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THE SYSTEMS HOUSE

Vision – Release 7.0

1st Quarter 2005

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Introduction

TSH Vision 7.0 is a major software release featuring a new **Retail / Point-of-Sale** system. Vision users will find ultra-quick invoicing on our powerful and simple new screens which are optimized for retail point-of-sale and counter sales environments. A new Retail/POS tab and related cash management tools provide a robust and **complete store management system** for single store locations, multi-store chains, and mixed distribution enterprises in the Office Products industry and Automotive Aftermarket.

New sales and inventory activity graphs on the **Product / Part** form take advantage of TSH Vision's rich Microsoft .NET-based graphical interface.   A set of 12 month activity graphs has been added to show trends by product or part, by location.   Visual charts help your users more readily understand the sales and usage metrics that your system collects naturally without forcing them to hunt for information on another screen or print a report and absorb columns of raw numbers. Graphical data patterns go beyond providing raw data to offer more information at a glance – a perfect example of the intrinsic benefits of TSH Vision's unique graphical design.

TSH Vision automotive users will be pleased to be able to offer their customers 24 x 7 online web ordering with Wrenchead's Nexpart e-commerce. Nexpart has gained wide acceptance as the leading e-commerce solution available in the aftermarket and has been fully integrated with TSH Vision.   In addition to the Nexpart integration, General Motors AD I program for GM accessory distributors is now also supported in Vision.

TSH Vision office products dealers who are members of TriMega or Independent Stationers buying groups will be pleased to find new EDI and order tools to help them automate transaction processing across platforms and into TSH Vision. Dealers served by wholesaler United Stationers can now take advantage of electronic manifests to verify carton counts.

CRM enhancements include 7 new profile icons, a new SetMVP event, and an enhanced sales pipeline activity report that helps sales reps manage their pipeline and supports management visibility into their sales associates' activity forecasts.

The best business practice concepts and tools delivered within Vision 7.0 represent one facet of the ongoing commitment that The Systems House continues to make to ensure that our customers always maintain a leader's competitive edge.

Customer Service & CRM Enhancements

New 7 additional profile icons

New CRM profile icons have been created for the following types of customers: Government, National Accounts, Education, Installer / Service, Jobber, Fleet, and Hot Shot Delivery. You can assign the CRM Profile icon to a customer on the *Customer Maintenance > Main form > Classifications* panel or by assigning a profile icon to the customer class on the *Vision Configuration > System Configuration > Customer Information > Customer Class Maintenance* form. For example, if you create a customer class of National Account and assign the corresponding icon to this customer class, all customers who are assigned this class will automatically display the National Account icon.

New SetMVP CRM event

The new SetMVP event allows your Vision system to automatically assign the MVP customer profile icon to customers when they reach the 50K sales level within a rolling 12 month period. This event can be triggered to run on demand, at EOD, or at EOM by activating it on the *CRM Management > Event* form. As a best-business-practice reflecting the value of strong customer relationships that you build over time, once the MVP icon is set on an account, it persists even if the account drops below the 50K level.

New sales pipeline activity report

A sales pipeline activity report, used in conjunction with TSH Vision's CRM profile icons and follow up system, offers management a quick snapshot of current and forecast sales activity. This report has been added as option 18 on the back-office *Sales Analysis* reports menu for office products dealers and as option 15 for automotive aftermarketers. The Sales Pipeline Report prompts for a starting activity date and lists five areas of pipeline activity for each account executive.

The first report section recaps orders and quotes received in the reporting time period. The second, third, fourth and fifth sections recap forecasted sales and projected activity for customers who are assigned to each corresponding pipeline category:

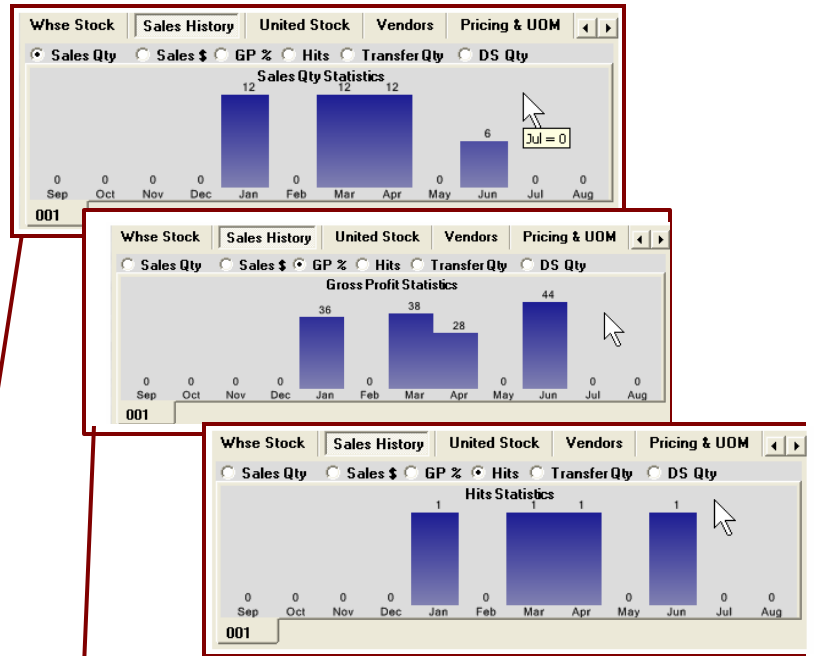| 100% certainty | 75% certainty | 50% certainty | 25% certainty |

Prospects or customer accounts that are assigned one of these four CRM profile icons on the *Customer Maintenance Main* form will print in the corresponding section of the pipeline report. If a sales associate has logged appointments or contact activity on the *Home Page Follow up* form for prospects or customers assigned to a pipeline category, the report will show a "Y" under the activity column. The Monthly Sales Target field and Customer or Prospect indicators on the *Customer Maintenance Main* are also listed on the report.

New **product activity graphs**

A rich new set of bar charts has been added to the *Customer Service > Product / Part* form to help you answer a variety of sales and part movement questions. With just a few quick clicks you can see 12 month sales and activity trends at a glance rather than hunting for this information and deducing trend patterns from numbers on a report.

Click on the Sales History button to bring forward the graph panel then choose the Sales Quantity, Sales Dollars, Gross Profit%, Hits (tally of orders), Transfers Quantity, or Drop Ship Quantity bar charts.

You can look at activity for other facilities which carry or sell the item by clicking on the lower tab for the location of choice. The form will default the display to the user's default facility or the customer's default shipping facility if a customer is active.

Click on the lower tab to see the set of activity graphs for each location that sells the product or part.

New **Find products sold to a customer; quick start a new order**

What's the best approach when a customer says, "I want the same gizmo I bought before"?   A customer history search is the answer!

 A new search filter has been added to the options on the *Product / Part* form. It provides a quick way to locate items previously sold to a customer then add them to a new order. Click on the Options button and select the Customer History search method. This field is enabled when you have an active customer selected.   Enter a word or words in the product description and search.   All items which match your search criteria and have been previously purchased are returned in the search results listview. Select an item line to see last purchase and part info and one click adds the item to a new order.

If you choose the Customer History search method and leave the search criteria blank, your search will return a list of all the items which have been previously ordered by the customer. You can stay on this form choosing parts and adding them to an order --- a quick way to replenish your customer's stock or quickly add a group of frequently ordered items to a new order on the fly!

Retail / Point-of-Sale

New **Quick click point-of-sale**

A new graphical point-of-sale application has been added to TSH Vision offering you ultra-fast invoice entry in retail point-of-sale and counter sale environments. The new *Retail / POS* tab and associated cash management tools provide a robust and complete store management system for single store locations, multi-store chains, and mixed distribution enterprises in both office products and auto aftermarket. Users assigned the **POS Representative** role will have access to this new tab.

The new Retail / POS tab is similar to the *Customer Service* tab offering an identical form set with a simplified and streamlined *Current Order* form. Quick-click mouse navigation, Hot-key keyboard-only navigation, and POS scanning are all supported. The number of keystrokes required to complete a transaction is minimal and can be reduced even further by choosing Retail order mode.

Function keys assigned to each form support optional keyboard-only navigation.

Depending on the roles a user is assigned, they may access only the Retail / POS tab, only the Customer Service tab, or both Retail / POS and Customer Service.

In Standard order mode as each line item is entered, focus moves to order quantity then Accept line and on to the next item.

In Retail entry mode, an item is keyed or scanned, quantity defaults to 1 (or per car quantity), the line is automatically added and focus is immediately back on the next item – the motion is controlled automatically by Vision.

Additional navigation features of this new tab include the ability to move between the set of forms using function keys. This offers users a great deal of flexibility in how users add items to an order – they can stay on the *Current Order* form or review detailed usage info and quickly add items from the product form or perform an automotive application search and quickly add parts from the catalog form. All of the forms work together and are accessible quickly with a single keystroke.

Order Source, Map Location, and Billing Code fields have been moved from the header area on the Retail / POS Current Order form to the hidden order details section of the form. A Default Order Source field has been added to the *Vision Configuration >System Configuration > Warehouse > Order Processing* form.

Returned items can be added to an invoice by keying in a negative quantity. When a negative amount is entered, additional fields are enabled to indicate the type of return, the reason for the return, and any associated warranty tag information.

Retail processing and cash drawer management

Users can achieve fastest throughput on the *Retail / POS* form by choosing the Retail Order Type on the *Current Order* form. In retail mode the entry or scan of an item is all that is required to add the item to the order. After scanning or keying the part or product ID, the line is automatically added to the order with a quantity of one (or the per car quantity in Automotive if it exists) and focus returns to prompt for the next item.

Retail mode is suitable for scanning or scanner-like item entry. Users can be setup to operate exclusively in retail mode by assigning the retail order access code in back office Vision operator maintenance. When this access code is assigned, the user will not have the option of changing order type.

Clicking on Accept (or Alt_A keyboard equivalent) automatically pops the payment form. Clicking on a line after entry will retrieve the line in maintenance mode, should the quantity need to be adjusted.

A new cash drawer control table stores drawer open/close sequences by users so you can mix and match cashier hardware in the same facility.

A payout function, which tracks amounts removed from the cash drawer, and cash drawer closing processes are available on the *Retail Store Orders* menu in back office Vision. At the end of day a drawer balancing report is printed, showing expected cash and totals by pay type for each drawer. Transactions accumulate on the drawer balancing report for any orders which have a retail order type.

You can give cashiers the ability to check out exceptional undefined items by creating a special item in *product/part* maintenance and setting its inventory update flag to "N". For example, you might setup a MISC999 item and train your cashiers to enter MISC999 if you want them to be able to check out a part which can not be found on the system. When the MISC999 item is keyed or scanned on the order form, the description field and price fields will open allowing the cashier to enter the

information. An audit record is created in the RETAIL_PROBLEMS file and a report recaps any of these problems encountered.

Customers can be setup as COD so that no amounts may go on account, or an order may be set as COD at the time of sale.   A COD customer who places a retail order will be required to fully pay for the merchandise at the time of sale.

A new feature of Vision's graphical retail system allows a backorder to be created on the retail order form. Backorders are allowed or disallowed by choosing your preference o n the *Vision Configuration > System Configuration > Warehouse > Order Processing* form.   If an item is backordered on a ticket along with sellable items, the customer has the option of paying for the backorder upfront or when the product is shipped. The backordered item will create a second invoice. If the customer is a COD customer, payment for all items is required upfront.

New **Loss prevention with scantags**

A new passive theft-deterrent process has been added to help retail stores prevent the loss of expensive items which are pulled from a locked case or behind a counter and then checked out at a remote cashier station. This process is particularly suited for stores which are arranged with a cashier station physically located some distance away from the counter or locked case and in situations where it is not practical for the counter associate to hand-carry the high-risk items to the cashier station.

Vision's workflow allows a sales ticket to be started on one station and then retrieved by another user at another station—an invoice can be started at the counter and then finished at the cashier station without printing a pick ticket or invoice document twice. Scantags are inexpensive bar-code stickers which can be printed on your printer on demand, stored at the counter, then adhered to the most theft-prone item coming from behind the counter. An order can be started at the counter as a by-product of part lookup, with virtually no incremental effort. The scantag label can be scanned or keyed onto the invoice, then rescanned as a token to retrieve the order at the cashier station.

In addition to being an invoice retrieval token, the scantag serves as a psychological theft-deterrent in that it alerts the customer that a loss prevention system is in place—alerting the customer that someone is paying attention is one of the simplest and most cost-effective loss prevention steps that can be taken.

Orders which are applied a scantag go on operator hold and remain visible and accessible by your cashier team in their home page follow up queues. The invoice can be retrieved at the cashier station by clicking on the held order in the queue, or by scanning or keying the scantag on the *current order* form.

Automotive Specific

Quick catalog keyboard navigation

The *Parts Catalog* form on the *Customer Service* and *Retail POS* tabs has been improved to support more rapid entry of year, make, and model with fewer key strokes and no requirement to use a pointing device. The form supports mouse / trackball point-and-click style navigation or keyboard hotkey navigation using the tab, arrow, and enter keys.

Make, model, and year entry fields are now "intellisense" enabled which puts the system to work for you suggesting the data to be entered from the list of possible choices in each drop-down category after only a few keystrokes have been entered. This is a very natural rapid entry process which is intuitive and comfortable for people who are not familiar with PC pointing devices or who are in locations where a pointing device is prohibitive. Users can either use a mouse or key in data according to their preference with no configuration or setup change. Users can begin to use the graphical catalog immediately without learning to use a mouse or memorizing new category codes.

New Wrenchead Nexpart web ordering

Nexpart is the leading e-commerce solution available in the automotive aftermarket. TSH Vision is now integrated with Wrenchead's Nexpart e-commerce system so you can offer real-time stock status visibility and 24 x 7 ordering capabilities to your customers over the web.

Using only a PC and an Internet connection, Nexpart users have continuous access to an online parts catalog and ordering service which is branded to reflect your particular business. Users can enter part numbers, use the online catalog with part pictures, check price and availability from multiple branches and order parts directly from you. Stock checks, pricing, and orders are submitted from Nexpart to TSH Vision in real time using Microsoft .NET web services. A pick ticket or invoice prints in your warehouse. Orders that trigger a credit or price margin hold are recorded on the TSH Vision Home page for follow up resolution by a designated web service user or team. This lets your customer service team maintain control over exceptional web orders without much overhead.

Contact your TSH account manager for pricing and to reserve a spot in the implementation schedule. A separate Wrenchead license and setup is required to use this interface.

New General Motors ADI program support

General Motors Service & Parts Operations (GM SPO) has launched a new procurement program to make GM accessories available to its dealers. The program allows ADI's (Accessory Distributor Installers) to sell and install accessories to GM dealers. Each ADI stocks GM accessories and sells them to the dealers within their territory.

Accessories become obsolete very rapidly and as a result GM has historically had a very rigid policy on the return of obsolete inventory. The ADI program helps GM better forecast accessory demand, and, as a result, helps GM distributors minimize their obsolete inventory expenses.

Within the ADI program data files are exchanged through a secure ftp site between the distributor and GM in order to automate inventory replenishment. The distributor provides an initial sales history and daily sales. GM sets reorder points based on this information and creates EDI Purchase Orders to its suppliers based on demand reported by its ADI distributors. These EDI purchase orders are picked up from the ftp site and loaded and activated on the distributor's system, rather than allowing TSH Vision to create suggested buy purchase orders. When an ADI distributor participates in the program

and allows GM to manage reorder points and initiate the PO's, GM will automatically accept returns of any obsolete parts procured as a result of their replenishment forecast.

The following transactions are exchanged between TSH Vision and GM in the STAR (Standards for Technology in Automotive Retail) format.

- Daily Sales & Inventory (Sent by ADI to GM)   (Available now)
- Daily Orders to suppliers (Sent by GM to ADI) (future)
- Daily Material Returns (Sent by GM to ADI)   (future)
- Daily Parts State (Sent by GM to ADI)   (future)

Configuration parameters to access the GM ftp document drop zone for the ADI file transfers are set on the *Vision Configuration >System Configuration > Miscellaneous Information > ADI fulfillment* form.   File drop and pickup times are dictated by GM and setup through Vision's batch process scheduler.   On demand file transmissions can be run ad hoc by clicking the send button on the ADI fulfillment form. GM accessories can be flagged for ADI fulfillment by checking the box Use GM ADI fulfillment on the *Part Maintenance > Main* form.

Office Products Specific

New D-force e-commerce integration

Office products dealers who offer their customers 24 x 7 web ordering through Independent Stationers' D-force e-commerce system may now automatically transmit their orders directly from D-force into TSH Vision.

D-force sends an XML e-mail to TSH vision as web orders are submitted. A special mailbox on the TSH Vision server receives the e-mail and extracts the order information, creating E-orders on the TSH Vision back office server according to a preset transfer schedule. Incoming orders pass through audit processes in TSH Vision to validate customer, product, units of measure, etc. and either create an order, or log errors into the E-order error queue. Tools to resolve any E-order issues are available on back office Vision menu 25.3. An additional new report has been added as option 25.3.16 to report pricing discrepancies between D-force and Vision.

Note that some setup is required to enable the D-force / TSH Vision interface. Contact The Systems House support for additional information if you are interested in activating the interface.

New United Stationers electronic manifests

Wholesaler United Stationers has implemented an electronic document mailbox system to support data exchange with their trading partners and ultimately help their customers improve accuracy and efficiency of operations.

TSH integrated with United's mailbox system and has created a new process to pick up electronic manifests ("E-manifests" or "E-docs") which are transmitted from the source United warehouse into the dealer's private mailbox prior to shipment.

As manifests are received from United and updated into TSH Vision, carton counts are updated on the release records, so the information can be used to match against the physical cartons audited during verification.

To implement this process, contact the United Manifest coordinator at (847) 699-5000 and advise them that you'd like to have an electronic mailbox establish for your company in order to receive electronic manifests. You will need to get login and password information, a server name and url, along with instructions for testing the mailbox once it is created. Enter these parameters in Vision on the United Manifest Parameter maintenance screen 24.1.1.14. The parameter maintenance screen also allows you to initiate a test of the mailbox.

Prior to running verification you will run the United EDI Carton Count update process on verification menu 9.7.1.2.9. This will poll the United mailbox and update the manifest information.

TPA buying group member enhancements

Phase II of the TriMega Purchasing Association (TPA) Information Technology plan has been implemented offering TriMega members the ability to fully automate central purchasing from their diverse existing systems into TriMega's central TSH Vision exchange system via X12 EDI. 850 purchase orders are transmitted from member systems to TPA's central server, consolidated and reformatted, then transmitted to the vendors. 810 invoices are transmitted back to the members. Approximately 100 vendor trading partners are supported in the central exchange.

A new remote order entry process has been created for TPA members who are not automated allowing them to log into the TPA system over the internet and place their orders directly.

Future order logic has been implemented to allow inbound member purchases dates to be sent to TPA ahead of the purchase date and not affect credit limits until release 5 days prior to requested ship date.

Inventory Management Improvements

Non-stock item returns improvements

The credit return process has been enhanced so that returns of non-stock items can be reflected in on-hand inventory and are available for resale or return to the vendor. Previously non-stock item returns were tracked via a report, but were not available for resale without manual action.

Two new fields have been added to the *Inventory Management > Warehouse* folder on the *Vision Configuration* tab. Check the Track Non-stock Inventory box when you want non-stock item returns

to be added back to sellable inventory. Enter a valid warehouse location in the Default Non-stock Location field to indicate which warehouse location will hold Non-stock inventory.

Delete inactive products or parts

Products or parts that have no quantity and have had no activity for 180 days can be deleted from either the global system level or from an individual warehouse or store location. This has been implemented as a two-step process because there are many related files in your system which needs to be properly updated at exactly the same time.

A new Mark for Deletion checkbox has been added to the *Product / Part Maintenance > Main* form. A new *Product Deletion* menu option has been added to the back office *Product Maintenance* menu. From this menu you can run a report of products pending deletion, process the pending deletions, print an error report, or print a history of previously deleted items.

Tools & Utilities

Default Invoice and PO print queues by user

Purchase order and invoice forms can be routed to a specific printer device by individual user, overriding the default invoice and purchase order print queues for a location.   Default invoice print queue and purchase order print queue fields have been added to the *Vision Configuration* tab *Security Maintenance > User Configuration* form.   Choose a queue from the list of existing queues to setup the override.

Miscellaneous Improvements

The following miscellaneous enhancements, modifications, and fixes are included in this release:

- To improve search results, all words in the extended product description are now automatically added to the product search cross reference (PROD_XREF). Standard delimiters and special characters, plus throw-away words are stripped off following the same logic as the Vision graphical product search. The product cross-references are automatically refreshed each week in your normal end-of-week process. #32985 #AD750

- Added a driver field to the Quick Scan In/Out confirmation used to record inventory movement between enterprise locations in the order activity log on the *Order Inquiry* form.   This field is not required. The field sequence changed to scan a driver / route one time, then scan multiple releases. The order activity on the *Order Inquiry* form is updated to let the CSR know when a particular order left the facility, and also who has that order. This is useful if the driver needs to be contacted by cell, etc. #AD236

- Modified both laser and plain paper Purchase Order print to print total weight and piece count to assist in logistics and accuracy. The piece count can be used in receiving to help highlight missing items. Weights can be helpful for reference and logistical planning when returning items to the vendor and meeting minimums. #AD237

- Customer PO field on the *Customer Service > Current Order* form has been moved to follow the Order Source field. This allows access to both fields without having to backup or use the mouse.   When a default Order Source is set for the warehouse in *warehouse maintenance* and a new order is created, cursor focus starts at the first line item field. When no default Order Source exists for a new order, cursor focus starts at the Order Source field. A tab from there moves focus to the Customer PO field, then to the first line item. #32992

- When contact information is updated on an open quote during order maintenance, any associated *OpenQuote* activities on home page activity display will also be updated. #AC930

- For a credit card customer, all default credit card information is preserved along with the order even when an order is saved with a zero amount. This ensures that credit card defaults are in place should order maintenance occur. #AD062

- The Summary Monthly Tax Register was modified to exclude non-summary fields including Customer#, Date, Transaction Type, Invoice# and Invoice Reference. This makes the summary tax register match the summary invoices, reducing the paper and removing unneeded details. #AD070

- Company and salesman security role restrictions removed from order inquiry. Now the *Order Inquiry* will not limit access to company and salesman information based on the user setup. This allows users to inquire on but not update orders that were created outside of their location when a location restriction has been assigned to the user in security maintenance. #AD617

- Lines can now be removed from a quote on the *Current Order* form. #AD618

- Customer templates are now excluded from the *SickCustomer* CRM event. #AD702

- Added a new error code "40" to Vendor Product Update from Spreadsheet for UPC Codes that are loaded as new but already on file. #AD723

- Enhanced error handling on home page for deleted CRM sources. #AD779

- On-demand statement printing for both GUI and Back Office no longer requires that the customer be flagged to receive statements on the *Customer Maintenance* form in order to print an on-demand statement. #AD782

- Modified "On-Demand" statement print to default customer to "Monthly Statements" (03) if no Statement Cycle code is specified in CUST_MAST #AD908

- Expanded the user Id field in Back Office *Salesman Maintenance* to 25 characters. This field is used to link a salesman to a Vision GUI user for CRM home page activity management. #AE069

- Current Order and Retail POS order processing will not force an item to list price if the item is on a contract for a price of zero. This allows you to maintain contract pricing outside of standard normal thresholds should you so choose. #28232

- Added facility code to print on the *Expected Deliveries Report*.   If a facility is sent from Vision in the EDI instructions, it will also print on this report. #30572

- The Credit Hold message box on the *Current Order* and *Retail POS* forms was modified to include more information including customer's Open A/R Balance, Oldest Invoice Date and Last Payment Date. Example: This Order is on Credit Hold! Order Balance - $8.14; A/R Balance - $159,880.62;   Credit Limit - $5,000; Open Balance - $145,701.99; Oldest Open Invoice Date – 10/27/2002; Last Date of Payment – 09/07/2004.   #31346

- A new report has been added to Vision which recaps customer special pricing. Price overrides that are setup in *Customer Maintenance* by Manufacturer / Pricing Class / Part Type are printed on this report. The *Customer Special Pricing* report is menu option 23.17 for Office Products dealers and menu 10.17 for Automotive distributors. #AC665

- Prohibit duplicate order lines from being created in Vision, when duplicate sequence numbers are sent from Thalerus Vendere e-commerce. #AC751

- End-of-Day processing will now use the Business Date instead of the Current Date when saving EOD process status information. Vision's EOD maintenance does not require the EOD Invoice Date to be unique. This is needed occasionally, for example at EOM or in preparation to a physical inventory, when an extra EOD needs to be run with the same invoice date. #AC872

- Allow the VSP user transmitted in the order save process to be in lower case in support of JumpTech. #AC887

- For Vendere e-commerce orders, the shipment information is now updated from the release record not the order record, so that if changes are made in verification, they are reflected in the shipment information posted back to the web. When a new line is added during verification, this information is also now sent to Vendere.   #AD440

- Modified *Current Order* form such that the Order Source remains the same when no default order source is setup on the warehouse. If the customer selects an order source and then selects a ship to, the customer's selection will not be erased. However, it will be reset to the default order source for the warehouse that is associated with the ship to, if a default order source exists. #AD512

- Corrected issue where "Override Price" checkbox on the *Current Order* form would become unchecked when switching vendors on a line item with a 'special' item on it. #AD539

- Correction to Payments amount on the order when a product or freight is added during verification. Allow amount to adjust up to the new total due. #AD682

- A new statement sequence field has been added to *Vision Configuration > Dealer Settings* form. This field allows A/R statement detail information to be sequenced in the distributors preferred order either by transaction date or by transaction code. #AD752

- Modified name on email correspondence in EDI transmissions for buying groups #AD773

- Changed *Customer History* form such that "REA" (cash reapplied) transaction types will only display when the filter is set to "AR" type or All transactions. #AD842

- Modified complete invoice process so that invoice prints during shipping process rather than at EOD. T#4995.

- *Inventory Receipts not Vouchered* report modified to now list the open amount in addition to vouchered amount. #AD914

- Modified Invoice e-mail so that payment information matches laser invoice print. #AD980

- The United EDI carton-count process has been modified to handle null data coming from United. #AE217.

- Added Service fields to Accounts Receivable tab A/R Detail inquiry form including: Contract, labor, Mileage, Travel and Surcharge. #AD491

- Added Spooler Name & Description to "Complete Invoice Xref Items over 7 days Old" report, "Stock Replenishment" pickers printed from Inventory Processor, and "Replenishment Action Report" from "Stock Replenishment On Demand" menu selection. #31494

- Create EOD error report for all update errors. #AD757

- Will call orders print on freight manifest route - Do not print 'Will-Call' Release on Freight Manifest Report. #AD952

- Fee Warehouse (Vendor Owned) Processing - Enhanced to allow specific sellable inventory warehouses to be auto verified when sourcing from a fee warehouse. Warehouses not in the auto verify warehouses list will not auto verify at order entry time but will instead print a picker at the fee warehouse and a PO at the ordering warehouse. After verifying the fee warehouse picker and receiving the associated ordering warehouse PO the Customer Invoice will print as usual. T#5029

- Order tax rate calculation revised to only tax Unit Cap$ for UM's that have unit price greater or equal to the Unit Cap amount. Tax applies Cap amount for each qty ordered. #AD987

- Enhance formatting of the Journal Entry Update Error Listing #AD161

- Correctly process Direct Ship lines when changing between ship to's with routes that are Direct Ship and non-Direct Ship #AD352

- Do not check for existence of AR records to link credit memos on Great Plains accounts #AD916

- Allow price hold to be removed if the line is a source purchase direct ship #AD445

- Correct display of the *Pricing > Pricing Configuration > Contract Maintenance* forms. Also correct the save to the user's preferences for Customer Contract Search text -- should save the last 10 search string's. #AD212

- Allow inventory return of a part even if the reason code was marked as damaged. Item will not be returned into inventory, but instead be put on a returns manifest record for the appropriate vendor. #28521

- Modify automatic load logic when doing a product search to ignore a dash after the manufacturer prefix when comparing the search text. #AD913

- Insure SPR update sets items that are flagged as discontinued if they have a refer-to number and the refer-to item is already on file. #AD311

- Ensure that the GL company on the GL journal entry detail screen is the same as the header company. #AD506

- Changed inquiry heading to read Buyer instead of Calc Lead on the lead time inquiry. #AD699

- Removed default printer assignment for Allocation Error report, will still be set to hold suppress (HS). #AD838

- Back-office Order Maintenance: Changed to restrict change of non-direct (ND) to direct ship (DS) when the PO has been created to ensure logistics integrity. #AD910

- Modified order entry so that a part can be sourced when it is temporary and discontinued, provided that it is also superseded. #AD915

- Added Purchase Stockouts from Wholesaler field to the *Customer Maintenance > Preferences* form. #33237

- Physical Inventory create tag process (both PBP and PBO) modified to sort tags by external part number. If Vision flavor is "AUTO", sort omits manufacturer code. #AD955

- Daily Totals Summary Report modified to include core sales and cost figures. These elements are deducted from sales amount and cost prior to calculating GP.   #AE085

- Modified inventory commit so the system evaluates whether or not the line unit-of-measure needs to be equal to the Purchase Order unit-of-measure when switching warehouses. If the line UM is not equal to the PO UM for a non-stock or special, or if it is a stock or temporary direct ship item, the quantity will be removed from the order. #AE125

- When linking a credit memo to an original release, set the direct ship indicator on the credit memo from the original release   #AE132

- Modified bulk verify to run after an order maintenance add line of a shippable line, when prior direct ship PO sourcing occurred   #AE198

- Modified CRM events Delivery 1 through 4 so that individual CRM follow-ups can be triggered by the PocketVision POD device. #AE199

- A new prompt has been added to Automotive Product Upload (from Excel) Main menu 11.3. 'Check part number match with and without special characters (Y/<N>)' #AE219

- Modification to complete ship override – When releasing a complete ship order, ALL line items will be placed on the new Release 001. #22484

- GL/AP Pre-Process backup - Instead of having end-of-month GL and AP dump to tape, they will now dump to a history file that will be the same filename, but with _BACKUP appended to the end of the name. #24909

- Store the wholesaler price plan in its own attribute - Save last wholesaler price plan that updated product cost. #AB627

- Added logic to excess transfers to check if the replenishment warehouse has a MIN.SELL greater than the quantity to be transferred. If so then no excess transfer will be created. An excess transfers will only be created in multiples of the MIN.SELL at the REPLN.WHSE. (#AC228, AB995)

- Modified Thalerus 00 code in E-Order processing: validate billing code match pattern (if applies) #AC272

- Modified the United cost update process to use the Product# format indicator contained in *Wholesaler Parameter* maintenance when generating new product records.   #AD351

- Modified front-end rounding logic to better match back-end to prevent rounding errors involving the calculation of sales tax that throws the credit card payment amount off balance. #AD476

- Modified phone number print format on laser invoices to accommodate a phone extension. #AD600

- Corrected issue that prevented validation error messages from being displayed when saving a product with an NIB Equivalent on the *Product Maintenance* form   #AD812

- Added a new Order Activity description line for vendor owned releases (Fee warehouse processing) when updated thru EOD Invoice Update. #AD820

- Modified EOD for furniture moving furniture deposits processing to run after invoice update but before EOD event 'AFTER_IU' to better accommodate user's custom invoice processing. #AD862, #AD593

- Added customer# to GUI AR Detail inquiry form (in addition to bread crumb trail)   #AD873

- Modified back-office detail release inquiry to display all part lines if a field service visit number is entered.   #AD956

- Added form width to company print queue maintenance and ensured SP-ASSIGN commands use this field as an argument if present. #AD974

- Modified the way NT user IDs are validated in Vision User Maintenance so that Vision User Maintenance can be successfully performed on Windows hosted system when the client is connected using the Vision Proxy.   #AE001

- Modified Office Products wholesaler stock check to use external product (PROD_MAST 21) as a default if no wholesaler family can be found. Strip product ID of all throw-away characters. #AE156

- Modified TSH tool, BP SMART.INDEX, to correctly display file indices found on NT/Windows systems #AE191

- Modified daily SPOOLER process to purge SPOOLER records regardless of whether the login name in the beginning of the SPOOL record key is upper case, lower case, or mixed case #AE207

- Corrected invoice reprint to show the deposit applied on a furniture order. #AE216

- The invoice process was modified to move the emailing of invoices to after the printing. The email process re-assigns the print queue, and was overriding any previous settings. #AE255

- Changed position of tabs on customer profile form to be Sales/ Pricing/ AR/ Reps/ Demographics #AE345

- Removed restriction that allowed only one warehouse to update price levels on the global product master file #AE388

- Automotive only: Added Main Menu item 3.2.16 Scrap Warehouse Inventory Valuation and Clear. Removed this from running automatically in EOM. #AE398

- Modified Daily Gross Profit Report: Print Operator Initial instead of operator code. Corrected Invoice number. #AE451

- When saving a product, removed the validation that a future price level date cannot be less than today. #AE502

- Enhanced spooler purge to improve performance. Revised dictionary items / use program call instead of multiple IF's in dictionary. #AE610

- The invoice print process generated during EOD and/or EOM has been modified to remove the Invoice Print Cold processes. #AD942

- Pass release serial number to COSTING routine in verification so that actual costs are used rather than average. #AD506

- Modified programs to update INV_AUDIT with low UM cost to conform to other INV_AUDIT updates. Reports changed to show Extended Cost as Low UM qty * Low UM cost. #AD769

- Added list price to list view in current order. #23986

- Allow route input of up to 6 characters when assigning Vendor Xmit Sequences to End-of-line backorders (OP menu 7.7.12 – Assign) #22934

- United, SPR, Daisytek updates - update the product class / type for existing products. #26336

- Now allow temporary items to be transferred from the replenishment warehouse if quantity available is less than zero. #31698

- Modified Customer History Update to move each new/updated transaction to the top of the time sequence so that the most recent transaction touched is displayed first. #AC655

- SIF file import in the furniture sub-system has been modified to check for and remove Char(25) control characters before creating the Order Detail record in Vision. #AD385

- On NT Office Products laser invoice print, if no invoice/shipping document is generated skip attempt to print packing list. This previously generated an "Item not on Hold" error message. #AD721

- Core value has been added to the Physical Inventory Valuation Reports. #AE242

- The United manifest load system was enabled to function on NT platforms for Office Products Dealers. #AE475