unit of measure information in the Inventory export. Unit of measure information is found on the “Inventory\_Dtl” tab in Excel, or in “Inventory\_dtl.txt” when exported to a text format.

	A	B	C	D	E	F	G	H	I	Al
1	Part number	Location	UOM code	UOM description	Quantity factor	Factor type	Direct factor	Buy UOM	Sell UOM	Al
12	ITEM	Aisle 12	CRATE	Crate of 100	100	EACH per CRATE	Yes	Yes	Yes	Ye
13	ITEM		DOZEN	One dozen	12	EACH per DOZEN	Yes	Yes	Yes	Ye
14	ITEM		EACH		1	EACH per EACH	Yes	Yes	Yes	Ye
15	ITEM		HALF	Half	2	HALF per EACH	No	Yes	Yes	Ye
16	MCB-250	wrhse	EA	EA	1	EA per EA	Yes	Yes	Yes	Ye
17	MD46	shelf	EA	EA	1	EA per EA	Yes	Yes	Yes	Ye
18	N142	bin 8	EA	EA	1	EA per EA	Yes	Yes	Yes	Ye
19	P1210A	wrhse	EA	EA	1	EA per EA	Yes	Yes	Yes	Ye

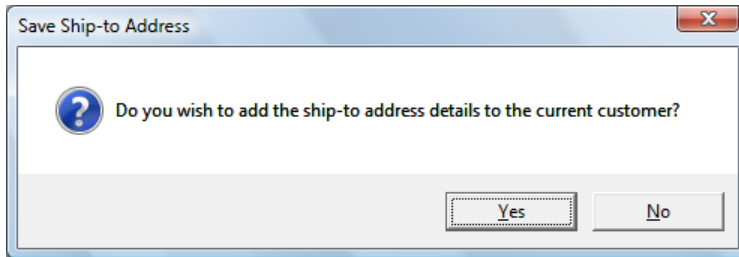
E-BusinessVision uploads only the stock unit of measure for any inventory item. An item may have a default sell unit of measure that differs from its stock unit of measure. In that case, the unit of measure uploaded to the web store is the stock unit of measure as long as it is flagged as a sell unit of measure. If the stock unit of measure is not flagged as a sell unit of measure, then the inventory item will not be uploaded to the web store.

External orders created in Sage BusinessVision and uploaded to the web store may contain units of measure other than the stock unit of measure. If the external order is then added to the shopping cart on the web store the item will be ordered and processed in the unit of measure of the web store.

## Order Entry Enhancements

### Prompt to Create Customer Ship-To Addresses

Whenever a new ship to address is created in Order Entry, the system can optionally prompt the user to add the ship-to address to the customer file. This option is controlled by the “Prompt to create customer ship-to addresses” setting in User Details.

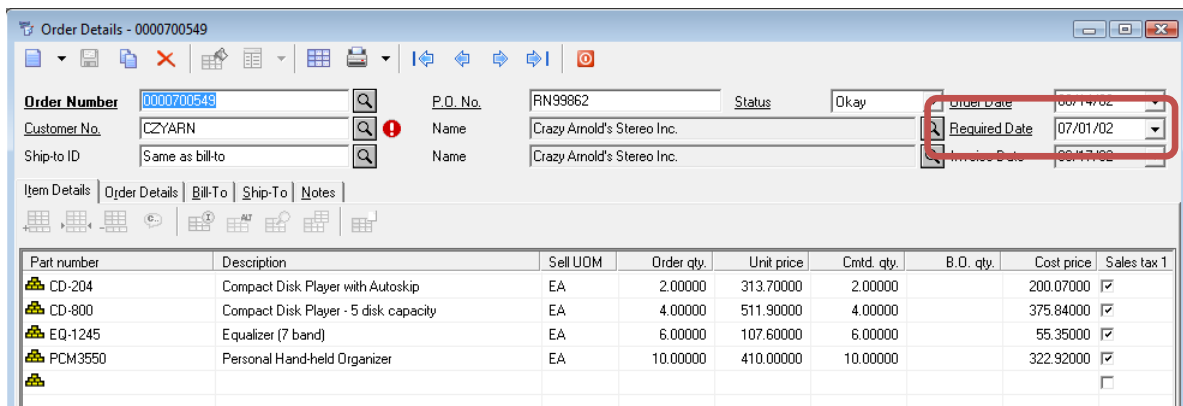


### Edit Customer Ship-To Address Details

The address fields on the Ship-To tab in Order Entry can optionally be open for input even when a ship-to address has been selected from the customer file. This option is controlled by the “Edit customer ship-to address details” setting in User Details.

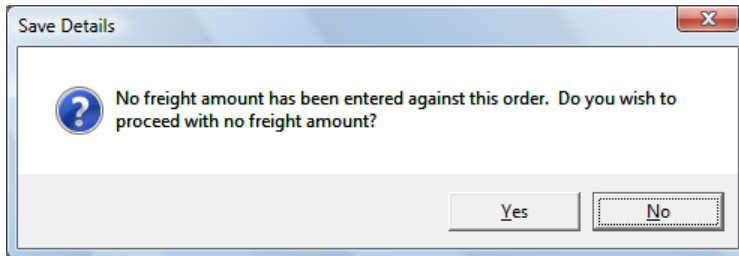
### Required Date

Orders now have a “Required Date” field. This label for this field is underlined, which indicates that it can be used as a sort key to navigate through the order file. The required date has been added to existing reports. Also, “Order List – Detailed – By Required Date” and “Order List – Summary – By Required Date” have been added to the Report Suite.



## Confirm Orders with Zero Freight Charges

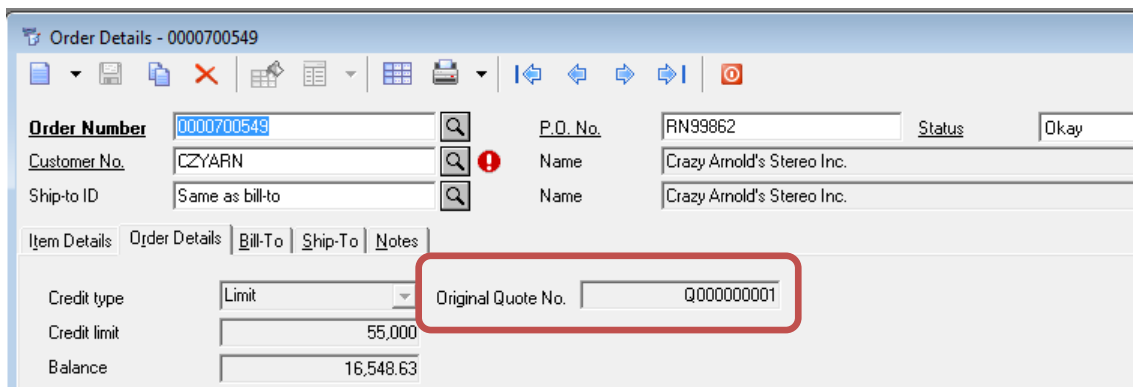
Whenever an order is created in Order Entry, the system can optionally prompt if the freight amount for the order is zero. This option is controlled by the “Prompt to confirm a zero freight amount” setting in System Setup.



**NOTE:** This option only applies to shipping methods that use the “Prompt” calculation method. It does not apply to shipping methods that use the “Fixed” or “Rate” calculation methods.

## Quotes Converted to Orders use Next Order Number

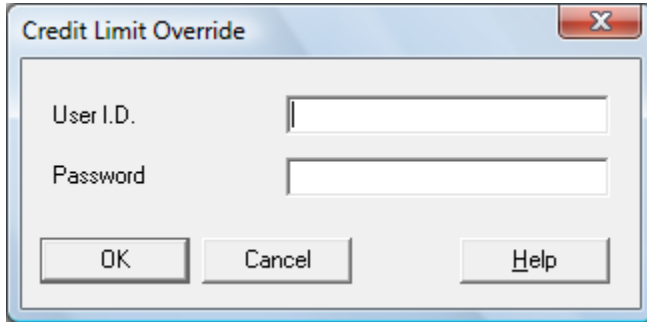
Whenever a quote is converted to an order in Order Entry, the system can optionally use the next available order number, rather than retaining the original quote number. This option is controlled by the “Convert quotes using next order no.” setting in System Setup. When this option is enabled, the original quote number is still retained on the order, can be viewed on the Order Details tab in Order Entry, and can be used in search criteria in Find and Sales Analysis.



## Credit Hold Override

When an Order Entry user encounters an order for a customer who has a credit problem, the system can now optionally allow a supervisor to override the credit hold so that the order can be invoiced. Users who should be prompted to allow a supervisor to override the credit hold must have the “Hold invoicing” option in User Details set to “Over limit”, and the “Prompt to override credit limit” option set to “Yes”. Users who

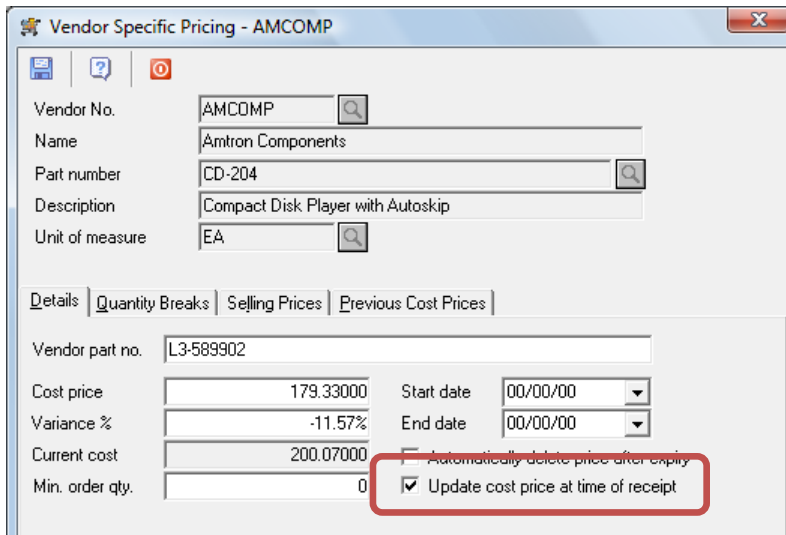
are supervisors capable of overriding a credit hold must have the “Override credit limit supervisor” option in User Details set to “Yes”.



## Purchase Order Enhancements

### Update Vendor Cost based on Purchase Order Receipt

Whenever an item is received on a Purchase Order, the system can optionally update the vendor specific cost for that item. This option is controlled by the “Update cost price at time of receipt” setting in Vendor Specific Pricing and is set on each specific price independently.





## Purchase Order Type

Purchase Orders can be printed and e-mailed (Form and e-mail), e-mailed only (E-mail) or printed only (Form). This option is defined at the vendor level, using the “Purchase Order Type” list on the Details tab of Vendor Details.

The screenshot shows the 'Vendor Details - AMCOMP' window. The 'Purchase Order type' dropdown menu is open, showing the following options: Form, Form and e-mail, E-mail, and Form. The 'Form' option at the bottom of the list is highlighted in blue. A red rectangle highlights the dropdown menu area.

## Point of Sale Enhancements

### Enter Customer Number

The Customer Details dialog allows entry of the customer number when the “Enter Customer No.” check box is checked.

The screenshot shows the 'Customer Details' dialog box. The 'Enter Customer No.' checkbox is checked, and a search icon is visible next to the input field. A red rectangle highlights the 'Enter Customer No.' checkbox and its associated input field. Other fields include Name, Address, City (Toronto), Post Code, Province (ON), Country (Canada), Contact, Tel. No., Fax No., and E-mail. Buttons for OK, Cancel, Clear, and Help are also visible.