



# Software Enhancements

April through June 2016

RELEASE: 2016 Volume 2

## Highlights:

- Shipment confirmation automatic work order receipt and back-flush option
- User entry Limit Option added to purchase order entry

## Contact Us

<http://www.maxxumerp.com>

<http://maxxerp.software>

[lisa@maxxumerp.com](mailto:lisa@maxxumerp.com)

telephone: (414) 587-5594

## Sales and Service

### ORDER PROCESSING

#### Shipment confirmation:

- Optionally, work orders and service work orders tied to Sales can now be back-flushed and received when the Sales Order is shipped.

#### Invoice Printing:

- Optionally, you can stop a user from entering any parts defined as type M (make) in the part master location on a purchase order.

#### UPS Exception Report:

- This is a new report that compares the current invoicing to the imported UPS data. It lists any invoices that are UPS that are not in the current UPS batch as well any items in the UPS batch that are not in the current invoicing.

#### Ship Via Maintenance:

- A new field named UPS has been added to designate which codes are used in conjunction with the UPS WorldShip integration.

### ACCOUNTS RECEIVABLE

#### Customer Hold List:

- This is a new report that lists all Customers that are currently on Credit Hold.

### SALES ANALYSIS

#### Sales Analysis Report:

- Six new fields have been added to the EXPORT function of this report pertaining to Rep Commission. Each of the 3 sales reps will now also include the Commission Percent and the Commission Amount for each line item.

## **ADMINISTRATION**

### **Import List Prices:**

- There is now an option to also update the NON-USD list price found in the part master location.
- 

## **Financial**

### **ACCOUNTS RECEIVABLE**

#### **Customer Statements:**

- An A/R Balance range has been added to the print criteria. The default will allow for all customers to print however changing this range will allow for printing of high balance customers and also skipping of negative balance customers.

### **ACCOUNTS PAYABLE**

#### **Cleared Check Entry:**

- A sort option has been added. The default remains to sort by check number. A new sort has been added that will you to sort checks by the check date.

### **GENERAL LEDGER**

#### **G/L Journal Inquiry:**

- A date range has been added to this inquiry.
  - A new option has been added that allows printing of the detail behind the summary journals that displayed on the screen based on your selection criteria.
- 

## **Material**

### **PURCHASE ORDERS**

#### **Purchase Order Entry:**

- When a drop-ship purchase order is created the UPS Residential and Saturday Delivery option flags are carried over from the sales order.
- Optionally, you can stop a user from entering any parts defined as type M (make) in the part master location on a purchase order.

---

## Systems

### Import Sales Orders

- Optionally, the import can now also create the production work orders for each line item that is imported.

### User Security

- Optionally, you can stop a user from entering any parts defined as type M (make) in the part master location on a purchase order.

- Optionally, under Purchase Order Entry a Credit Limit Value and Override password can now be set up for each User.

---

## Self Service Portal

**This is a 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:**