Software Enhancements

Highlights:

- **Import Purchase Orders utility**
- **Import Sales Orders utility**
- **Purchase Code item type logic expansion**
- **End of day customer hold**
- **Order Entry additional fee**

Sales and Service

ORDER PROCESSING

Sales Order Entry:

●Freight Logic has been expanded and Order Entry and Shipment confirmation now have the option to be validated individually. Each Freight code can now Require or Disallow the entry of a Freight Amount at time of Order Entry and/or at time of Shipping.

● Optionally, the Terms Code can now drive a fee that is added to the sales order at time of Order Entry based on a percentage of the Line Value and Freight amount. If the terms code does not drive a fee – this additional fee can be manually entered on those sales orders as needed. All changes to that amount are tracked.

Shipment confirmation:

●Freight Logic has been expanded and Order Entry and Shipment confirmation now have the option to be validated individually. Each Freight code can now Require or Disallow the entry of a Freight Amount at time of Order Entry and/or at time of Shipping.

Invoice Printing:

●The default of whether or not to send invoices to the Ship-to email addresses is now a control file setting. The default can be overridden by being checked and un-checked as needed.

Financial

ACCOUNTS RECEIVABLE

Customer Statements:

●A default Email subject and body can now be set up for use with the batch emailing of statements.

Terms Codes:

●Optionally, the Terms Code can now drive a fee that is added to the sales order at time of Order Entry based on a percentage of the Line Value and Freight amount. If the terms code does not drive a fee – this additional fee can be manually entered on those sales orders as needed. All changes to that amount are tracked.

ACCOUNTS PAYABLE

Vendor History Inquiry:

●A new search option has been added for P/O number.

Invoice Update:

●The date that an invoice is created is now tracked in the A/P side of the Unvouchered Detail.

Vendor Maintenance:

●Any changes made to the vendor Bank information including Routing and Account number are now tracked.

A/P Check Format Maintenance:

●This is a new screen which allows the changing of check/banking information related to each check format that is used in the Auto Check Process.

GENERAL LEDGER

G/L Journal Entry:

●Changes made to existing journal entries are now tracked.

Material

INVENTORY

Part Master Maintenance:

●The Reporting Tool has been expanded by an additional 25 fields. It also has the option to be tied to the parts by either part number or Sales Model Number (Description 2)

●Changes to the Header Item Type code are now tracked.

●Changes to the Header N Skip G/L Post Flag are now tracked.

●The Purchase Code now has additional checks for the type of parts that use each code. The item type is now checked against the part master and verified against the Purchase Code Master. If a part is type (M)ake or (B)uy that option must be checked in the Purchase Code Master. If a part is type (N)on-Inventory that option must be checked. This is validated for new parts entered and changes to existing parts.

PURCHASE ORDERS

Purchase Order Entry:

● The Purchase Code now has additional checks for the type of parts that use each code. The item type is now checked against the part master and verified against the Purchase Code Master. If a part is type (M)ake or (B)uy that option must be checked in the Purchase Code Master. If a part is type (N)on-Inventory that option must be checked. If a Non-stock part is entered the option for Non-stock must be checked in the Purchase Code master.

Systems

Import Sales Orders

●Optionally, Sales Orders can now be created via an import from an excel spreadsheet. This option is fairly flexible and a huge time saver. Contact Maxxum if you are interested in using this function.

Import Purchase Orders

●Optionally, purchase orders can be created through an import function into the P/O Requisition system from an excel spreadsheet. Contact Maxxum if you are interested in using this function.

Screen User Tracking

●Optionally, user tracking of menu options can be reduced to just major updates rather than all screen access.

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: