



Software Enhancements

October through December 2016

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Highlights:

- **Optional Order Entry Minimum Billing**
- **Optional Order Entry line item value restrictions based on Sales Code**
- **Ability to create Computer Planned Orders – both P/O and W/O from Order Action Report**

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Sales and Service

ORDER PROCESSING

Customer Look-Up:

- There is now the option to include customers that are not active in the look-up. Show Active customers only will be the default with the option to Show All customers.
- The customer's Credit Code will now display in the look-up.

Sales Order Entry:

- Optionally, a user can be prevented from entering sales orders with a promise or request date that is in the past.
- Optionally, 2 new fields have been added to the Sales Code Master that will work with sales order entry. OE Line Amount < or > or = and OE Line Amount Value work together to insure that items entered follow these restrictions. For example: If a sales code entered must be free, use = 0. If entry cannot exceed 1000, use < 1001.
- Optionally, a Minimum Billing amount can be set-up and calculated in order entry. This amount will be recalculated with each order line entry and change. There is an override check-box next to this amount that allows for this amount to be changed which in turn will stop the calculation. This amount is a control file setting and is the difference between the order line values and this Minimum Billing amount.
- A new field in the part master called O/E Non-Taxable Override has been created for use with Sales Order Entry. When this box is checked any orders entered for this part will default to Non-Tax.
- The Bill-to's Customer phone number is now displayed.

Sales Code Maintenance:

- Optionally, 2 new fields have been added that will work with sales order entry. OE Line Amount < or = and OE Line Amount Value work together to insure that items entered follow these restrictions. For example: If a sales code entered must be free, use = 0. If entry cannot exceed 1000, use < 1001.

Customer Maintenance:

- Optionally, 2 new fields have been added that will work with sales order entry. Lock Freight Change and Lock Discount Change will not allow the user to change the Frt Code and Discounts that default from the customer master to the Sales Order.

Serial Shipping:

- If a customer is set to not allow backorders – the user will be warned.

Ship Via Maintenance:

- An EDI Code field has been added that will tie required EDI ship via code back to the trading partner.

Financial

ACCOUNTS RECEIVABLE

Customer Look-Up:

- There is now the option to included customers that are not active in the look-up. Show Active customers only will be the default with the option to Show All customers.

- The customer's Credit Code will now display in the look-up.

CASH RECEIPT ENTRY:

- The Invoice Currency is now displayed as a payment reference.

GENERAL LEDGER

G/L JOURNAL ENTRY:

- The journal header now contains a Currency specification that is defaulted to the journal lines. Optionally, the Currency can be changed at the line item level. The line item Currency is carried into the G/L detail. Currently this information is strictly memo.

Material

BILLS OF MATERIAL

Indented Explosion Inquiry:

- Three filter options have been added for the Bill of Material components. You can filter by Part Number, Description 1 & Description 2. They can be used in any combination. * is used to search within the filter.

INVENTORY CONTROL

Report Tools Maintenance:

- This is a new menu option that allows for maintenance to the Report Tools tied to the part master.

Part Master Maintenance:

- Currency is now tied to a part number by location. This is a required field next to the Country of Origin.

- A new field called O/E Non-Taxable Override has been created for use with Sales Order Entry. When this box is checked any orders entered for this part will default to Non-Tax.

Inventory Valuation Report:

- The Last Usage Date has been added to this report.

Inventory Currency Valuation Report:

- This is a new report similar to the Inventory Valuation report. It allows for only selection of parts based on their currency. A currency exchange rate is then used to calculate their value.

Order Action Report:

- Optionally, you can now create Computer Planned Purchase Orders for Buy Parts that are generated by the results of this report. These CPOs will be updated into the P/O Requisition System.

- Optionally, you can now create Computer Planned Work Orders for Make Parts that are generated by the results of this report. These CPOs will be updated into the Work Order system and can be created as either Planned or Released Jobs.

Systems

User Security

- Optionally, a user can be prevented from entering sales orders with a promise or request date that is in the past.

NOTES: