



# Software Enhancements

January through March 2015

RELEASE: 2015 Volume 1

## Highlights:

Non-USD List Pricing Structure  
Environmental Agents  
Part Master Kitting tied to Order Entry  
Additional Customer Look-Up by email address  
Expanded Part Cost Override for Order Processing  
Expanded Costing Options for Drop-Ship parts

## Contact Us

<http://www.maxxumerp.com>  
[lisa@maxxumerp.com](mailto:lisa@maxxumerp.com)  
telephone: (414) 587-5594

## Sales and Service

### ORDER PROCESSING

#### Customer Look-Up:

- The Customer Look-up now contains the option to search for a customer using their Email address. The Wildcard Search is available within the Email address field as well. This addition is available throughout Maxx ERP wherever the Customer Look-Up option is available.

#### Sales Order Entry:

- Maintenance to orders created by EDI will be limited. Only those with user access will be able to change Ship-To, Purchase Order, Line item deletion and new Line Item creation.
- Overriding Part Cost is now separate Security based on the Part Type in the Part Master. There is a separate security option to Override the Cost on a Make/Buy Part vs. Override of Cost on a Non-Inventory Part. A Non-Stock or Misc. Part Cost Override is not affected by either of these.
- A User can now be locked out of entering a part in Sales Order Entry that is designated as a Phantom.
- Optionally, Drop-Ship parts as defined by the sales order item can exclude Material, Labor and Labor Costs. This is a Company Wide setting.
- Optionally, You can now set up additional parts that will be added to a sales order each time a main part number is entered. This is a Kit process. Kits are set up in the part master. They can be set up as a fix quantity or as a multiple of the master part.
- A Non-USD List price has been added to the Part Master. When the pricing structure hits the List Price and determines that the customer ordering is not a US Customer it will pull the Non-USD List Price.

### **Price Table – Spreadsheet View:**

- The Customer number is now displayed on Bottom line of this screen. Optionally you can now display price tables for all customers rather than one at a time.
- A Levels Options has been added. It defaults to Level 1. Most price tables are only structured to Level 1 and the other information just makes the tables more difficult to navigate. If you wish to see more levels this can be changed on the screen as needed. This makes the screen easier to view and change.

### **Serial Shipping:**

- The exceptions Tab will now show the part number tied to the serial number exception.
- There is a new table to View Exception Detail which may give additional information about why serial numbers were not pulled.

### **Customer Maintenance:**

- A new Tab has been added for Environmental Agent information.

## **CUSTOMER SERVICE**

### **Customer Look-Up:**

- The Customer Look-up now contains the option to search for a customer using their Email address. The Wildcard Search is available within the Email address field as well. This addition is available throughout Maxx ERP wherever the Customer Look-Up option is available.

### **Customer Profile:**

- Both email addresses and the customer website have been added to this screen for inquiry only.

---

## **Financial**

### **ACCOUNTS RECEIVABLE**

#### **Customer Maintenance:**

- A new Tab has been added for Environmental Agent information.

### **Customer Look-Up:**

- The Customer Look-up now contains the option to search for a customer using their Email address. The Wildcard Search is available within the Email address field as well. This addition is available throughout Maxx ERP wherever the Customer Look-Up option is available.

## **ACCOUNTS PAYABLE**

### **Vendor Maintenance:**

- A default Division can now be set up on the vendor that will default for a new invoice in Invoice Entry.

### **Error Reconciliation Entry:**

- A Refresh Button has not been added that will allow you to remove all fully reconciled items from the screen at any point during reconciliation entry.

---

## **Material**

## **INVENTORY**

### **Part Master Maintenance:**

- A Kit Tab has been added to the Part Master. Optionally, You can now set up parts that will be added to a sales order each time a part is entered. Kits are set up in the part master. They can be set up as a fix quantity or as a multiple of the master part.

- A Non-USD List price has been added to the Part Master. When the pricing structure hits the List Price and determines that the customer ordering is not a US Customer it will pull the Non-USD List Price.

### **Part Master Inquiry:**

- The new Kit Tab in the Part Master will now also be displayed.

- The new Non-USD List Price in the Part Master will now also be displayed.

## Cycle Count Import QOH:

- This is a new function within Transaction Processing that allows the import of a spreadsheet containing part numbers and their new QOH. This will create 2 inventory adjustments: first to zero out the current QOH and second to increase the current QOH by the amount imported on the spreadsheet.

---

## Systems

### EDI - Incoming

- There is now a cancel option on the line that is imported that allows you to skip a line that is sent electronically. This is especially useful if the trading partner is sending information in the line segments that are not physical items to order.

### Merge Part Numbers

- This option will allow for the import of a spreadsheet to globally change part numbers in the system to a new format. This option requires a specific import format to function and should only be performed by administrative personnel.

### User Security – by User

- Maintenance of EDI created Sales Orders – Allow for Override of EDI fields
- Override of Sales Order Part Cost for Make/Buy Parts
- Override of Sales Order Part Cost for Non-Inventory Parts
- Do not Allow Entry of Phantom Parts

---

## 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:**