

New Features in Sage BusinessVision 2009

Initial Installation and Configuration of Sage BusinessVision 2009

Overview

The installation of Sage BusinessVision 2009 follows the same process as version 7.2. 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.



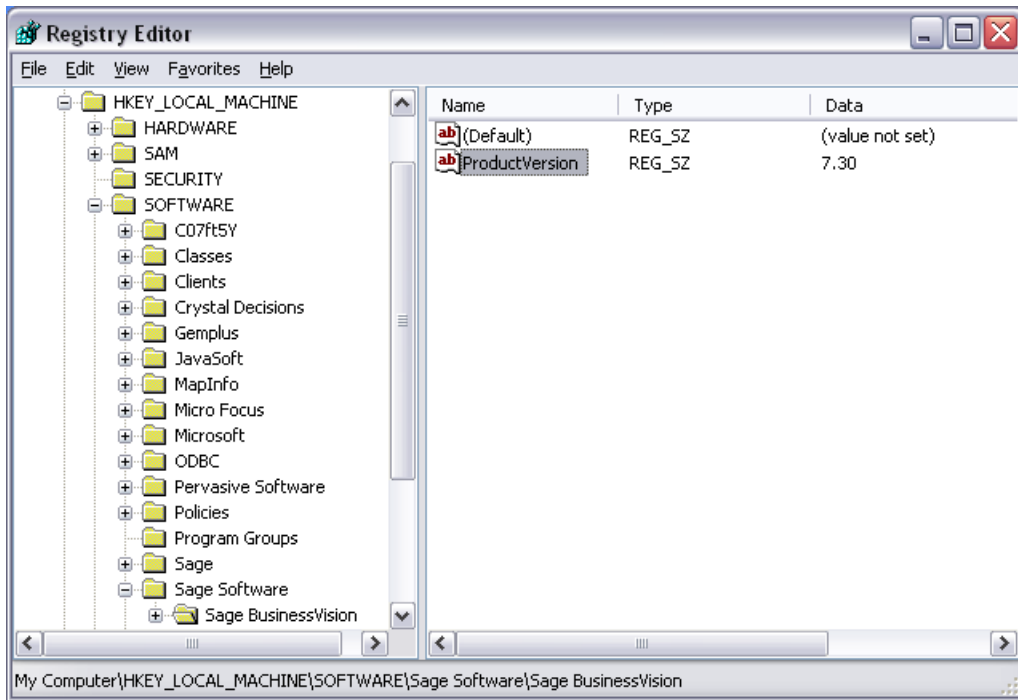
NOTE: It is not necessary to reinstall CustomPack, e-BusinessVision, LAN Packs or Multiple Currency Manager if they have already been installed with v7.1 or v7.2. The existing licenses will continue to be honoured.



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.

New Registry Key

A new key has been added to the registry during the installation routine. This new key will be used by service packs and payroll updates to determine which version of the application is currently installed. The new key is "ProductVersion", and is located in HKEY_LOCAL_MACHINE\SOFTWARE\Sage Software\Sage BusinessVision.



Data File Conversion

Existing sets of Sage BusinessVision data will be converted to v2009 format when logging in for the first time.



NOTE: Once your data has been converted to be compatible with v2009, it will no longer be compatible with prior versions.

Files converted

The following table lists data files that are converted, created, or reorganized during the v2009 file conversion process.

FILE NAME	CONVERSION/NEW/REORGANIZATION
ap.btr	Conversion – initialization of new fields
ar.btr	Conversion – initialization of new fields
bvcon.fil	Conversion – support for new system settings
customer.btr	Reorganization – initialization of new fields
impdtls.imp	Reorganization – indexes added
imphdr.imp	Reorganization – indexes added
pmgrset.btr	New – printer settings file
supplier.btr	Reorganization – initialization of new fields
users.btr	Conversion – support for new user settings
userslv.btr	Conversion – support for new user browse settings

Using Existing Customized Reports

If you wish to re-use customized Account Statements previously created for v7.2, they will need to be updated in order to be compatible with v2009. If you do not use customized Account Statements (i.e. you use the forms supplied with Sage BusinessVision) then you will not need to update your forms. Other than the Account Statements, no other forms customized to work with v7.2 need to be updated to work with v2009.

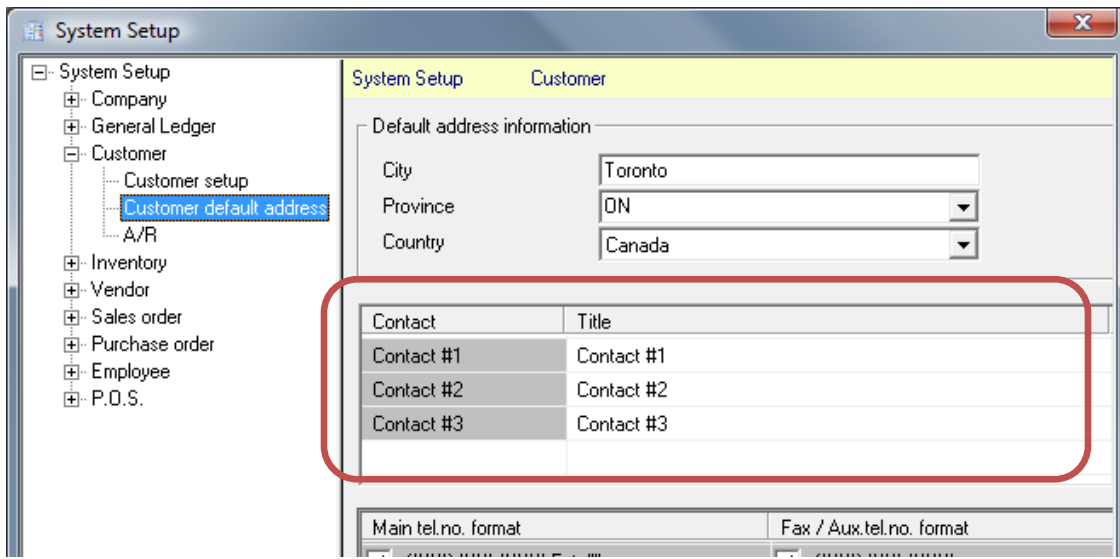
For details on how to update existing customized Account Statements, refer to “BV2009_Customized_forms.pdf” which is located in the \Readme folder on the Sage BusinessVision CD and in the \BusinessVision folder on any workstations with v2009 installed.

System Setup Additions and Changes

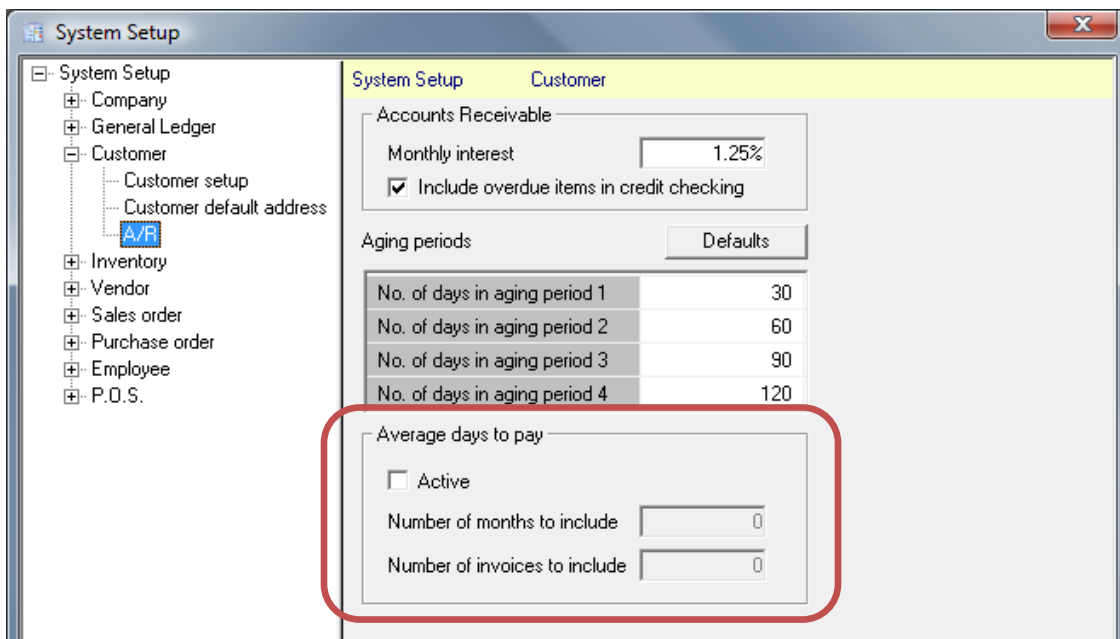
A number of changes and additions have been made to System Setup in order to activate and control some of the new features in version 2009.

Customer

In Customer default address, entries were added for contact titles.

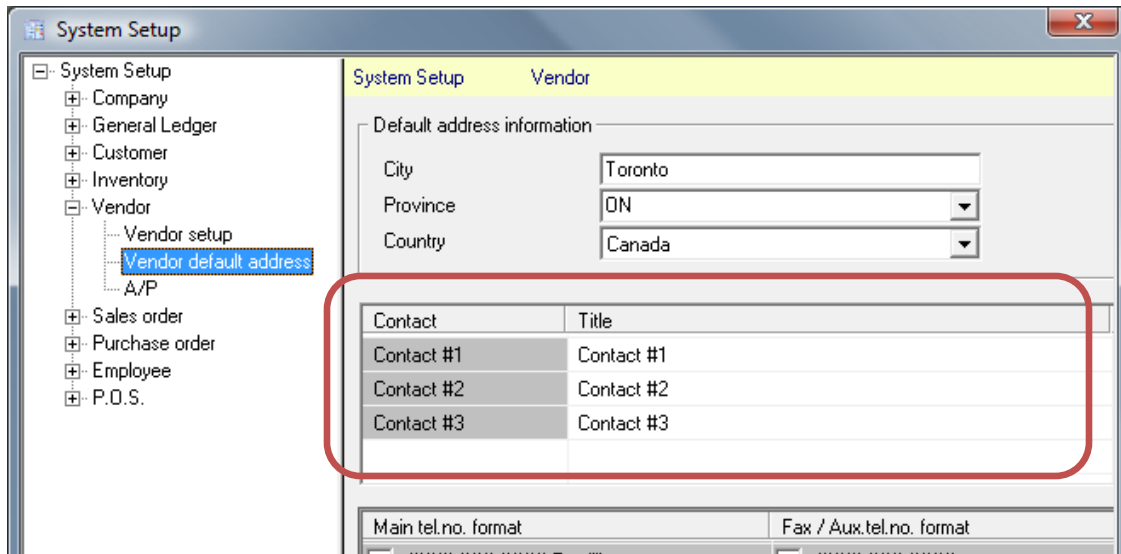


In A/R, a check box was added for Average days to pay "Active", and entries were added for "Number of months to include" and "Number of invoices to include".



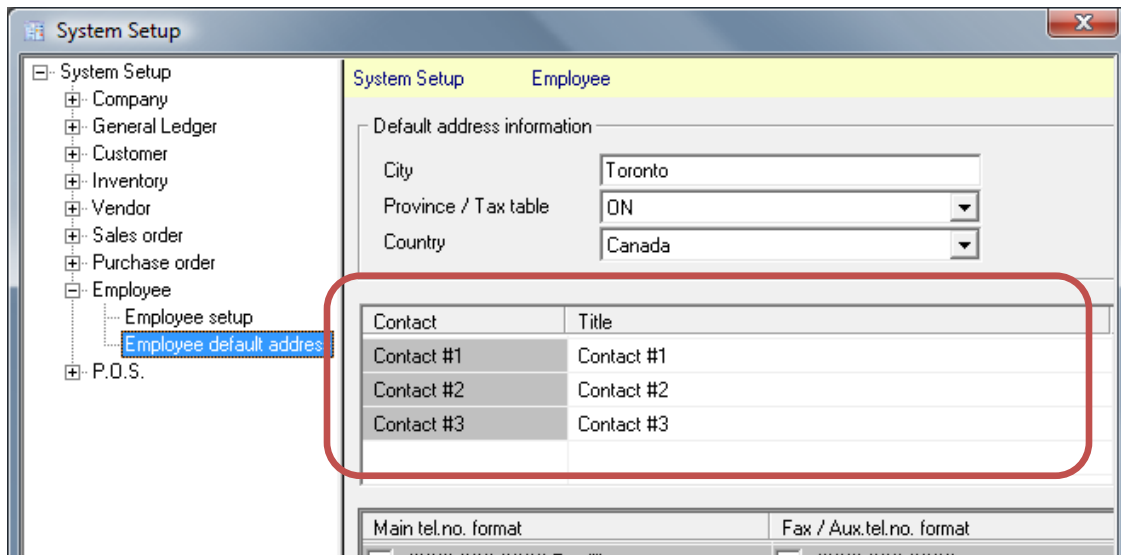
Vendor

In Vendor default address, entries were added for contact titles.



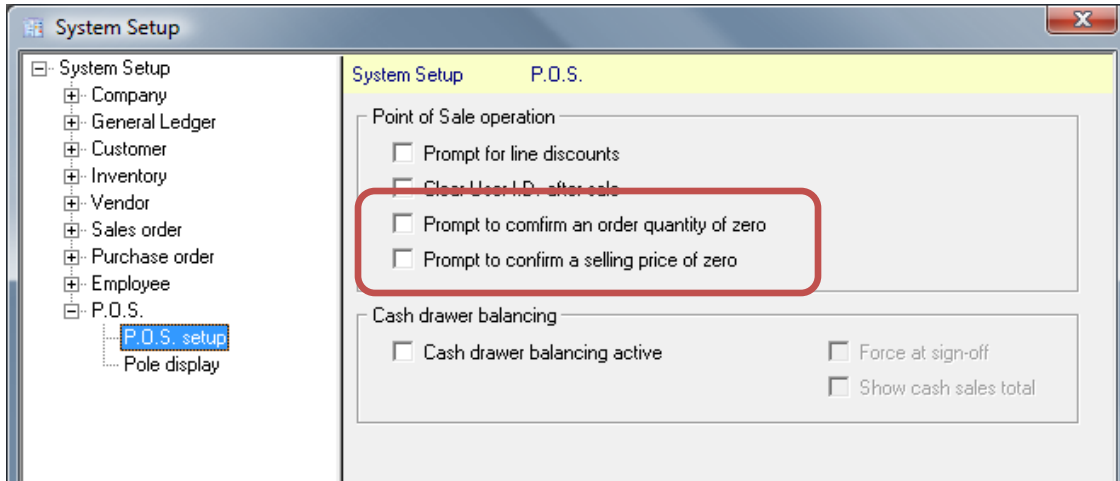
Employee

In Employee default address, entries were added for contact titles.



P.O.S.

In P.O.S. setup, check boxes were added for “Prompt to confirm an order quantity of zero” and “Prompt to confirm a selling price of zero”.

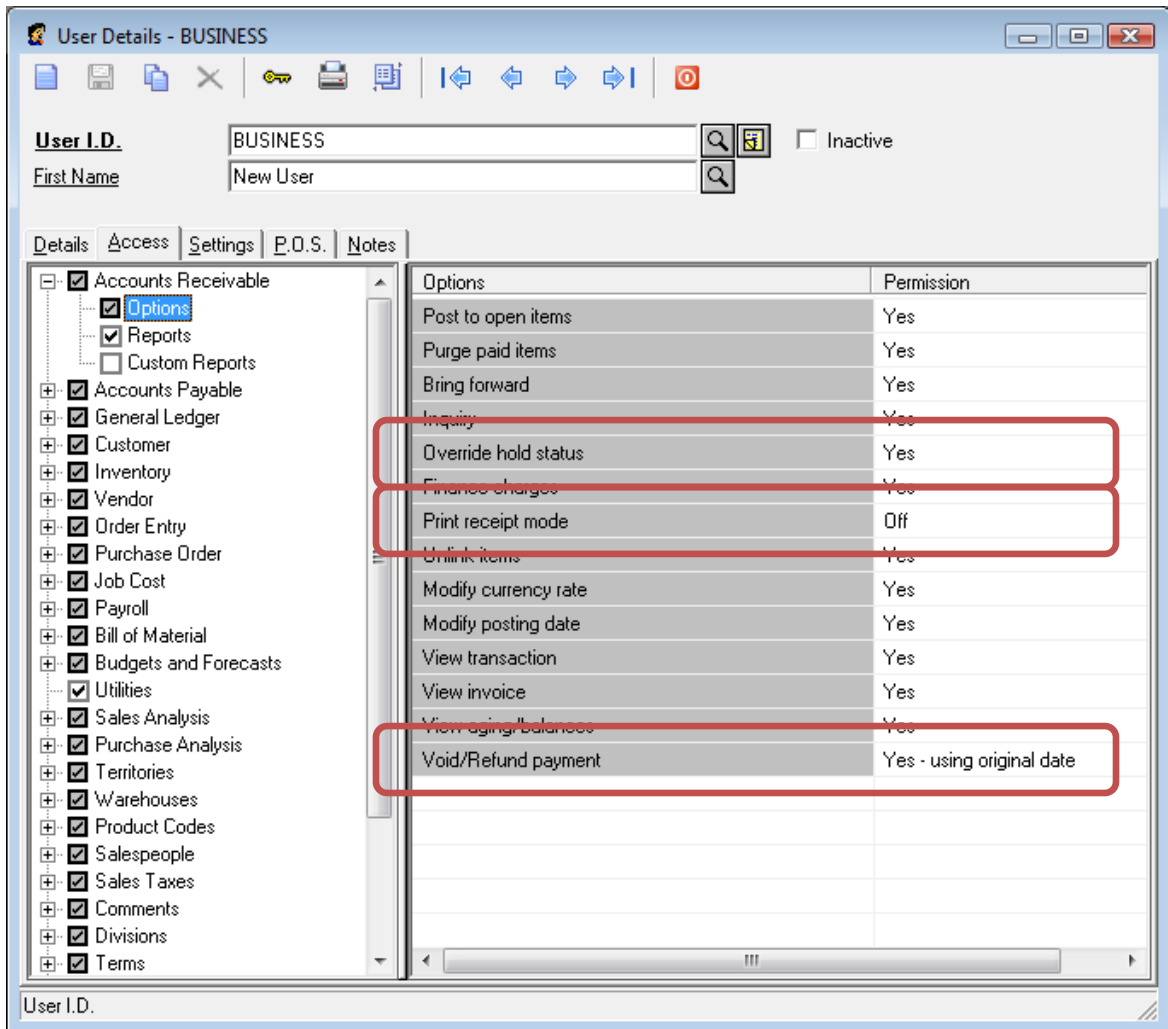


User Details Additions

A number of additions have been made to User Details in order to activate and control new and existing features in version 2009.

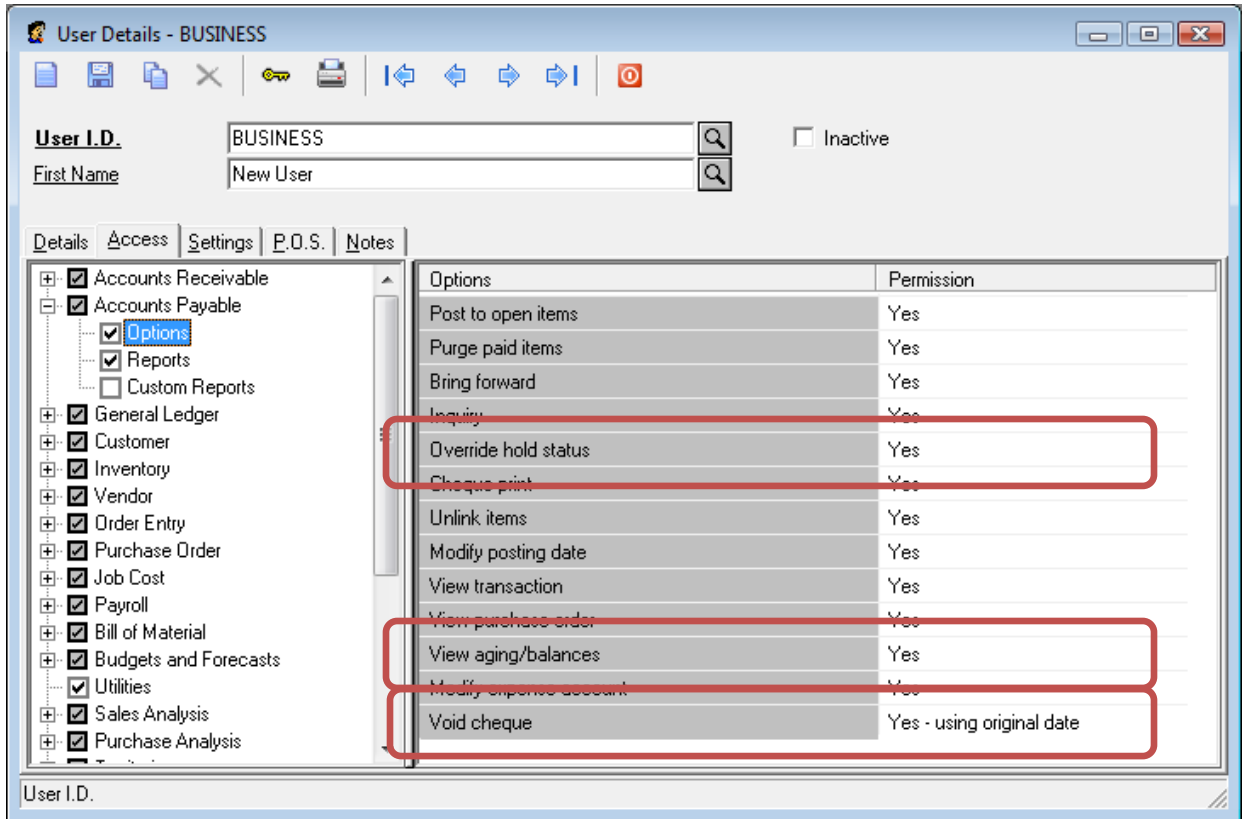
Access – Accounts Receivable

In Accounts Receivable > Options, entries were added for “Override hold status”, “Print receipt mode”, and “Void/Refund payment”. The entry for “Search by transaction number” was removed.



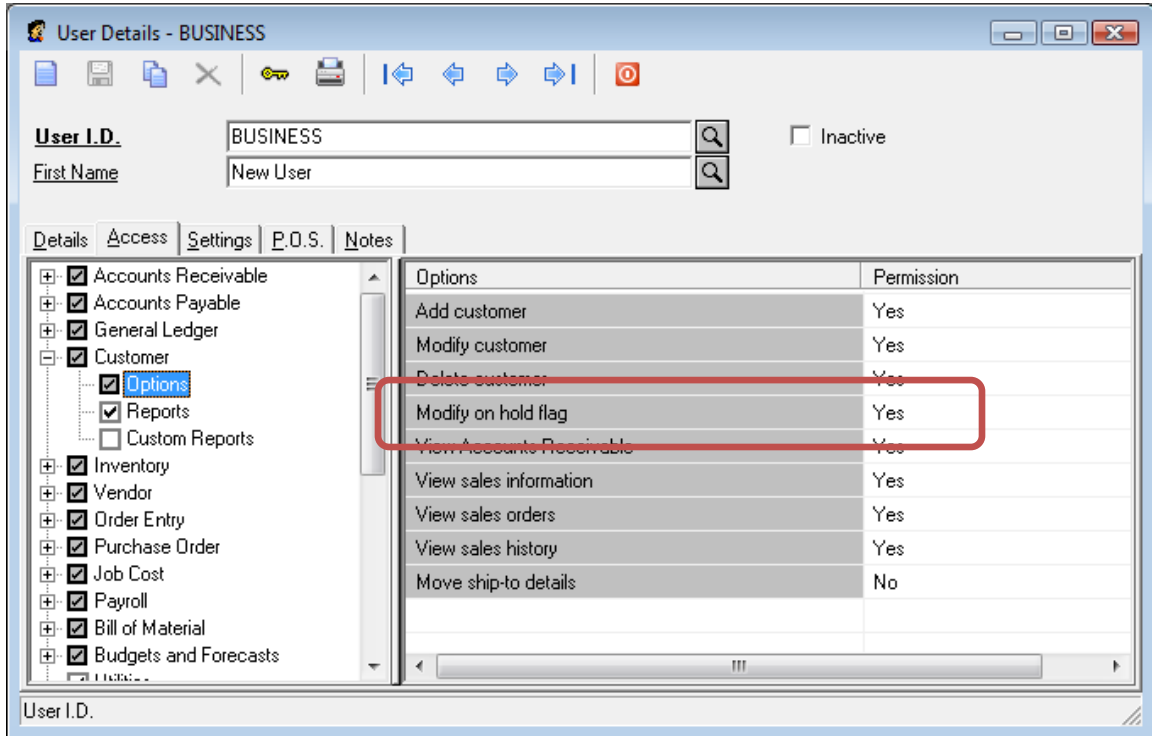
Access – Accounts Payable

In Accounts Payable > Options, entries were added for “Override hold status” and “Void cheque”. The entry for “View balances” was renamed “View aging/balances”. The entry for “Search by transaction number” was removed.



Access – Customer

In Customer > Options, an entry was added for “Modify on hold flag”. The entry for “Override hold status in Accounts Receivable” was removed. (Note – it has been replaced by the “Override hold status” entry in Accounts Receivable > Options.



Access – Inventory

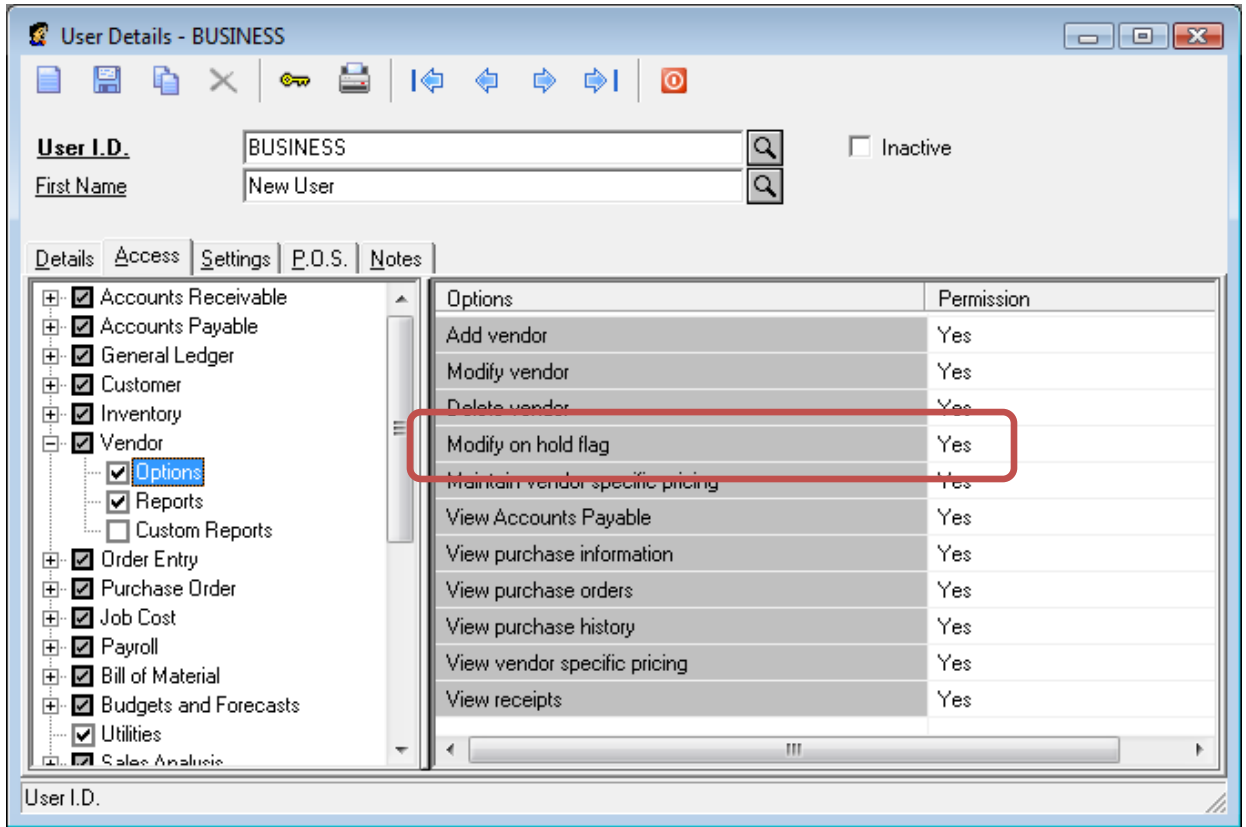
In Inventory > Options, entries were added for “Add new items to additional warehouses” and “Modify on hold flag.” The warehouse entry only appears when multiple warehouses are enabled.

The screenshot shows the 'User Details - BUSINESS' window with the 'Access' tab selected. The 'Inventory' folder is expanded to show 'Options'. A table lists permissions for 'Options', with 'Add new items to additional warehouses' and 'Modify on hold flag' highlighted by a red box.

Options	Permission
Add inventory	Yes
Modify inventory	Yes
Delete inventory	Yes
Edit sales departments	Yes
Receive inventory	Yes
Show cost price/margin	Yes
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
Warehouse transfer	No
Add new items to additional warehouses	Yes
Modify on hold flag	Yes

Access – Vendor

In Vendor > Options, an entry was added for “Modify on hold flag”. The entry for “Override hold status in Accounts Payable” was removed.



Access – Order Entry

In Order Entry > Options, an entry was added for “Edit Unit of Measure”.

The screenshot shows the 'User Details - BUSINESS' window. The 'User I.D.' is 'BUSINESS' and the 'First Name' is 'New User'. The 'Options' table is displayed under the 'Order Entry' module. The 'Edit Unit of Measure' option is highlighted with a red box.

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	Prompt, set default button to Yes
Allow non-stocked items	Prompt for confirmation
Automatic order filling	Yes
Modify selling price	Yes
Apply line discounts	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
Edit Unit of Measure	No

Access – Purchase Order

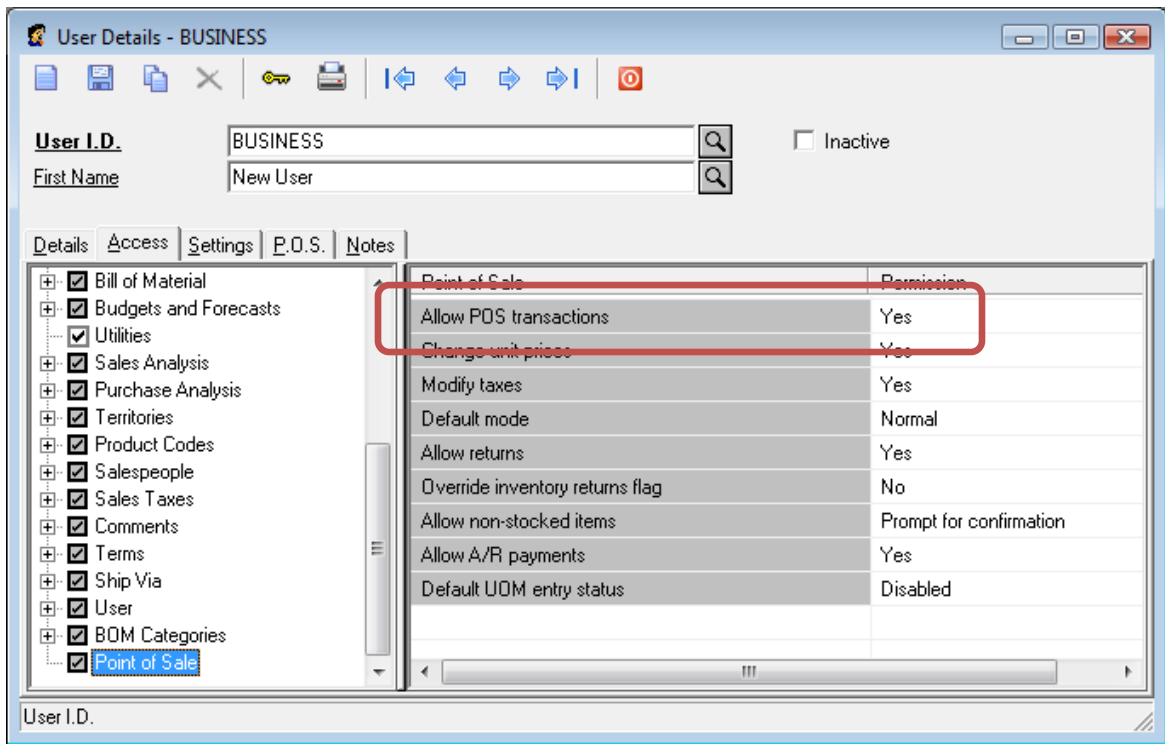
In Purchase Order > Options, an entry was added for “Edit Unit of Measure”.

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, showing a list of permissions for the 'Purchase Order' module. The 'Edit Unit of Measure' option is highlighted with a red box, indicating its permission status.

Options	Permission
Add purchase order	Yes
Modify purchase order	Yes
Delete purchase order	Yes
Post invoice to A/P	Yes
Default purchase order status	Okay
Allow non-stocked items	Prompt for confirmation
Edit tax flags	Yes
Add standing purchase order	Yes
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
Edit Unit of Measure	No

Access – Point of Sale

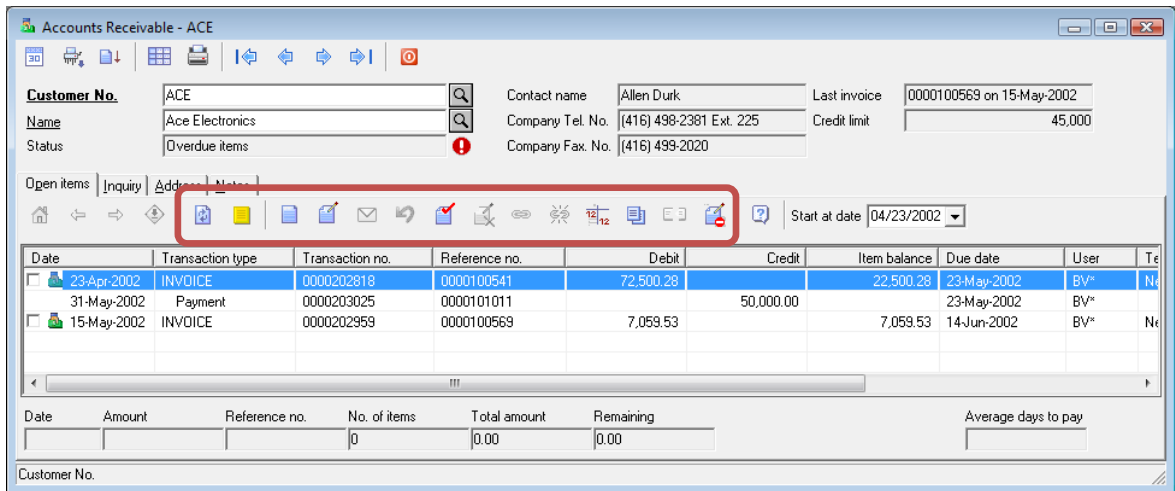
In Point of Sale > Options, an entry was added for “Allow POS transactions”.



Accounts Receivable Enhancements

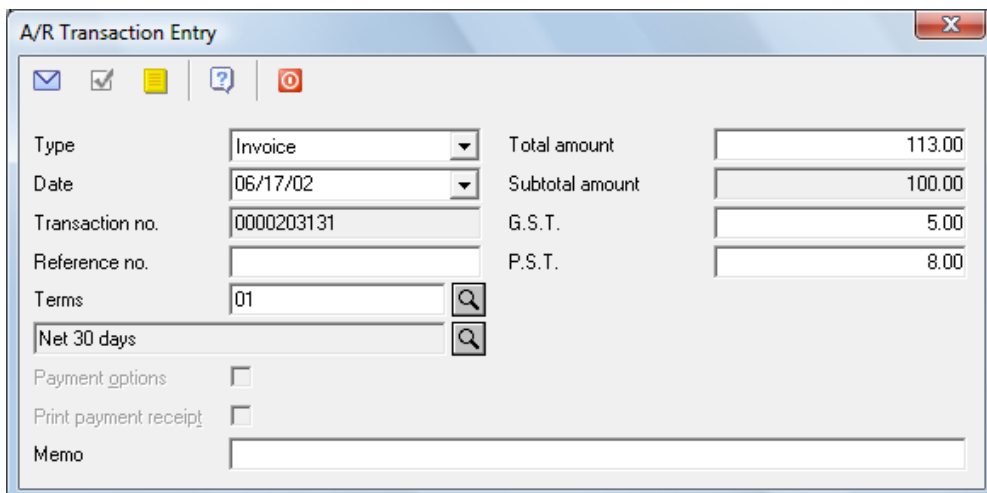
Redesigned User Interface

The Accounts Receivable module has been redesigned to use tabs to present more information than the previous design allowed. This new design is consistent with other related modules such as Customer Details and Order Entry. Buttons that relate to transactions have been moved to the Open Items tab toolbar, or the Inquiry tab toolbar.



Streamlined Transaction Entry Dialog

The A/R Transaction Entry dialog has been streamlined to allow entry of all transaction details in one place. Terms can be specified at the transaction level. Sales taxes are entered at the same time as the amount. (In previous Canadian versions, sales taxes were entered on a second dialog. In previous US versions, there was no opportunity to enter taxes.) A sixty character memo field has been added to allow a description to be entered if desired.



Process Credit Card Payments

The A/R Transaction Entry dialog has a “Payment options” checkbox. If this is checked when processing a payment, the Payment Details dialog will appear, allowing you to specify which of the available payment methods was tendered by the customer.

A/R Transaction Entry

Type: Payment | Total amount: 22,500.28
 Date: 06/17/02 | Subtotal amount: 22,500.28
 Transaction no.: 0000203132
 Reference no.: 552675
 Terms: 01
 Net 20 days
 Payment options
 Print receipt
 Memo

Payment Details

Payment method

<input type="checkbox"/> Cash and Cheque Receipts	0.00
<input checked="" type="checkbox"/> Visa	22,500.28
<input type="checkbox"/> MasterCard	0.00
<input type="checkbox"/> American Express	0.00

Sale amounts

Net:	22,500.28
Freight:	0.00
Discount:	0.00
N/A	0.00
N/A	0.00

Card number **Expiry** **Authorization**

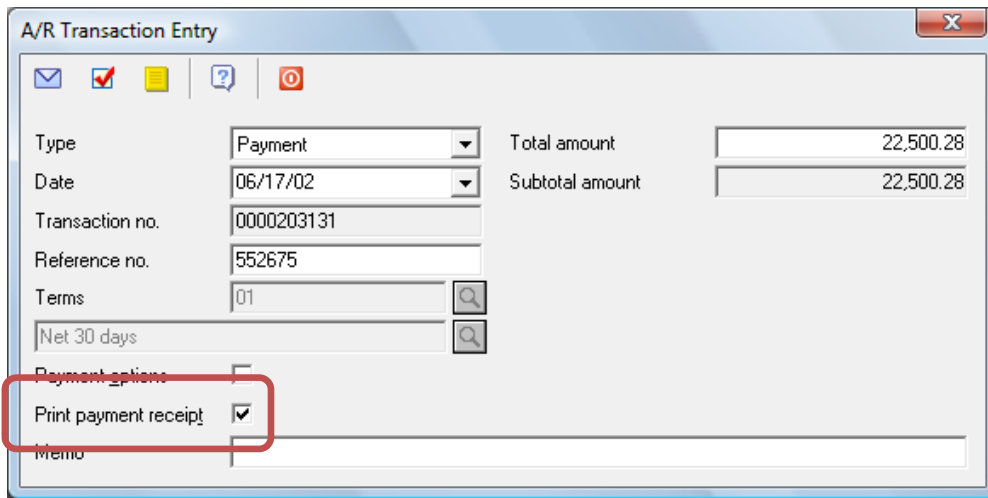
5454545454	02/12	2318971
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Total: 22,500.28
Tendered: 22,500.28
Change: 0.00

OK Close Help

Print Payment Receipt

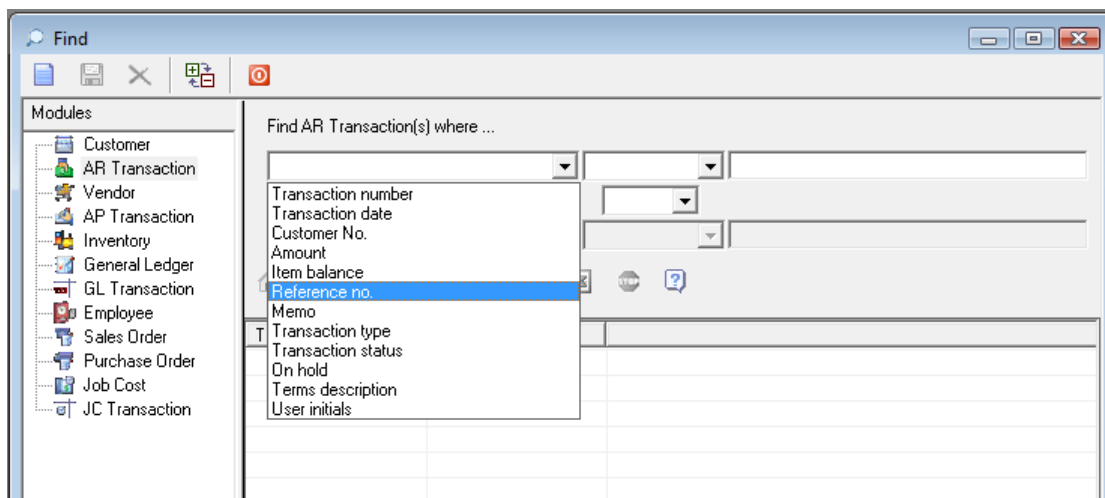
The A/R Transaction Entry dialog has a “Print payment receipt” checkbox. If this is checked when processing a payment, a receipt will be printed.



The form used to print the receipt can be selected in Printer Setup, under the “Accounts Receivable Receipt” document type.

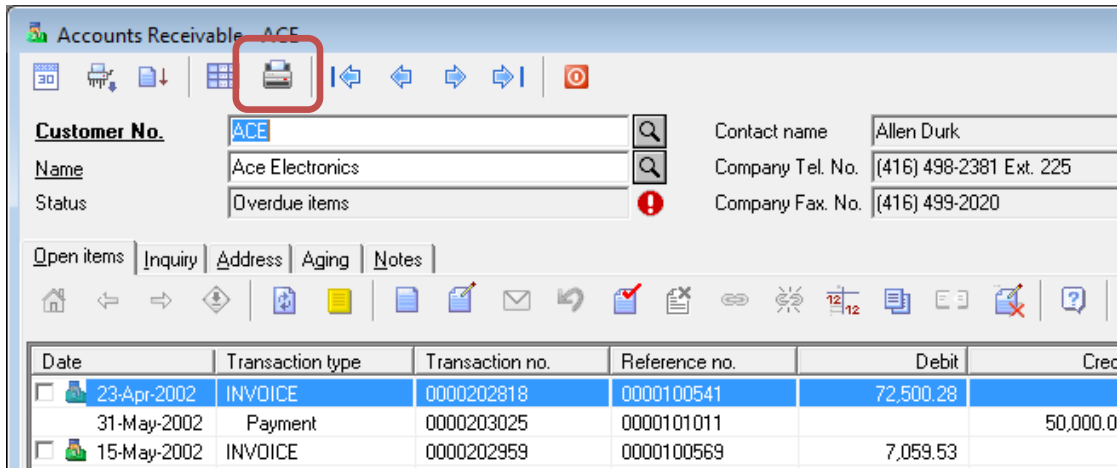
Transaction Search

The Accounts Receivable transaction search function was formerly limited to searching for items by General Ledger transaction number only. In version 2009, the transaction search feature was removed from the Accounts Receivable module, and added to the Find Utility. This allows searches to be performed based on many different fields. Double clicking on an item in the Find results list will launch the Accounts Receivable module and display the appropriate transaction.



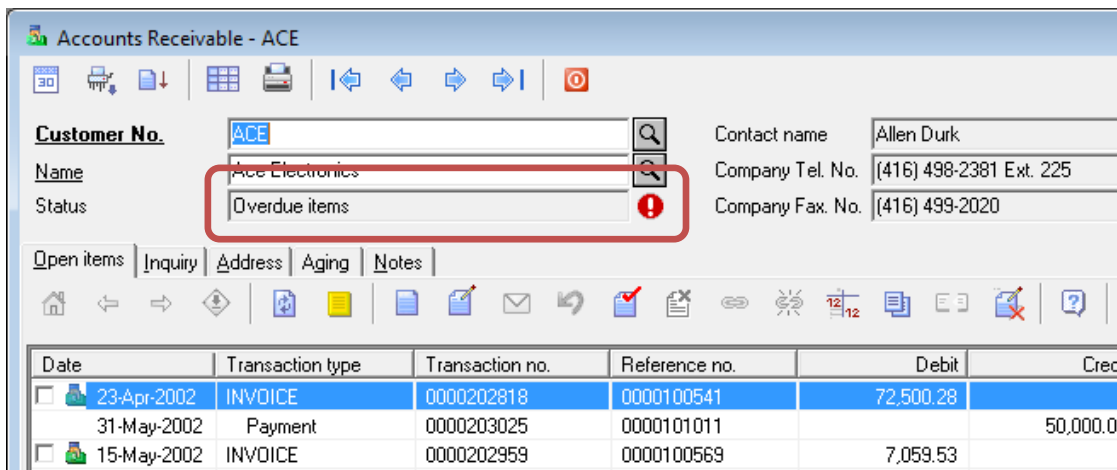
Accounts Receivable Details Report

A print button has been added to the Accounts Receivable module toolbar. Its purpose is similar to the print button found in the other modules – to allow quick access to a report that prints information contained in the record that is currently being viewed. In this case, the report prints contact details and a list of open items for the customer currently loaded in the Accounts Receivable module.



Status Indicator

In previous versions, a pop-up message appeared when a customer record was loaded in Accounts Receivable that had overdue items or was over their credit limit. The pop-up message has been replaced by a Status field that appears when a customer's account has one or both of the issues.



Average Days to Pay

The Accounts Receivable module will optionally calculate the customer’s average days to pay. To enable this calculation, set this option to active, and enter values in the “Number of months to include” and “Number of invoices to include” fields in System Setup.

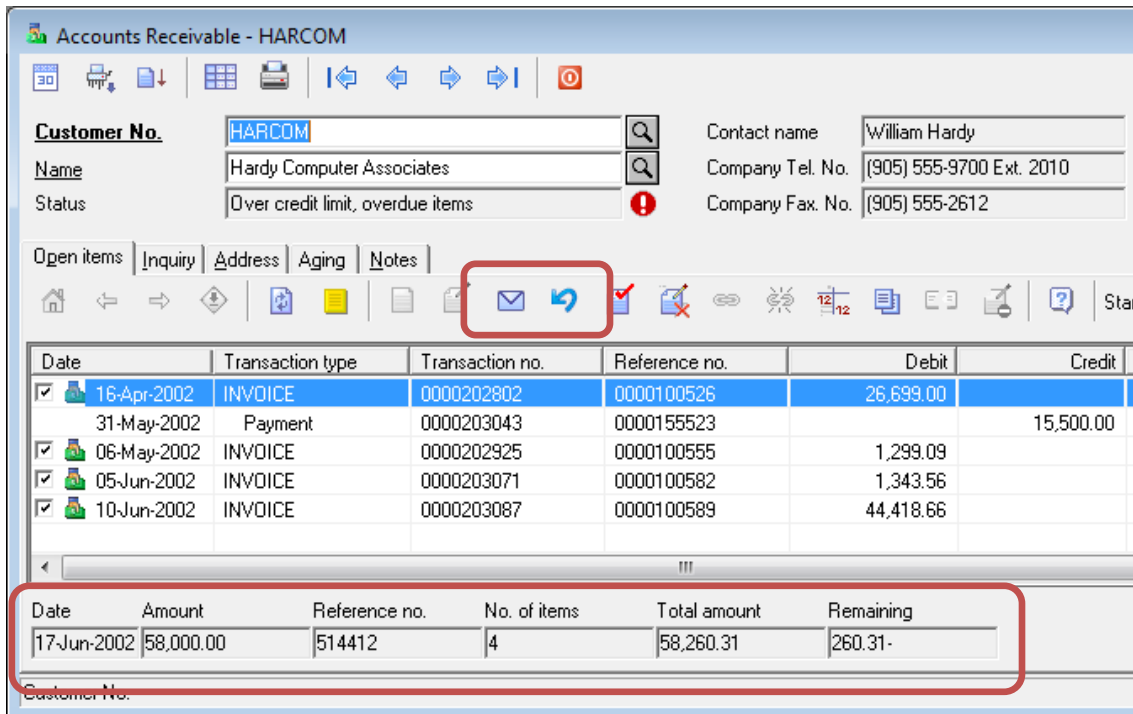
The average days to pay value is displayed in Accounts Receivable, on the Open Items tab, in Customer Details on the Accounts Receivable tab, and on several reports.

Unlimited Transaction Linking

The limit to the number of transactions that can be linked together has been removed.

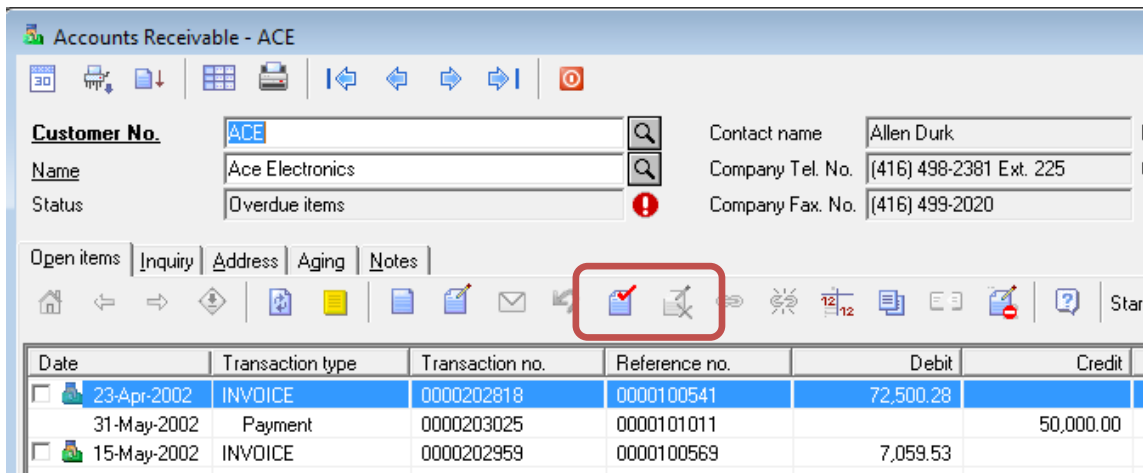
Changes to “Post flagged items”

In previous versions, a payment transaction could be entered, and then transactions could be flagged before the payment was posted. This workflow remains in version 2009, but the location of the buttons and transaction total statistics have changed. The “Post flagged items” and “Cancel flagged items” buttons are now in the Open Items tab toolbar. The payment transaction details and flagged item totals now appear below the transaction list.

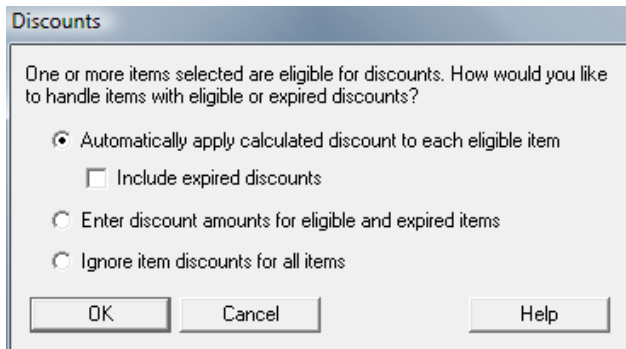


Select All/Deselect All

All open items can be flagged or unflagged using the “Select all” or “Deselect all” buttons on the Open Items tab toolbar.



When the “Select all” button is pressed, if one or more open items have a potential discount, you will be prompted with options on how to handle any discounts that may apply to the transactions being flagged.



“Automatically apply calculated discount to each eligible item” will apply discounts to eligible items based on the system’s calculations. If “Include expired discounts” is checked, then expired discounts will also be given. Note – if the log on date is after the item’s due date, but less than double the number of days for the discount, an item is considered to have an expired discount available.

“Enter discount amounts for eligible and expired items” will present the Available Discount/Expired Discount dialog for each item that has an available or expired discount, and will allow you to give the discount, deny the discount, or change the amount of the discount.

“Ignore item discounts for all items” will not apply discounts to any transactions.

Void Payments

Unapplied payments can be reversed using the “Void payment” button on the Open Items tab toolbar. The system will post a corresponding debit memo and link it to the original payment. The debit memo will use the data and reference number or the original payment, and the journal entry for the debit memo will have the journal entry of the original payment noted. Based on the user’s setting for “Void/Refund Payment”, they may be allowed to specify a different date for the transaction to be voided on.

Accounts Receivable - ACTECH

Customer No. ACTECH Contact name Linda Adams
 Name Access Technologies Company Tel. No. (514) 364-8080 Ext.
 Status Overdue items Company Fax. No. (514) 273-9221

Open items | Inquiry | Address | Aging | Notes

Date	Transaction type	Transaction no.	Reference no.	Debit	Credit
30-Apr-2002	PAYMENT	0000202852	99912		19,266.89
15-May-2002	INVOICE	0000202954	0000100564	11,267.61	
05-Jun-2002	INVOICE	0000203072	0000100583	10,662.23	

Hold Transaction

In previous versions, Accounts Payable had the ability to mark individual transactions as “on hold.” This ability has been added to Accounts Receivable.

Accounts Receivable - ACE

Customer No. ACE Contact name Allen Durk
 Name Ace Electronics Company Tel. No. (416) 498-2381 Ext. 225
 Status Overdue items Company Fax. No. (416) 499-2020

Open items | Inquiry | Address | Aging | Notes

Date	Transaction type	Transaction no.	Reference no.	Debit	Credit
23-Apr-2002	INVOICE	0000202818	0000100541	72,500.28	
31-May-2002	Payment	0000203025	0000101011		50,000.00
15-May-2002	INVOICE	0000202959	0000100569	7,059.53	

Available Discount/Expired Discount Dialog

When a transaction is flagged that is eligible for an available or expired discount, the Available Discount dialog, or Expired Discount dialog appears. These dialogs have had additional information added to aid in deciding how to process the discount.

Available Discount		
Transaction no.	0000203087	<input type="button" value="Give discount"/>
Reference no.	0000100589	<input type="button" value="No discount"/>
Original amount	44,418.66	
Terms	2% 10 days	
Discount date	20-Jun-2002	
Net amount due	43,530.29	
Calculated discount	888.37	<input type="button" value="Cancel"/>
Discount allowed	888.37	<input type="button" value="Help"/>

Terms at the Transaction Level

Payment terms information (terms code, due date, discount percentage, etc.) are now stored at the transaction level. This means that all functions and reports that use terms or due date information no longer default to the customer's terms, but instead use each transaction's terms.

Import Accounts Receivable

The Import Wizard allows you to import Accounts Receivable transactions. The Import Wizard appends to an existing file (add new transaction records) but does not modify records that already exist.



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, each Accounts Receivable transaction that is imported will have a corresponding G/L journal entry made. When G/L integration is disabled, no G/L journal entries will be made.

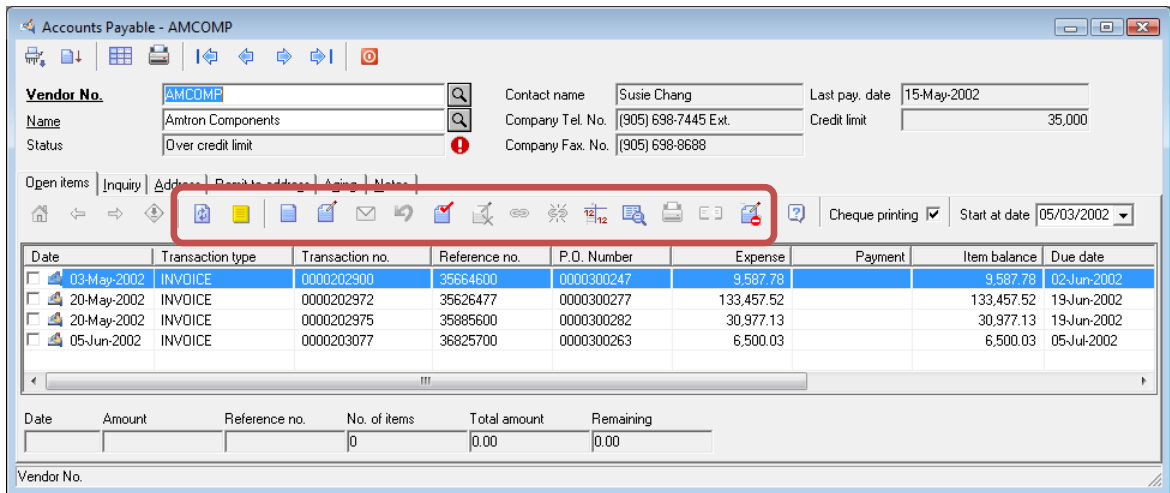


NOTE: Calculate Sales Tax option – As an alternative to providing sales tax amounts during import, you can optionally have the system calculate sales taxes based on the tax settings on the customer's profile. In order to use this option, none of the sales tax amount fields may be mapped.

Accounts Payable Enhancements

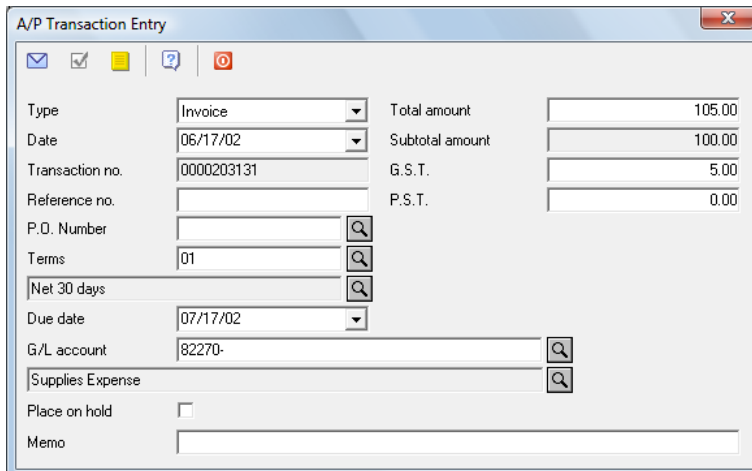
Redesigned User Interface

The Accounts Payable module has been redesigned to use tabs to present more information than the previous design allowed. This new design is consistent with other related modules such as Vendor Details and Purchase Order. Buttons that relate to transactions have been moved to the Open Items tab toolbar, or the Inquiry tab toolbar.



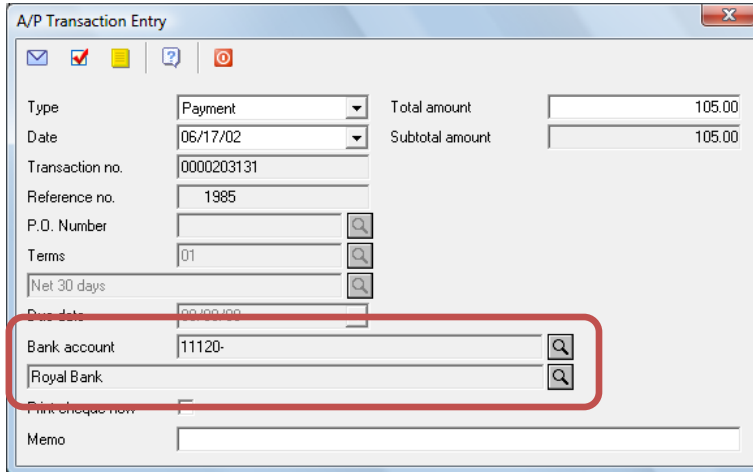
Streamlined Transaction Entry Dialog

The A/P Transaction Entry dialog has been streamlined to allow entry of all transaction details in one place. Terms can be specified at the transaction level. Sales taxes are entered at the same time as the amount, rather than on a second dialog. A sixty character memo field has been added to allow a description to be entered if desired.



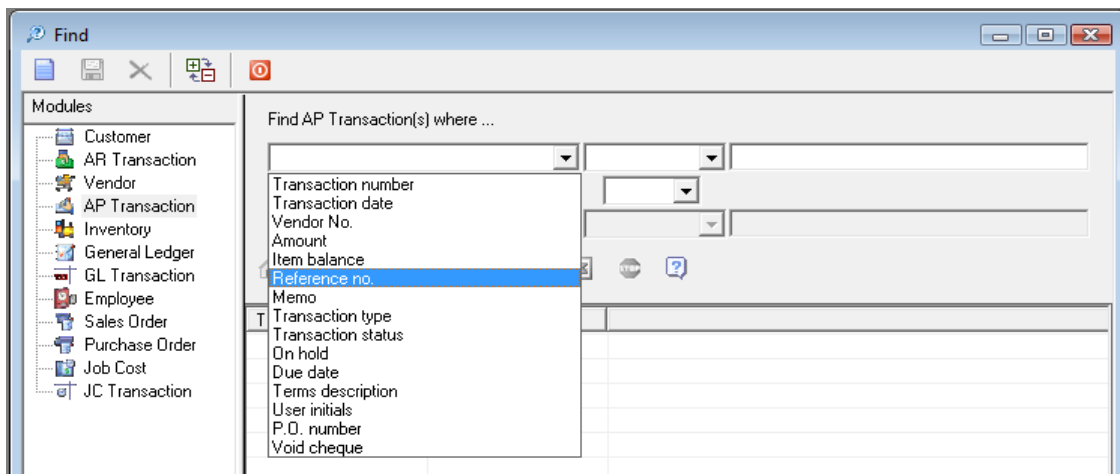
Choose Bank Account at Time of Payment

The A/P Transaction Entry dialog allows you to choose the bank account from which the cheque will be written. In prior versions, this was set using a button on the module toolbar.



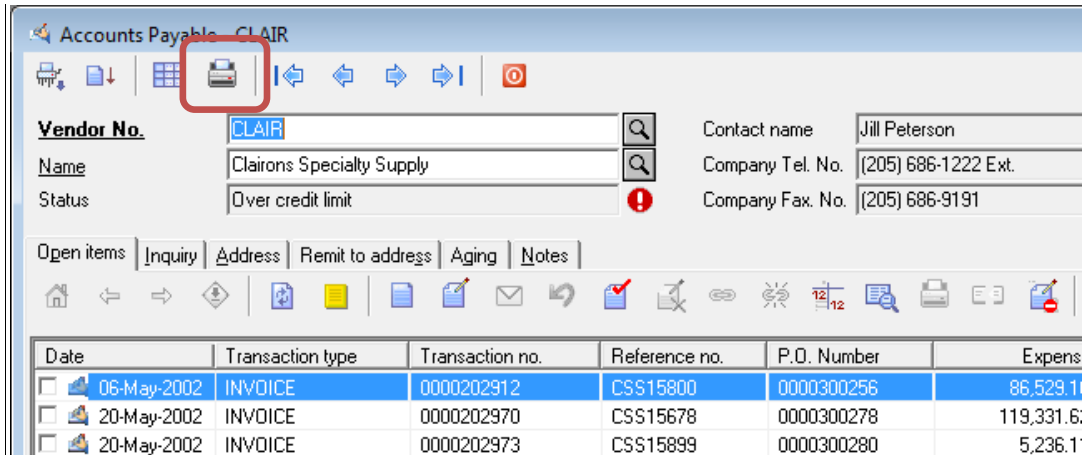
Transaction Search

The Accounts Payable transaction search function was formerly limited to searching for items by General Ledger transaction number only. In version 2009, the transaction search feature was removed from the Accounts Payable module, and added to the Find Utility. This allows searches to be performed based on many different fields. Double clicking on an item in the Find results list will launch the Accounts Payable module and display the appropriate transaction.



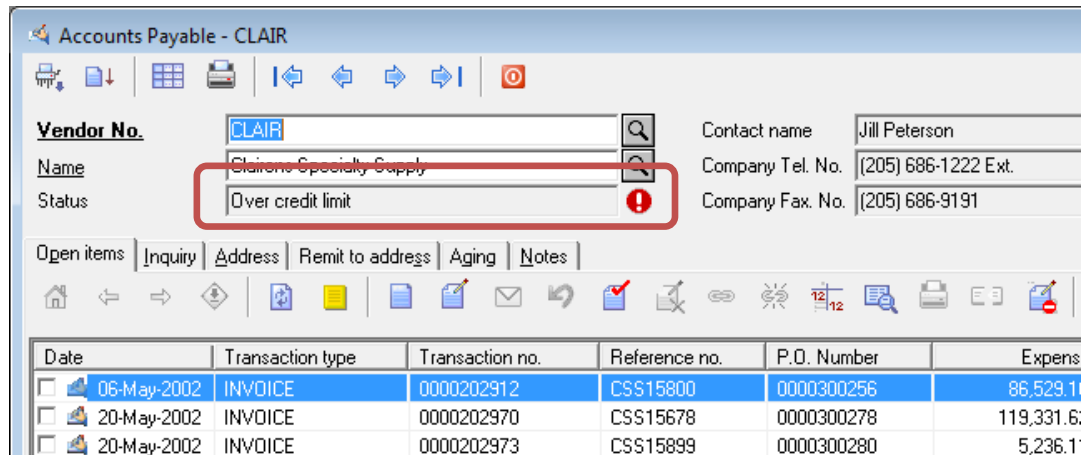
Accounts Payable Details Report

A print button has been added to the Accounts Payable module toolbar. Its purpose is similar to the print button found in the other modules – to allow quick access to a report that prints information contained in the record that is currently being viewed. In this case, the report prints contact details and a list of open items for the vendor currently loaded in the Accounts Payable module.



Status Indicator

In previous versions, a pop-up message appeared when a vendor record was loaded in Accounts Payable that had overdue items or was over their credit limit. The pop-up message has been replaced by a Status field that appears when a vendor's account has one or both of the issues.



Unlimited Transaction Linking

The limit to the number of transactions that can be linked together has been removed.

Changes to “Post flagged items”

In previous versions, a payment transaction could be entered, and then transactions could be flagged before the payment was posted. This workflow remains in version 2009, but the location of the buttons and transaction total statistics have changed. The “Post flagged items” and “Cancel flagged items” buttons are now in the Open Items tab toolbar. The payment transaction details and flagged item totals now appear below the transaction list.

The screenshot displays the 'Accounts Payable - AMCOMP' window. At the top, there are navigation icons and a toolbar. The vendor information section includes fields for Vendor No. (AMCOMP), Name (Amtron Components), Status (Over credit limit), Contact name (Susie Chang), Company Tel. No. ((905) 698-7445 Ext.), and Company Fax. No. ((905) 698-8688). Below this is a tabbed interface with 'Open items' selected. The main area contains a table of open items:

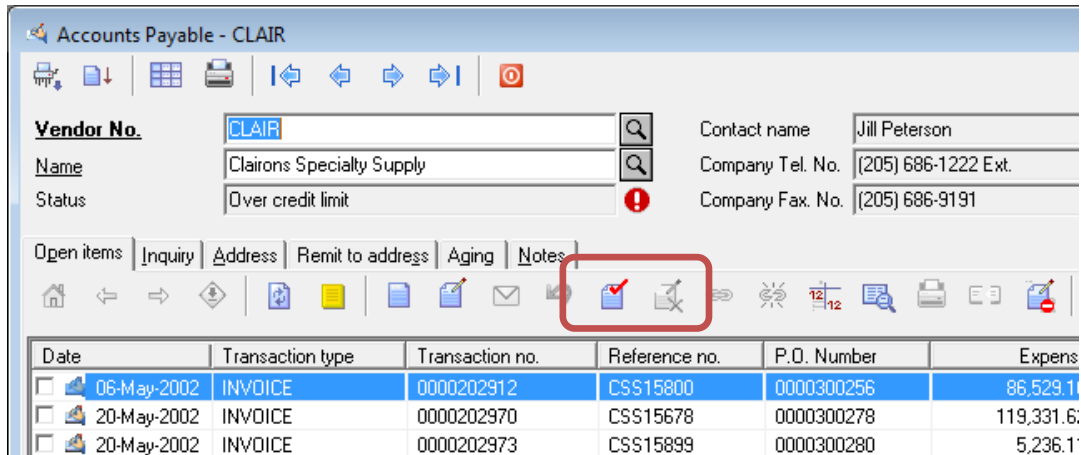
Date	Transaction type	Transaction no.	Reference no.	P.O. Number	Expense
03-May-2002	INVOICE	0000202900	35664600	0000300247	9,587.78
20-May-2002	INVOICE	0000202972	35626477	0000300277	133,457.52
20-May-2002	INVOICE	0000202975	35885600	0000300282	30,977.13
05-Jun-2002	INVOICE	0000203077	36825700	0000300263	6,500.03

Below the table is a summary table for the date 17-Jun-2002:

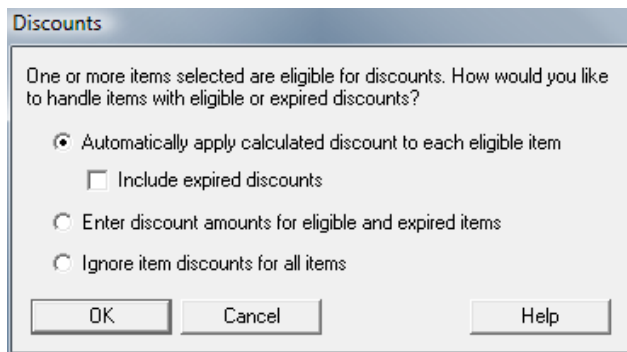
Date	Amount	Reference no.	No. of items	Total amount	Remaining
17-Jun-2002	180,522.46	1985	4	180,522.46	0.00

Select All/Deselect All

All open items can be flagged or unflagged using the “Select all” or “Deselect all” buttons on the Open Items tab toolbar



When the “Select all” button is pressed, you will be prompted with options on how to handle any discounts that may apply to the transactions being flagged.



“Automatically apply calculated discount to each eligible item” will apply discounts to eligible items based on the system’s calculations. If “Include expired discounts” is checked, then expired discounts will also be given. Note – if the log on date is after the item’s due date, but less than double the number of days for the discount, an item is considered to have an expired discount available.

“Enter discount amounts for eligible and expired items” will present the Available Discount/Expired Discount dialog for each item that has an available or expired discount, and will allow you to give the discount, deny the discount, or change the amount of the discount.

“Ignore item discounts for all items” will not apply discounts to any transactions.

Available Discount/Expired Discount Dialog

When a transaction is flagged that is eligible for an available or expired discount, the Available Discount dialog, or Expired Discount dialog appears. These dialogs have had additional information added to aid in deciding how to process the discount.

Available Discount		
Transaction no.	0000203093	Take discount
Reference no.	996435	No discount
Original amount	59,373.96	
Terms	2% 10 days	
Discount date	21-Jun-2002	
Net amount due	58,186.48	
Calculated discount	1,187.48	Cancel
Discount allowed	1,187.48	Help

Void Cheque

Based on the user’s setting for “Void cheque”, they may be allowed to specify a different date for the transaction to be voided on.

Import Accounts Payable

The Import Wizard allows you to import Accounts Payable transactions. The Import Wizard appends to an existing file (add new transaction records) but does not modify records that already exist.



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, each Accounts Payable transaction that is imported will have a corresponding G/L journal entry made. When G/L integration is disabled, no G/L journal entries will be made.

Customer Details Enhancements

Quote and Order Confirmation Type

Quotes and Order Confirmations 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 customer level, using the “Quote” and “Order confirmations” lists on the Details tab of Customer Details.

Top Customer Reports

In the Report Suite, two reports have been added to the Customer module. They are “Top Customers – by balance owing” and “Top Customers – by sales”.

Print Address Labels for Ship-to Addresses

The customer address labels now give the option of including bill-to addresses only, bill-to and ship-to address, or ship-to addresses only.

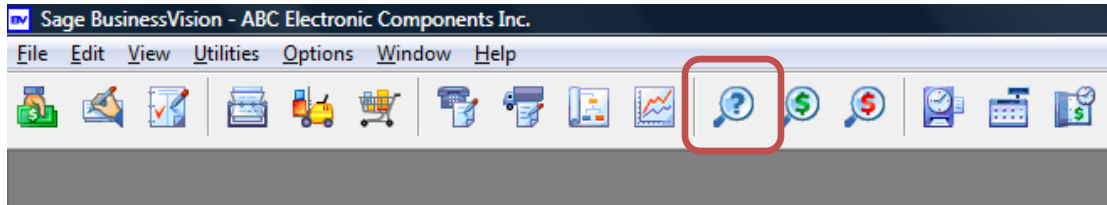
Export Enhancements

The Export utility now includes the ability to export customer ship-to addresses, customer specific prices, and vendor specific prices.

Find Enhancements

Find Button on Toolbar

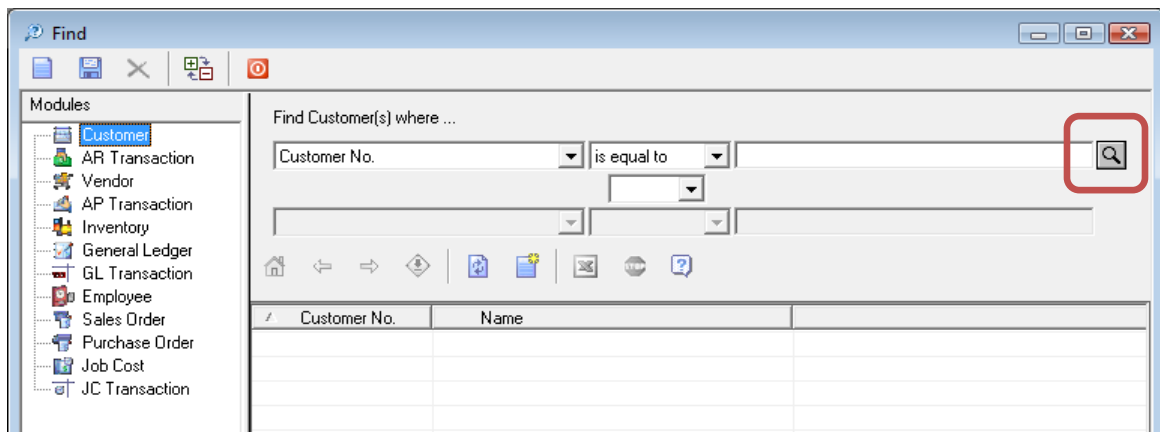
To make the Find utility easier to access, a new button has been added to the application toolbar.



General Enhancements

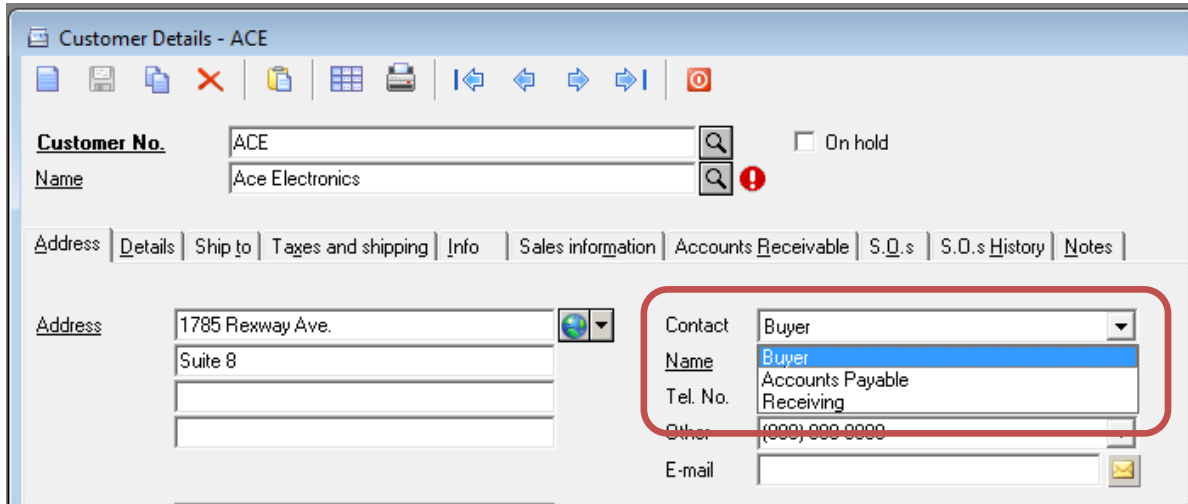
Browse Key Fields

When entering criteria in the Find utility, Sales Analysis, or Purchase Analysis, the ability to browse to select values has been added. Note – the browse only appears when the field chosen in the search criteria has a corresponding browse in the related module. For example, in Customer Details, there are browsers for Customer Number, Customer Name, and Terms Code, while there are no browses for City or Postal Code. Therefore, the Find utility gives the ability to browse for values for Customer Number, Customer Name, and Terms Code, but not for City or Postal Code.



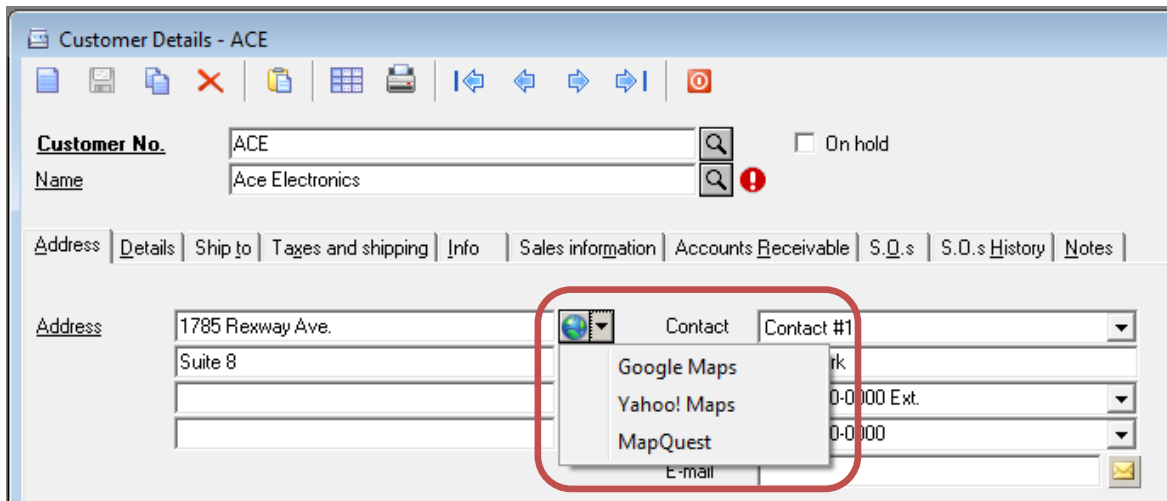
Definable Contact Labels

The labels for contacts 1-3 can be defined for Customer Details, Vendor Details, and Employee Details. For example, in Customer Details, contact 1 could be defined as “Buyer”, contact 2 as “Accounts Payable”, and contact 3 as “Receiver”. See the section above entitled “System Setup Additions and Changes” for details on where this is defined.



Web Map Link

In each module where an address is present, a new button has been added that allows one-click access to an online map of the address being viewed. The drop-down button allows the choice of three different web sites from which to view the map. When the button is clicked, or one of the three options chosen, the workstation’s default web browser will open and load the appropriate web site that will map the location. Note – an active internet connection is required in order for your web browser to be able to load the map.



General Ledger Enhancements

Transaction Journal – by date

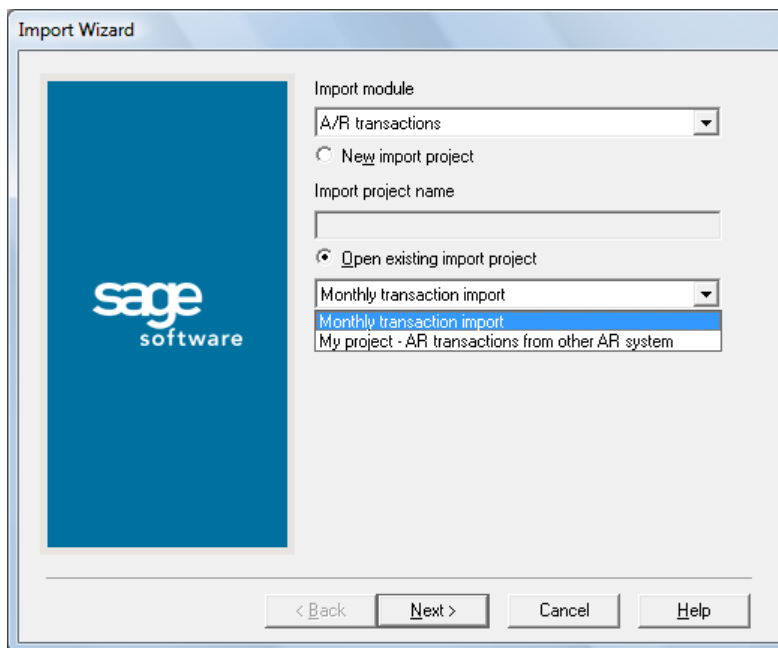
In the Report Suite, the “Transaction Journal – by date” report has been added to the General Ledger module.

Import Enhancements

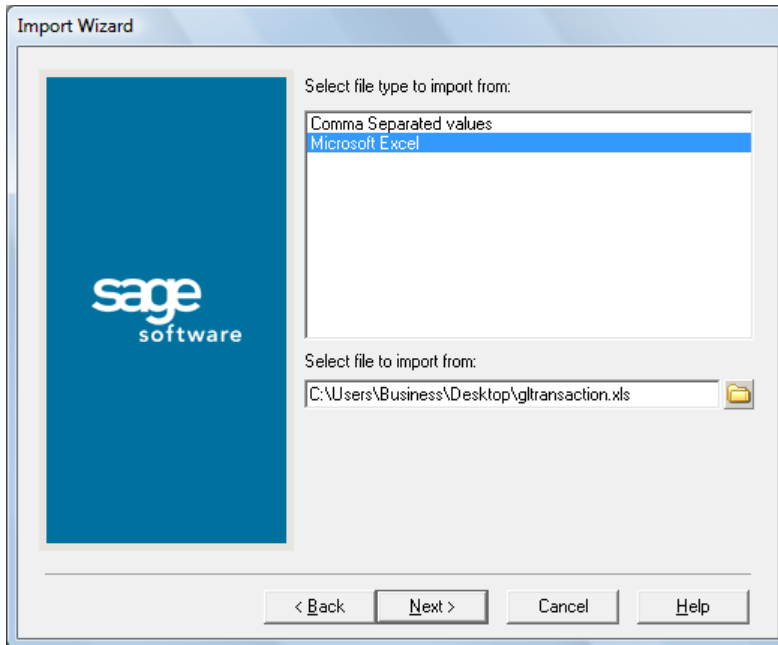
The Import Wizard introduced in version 7.20 that allowed G/L transactions and Chart of Accounts to be imported has been expanded in version 2009. The wizard has completely replaced the previous standard import.

The standard import in v7.2 could import Inventory, Unit of Measure, Vendor Specific Pricing, Customer, and Vendor data. In addition, the Import Wizard in v2009 can import A/P transaction, A/R transaction, Customer Ship-to, Customer Specific Pricing, and Vendor Remit-to data.

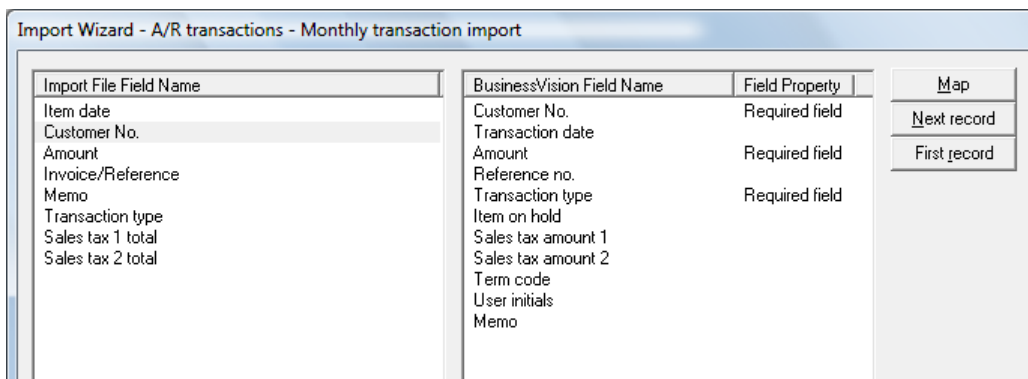
The Import Wizard allows to you define multiple import projects for each module as templates that can be saved and then used when needed. This is particularly useful for importing transactions repeatedly over time, such as for month end entries.



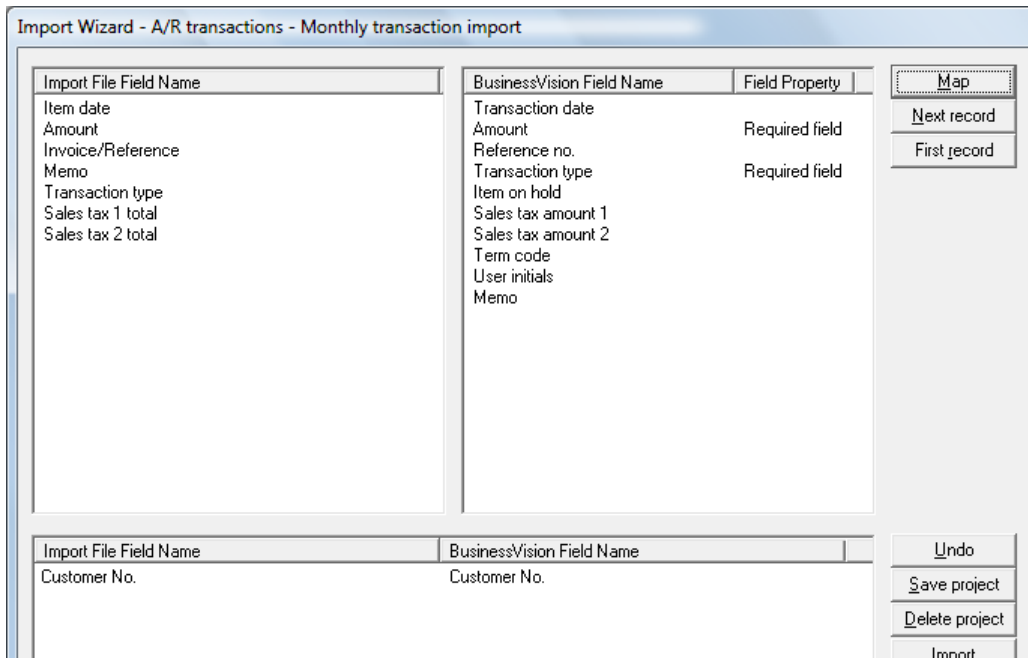
The Import Wizard recognizes Comma Separated Value text files, as well as Microsoft Excel files as input.



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.



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

Inventory Enhancements

Add New Items to All Warehouses

When multiple warehouses are in use, and a new inventory item is added, the system can optionally add the new item to all warehouses. The system may do so automatically, or it may prompt the user for input, or may add the item only to the current warehouse, depending on the value chosen for the “Add new items to all warehouses” option in User Details.

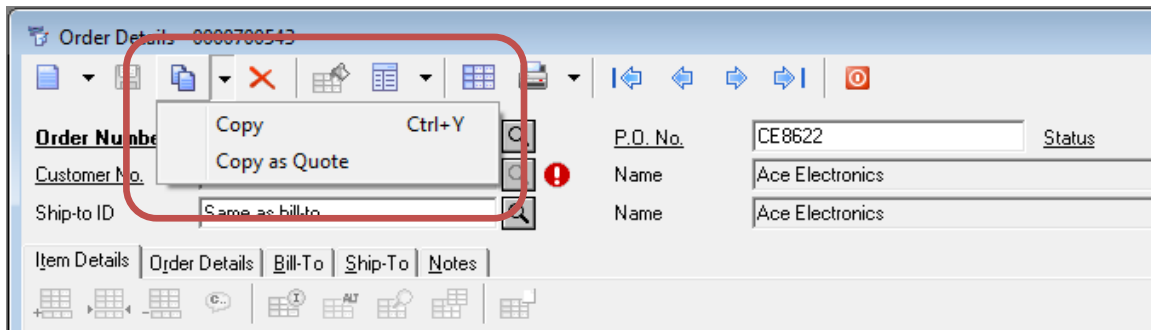
Top Inventory Reports

In the Report Suite, three reports have been added to the Inventory module. They are “Top Inventory Items – by sales amount”, “Top Inventory Items – by unit sales”, and “Top Inventory Items – by value”.

Order Entry Enhancements

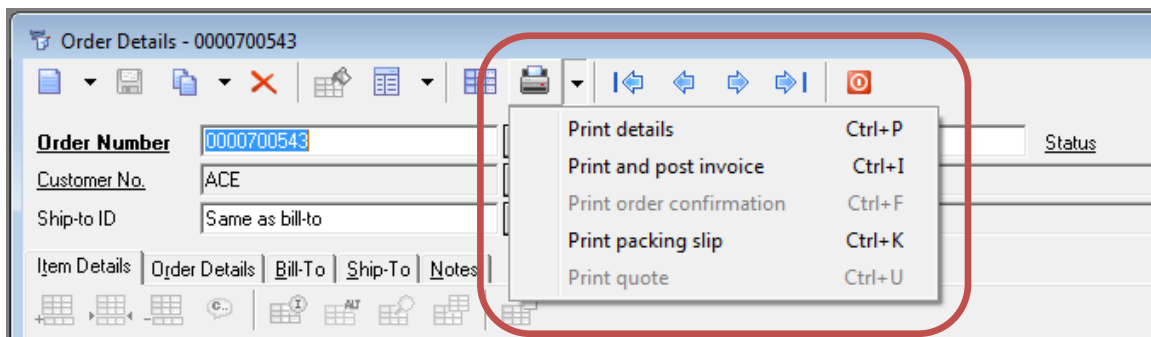
Copy as Quote

In Order Details, the copy button in the module toolbar now has a drop down list that allows the currently loaded order to be copied as a quote.



Print Packing Slip

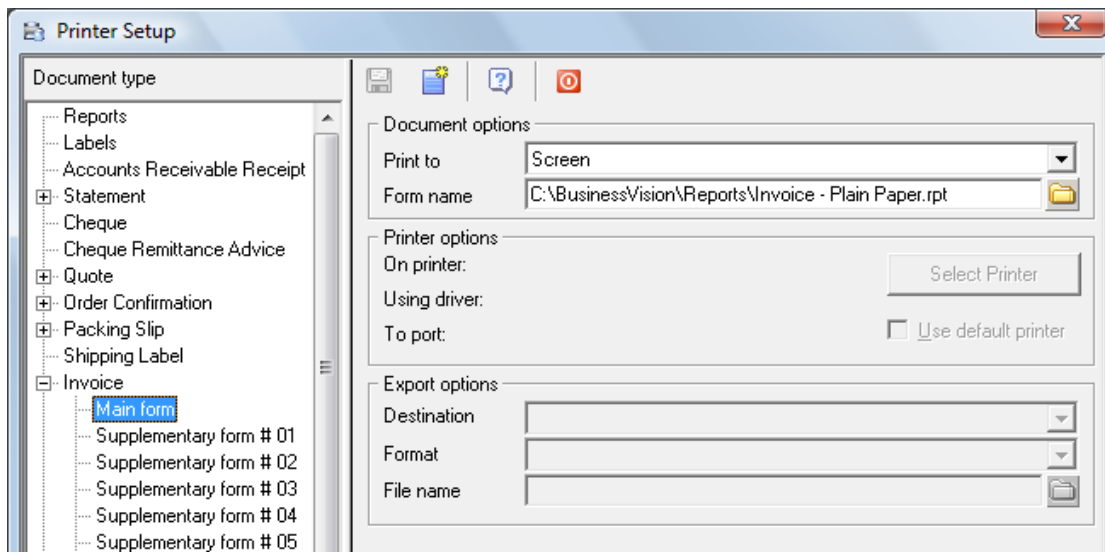
The option to print a packing slip has been added to the print button’s drop down list. This option is enabled when the user has “Prompt for packing slip” enabled in User Details, for orders that have not had their packing slip printed.



Printer Setup Enhancements

Redesigned User Interface

The Printer Setup window has been completely redesigned to allow for additional options. In previous versions, all supplementary forms used the same printer settings as the main form. In version 2009, each supplementary form has its own individual printer settings. Also, version 2009 will honour selections for size, and source. Note that orientation is set in each individual report, so therefore any setting in Printer Setup for orientation will not be honoured.



Printer Settings report

In the Report Suite, the “Printer Settings” report has been added to the User module.

Sales Analysis Enhancements

Search by Ship-to Name

“Ship-to name” has been added to the list of fields that can be used as search criteria in Sales Analysis.

Vendor Details Enhancements

Remit To Address

Vendor Details now has a tab entitled “Remit to Address” that allows a remittance address to be specified per vendor. If “Use remit to address” is checked, then cheques printed by the system for this vendor will use the name and address information on this tab as the payee. When “Use remit to address” is unchecked, then cheques printed by the system will use the main vendor name and address as the payee.

The screenshot shows the 'Vendor Details - AMCOMP' window. The 'Remit to Address' tab is selected. The 'Use remit to address' checkbox is checked. The form contains the following fields:

Vendor No.	AMCOMP	<input type="checkbox"/> On hold
Name	Amtron Components	
Address Details Info Purchase information Remit to Address Accounts Payable P.O.s P.O. History Specific Pricing Receipts		
Use remit to address <input checked="" type="checkbox"/>		
Name	Amtron International	Contact
Address	555 Airport Road	Contact #1
		Name
		Rex Mansbridge
		Tel. No.
		(000) 000-0000 Ext.
		Other
		(000) 000-0000
		E-mail
City	Brampton	Web page
Postal code	N1L 4V2	
Province	ON	
Country	Canada	
Tel. No.	(905) 555-1212 Ext.	
Fax No.	(000) 000-0000	
E-mail		

Top Vendor Report

In the Report Suite, the “Top Vendors – by purchases” report has been added to the Vendor module.

File Reorganization Enhancements

A/P

The A/P file reorganization now deletes orphaned records (A/P transaction records that have no matching vendor in the vendor file).

A/R

The A/R file reorganization now deletes orphaned records (A/R transaction records that have no matching customer in the customer file).

Customer

The Customer file reorganization now has options for recalculating present balances and average days to pay.

Vendor

The Vendor file reorganization now has an option for recalculating present balances.