Version 6 Overview

Point of Sale

- Quote / Order search combined: When keying in a customer number, instead of the ‘Open Orders for This Customer’ prompt, counter-staff may be presented with any combination of a [A/O/P/Q/N] prompt, allowing them to quickly view any [O]pen Orders, [P]acking Slips or [Q]uotes. Other options include [A]ll or [N]one
- Option to Delete Quotes: Upon invoicing a quote now, counter staff will be asked if they wish to delete the quote.
- Dispatch with Delivery Runs: The delivery dispatch module now has the ability to assign customers to a delivery type, and a run. This allows you to keep cash sale transactions, and non-delivery customers out of the dispatching screen. Cleaning up the process for your dispatcher. Delivery type and Run maintenance is handled in the **4. Sales Desk > 7. Delivery Dispatch** menu, with delivery types determining whether an invoice is delivered or not, and a run helping group customers in geographic runs. Once delivery types and runs are set up, they are assigned to a customer in the customer maintenance screen.
  - We include 3 default delivery types [D]eliver, [P]ick-Up, and E[X]press. Both [D]eliver and E[X]press will be pushed to the delivery dispatch screen, which no delivery type or a [P]ick-Up delivery type will not.
  - After all maintenance is done, the counter-staff will notice a ‘Deliver’ option when finalizing an invoice. Typing the ‘D’ key will give them the option to change the default value. The dispatcher & drivers can also select a run number when displaying invoices, but do not have to.
  - JDispatch 'base' is now included for **all** Version 6 customers. Full documentation on JDispatch can be found **here**

- Inclusion of Pick Tickets in the transactions sent to the dispatching screen. Pick tickets will now be available for dispatch via the COUNTERPOINT dispatch module.
- Gift Receipt Option: If activated, the other new option when finalizing an invoice will be the option to print a gift receipt.
- Lost Sale Reason Codes: You can now add reason codes for when counter-staff log lost sales. Once you set up reason codes, when a lost sale is logged, the reasons show on screen for selection.
- Standard Comments and General Charges: Ability to automatically apply standard comments to invoices based on customer.
- Deposits: Utilizing the general charges module, you can accept deposits on items. These can be a pre-set percentage, a default value or a value keyed in at the time of sale.

- Change PO Number after invoice completed.
- Customer Notes to be printed on the invoice: You can select a customer note type to automatically print on the invoice
- Branch Stock Inquiry transfer create enhanced. From within the invoicing screen, when you hit the Shift/F4 function key to access the Branch Stock Inquiry, you can now also create stock transfers. These transfers can be for a single item at the time you enter the inquiry, or you can create and add to a running transfer for completion at a later time.
- Loyalty Rewards: Slight revamp to our loyalty rewards program.
- Add part to invoice using Customers Part Number: For customers who have an internal part numbering system, and order from you with those parts, there is now the ability to invoice them with those part numbers, which are tied to your real part number.
- Extra Invoice copies for customers controlled by transaction type: Extra invoice copies are now paramaterized by transaction type. So, for instance, you can have duplicate copies of invoices but not quotes.
- Email option for VIP Customers: Ability to email transactions to VIP customers.
- Control all pricing from Contracts/Specials screen: With the inclusion of both Price Level and Discount group as possible filters to add Contracts/Specials via **4. Sales Desk > 8. Administration > 2. Customer Pricing > 3. Contracts / Specials**, there is the possibility to migrate all pricing matrixes and discounts into the Specials, and do all pricing/discount maintenance from that one screen. There is a migration routine that must be run by AMS prior to adopting this method.
- Web order discounts: Allows the setup of a global discount (by branch) to be applied to web orders. This discount is then printed on the invoice. However, the printed web discount is **printed** in place of the customer's regular discount (Both discounts still apply, only one prints).
- Ability to disallow clerks from lowering prices. This feature is a new field in the clerk maintenance that, when activated, will prohibit the clerk in question from lowering the selling price from within the invoice. Clerks may change the price of an item to a higher selling price.

Customer Maintenance

- Delivery Type: This is where you need to add in the delivery type by customer. Delivery runs are mandatory to enable delivery of invoices for a customer. However, we will automatically enable any customer who has already had an invoice delivered under the current system.
- Delivery Run: This is where you **can** add the delivery run by customer. Delivery runs are an optional part.
- Core Billing: Used for customers setup to not pay core charges at time of purchase
- No Print of invoice for customers receiving Automatic Email: Ability to turn off the printing of invoices for customers set for automatic emails
- Automatic Email to multiple recipients: Additional emails can be added with the (A)utomatic type, and emails will be sent to all available addresses

- Customer change log: A running log of changes made to the customer record, available for inquiry at any time.

Customer Notes

- Customer Note type "P": A “P” type note has been added to the standard customer not types, and these notes will be printed on the invoice automatically.

Accounts Payable

- Cheque Void: Ability to void a cheque after creation

General Ledger

- Upload of Budget Values

Sales Analysis

- Extract files for selected Sales Analysis reports
- Hourly Sales extract: Hourly sales extract is a routine that will analyze your hourly sales for a given time-frame, export the information to an excel template and present you with raw detail and graphed information on your hourly sales.

Inventory

- Revised Maintenance screen: The product maintenance screen has been enhanced to allow for a number of new fields related to our ‘turns based’ purchasing module.
- Rename of Minimum to ROP Vendor: This does not include the entire new purchasing module, but is a precursor
- Return allowed flag – Defined whether a part is allowed to be returned to the supplier.
- Base Price and Base Core (Primarily for foreign currency): Addition of a ‘Base’ price and core. This is the price that was used to update your system pricing, before pricing parameters were added.
- Duty Rate
- Quantity per barcode as part of product maintenance: Addition of a quantity tied to a barcode, for use on items that come in and can be sold by a unit and/or case.
- Option to Chain Substitutes as part of product maintenance.

Purchasing

- Enhanced support for Foreign Currency

- Booking and Special PO Handling
- RF Gun based rush receiving
- Updated parameters for Critical Inventory report to include and report on items in a low inventory status based on minimum usage value

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