



Software Enhancements

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RELEASE: 2015 Volume 3

Highlights:

- Inactive Customer Option
- Enhanced Customer Statements
- Enhanced Unvouchered Processing

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Sales and Service

ORDER PROCESSING

Sales Order Entry:

- A customer that has been flagged as Inactive cannot place a new sales order and will not be displayed in the Customer Help Look-Up option.
- A new tab has been created for EDI. This EDI tab will show the EDI raw data that was used when this order was imported via the EDI process.

Daily Sales Journal:

- Currency has been to the Credit Card Detail page of the journal.

Customer Maintenance:

- A customer can now be flagged as inactive. An inactive customer is no longer seen in the Customer Help Look-up option and cannot place a new sales order.
- A new email address field has been added. Non Billing Email is a memo address that will not be used in the Invoice or Statement email procedures. It will be used as a search option in the Customer Help Look-up option.

Customer Inquiry:

- Now displays the net Inactive Option.

Shipment/Invoice Inquiry:

- The Customer Email Addresses and Preferred Billing options are displayed for inquiry purposes.

SALES ANALYSIS

Sales Analysis Report:

- A Net Sales Option has been added to the report that allows you to specify items on the report to print only if they are Greater Than or Less Than an Amount you specify.

Financial

ACCOUNTS RECEIVABLE

Customer Statements:

- A new Preview Window has been added. Based on the selection criteria you can select to Preview Statements and it will list all customers that will produce a statement based on your selection. From there you can pick and choose the customers.

- An Email Statements options has been added.

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AR Transactions Report:

- A Check Date range has been added. The Check date is only applicable to AR Cash process transactions.

ACCOUNTS PAYABLE

Automatic Check Processing:

- Optionally, more than one Bank/Check format can be selected and processed in a single batch. Please not that this option is only valid for total electronic check processing or companies with MICR check printing capability.

Unvouchered By Receipt:

- This is a new report created similar to the Unvouchered Status report but with a more detailed match-up for those reconciling by individual P/O receipt.

Unvouchered Status Report:

- Skip Zero Variance Items has a new option: Skip Zero Dollar & Quantity.
- An Account Number option has been added to limit Purchase Orders and Invoices that will print on the report based on the G/L account that the P/O receipt and A/P Invoice was distributed to.

Invoice Entry:

- If reconciliation by P/O receipt is used - a more detailed match-up of individual receipt is now being created for used in the new Unvouchered by Receipt report.

GENERAL LEDGER

G/L Chart of Accounts Maintenance:

- A memo field has been added that is tied to each G/L account. At this time this field is only used on this screen.

Material

INVENTORY

Part Master Maintenance:

- Job Bar Code labels now have 2 Bar Tender driven options. The Label format to be used will be based on the part number as defined in the new Job Label field. However if the customer master has a format defined – this will override. The customer is only used for Jobs that were created from a sales order.

- A new checkbox labeled N skip P/O Rcpt G/L Post has been added. If a part type of "N" for non-inventory is defined for a part you have the option to skip any G/L distribution that is created when a P/O receipt is done.

PURCHASE ORDERS

Purchase Order Entry:

- The Division is now defaulted from the User Security.
- Changing of a Purchase Code is now controlled by User Security.

Open P/O Report:

- The Vendor Part Number has been added to the line item detail.

P/O Receipt Confirmation:

- There is now a User Security option that determines if a User has permission to receive against a closed purchase order line item. If this box is not checked the User will not have the option to receive a purchase order line that is closed. The screen option "Show Closed Items" will also not be displayed for the User.

Purchase Code Maintenance:

- An Ignore PPV Option has been added. If this is checked the A/P Invoice Entry process will ignore the PPV creation option for any lines tied to this purchase code.

Systems

Customer Help Look-Up

- If a customer is flagged as Inactive they will no longer show up in the Customer Help Look-Up option available throughout Maxx ERP
- Email2 and the new Non Billing Email address will now show up in the Customer Help Look-Up option under Email available throughout Maxx ERP

EDI - Import

- The importer will now also capture the actual EDI filename that was imported for reference purposes.

User Security – by User

- PO Receipt – Receive Closed:** If this box is not checked the User will not have the option to receive a purchase order line that is closed. The screen option "Show Closed Items" will also not be displayed for the User.

●**Default Div:** This is now used as the default Division on a new Purchase order that is entered.

Self Service Portal

This is a brand new option available to Maxx ERP Users. This is a dedicated Cloud based portal that will allow you to store up-to-date and accurate information that will be available to your customers, sales people, employees, vendors and anyone else that you regularly share documents with. This will allow them secure and instant 24/7 access from virtually anywhere to any type of documents, certificates, policies, drawings, etc.

The portal is available in customizable color schemes with your company logo. There is no charge for the portal for all Maxx ERP Users – the only charge incurred will be based on the amount of cloud storage required.

Please call to discuss if this sounds like it might be a benefit to your Business!!

Maxx CRM

Coming Soon!! Our new Customer Relationship Management software. Stay on top of your interactions with your existing customers and keep tabs on your Sales Prospects. This will be a brand new option available to all Maxx ERP Users.

Maxx CRM will be available in 2 forms: direct linkage into Maxx ERP or Cloud based data available anywhere. Additional fees will be incurred for the Cloud Database.

NOTES: