



Software Enhancements

April through June 2015

RELEASE: 2015 Volume 2

Highlights:

New CYCLE COUNT IMPORT process

EDI Override Security for Sales Order Entry

P/O Cancel option added

Planner default to P/O from User

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Sales and Service

ORDER PROCESSING

Sales Order Entry:

- EDI Override is an option controlled by User Security. It applies only to sales orders that have been imported via the EDI Import process. If this option is checked it will allow for the override of specific EDI fields: Purchase Order, Add or Delete line items. Leave it unchecked to stop unauthorized users from changing EDI order information that may affect document turnaround.

- The Estimated Totals Tab now contains the estimated weight for the entire sales order. This is based on the quantity ordered and the weight as defined in the part master.

Print Sales Invoices:

- The Invoice Number is now included in the Subject Line when an invoice is emailed.

- The Customer's P/O number is now included in the Subject Line when an invoice is emailed.

Customer Maintenance:

- A new Email address field has been added for Non-Billing related communication. This email address will not be used by Invoicing.

Customer Inquiry:

- The new Email address field added for Non-Billing related communication is now displayed.

Shipment/Invoice Inquiry:

- The Customer Billing Email address and Preferred Billing method are now displayed on the screen.

Costed Commission History Report:

- This is a new report that is a version of the standard Commission History report with invoice cost included.

Financial

ACCOUNTS RECEIVABLE

Check History:

- Check History will now also store the fiscal year and period this check was updated.

Customer Maintenance:

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Shipment/Invoice Inquiry:

- The Customer Billing Email address and Preferred Billing method are now displayed on the screen.

ACCOUNTS PAYABLE

Automatic Check Processing:

- A Batch Number will now be assigned to be check run. The batch number will be incremented for that check/bank account and stored in history for future reference.

Vendor Master:

- A Savings Account check box has been added to the Banking information on the Remit To Tab which is used by the NACHA export.

Invoice Entry:

- Optionally, when an invoice line is created for a purchase order item that is non-stock (not defined in the part master) the PPV (Purchase Price Variance) calculation can be skipped. This is a control file setting that will skip the creation of PPV variances for all non-stock items.

GENERAL LEDGER

G/L Posting Detail Inquiry:

- You now have the ability to look at postings for future G/L periods. When you select a period in the future it will warn you.

Material

INVENTORY

Cycle Count Import QOH:

- This is a new process within Transaction Processing that allows for the import from a spreadsheet of the current new Quantity On Hand. Two transactions will be created: first to zero out the current quantity and second to increase the current quantity based on the import.

PURCHASE ORDERS

Purchase Order Entry:

- There is now an option to Cancel a P/O and all open line items. This is similar to the Cancel process in Sales Order Entry. There is a new table set up to define reason codes for cancelling P/Os. Cancelled P/Os and line items are tracked in the Change history.
- Optionally a planner can be tied to a User. This is set up in User Security. This planner will then default on new purchase orders created by this user.

Purchase Order Inquiry:

- There is now an option to search for P/O based on the vendor part number.
- The vendor part number is now displayed in the summary P/O line.

P/O Receipt Confirmation:

- Then Vendor Part Number is now displayed in the P/O item list Drop Down.

Production

Serial Number Maintenance

- A Wildcard search has been added to the Serial Number field.

Serial Number Inquiry

- A Wildcard search has been added to the Serial Number field.

Systems

Menu structure within Systems

- The menu structure has been redefined within Systems breaking them into their respective categories.

Re-explode Jobs

- This is a new administrator function that allows for released jobs to be re-exploded grabbing the current defined Bill of Material.

User Security – by User

- EDI Override – If this option is checked it will allow for the override of specific EDI fields. Leave it unchecked to stop unauthorized users from changing EDI order information that may affect document turnaround.
- Planner – Optionally a planner can be tied to a User. This planner will then default on new purchase orders created by this user.

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: