



New Features in Sage BusinessVision 2014 (version 7.7)

Initial Installation and Configuration of BusinessVision 2014

Overview

The installation of Sage BusinessVision 2014 follows the same process as version 2013. 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 higher. 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 of the Sage BusinessVision install.

Data File Conversion

Existing sets of Sage BusinessVision data will be converted to version 2014 format when logging in for the first time.



NOTE: Once your data has been converted to be compatible with version 2014, it will no longer be compatible with prior versions.

The following table lists data files that are converted, created, or reorganized during the version 2014 file conversion process.

| FILE NAME | CONVERSION/NEW/REORGANIZATION |
|--------------|--|
| supplier.btr | Conversion – initialization of new fields |
| users.btr | Conversion – support for new user settings |

User Details Additions

Two additions have been made to User Details in order to activate and control new and existing features in version 2014.

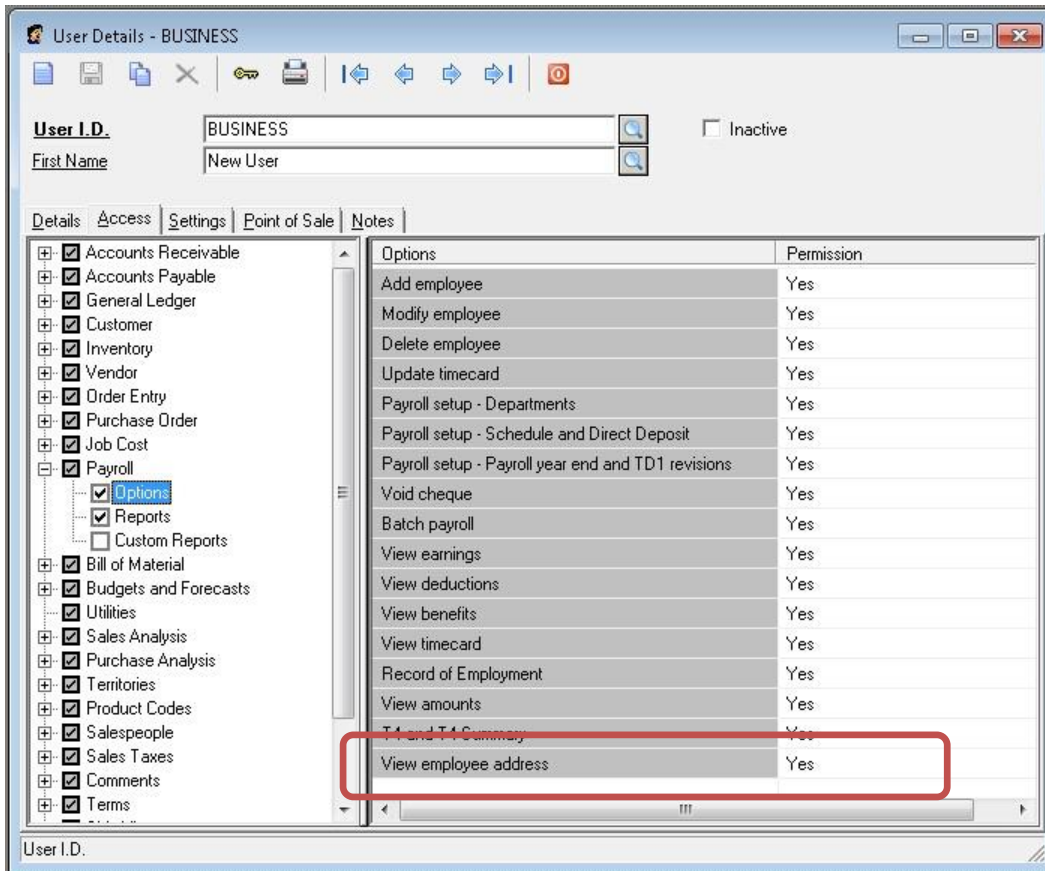
Details

On the Details tab, an entry was added for “Default salesperson for new orders”.

The screenshot shows the 'User Details - BUSINESS' window. At the top, there is a toolbar with various icons. Below the toolbar, the 'User I.D.' is set to 'BUSINESS' and 'First Name' is 'New User'. There is an 'Inactive' checkbox. The 'Details' tab is selected, with other tabs being 'Access', 'Settings', 'Point of Sale', and 'Notes'. The 'Details' section contains several fields: 'Last Name', 'Initials' (set to 'BV*'), and 'Priority' (set to '9'). There are three checkboxes: 'Point of Sale User Only' (unchecked), 'Default autopost status' (checked), and 'Change autopost status' (checked). Below these is the 'Application Background' section with a 'Colour' field, a 'Bitmap' checkbox, and three radio buttons: 'Centered' (selected), 'Tiled', and 'Stretched'. A red box highlights a new field titled 'Default salesperson for new orders' which contains a 'Salesperson' dropdown menu. At the bottom right, there are two fields: 'Created: 07/07/2005 by BV*' and 'Last modified: 05/07/2013 by BV*'. The 'User I.D.' is also displayed at the bottom left.

Access – Payroll

In “Payroll > Options”, an entry was added for “View employee address”.

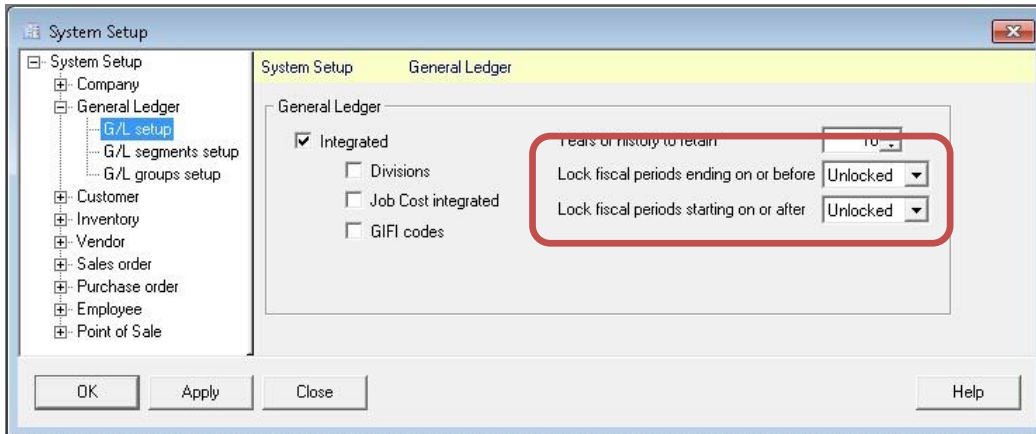


System Setup Additions

Several additions have been made to System Setup in order to activate and control new and existing features in version 2014.

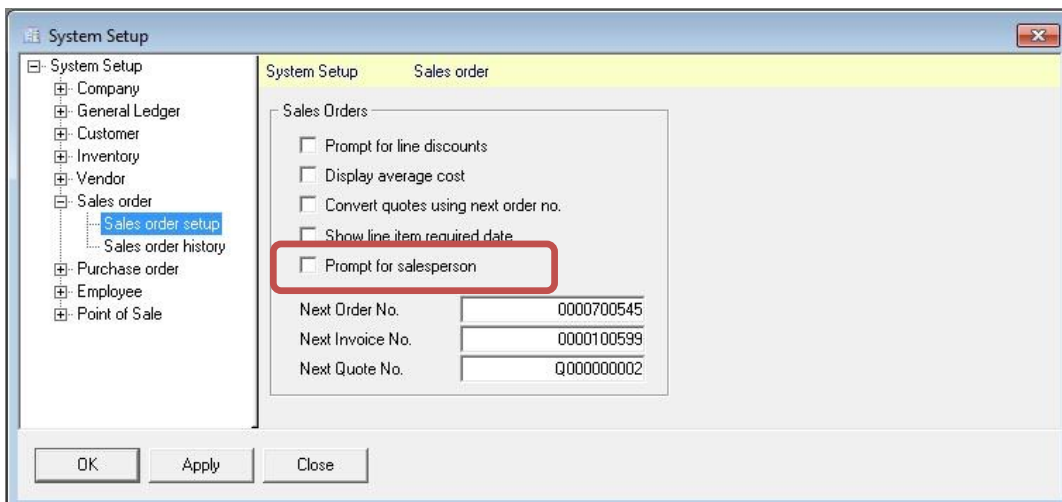
General Ledger

In “General Ledger > G/L setup”, entries were added for “Lock fiscal periods ending on or before” and “Lock fiscal periods starting on or after”.



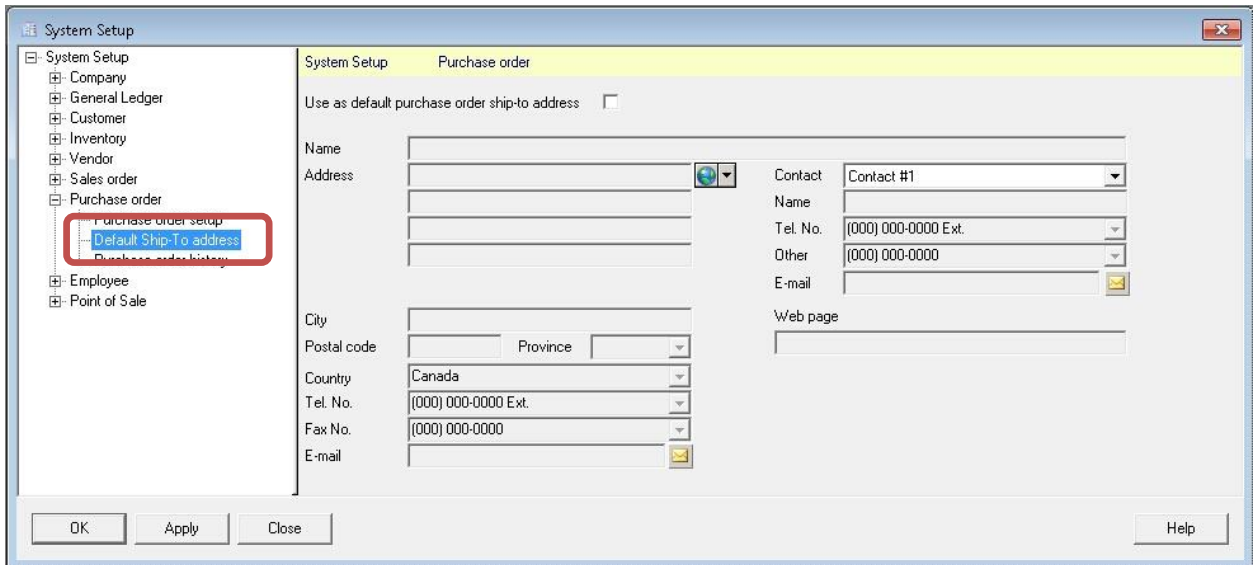
Sales order

In “Sales order > Sales order setup”, a new entry was added for “Prompt for salesperson”.



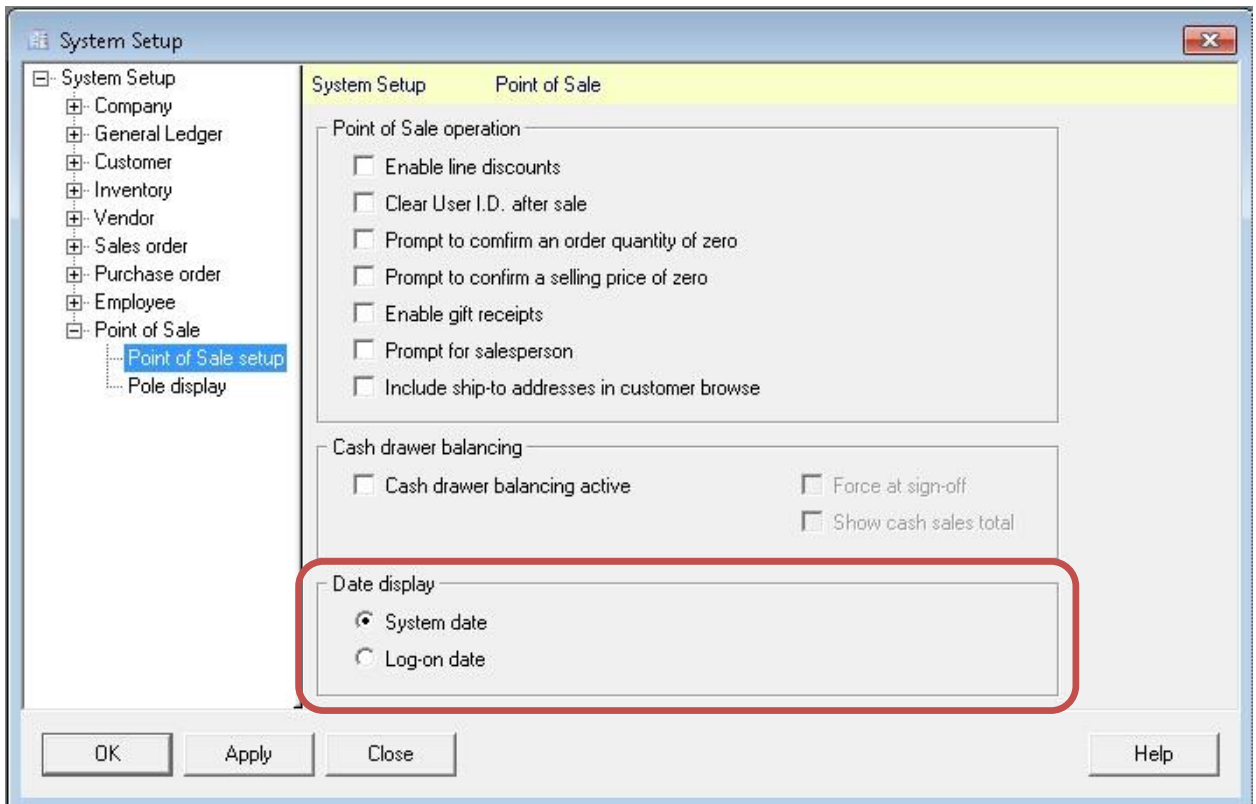
Purchase order

In Purchase order, a new node was added for “Default Ship-To address”.



Point of Sale

In “Point of Sale > Point of Sale setup”, entries were added for “Date display”.



General Enhancements

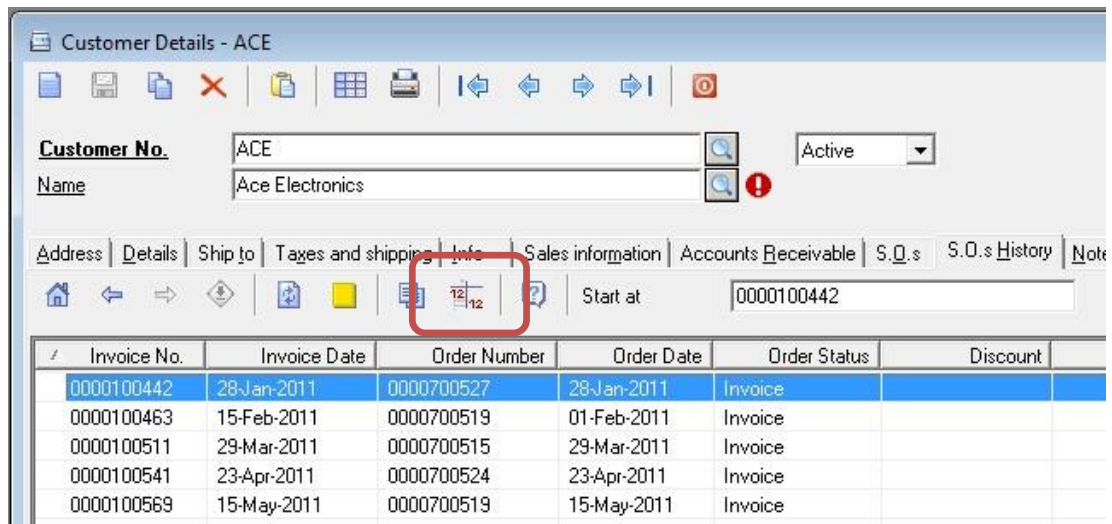
Lock future fiscal periods

The option to lock future fiscal periods has been added to prevent postings from being made on or after a fiscal period start date. The option can be set in “System Setup > General Ledger > G/L setup”.

Customer Details Enhancements

View journal entries from S.O. History

In Customer Details, on the S.O.s History tab, a “View Journal Entry” button has been added that allows journal entries to be viewed for transactions in sales history for the customer.



Customer Details - ACE

Customer No. ACE Active
Name Ace Electronics

Address | Details | Ship to | Taxes and shipping | **Info** | Sales information | Accounts Receivable | S.O.s | S.O.s History | Note

Start at 0000100442

| # | Invoice No. | Invoice Date | Order Number | Order Date | Order Status | Discount |
|---|-------------|--------------|--------------|-------------|--------------|----------|
| | 0000100442 | 28-Jan-2011 | 0000700527 | 28-Jan-2011 | Invoice | |
| | 0000100463 | 15-Feb-2011 | 0000700519 | 01-Feb-2011 | Invoice | |
| | 0000100511 | 29-Mar-2011 | 0000700515 | 29-Mar-2011 | Invoice | |
| | 0000100541 | 23-Apr-2011 | 0000700524 | 23-Apr-2011 | Invoice | |
| | 0000100569 | 15-May-2011 | 0000700519 | 15-May-2011 | Invoice | |

Vendor Details Enhancements

Print cheques

In Vendor Details, on the Details tab, a new checkbox was added labelled “Print cheques”. By default, all new and existing vendors will have this option checked.

Vendor No. Active

Name

Address | **Details** | Info | Purchase information | Remit to Address | Accounts Payable | P.O.s | P.O. History | Specific Pricing | Receipts

Financials

G/L payables

Accounts Payable

G/L expense

Supplies Expense

Print cheques

Account No.

Credit type

Credit limit

Print CPRS?

Identification No. type

Business No.

Purchase Order type

Vendor No.

This setting controls whether or not the existing “Cheque printing” checkbox is checked or unchecked when the vendor is loaded in Accounts Payable.

Accounts Payable - AMCOMP

Vendor No. Contact name Last pay. date

Name Company Tel. No.

Status Company Fax. No. Credit limit

Open items | Inquiry | Address | Remit to address | Notes [2]

Cheque printing Start at date

| Date | Transaction type | Transaction no. | Reference no. | P.O. Number | Expense | Payment | Item balance | Due date |
|-------------|------------------|-----------------|---------------|-------------|------------|---------|--------------|-------------|
| 03-May-2011 | INVOICE | 0000202900 | 35664600 | 0000300247 | 9,587.78 | | 9,587.78 | 02-Jun-2011 |
| 20-May-2011 | INVOICE | 0000202972 | 35626477 | 0000300277 | 133,457.52 | | 133,457.52 | 19-Jun-2011 |
| 20-May-2011 | INVOICE | 0000202975 | 35885600 | 0000300282 | 30,977.13 | | 30,977.13 | 19-Jun-2011 |
| 05-Jun-2011 | INVOICE | 0000203077 | 36825700 | 0000300263 | 6,500.03 | | 6,500.03 | 05-Jul-2011 |

Order Entry Enhancements

Default salesperson

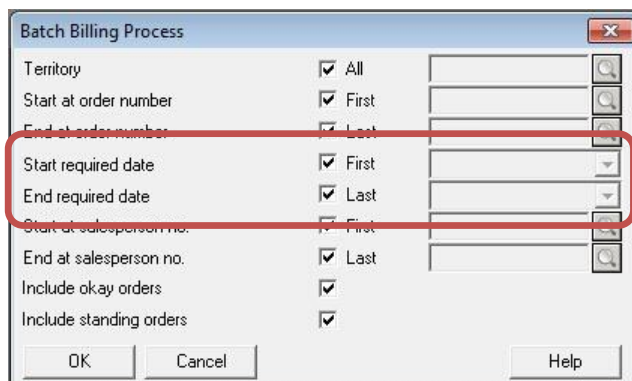
The default salesperson for new orders created in Order Entry can be set based on the user who initially creates the order. If a value is entered in User Details, on the Details tab, for “Default salesperson for new orders”, then this value will override the salesperson that is saved with the customer profile.

Prompt for salesperson

When a new order is saved, enabling this option will require that the user enters a value in the salesperson field. This feature is controlled by the “System Setup > Sales order > Sales order setup > Prompt for salesperson” setting. Note: A salesperson value will not be required when processing cash sales in order entry.

Required date filters in Batch Billing

The Batch Billing utility now includes the ability to select orders based on a range of order required dates.



Expanded Inventory Item Lookup Information

The View Inventory Details dialog that can be invoked from within Order Entry now includes P.O.s and P.O. History tabs.

The screenshot displays the 'Order Details - 0000700543' window. The 'Order Details' tab is selected, and the 'View Inventory Details - STS-01' dialog is open. The dialog shows the following information:

Part number: STS-01
Description: Home Sound System with MP3 Decoder
On hold:

Navigation tabs: Details | Unit of Measure | Pricing | Extended | Info | Image | P.O.s | P.O. History | Vendor Pricing | Serial Numbers | Notes [1]

| P.O. Number | Vendor No. | P.O. date | Line # | Status | Order qty. | Buy UOM |
|-------------|------------|-------------|--------|----------|------------|---------|
| 0000300290 | DAVELE | 04-Jun-2011 | 003 | Standing | 10.00000 | EA |

Additional fields in the dialog include 'Gross Profit' with a value of 0.65.

Purchase Order Enhancements

Default Shipping Address for Purchase Orders

A default shipping address for Purchase Orders can be configured that is different from the standard company address. This additional address can be set in "System Setup > Purchase Order > Default Ship-To address".

Choose Payment Terms when posting invoice to Accounts Payable

When posting an invoice to Accounts Payable from Purchase Order Details, payment terms can be modified.

The screenshot shows a 'Post Invoice' dialog box with the following fields and values:

| | |
|---|------------|
| Suggested vendor's invoice amount | 8,561.27 |
| Actual vendor's invoice amount | 8,561.27 |
| Actual vendor's freight amount (included) | 39.95 |
| HST (13%) | 984.92 |
| Tax 2 (not used) | 0.00 |
| Invoice number | |
| Terms | 04 |
| Net 60 days | |
| Invoice date | 06/17/2011 |
| Due date | 08/16/2011 |

Buttons at the bottom: OK, Cancel, Help.

Payroll Enhancements

View Address permission

Users can now be allowed access to view employee address information independent of all other employee information. This is controlled by the “User Details > Access > Payroll > Options > View employee address” option.

Email direct deposit pay advices

In Employee Details, on the “Details” tab, a new option has been added that allows you to specify whether direct deposit pay advices should be printed, emailed, or printed and emailed. This setting is made on an employee by employee basis.

The screenshot shows the 'Employee Details - 001234' window. The 'Details' tab is selected. Under the 'Direct deposit' section, the 'Statement' dropdown menu is open, showing three options: 'Form', 'E-mail', and 'Form and e-mail'. The 'Form' option is currently selected. The window also displays fields for Employee No. (001234), Name (Adams, Robert S.), Status (Active), Personal information (Dept. code, Sex, Date of birth, S.I.N., Union I.D., Health No., Bank acct., Language), and Job information (Job title, Tax table, Pay periods, Date hired, Review date, Termination date). A red box highlights the 'Direct deposit' dropdown menu.

Point of Sale Enhancements

Easier access to Line Item Discounts

In Point of Sale, the “Line disc. %” field has been added to the data entry fields for easier access.

The screenshot shows the 'Point of Sale' window. At the top, there are fields for 'BUSINESS', '<ENTER CUSTOMER NO.>', and 'Cash Sale'. Below these are fields for 'Part number', 'Quantity', 'Unit price', and 'Line disc. %'. The 'Line disc. %' field is highlighted with a red box and contains the value '0.00'. Below the data entry fields is a table with columns: 'Description', 'Quantity', 'Sell UOM', 'Unit price', and 'Extd. price'. To the right of the table are two buttons: 'Delete Item' and 'Return Item'.

Option to view system log-on date

The date that is displayed in Point of Sale can be either the current system date, or the user’s log-on date. This option is controlled by the “System Setup > Point of Sale > Point of Sale setup > Date display” option.

Product Code Enhancements

Default Sales Department

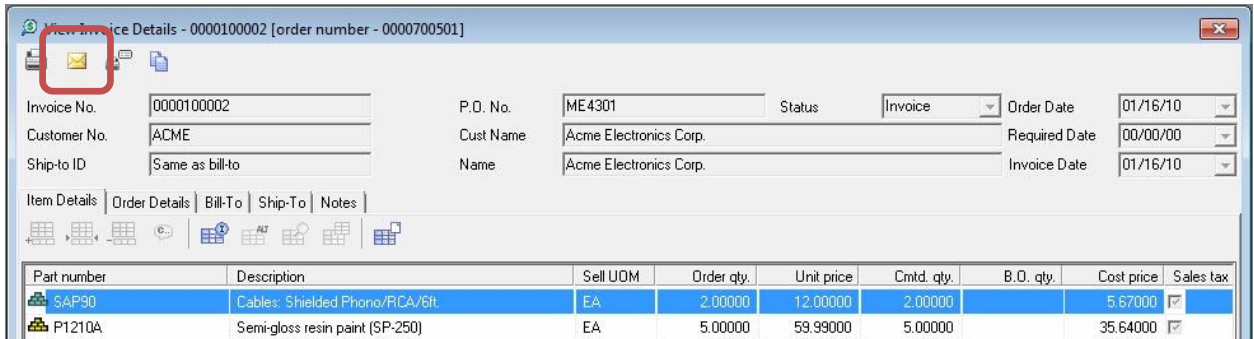
In Product Code Details, on the Details tab, a “Sales dept.” field has been added. If a value is entered in this field, new inventory items that are created in this product code will have the sales department automatically filled in.

The screenshot shows the 'Product Code Details - (Untitled)' window. It has a toolbar with various icons. Below the toolbar are fields for 'Product code' and 'Description'. There are several tabs: 'Details', 'Discounts', 'Inventory', 'S.O.s', 'S.O. History', 'P.O.s', 'P.O. History', and 'Notes'. The 'Details' tab is selected. Below the tabs, there are fields for 'Default margin' (set to 0.00%) and 'Sales dept.' (set to 000). The 'Sales dept.' field is highlighted with a red box.

Other Enhancements

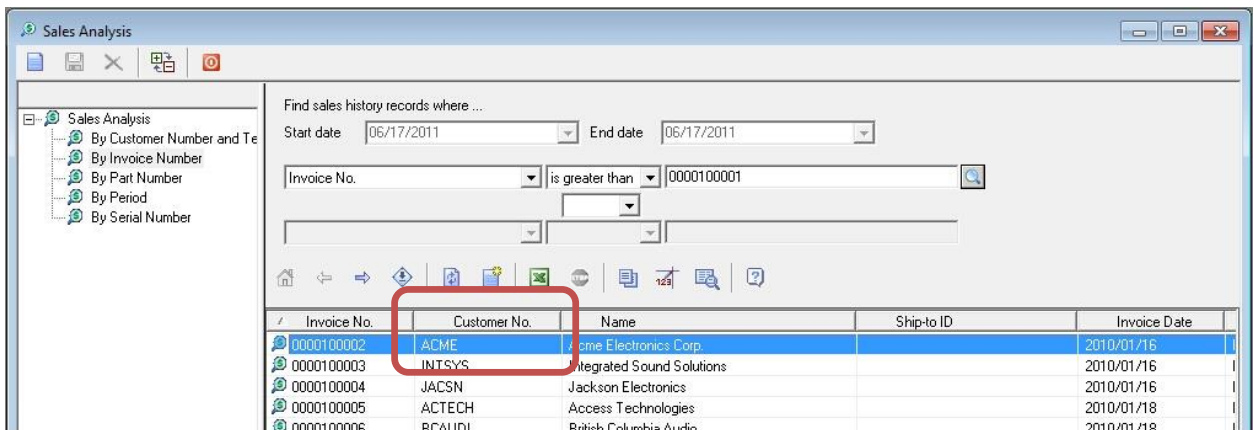
Email option in Invoice viewer and Purchase Order viewer

An email button has been added to the Invoice viewer and the Purchase Order viewer. When viewing Invoices or Purchase orders for customers/vendors for whom documents are set to “Email” or “Form and email”, the button will be enabled, so that the document can be either reprinted or re-emailed.



Customer number included in Sales Analysis – by Invoice Number results

When using Sales Analysis to retrieve results by Invoice Number, the customer number is now returned as one of the columns.



View Inventory items from Find – by Vendor Specific Prices

A “View Inventory” button has been added Find when searching by Vendor Specific Prices.

