Version 8 Preview: New Features

Version 8 Enhancements

New Product Highlights

1. Greatly enhanced Sales Order & Inventory Systems
2. Hundreds of enhancements throughout all modules
3. Resizable screens & free text searching
4. Grant Tracking System for Not-For-Profit Edition
5. New inquiry capability in AR, AP, SO, and PO
6. Quick Entry system in Payroll
7. Faster reports through pre-processing of data files
8. Cross period and Cross year financial statements in GL

Version 8 requires no change to Crystal Reports and Pervasive products (this only applies to Version 7.x customers; customers with prior CYMA versions will need new version of these products).

The F9 Financial Report Writer has been enhanced to support the new file structures in CYMA^{IV} Version 8 and to support the new Grant Tracking System.

System Manager Module / System Wide

- Resizable Screens
- Browser now allows multiple indexes for sorting based on more than one field
- Added capability to perform string searches in the browser
- Ability to edit selected records in browser with "Edit" button
- Added a copy Product Alternate Prices selection screen to Maintain Products
- Test button added to General Import, for testing the import for errors
- Added ability to import custom fields in PO
- Added General Import to bring Product Alternate Prices into system
- Print Batch Reports menu option added to CW
- All date fields will accept the day and month and then default the year upon exit from the field.
- Default Transaction Class codes can be entered at the customer/vendor/employee level
- All configuration screens now allow a zero in Periods Before Archive fields.
- F9 added a new function for accessing Grant information
- Report selection FORMULA number fields now default to ZERO w/o need tab through
- Added a description tag to the reports in Print Batch Reports so that you can name the Reports in a Batch to better identify them and to control the order of printing
- Inactive Vendors can now be purged when history transactions are purged

Accounts Payable Module

- Added Purchase and Invoice Activity tabs to Maintain Vendor
- Vendor's Product ID is no longer a required field on Maintain Vendor Cross Reference
- Delivery Days has been moved from PO config to Maintain Vendor
- Added Vendor customer ID to all standard check formats
- GL record IDs are now written back to the AP transaction files
- Job number added back as a selection filter in Select Invoices

- Vendor Name added to check stub of all check formats
- Added Invoice Status Inquiry System

Accounts Receivable Module

- Added configuration option to allow users to be able to completely edit a Printed AR invoice
- Added a flag to AR Config to prevent entry of Sales Orders or Invoices for Customers on credit hold
- Added a date for NSF checks
- Added the sales order number to AR Enter Payments - Customer screen
- Added a customer Sort Name field to Customers similar to functionality in AP
- Added an Invoice Activity tab to Maintain Customer
- Added a Sales Order Activity tab to Maintain Customers
- Added a copy feature to Maintain Customer Price tab
- Added a "Default Ship From Warehouse" field to the customer ship-to tab
- Added ability to Void an entire deposit
- Added an AR Invoice Status Inquiry screen
- If Invoice originates in SO the Sales Order Number now prints on AR Invoice
- Added ability to email invoices in PDF format
- Added a function to Generate Invoice number without printing
- Changed the description of the second parameter in the Invoice selection grid from Order Date to AR Order Date
- Add a To: field and CC: field to the Email Information dialog box when printing from the Enter Invoice screen
- Added Sales Order number as a selection parameter on AR Print Invoices
- GL record IDs are now written back to the AR transaction files
- Count of Invoices to be printed added to the AR Invoice Print Proof Listing (Detail)
- Added filters for Customer Type, Customer Price Category, Product Price Category and Product Line to Gross Margin Reports
- Customer Ledgers have been modified to only show the last 4 digits of the credit card number
- Added "Sort by Total?" option to Customer Balance Report
- Added filters to the Gross Margin Reports for Customer Type, Customer Price Category, Product Price Category and Product Line
- Added filters to the Gross Margin Report for Customer Type
- AR aging and ledger reports use the new customer sort name field to sort the report

General Ledger Module

- Grant Tracking added to NFP General Ledger. Grants can be tracked through transactions entered in AP, PR, AR, PO and GL. You can track information regarding Funding Source, Core Object Expense, Programs and Activities. There is a capability to track Actions on the Grant to keep track of meetings, phone calls, etc. Grants can be budgeted by Funding Source, Core Object Expense, Programs and Activities. There is a tab on the Maintain Grant dialog to see the Financial Overview at a glance. Sixteen reports have been added to the GL module to help you analyze the data.
- Four reports now have the capability to cross years and periods: Income Statement Detail, Income Statement Subtype, Income Statement Detail (Period, YTD), and Income Statement Subtype (Period, YTD)
- GL Recalc launches automatically when entering Prior Period Adjustments
- Default Journal Type added to Maintain Configuration
- Asset Keeper by ProWare fixed assets export file can be imported into CYMA^{IV} to create Depreciation Journal Entries
- BNA Fixed Assets export file can be imported into CYMA^{IV} to create Depreciation Journal Entries
- When closing the GL year the system now checks the AP and AR modules to make sure they are past the date of

closings

- General Ledger Recalculation automatically launches prior to closing year
- Added time and date stamp to all income and balance sheets
- Added an audit report to show which accounts have a fund that doesn't match the Net Asset Value account in NFP system
- Improved performance on some Income Statements
- Improved performance of the List Of Budget Amounts report
- New Report that shows the consolidation for closed years

Inventory Control Module

- Added Bill of Materials Functionality. This allows a company to define a Bill of Material of subassemblies and/or component products for a specific Inventory finished/assembled product, and then assemble these products for the purpose of either putting the assembled product in stock or issuing to a CYMA job. The "Build" process issues the component products out of stock and creates a receipt of the finished assembly into stock or issues directly to the job. Other features include: Defining overhead cost types with either a fixed cost amount or a percentage; an option to copy an existing BOM to create a new BOM; substituting component products in all or select BOMs with a different component; the capability of projecting component requirements based on a projected number of builds; and added a "View Detail" button to the Enter Build dialog box to see available quantities in all warehouses.
- Added a third Adjustment type of "Physical Count" to IC Enter Adjustments. When this adjustment type is selected a new "Count Qty" field is enabled to allow the warehouse personnel to enter the total quantity counted during a cycle count instead of having to enter the net affect to the quantity on hand.
- Added a proof report to Enter Adjustments to verify entry before posting. The proof also shows serial numbers.
- Added serial numbers to the IC Enter Beginning Quantities dialog box if serialization is used "Throughout IC".
- Changed Enter Issues to allow the repetition of same product/warehouse combination on more than one line in the data grid.
- Added the capability to print an " Issue Ticket" via a button from the Enter Issues dialog box. The Issue ticket will print serial numbers if using.
- Added a "View Detail" button to view product/warehouse quantities on hand and available to IC Enter Issues, Enter Adjustments and Enter Transfers.
- Added option to create JC cost record upon posting IC Receipts. The company now has the option when receiving products on a Purchase Order for a job to create the cost record for the job at the time the receipt is posted or to wait until the invoice from the vendor is entered and posted in AP.
- Added serial number to IC Enter Receipt Proof report if the company is using the serialization "Throughout IC" option.
- The IC Receipt Proof report now shows quantities and costs to four places to the right of the decimal.
- Added product warehouse lookup on IC Enter Transfers.
- The serial numbers now print on the IC Transfer Print Ticket if using this feature.
- Changed Enter Transfers to allow the repetition of same product/warehouse combination on multiple lines in the grid.
- Expanded "ABC Codes" values from A - C to A - M. The user now has the industry-standard 13 classes for grouping products.
- Increased the size of the Weight field to 6.2 and renamed "Weight in Pounds".
- Added Prime Vendor Product ID field to Maintain Product dialog box. The program will then automatically create a vendor cross-reference record when the prime vendor and their product id is added to the product.
- Products can only be changed from the "Inventory" type to any other type if the Qty on Hand is zero.
- Added a new Activity tab to the Maintain Product dialog box. This view only tab allows the user to see all activity, either in the current file or in history, for a specific product/warehouse with filters for all transactions types. The user

can also sort the activity by date or by transaction type.

- Added a new option field "Prevent Build After Date" to Maintain Products. When saving a BOM Build, the program checks to see if the assembled product or a component product has a Prevent Build After Date that is earlier than the build date. If there is, the build cannot be saved.
- Added a Process that allows the user to add existing products (by range) to a warehouse. This is very beneficial if the user was using SM products and then purchased the Inventory module, or in the case where the company adds another warehouse location.
- Added a maintenance table for the user to set up their own units of measure. In Version 7.0 CYMA had a list of about 20 units of measure to choose from, but many times the choices were not the unit of measure the user needed. When upgrading to Version 8.0, the CYMA program will auto populate the new table with the existing 20 units of measure, and allow the user to set up their own. The user can also easily delete the converted units of measure not needed.
- Enter Inventory Receipts no longer shows inactive Warehouses in the browser.
- Added new "Serialize Throughout IC" option to IC Maintain Configuration. In Version 7.0 the program asked for serial numbers whenever a serialized product was issued or shipped as in a manufacturing environment. In Version 8.0, the company can now track serialized products throughout all inventory movements including receipts, adjustments, transfers and BOMS.
- Created an IC Manager status on SM Maintain User. Being either a System Manager or an IC Manager allows you to select the Manufacturing BOM Type, which is required before a BOM Build can be saved. Having this status also allows you to change a saved BOM from the Manufacturing type to one of the other three types. Lastly, It allows you, when editing a BOM, to decide if you want to update unit costs in the data grid based on new SM Product Unit Costs.
- Added new logic to the Print Cycle Count Worksheet including: added the ABC Code as a report filter; added a flag asking if the user wants the serial numbers to print on the worksheet; added a user-defined description field which prints in the header of the report; and changed the report to include serial numbers if the user selected this option.
- IC Transactions can now be moved to history when performing the Inventory Control Period End Process. Transactions can move to history if the Transaction Date is less than or equal to period end date and the transaction is not an "open" cost layer.
- Cosmetic changes to the Transaction Activity report.
- Added a new Purchase & Sales by Period report. This report shows by period the quantities sold and purchased plus their extended costs and prices.
- The Purchase Order Tracking report now displays the SO number from the PO line.
- Purchases and Sales Report now groups and totals by Calendar Month.
- Added an Average Sales Price column to the Purchase and Sales Report(s).
- Added the SO number from the PO Line to the Expected Receipts Report.
- Removed the product line warehouse total and report totals from the Overstock Advice report.
- Added option to many IC reports to either group data by warehouse or by product.
- Add warehouse filter to the Purchase Order Tracking report.
- Add warehouse filter to the Sales Order Tracking report.
- Add warehouse filter to the ABC Sales Analysis (by Product) report.
- Added Prime Vendor to the IC Reorder Advice report.

Job Costing Module

- Added a "Costed" checkbox to the "Other" Billable Charges data grid. If a product is not an I-type product, the user can now indicate that the billable charge has a known cost. If this field is checked, then the program creates two activity records. The billable activity is created when the billable charge is saved and the cost activity record is created when this cost is selected in Prepare Invoice and an AR Invoice is created.

- Added a "Job Type" default field to Maintain Base Jobs. This is a non-required field, but when entered, this value will populate when adding jobs belonging to this base job.
- Added a default Cost Category to JC Maintain Configuration. This feature is especially useful if the company using JC uses Cost Codes but not Cost Categories. The company can add one universal cost category and then enter it as the default. Whenever a cost code is set up this universal cost category will default. The other use is if the company has a majority of cost codes belonging to one cost category.
- Added a "Copy" button to the Maintain Jobs dialog box. This button is enabled when an existing job is displayed. When this button is pressed the program will ask for a new job number. Once entered, this function will copy most existing static information from the "Job" tab plus all gl accounts and budgets, plus any special pricing and labor pricing set up.
- Added a "Do Not Exceed Contract Value" checkbox to Maintain Jobs. When this field is checked and the sum of the selected transactions in Prepare Invoice will cause the Job's "Invoiced to Date" amount to exceed the "Contract Value" amount, the program will warn you of this occurrence.
- Added system-calculated fields for Budget Totals, Profit Margin Amount and Profit Margin Percent to the bottom of the Budget tab.
- Added "Maintain Job Types" to the initial Job Costing set up check list.
- Added "Cost Code" and "Cost Category" filters to the JC Transaction Listings.
- Added a new JC "Transaction Listing (By Job Segment) report that groups by base job segment and/or other segments.
- Added filters for Cost Category & Cost Code to many reports.

Payroll Module

- Increased the number of employee defaults on the features in Maintain Configuration.
- Flat percentage can be added to Employees to use in the calculation for supplemental wages.
- Gender, Race, and Title fields added to Maintain Employee/Personal Information Tab.
- Added an employee status to show full-time or part-time.
- Copy feature now allows the selection of only specific fields to copy.
- Added W-2 box for SUTA features.
- Zero line item entry now allowed in departmentalization setup.
- Added Product BOM Group Type field to the employee. This will allow you to create reports that will show what employees earnings were recorded against Bill of Materials.
- Added process in PR to create the AP liability invoice. This is a separate item off the Process menu that will allow you to create AP liability invoices based on user defined criteria. The AP Vendor can be defined on the feature in Maintain Configuration. The process will allow you to look at the detail of the payroll entries that make up the total. Once the AP Invoice is created, it can then be processed through the AP module like any other invoice.
- Added a Quick Entry Payroll dialog box. The dialog box is a spreadsheet-like screen that allows quicker entry of payroll data. You can also access the detail for a given employee that has a more complex payroll.
- After Printing Checks from Calculate Payroll screen the Calculate Payroll screen is updated to show the printed check numbers.
- Added a field to "enter Trade Name" to populate field on the 941.
- Added new check format that "rolls up" multiplelines for the same feature into one line. This check format will show one line for each earnings feature instead of multiple lines entered. This format will be useful for users of the Job Costing module, when employees work on multiple jobs.
- GL record IDs are now written back to the PR transaction files.
- All check boxes when purging employees are set to off when closing the year. No more accidentally purging employees.

- Company Configuration report is now pre-processed to improve performance.
- All Payroll Journals have been pre-processed to increase performance.
- Employer Balance Report is now pre-processed to improve performance.
- Employee Balance Report is now pre-processed to improve performance.
- Employee Personnel Report is now pre-processed to improve performance.
- Added filter to Current Check Register to show only EFT checks.
- Added options to sort by employee ID, last name, entry order, and department to the Entry Verification Report.
- Added Cost Code and Build number to PR Proof or Entry Verification Reports.
- Added a page break to the Payroll Journals before the Company grand totals.
- Added new fields to Employee Listing for race, gender, pt/ft, title, group type, etc.
- Add Group Type Filter to Employee Listing and all PR Journals.

Purchase Order Module

- Added Return to Vendor capability to PO. When the user selects the new order type of "Order - Return" the program recognizes this as a negative PO and as such will default line item quantities to negative 1 and print a "Purchase Return" PO. When products on this PO are received in IC Enter Receipts, the quantity on hand of these products will be reduced. An "Order Return" will also create a Credit AP Invoice.
- Added logic to not allow a PO line that has been either partially/fully received or invoiced from being deleted.
- Add capability to Drop Ship a PO order directly to the customer. This is accomplished by adding a Customer ID to the PO header. When the PO is saved and there is a valid customer id in the PO header, the program knows to print the customer's ship-to address instead of the purchasing company's ship-to address.
- Added Requisitioncapability to Enter Purchase Order dialog box. A new PO type of "Requisition" has been entered for those purchasing departments that need pre-PO processing. A requisition can be entered with or without a vendor. A Requisition can be printed, but cannot be received or invoiced until it is changed into a Purchase Order.
- Added a "Warn User if a Product Has a Lower Cost" flag to PO Maintain Configuration. If selected, when a PO is saved, the Enter PO program will look to see if there are any vendors who supply the products on the PO for a lower cost. If there are, the program will display who those vendors are and what their unit cost is.
- Added a "Vendor" button to Enter Purchase Orders. This enables the user to view past PO and Invoice activity records (new tabs on Maintain Vendor) and also to add a new vendor from the Enter Purchase Order dialog box.
- Added "Delivery Date" field to the PO data grid. This date will default from the Delivery Date field entered in the PO header. This new field is enabled to identify those PO products that are expected to be delivered on a date than differs from the header date. PO reports will also now report on the PO line date.
- Added a display only column to the PO data grid for "Quantity Received" in order to give better receiving visibility to the purchasing department.
- Opened up Enter Purchase Orders to accept negative quantities on a regular PO and positive quantities on a Purchase Return. However, a regular PO must have an overall positive dollar value and a Purchase Return must have an overall negative dollar value.
- Added a "View Detail" button to the bottom of Enter Purchase Orders. By pressing this button a window pops up allowing the user to choose three different types of information to view for a product on a PO line. They are: 1) warehouse quantities (on hand, available, on Sales Orders and on PO), 2) the Alternate Product ID for the case where the product has reached its "Prevent Purchase After" expiration date, or the vendor no longer supplies this product, and 3) receipt records showing the quantities and dates of receipts.
- Added a new Purchase Order Status Inquiry to the Enter menu. This selection screen allows the user to display, in summary mode, the PO/Requisitions that meet the user-specified criteria. Once the PO/Requisitionsare found, the user can highlight a specific record and press the "View Document" button in order to display the detail of this

document, and in some cases edit the document.

- The Ship-To "Attention" name now prints under the addresses on the printed Purchase Orders.
- If a product on a PO line is being ordered for a job, that job number will print under the product description on all Printed PO forms.
- The printed Purchase Order Forms now show the order quantity and unit cost to four digits to the right of the decimal.
- Added warehouse filter to the Order Register (by Record) report.
- Added warehouse filter to Order Register (by Order) report.
- Added warehouse filter to the Order Register (by Product) report.
- Added warehouse filter to the Order Register (by Vendor) report.
- Added warehouse filter to the Order Register (by Job) report.
- Added a new PO Order Register (by PO Type) report in Detail.
- Added a PO status report for Requisitions.
- Added "WHSE ID" to Selection Criteria and added "Sales Order Number" to the Open Commitment Listing (by Product).
- Added" WHSE ID" to Selection Criteria for all Open Commitment reports.

Sales Order Module

- Sales Orders will now allow negative quantities on regular Sales Orders/Quotes and positive quantities on Credits provided the overall dollar amount is positive on a regular order, and the overall dollar amount is negative on a credit.
- Streamlined the entry of a Sales Order quote by removing the requirement that Customer, Terms, and Ship Date are entered. These fields will become required when changing the quote into a sales order.
- Improved Enter Sales Order program to refresh special unit pricing when the user changes the customer ID on the order.
- Added the e-mail address to Enter Sales Order screen in order to override the standard customer email address at the sales order level.
- Added a "Copy" button to the Enter Sales Order dialog box. This feature allows the line items from an existing Sales Order/Quote to be copied to a new Sales Order/Quote. Once copied, this new document is fully enabled for editing.
- Added a Pop-up window to show the Alternate Product ID for products that have either passed their sale expiration date, or that have a low stock condition. The Alternate Product window is one of three data options available with the "View Detail" button added to the Enter Sales Order dialog box.
- Added a "Customer" button to the bottom of the Enter Sales Order screen. This feature is useful for adding new customers right from the Enter Sales Order dialog box and also for viewing the new Sales Order and Invoice activity tabs added to the Maintain Customer dialog box.
- Added a Quote Expiration Date field to the sales order header. If a date has been entered, when the quote is converted into a sales order, the program will compare the sales order date with the expiration date. If the expiration date is earlier than the sales order date the program will notify the user and ask if the user wants to honor the quoted prices.
- Added a pop-up window that displays a product's quantities (on hand, available, on PO and on Sales Orders) for all warehouses. This is one of three data type options available by pressing the "View Detail" button on the bottom of Enter Sales Orders.
- Added a display field to the SO footer indicating the source of the system-defaulting lowest price.
- Added Invoice and Sales Order activity tabs to Maintain Customer. These activity tabs can also be accessed in the Enter Sales Order dialog box by pressing the new "Customer" button.
- Added a "Total Weight" field to the footer of the Sales Order to assist in quoting a shipping amount to the customer.

- Changed field label from Ship Date to Scheduled Ship Date. The Scheduled Ship Date defaults by adding the number of Ship Days as specified on SO Maintain Configuration to the Order Date. This date is enabled for override.
- Added Alternate pricing capability for Sales Orders. In Version 8.0 the user can set up alternate prices for each product. Also added was a "Price Code" field (with browser) to the Sales Order data grid. The user can use the browser to see any alternate prices set up for this product and if one is chosen it becomes the Unit Price on this sales order line.
- Added a View Detail button to Enter Sales Order to view three data types: 1) warehouse quantities, 2) alternate product id and 3) shipment information.
- Added a pop-up window showing all shipping detail lines for all sales order lines. Data shown includes shipment date, shipping carrier, tracking number and AR Invoice. Shipping records are accessed by pressing the "View Detail" button on the Enter Sales Orders dialog box.
- Added a print and export button to "Preview Order" print option.
- Increased the size of the email message box when the user chooses to email Sales Orders.
- Added a new top layer to the default warehouse hierarchy in the Enter Sales Order data grid. The new hierarchy is to use the default warehouse from the Customer's Ship-to record on Maintain Customer. If not set up, then use the user's default warehouse on SM Maintain User. If not set up, then use the default warehouse from IC Maintain Configuration.
- Added a flag to AR Config to prevent entry of Sales Orders or Invoices for Customers on credit hold.
- The Enter Sales Order program will no longer refresh the Unit Price if the order quantity is changed and the Product Price Source is either "User Entry" or "Alternate Price".
- Increased the screen size for Enter SO dialog box to accommodate several new control buttons.
- Added ability for a System Manager or a Sales Manager user to change the Beginning Sales Order Number on SO Maintain Configuration. The new number can only be a higher number and a message will display letting the user know there will now be a gap in their sales order numbers.
- Add Warranty tracking functionality to SO. If a product is flagged as being covered by warranty, the Sales Order Process Shipment process will create a warranty record, and optionally create a warranty journal entry whenever this product is shipped.
- In Version 8.0 a payment on a Sales Order no longer creates the deposit when the first shipment is processed. It is now a separate dialog box and it is left up to the user when this process in run.
- Added functionality for "Credit" Sales Orders. A new order type of "Credit" has been added. A Credit signifies to the program that this order is being placed for a return to stock of previously shipped products, and as such will default a negative quantity of "-1.0000" on each sales order line. Positive quantities may also be entered on a credit order, as long as, the overall total of the credit is a negative amount. The printed sales order will now print as a "Credit Order" and when this order is shipped the quantity on hand and available will be increased.
- Added a SO Status Inquiry selection dialog box to the Enter menu. This selection screen allows the user to find and display summary information for Sales Orders and Quotes that meet the user-entered criteria. Once the records are found, the user can then highlight a specific document and press the "View Document" button to view or even edit the detail of this document.
- The Quote Expiration Date prints on the printed Quote.
- Changed the printed Sales Order to print the Customer Name on line two of the Ship To instead of the Location Description.
- The Packing List printed from the Process Menu now includes serial numbers.
- Added the Terms Code to the Packing list.
- Changed the Packing List to print the Customer Name on line 2 of the Ship-to address instead of the Location Description.

- Added new columns of Order Qty and Shipped Qty to the Pick Ticket.
- Added the Terms Code to the Pick Ticket. This is especially helpful to inform the shipping person when a shipment should be sent COD.
- Added a shipment "Tracking Number" field to the bottom of shipment screen. The user can manually enter the assigned shipment number if not using the CYMA shipment software. If using the shipment software, the program will update this field.
- CYMA has created an interface to "StarShip" software by V-Technologies Inc. StarShip is one of the most popular shipment software packages available. When you purchase StarShip and it is integrated with CYMA, the Sales Order Process Shipment will pass the customer and ship-to information to StarShip. While in StarShip the shipping person can: 1) have the electronic scale calculate the weight, or manually enter the weight, 2) "rate shop" shipping methods and carriers, 3) add COD and other handling charges, 4) print the shipping label and COD tag, and 5) Initiate a package pickup. Upon saving the manifest in StarShip the program will copy the tracking number, ship weight and freight amounts into the Process Shipment dialog box and the shipment can then be posted.
- Added a column to the Process Shipment data grid to signify those products that are serialized.
- The user can now select which packing slip to use if there are multiple formats.
- Sales Orders that are placed for the purpose of issuing products to a "Fixed Price" job will now create the AR invoice at the time the order is shipped, instead of waiting to be created when the Prepare Invoice process is run in Job Cost.
- Removed the Print Packing List button from the Process Shipment dialog box. The program will now ask you if you would like to print a Packing List after the shipment is posted. This change ensures the shipment is posted first, and therefore ensures the correct quantities always print on the Packing List.
- Added the Customer name to the Sales Order (by Customer) report in order to more easily identify the customer.
- Added the Product Description to the Sales Order (by Product) report to more easily identify the product.
- Created a Sales Order Shipment report. Report can be sorted by Customer, Product, Date or Order Number. Report also shows carrier, tracking number, invoice number and quantity shipped.
- The Sales Order Backorder Report now included the Scheduled Ship Date.
- The Backorder Report now included the Open Qty on PO and totals the Open Qty for each product.
- Added filters for Customer Type, Customer Price Category ID, Product Price Category ID, and Product Line to all Sales Order entry reports.
- Added a Sales Order Status (by Order) report.
- The Pick Ticket and Packing List now show all three quantities: 1) Order Qty, 2) Shipped Qty and 3) Open Qty.
- Added a SO Order Totals by Date Range report.
- Added a new Warranty Status Report in SO.
- Added an Outstanding Quotes Summary report.
- Moved the "Order Status" selection criteria higher up on the selection screen for better visibility on all Sales Order Status reports.
- Added a SO Daily Order Summary report.
- Added a SO Order Summary report.
- Added a SO Product Line Sales Analysis report.
- Added a Historical Order Totals by Date Range report.
- Added a Historical Order Summary report.
- Added a Historical Product Line Sales Analysis report.