

# **BVEssentials Sales Manager Update Notes**

## **BVEssentials 5.x minimum requirements**

- **AMD Athlon 64 or Intel P4 CPU (Dual core preferred)**
- **Windows XP-SP3 with 1 GB RAM (Windows 7 with 2 GB RAM preferred)**
- **Monitor capable of 1024 X 768 resolution (higher is preferred)**

## **5.4.15 Released January 31, 2012**

### **Additions**

- add Remaining Quantity column to Production Order List
- add Refresh Prices button to Production Order List

### **Corrections**

- correctly highlight Sales Orders after Invoicing
- allow payment method to be changed after a sales Order has been Invoiced
- respect User Customer filters on auto complete lists
- realign fields on Sales history footer
- update Vendor Catalogue to current build level
- update International Price Import to current build level

## **5.4.14 Released January 23, 2012**

### **Additions**

- add option to try again during Email server timeout

### **Corrections**

- add Upload to Web setting to Edit Inventory and Multi Edit Inventory
- prompt to Save settings after changing Customer status
- allow a Customer ShipTo address to be selected as Shipping Customer on a Purchase Order
- correct date filter in Sales Order Filter
- correct crash on failed module license
- correctly remember Purchase Order List columns
- ensure that remaining deposit follows Back Order
- do not allow Purchase Order cost to automatically change unless Update Prices is clicked
- correct support for Ctrl – S to save a comment in a Sales Order
- re-add UPC search to Inventory List
- use secondary sort in Purchase Order List
- respect renamed Contact Label in Customer List
- automatically ship negative quantity product even if BOH is less than 0
- correct navigation error in Production Orders
- correct error when Status is not populated in a Production Order
- respect ShipTo Salesperson/Territory when filtering Customer List by SalesPerson and or Territory
- correct behavior causing Deposit Payment records of 0.00 creating when creating a BackOrder which caused the error "Payment does not equal Order total" when Invoicing
- correct some Deposit amounts showing in Red
- correct error when Requisitions has an item with no part number

## **5.4.13 Released January 13, 2012**

### **Corrections**

- improve Sales Order record locking for Deadlock errors

## **5.4.12 Released January 12, 2012**

### **Corrections**

- correct ASCII codec error in email comment
- correct error when synchronizing Requisitions and add a progress bar
- correctly respect permission settings for Cost and G/P in Sales History Invoice view

- correct error when creating a new Customer attachment

#### **5.4.11 Released January 10, 2012**

##### **Additions**

- add Weight, UPC and UOM Description columns to Inventory list
- add currency column to G/L account lookup

##### **Corrections**

- improve correction for C++ object error
- correctly post Quote fields when posting to Sales History
- correct Service Manager DDF installer
- correctly populate required quantity for non inventory items in Requisitions
- correct default order on Vendor lookup
- correct bad file descriptor error
- correctly retain Purchase Order number and Employee on a Sales Order the leaves a Back Order
- correctly commit Inventory during Transfer and using an alternate Unit of Measure
- correctly default Unit of Measure when creating an Inventory Transfer
- correct committed quantity column on Sales Order – Detailed Report
- refresh Inventory Adjustment list when changing divisions
- correctly display Cost and G/P on Sales History Invoice footer

#### **Production Manager**

##### **Corrections**

- corrected Production Order crash when closing BVEssentials while in a Production Order
- correctly release Production Order locks

#### **5.4.10 Released December 30, 2011**

##### **Corrections**

- correct C++ object error when closing Purchase Order list before Purchase Order screen
- correct post Sales Order Ship Date to Sales History Required Date field
- disable Processing a Quote from the Sales Order List, requires user to change to Sales Order first
- correct Sales Order forms to print ShipTo City, Province and Postal Code if all 4 address fields are filled
- do not allow a Purchase Order to be created for a Vendor that is On Hold
- do not force user to Tab off Requisition Required Quantity before clicking Process

#### **5.4.9 Released December 21, 2011**

##### **Corrections**

- correct another Null error with earlier versioned Purchase Orders
- add Retail price column to History Invoice screen
- correct error when edit Production Order user permission with the Production Order screen open
- autocomplete the payment amount when an Invoice value has increased and the same payment method is selected again
- correct crash on Inventory re-allocate with invalid inventory code in a Purchase Order

#### **5.4.8 Released December 19, 2011**

##### **Corrections**

- correct lookups crashing when seeking current record
- correct closing Purchase Orders with non-inventory items
- correct error when receiving a Purchase Order created by a previous version with non-inventory items
- correct multi company inventory list
- removed imbedded carriage returns when copying and pasting from other programs into BVEssentials text fields

#### **5.4.7 Released December 17, 2011**

##### **Corrections**

- correct Vendor sort and search on Inventory List
- respect user typed cost when creating Purchase Order from non-inventory items in requisition
- correct error in Edit Customer when customer has an invalid currency set
- copy all customer address information during customer copy

#### **5.4.6 Released December 15, 2011**

##### **Corrections**

- add ability to Requisition non-inventory items
- respect user restrictions for salesperson and territories in Edit Inventory, Sales Order tab
- allow the Receive date in the Purchase Order to be edited

#### **5.4.5 Released December 9, 2011**

##### **Corrections**

- trim extra characters when cutting and pasting in Edit Customer, Edit Vendor and Edit Inventory
- correct Crash when viewing a History Invoice with invalid unit of measure
- correct error on selecting a Salesperson in Tools, Users, General, Restrict user's customers by Salesperson
- correct POS closing when not desired after using –POS switch
- allow user to blank the Ship Date in the Sales Order
- correct occasional error when logging in after changing companies

#### **5.4.4 Released December 7, 2011**

##### **Additions**

- add reports to Inventory Code Change and Customer Code Change

##### **Corrections**

- removed highlighting from selected Sales Orders when Editing one Sales Order
- allow an Overpayment to be put On Account instead of Change
- correct Sales Order Sequence numbers removing imbedded zeros
- make Quotes properly respect Sales Order number Suffix setting
- remove access to Price Matrix, Copy Invoice and Credit Invoice if Sales Manager is not licensed
- remove ability to type in Sales Order extended price field if user does not have Edit Price permission
- correctly remember Inventory Lookup, Toolbar state
- correctly display Vendor Attachments

#### **5.4.3 Released December 3, 2011 (includes 5.3.9 changes)**

##### **Additions**

- add setting in Company, Sales Orders, Misc for Convert Quotes to Sales Order with next Order number and respect the setting when changing a Quote to a Sales Order
- allow Sales Person Name to be edited in Edit Sales Order and Edit Sales History Invoice
- allow an Invoice that gets stuck in a batch to be re Invoiced without turning on Batch mode
- show a Sync button in Requisitions whenever linked Purchase Orders are found that have been updated by something other than the BVEssentials Purchase Order module
- store Close Program preference on each user. Show checkbox option on Close Program screen.
- show created and modified, Date/Time/User on Sales Order, Sales History Invoice, Edit Customer and Edit Inventory status bars
- show created and modified, Date/Time/User on Production Order screen
- add Customer Status field and column in Customer List
- add menu item in Tools to display list of users currently logged in

##### **Corrections**

- allow User to copy / credit a Sales History Invoice even if they don't have Edit Cost permission
- correct error screens not popping up during Invoice stage
- do not discount Levies during Post

- correctly populate a negative payment amount in payment method screen for a credit note
- make Refresh Prices in Purchase Orders refresh all Cost prices
- correct the highlighted Sales Orders changing the selection if one of the Sales Orders is edited
- improve speed on Invoice process when many Price Matrix records are being updated
- improve Cash payment method selection in POS Payment Method screen
- improve licensing speed and reliability
- correct missing information in BVEssentials data dictionary. Include with DDFs in same folder.
- correctly ask to Save Changes when closing Sales Order screen after changing Phase
- improve column sorting when records do not have default values
- correct crash when opening BVEssentials with BV Control file in use
- correct next Invoice number and Next Sales Order number display in Tools, Company Setup, Sequence numbers
- do not display Customer screen again after changing from POS to Sales Order and back with F6 key
- allow a Purchase Order to be taken off Hold and Issued without closing the screen
- do not ask to save changes in Production Order screen if there have been no changes made

## **5.4.2 Released November 15, 2011**

### **Corrections**

- correct occasional error reading Windows Setting for Report Windows screen size

## **5.4.1 Not Released**

### **Additions**

- add Requisition List Report
- add Order type column to Edit Inventory, Sales Order tab and Edit Customer, Sales Order tab

### **Corrections**

- correct blank Invoices being emailed
- add User setting for Confirm Application Exit
- do not ask for Credit Override on Credit Note

## **5.4.0 Released November 10, 2011**

### **Additions**

- separate Order Status and Order Type. Add Order Types, Work Order and RMA
- add Update Prices button to Purchase Order list to update several selected POs at once
- add Update Prices button to Sales Order list to update several selected Orders at once
- add ability to print Purchase Order number on Inventory Labels
- add support for Fax/Cell mask in contact phone numbers
- add customer colour to Sales Order List
- add support for turning a Quote into a Sales Order and renumbering it with a Sales Order number
- add ability to set Order number by type in Tools, Company, Sequence Numbers
- add ability to Un-issue a Purchase Order if received quantity is 0
- do not allow a customer set as No Credit to receive a credit On Account. Limited credit of 0 is OK.
- do not allow Change when an Invoice is paid with Accounts Receivable
- display Sales Date in Edit Inventory, Lot number tab
- add optional Ship button after a Sales Order has been Processed
- add ability to set colours for each Order type in Tools, Company, Sequence Numbers
- add Created time / Modified time to Sales Orders and Purchase Orders
- add User setting for Default Order type
- display number of reports being emailed

### **Corrections**

- correct adding a Customer ShipTo on a Purchase Order
- change Email subject and attachment to report Invoice # when emailed from Invoice button
- correct Negative Invoice posting to Change instead of On Account
- correct Invoice posting to a foreign G/L account when no base account exists

- detect earlier that BVEssentials is in use when trying to install a new version
- correct error when trying to upload an empty dump file
- correctly support copy Sales Order number and Production Order number with right click
- respect user permission setting for Show Inventory cost in Production Order
- correct invalid tax label in Purchase Order screen
- correct error when creating a Requisition from an Invalid Production Order
- resize customer address and phone fields in OS screen
- correct all/none selection in Tools, User, Reports
- correctly show Non Physical type on Inventory List
- correct crash when email server times out
- correctly remember and use Show Sales Order Total by Order Qty when Editing a Sales Order
- correctly remember if POS was full screen when last closed
- add ShipTo ID to Sales History

### **Custom Report Changes!**

**Note – All custom Quote report formulas will need to be changed to replace {BVE\_ORDER.ORD\_STATUS} = "Q" to {BVE\_Order.Type} = "Q"**

*The following formulas have been changed in the stock Quote reports*

*@Discount*

*@Extended Price*

*@Form Label*

*@LevyAmount*

*@Shipping*

*@SubTotal*

*@Total*

*@TotalTax1*

*@TotalTax2*

*Details D Conditional Formatting – Suppress*

*Details E Conditional Formatting – Suppress*

### **Production Manager**

#### **Additions**

- support Kits as Components in Production Orders
- add Orange colour to items without required Balance on Hand but product already On Order
- add Lead Time to Production Orders
- add button to Reload BOM in Production Orders

#### **Corrections**

- correctly save BOM notes when Store BOM is clicked in a Production Order

### **5.3.9 Released November 25, 2011**

#### **Corrections**

- correct error on next POS entry after taking a deposit on previous POS entry
- correct Invoice being populated in the Sales Order when pressing F6 in POS
- correct Copy Inventory populating UOM value in Location field
- correct Duplicate Order number error on Saving a Sales Order Communication
- correct occasional Save verify message after clicking Save in Edit Inventory

### **5.3.8 Released November 18, 2011**

#### **Corrections**

- improve handling of sales to USD customers

### **5.3.7 Released November 17, 2011**

#### **Corrections**

- improve speed on Customer list
- correct missing ShipToID filter in Edit Customer, Sales History tab

### **5.3.6 Released November 9, 2011**

#### **Corrections**

- correct unwanted Sales Order line refresh prices on Quantity breaks
- improve speed when adding lines on a large Sales Order
- correct Fill Orders error
- correct Change being posted to Accounts Receivable in Payment method screen
- correctly copy History Invoice ShipTo address during copying and credit
- improve record locking during the posting of a large Sales Order batch
- reduce minimum screen height on Edit Inventory screen
- correct Edit Inventory, Sales Order tab report printing
- remember graphics screen size in POS

### **5.3.5 Released October 31, 2011**

#### **Additions**

- add ability to remove columns from a Production Order
- change BusinessVision DDFs to 2011, update Readme.txt file
- support multiple email addresses in an address field if separated by a “;”
- add ability to sort columns in Phase lookup
- report part number that is trying for a fractional quantity but has Fractional Quantity not allowed in a Production Order
- check email settings before trying to send to avoid crash when trying to email with invalid SMTP setup
- add Data Dictionary to DDF folder for Report Development
- add BOH, Committed, Back Order, Available and On Order columns to Inventory Component screen

#### **Corrections**

- correct index error toggling subassemblies
- correct occasional index error opening a Production Order
- remove dependency on Sales Tax table from Purchase Order reports
- correct Sales Order re-pricing items from Price Matrix when no cumulative is set on item
- add more Unicode support to Production Orders
- allow a Production Order to load a Bill of Material with items that have been set at 100% scrap and report offending items
- correct Production Order reports where database had been changed
- correct items on a Booking Order causing backordered quantity
- correct field label for user defined field in Edit Customer, General tab
- correct field label for Vendor Order No in Purchase Order screen
- allow Required Date to be blank in a Purchase Order
- correct Salesperson field inverting typed characters in Sales History
- allow SMTP email settings to be removed from a user
- increase email server timeout limit to 30 seconds
- improve reliability on adding a record to a Production Order
- correct address display in Sales History Invoice screen
- correctly remember Printer setting for reports

### **5.3.4 Release October 17, 2011**

#### **Corrections**

- correct Invoice Reprint report not require Tax table
- correct lookups not finding the correct record on some occasions when Hide Hold is turned on
- correct error when selling an item that is On Hold and has an accessory that is a kit
- correct the option to set percentage on a levy
- correct Quotes causing items to backorder
- correct User Selectable Kit not popping on a Kit where a component did not have a price record

- add report to Edit Vendor, Purchase History tab
- improve error reporting when importing a Sales Order.csv file with poor data
- highlight Sales Order Description field when tabbing from part number
- correct error when trying to open a History PO for a Manufactured item
- correct error in Edit Inventory when the user does not have permission set to add Unit of Measure
- correct Edit of Sales Department in Multi Inventory Edit screen
- correct ShipTo communication popping many times in a Sales Order
- populate Sales Order Header Type field for status that should be types

### **5.3.3 Release September 30, 2011**

#### **Corrections**

- correct Inventory Sales History Report to respect the selected tab
- correct Inventory Purchase History to respect the selected tab
- allow 6 character warehouse on Sales Order line
- pop Enhanced Kit screen when an item is sold that has a Kit as an accessory and User Selectable Kitting is active
- correct item selection in Fill Orders tab
- correct error on Inventory Edit when no Unit of Measure record exists
- correct ability to open multiple new Sales Orders at one time
- correct occasional errors editing/adding items/comments to Sales Order lines
- correct deleting one line from a kit that has been put on a Sales Order line
- make A/R Payment module apply credit on account in reverse date order

### **5.3.2 Release September 25, 2011**

#### **Corrections**

- do not check for MSM API services on startup
- correct Initial Phase record not being saved
- support warehouse codes with more than 2 characters on Sales Order line
- correct Cost and G/P display in Price Matrix
- reorganize Sales History and Purchase screen filters area
- correct crash when opening a Sales Order with an Invalid Phase
- support Sort by Vendor in Requisition screen
- remember last sort order in Requisition screen

### **Production Manager**

#### **Corrections**

- correct error when toggling sub-assemblies in a Production Order
- correct Vendor name display on Production Orders
- correct Invalid Category error when updating Bill of Materials in a Production Order

### **5.3.1 Release September 16, 2011**

#### **Corrections**

- revert FIFO changes so that Average cost is used when no FIFO records available, eg negative BOH
- correct title bar information for Inventory and Purchase History
- allow Requisition columns to be repositioned

### **5.3 Release September 15, 2011**

#### **Separate Update Notes for BVEssentials Sales Manager and BVEssentials Service Manager**

#### **Additions**

- add ability to put Sales Orders through the Phase process
- add carrier and reference fields to Phase Details screen
- warn but allow a Sales Order to be Saved without a customer PO number even if the customer is set to "Require PO". Do not allow it to be Processed or Invoiced without a PO

- remember Credit Approval on a Sales Order, do not prompt again when Invoicing unless the Order value has increased
- add smtp email engine so that a MAPI email client like Outlook or Windows Live is no longer required
- add Created and Modified User/Date/Time information to Sales Order, Info tab
- allow Re-Open button on Sales Order List to re-open Processed Sales Orders
- add Customer Status for Active, InActive, & Prospect
- Inventory Re-Allocate now also resets Lot Number temp allocations
- display Price Reason colour on Price Matrix list
- add Order Confirmation option to Communications
- add ability to type and locate a customer code by phone number in Sales Order and POS
- add setting to Company Setup, Sales Order, Messages, Display warning when a duplicate Purchase Order number is used
- add a Dock notification at the top of the Sales Order screen when an Order has been closed with the option to Re-Open
- add Copy PO to Purchase Order List
- remember the Sort Order in the Serial/Lot screen dependent on if user is adding or removing quantity eg, Consume Serial / Lot numbers can be descending, Receive can be ascending or date order
- add Details view to Edit Vendor, Purchase Orders
- add Address Communication button to Customer list to jump to highlighted customer's communication notes
- remove dependency of Sales\_Tax on all Sales Order reports and use the parameter TaxShortNameList

### **Corrections**

- correct A/R Payments posting to A/R Transaction file with all details intact
- Correct the Issue / Un-issue button text after un-issuing a Purchase Order
- enhance DDFs for 3<sup>rd</sup> Party Developers ODBC connections
- print Inventory labels only for selected items in the Purchase History Details screen
- no longer allow and Invoice to post an item into negative BOH if FIFO is active

### **Production Manager**

#### **Additions**

- add support to retrieve and Update BOM revision number in Production Order

#### **Database Changes!**

**Note – All custom reports using any of these tables will need to have a “database verify” performed in Crystal Reports.**

**\*BVE\_Order**

**\*BVE\_Phase\_Dtl**

**\*BVE\_Inventory**

**\*The BusinessVision Sales\_Tax table has changed in BV 7.5 (2011) so it is not usable in BVEssentials 5.3 Reports. Change to reports using this table to use a parameter called TaxShortNameList as per BVEssentials Sales Order reports.**

### **5.2.7 Release September 16, 2011**

#### **Additions**

- add deadlock prevention code to Production Orders

#### **Corrections**

- correct filling in make and model when adding equipment
- properly display History Invoice from Equipment Sales History

### **5.2.6 Release September 2, 2011**

#### **Corrections**

- re-add Company setting, Production Orders, enable scrap and yield

### **5.2.5 Release August 29, 2011**

#### **Corrections**

- correct error when scrolling to right inside a Production Order
- correct error when unable to locate a missing Requisition number from within a Production Order
- correct Edit Inventory screen too large to fit on a 1024 X 768 monitor
- correct unable to delete a Requisition after a Production Order has been deleted
- correct problem when scrolling down too far on Vendor auto complete list

### **5.2.4 Release August 23, 2011**

#### **Additions**

- add Vendor Code field to Price Matrix for Contract Price users
- add Purchase Order number created by applicable Requisition onto Production Order line
- add user permission setting for Process Requisition
- show Manufactured Part Number, Description and Quantity on Title bar of Production Order

#### **Corrections**

- correct error adding more part numbers to Inventory Label list
- correct Serial/Lot numbers appearing on Inventory Labels during reprint
- correct error when opening Requisition List that contains an invalid part number (has been deleted)
- correct user permission setting for Add Requisition

### **5.2.3 Release August 17, 2011**

#### **Additions**

- add menu item Help, Show DDF location to show user the DDFs needed for Crystal Reports development
- add serial / lot numbers to Inventory Label table
- add serial / lot number to Inventory Label Reports (hidden)
- add ability to auto fill comments from stored records on Sales Order line

#### **Corrections**

- more improvements on Sales Order List speed
- correctly display History PO when double clicking a record in Edit Inventory, Receipts tab
- respect user permission for Change component cost in Production Order
- allow user to change G/L accounts on Foreign currency Sales Order
- correct error when clicking Add button in Customer Mail merge
- correct window position being opened for the first time above the top of the screen
- improve speed on Items on Sales Order report
- correctly refresh price when the Unit of Measure is changed on the Order line
- add Vendor Contract Cost field to Price Matrix screen (used only by Contract Price Module)
- correctly refresh Price on Order line when:
  - Serial / Lot number is selected
  - Price Matrix record is set to Margin
  - Use serial cost is turned on in Company setup

### **5.2.2 Release August 5, 2011**

#### **Corrections**

- refresh price on Sales Order line when the Unit of Measure changes
- correct error when opening a Purchase Order when Requisition record does not exist
- allow 80 character description in Inventory Multi Edit
- correctly display Booking Order Status on Sales Order List

### **5.2.1 Release August 2, 2011**

#### **Additions**

- add Standard Cost column to Inventory List
- add Company setting for "Default Salesperson with Logon ID if customer salesperson is blank", respect during Add Sales Order
- add columns for Invoice Method and Statement Method to Customer List
- add column for Invoice Method to Sales Order List
- put focus on Email button when printing reports from the Invoice button and the customer is set to Email Invoice

### **Corrections**

- remember Purchase Order screen size and position
- add communication sub-reports (hidden) to Purchase Order Plain Paper
- do not allow Requisitions to create a Production Order without a Production Manager license
- improved search process for new reports added
- added more checks against deadlock error while posting
- copy all quantity break records when copying a price matrix record
- improve Sales Order List refresh time
- respect Purchase History user permissions, add to Tools, Users screen
- correct the addition of a none existent or non-inventory item from Edit Sales Order, Sales History tab
- respect Assigned To user when popping communication alerts
- improve screen layout in Add Communication
- improve resize on Price Matrix screen
- correctly copy Price Override flag when copying a Price Matrix record
- remember Requisition screen size and position
- correct Save prompt after Receiving a Purchase Order
- correct Vendor lookup and auto complete on Production Order
- improve tab after Part number on adding a new component line
- reorganize Inventory toolbar

## **5.2.0 Release July 25, 2011**

### **Additions**

- add Requisition system to Sales Order and Production Orders
- add usage quantity column to Edit Inventory, Components tab
- add Lot Number Auto Allocate (consume) functionality to Sales Orders and Production Orders
- add ability to view jpeg, gif, tiff and svg image files in Edit Inventory, Image tab
- add Purchase History report that respects the same selected settings as the screen
- add the ability to display attachments that are stored as a URL
- add text to less common tool bar buttons
- add warning dialogue when closing BVEssentials, with an always close button
- copy Sales Order Detail Reference number to Purchase Order during Requisition Process
- add ability to control built Production Order numbers independent of Purchase Order numbers
- add Quantity columns to Edit Inventory, Sales Order tab
- add Memo field to Purchase Order lines
- move Production Orders to a main menu item
- add average cost column to Inventory Adjustments screen
- add Production Orders Permissions settings to Tools, User
- add automatic recalculate customer balance function in Edit Customer, Billing tab
- add Price Selector drop down in POS, F4 screen
- add Warehouse Transfer permission setting to Tools, User, Inventory and respect it
- add Modify On Hold flag permission setting to Tools, User, Customer and respect it
- add details to Edit Inventory, Sales Order tab
- add ability to use Copy/Paste from a Sales History Invoice comment
- add Date/Time audit fields to Production Order tables
- add ability to record and display Serial Number Vendor returns in Edit Inventory, Serial Numbers tab
- add ability to edit default Freight and Duty percent to Multi Inventory Edit
- add ability to select multiple Purchase Orders in Purchase History and report on them
- add the ability to Add and Edit Ship Via records from lookup

- add Reference number to Sales Order detail line
- add ability to change the date with +/- keys when in a date field
- copy Required Date from Sales Order / Production Order to Purchase Order during Process Requisition
- add ability to have different reports respected on different Edit Inventory tabs
- add Customer terms column to Customer List

### **Corrections**

- correct error when double clicking on conversion factor field on Assembled item in Production Manager
- correctly display Edit Inventory, Component tab only on Manufactured and Kitted items
- allow the editing of Lot Number in a Production Order even if they were Auto Allocated
- pop Lot number dialogue on part numbers not set to Auto Allocate when changing the status on a Production Order
- correct error when user without permissions tried to Edit Production Order
- correct the BackOrder from Booking Order changing to Open when original is posted in non batch mode
- correct re-pricing the order when Margin by Serial/Lot Cost is in use
- correct Customer Code Change to change records in Tax Matrix, Requisitions and CCE.
- correct Part Code Change to change records in Tax Matrix, Vendor Catalogue and Requisitions
- do not allow Update to BOM when duplicate part numbers exist in the Production Order
- correct Deleted Orders report to respect new FOB field size
- correct enforcing Read only Processed Orders
- support French characters (and other extended characters) in email address
- support full character set in email text section
- correct copy on Part number field in Sales Orders and Production Orders
- remove Process button, Ship Qty and B/O columns from Quote screen
- correctly save the tray number in Print Defaults
- correctly display long warehouse field in Price Matrix
- remove the ability to remove the main toolbar from Lists
- correct sorts in Inventory Adjustment screen

### **5.1.8 Not Released (includes all 5.0.8 changes)**

#### **Corrections**

- correct crash opening a Sales Order with a Comment that contain many TAB characters
- add Yield column to top line on Production Order
- correctly adjust Cost of Goods when performing an Inventory Receive or Transfer into a warehouse/part number that has a negative BOH
- correct Crash when deleting a Quote with a long FOB value

#### **Database Changes!**

**Note – *BVE\_Order\_Del.ord\_fob had the field width changed***

### **5.1.7 Release June 27, 2011 (includes all 5.0.7 changes)**

#### **Corrections**

- correct crash during batch post when a duplicate serial number exists
- correct crash on too many records in Price Matrix Quantity Breaks
- correct Purchase Order emailing multiple attachments
- improve Inventory Adjustment reports to properly display up to 5 decimals as needed
- correct crash when opening Sales Orders with Comments that contain multiple <tab> characters
- correct error on Change Location
- remember column widths in Inventory, Components tab
- correct initial focus in Enhance Kit screen to be on Okay button
- create extra posting entry to Cost of Sales when receiving Inventory on a Purchase Order and the BOH is negative
- correct press <enter> on a line on Purchase Order List to open it

### **5.1.6 Release June 17, 2011**

## **Corrections**

- correct zeroing default duty and freight when adjusting or transferring Inventory

## **5.1.5 Release June 15, 2011 (includes all 5.0.5 changes)**

### **Additions**

- add Edit Inventory Components tab to Kitted items

### **Corrections**

- correct "ascii codec" error when Inventory has descriptions using extended character set
- do not allow a database update to complete if a corrupt database file is detected
- correct "NonType" error in Edit Inventory
- correct quantity in Inventory Adjustments to allow 5 decimal places
- do not populate Components tab in Edit Inventory until selected

## **5.1.4 Release May 28, 2011 (includes 5.0.4 changes)**

### **Corrections**

- improve speed on Unit Sales by Period Report
- do not post Surcharges on an Invoice if G/L account has not been set up correctly in Company Setup. Validate G/L account in Company Setup, Sales Orders, Surcharges
- remember User selectable kit screen size and position
- do not pop Inventory Communications if it has been marked as completed

## **5.1.3 Internal Release May 21, 2011**

### **Corrections**

- re-add components tab to Edit Inventory
- correct selection criteria to make Communications auto launch for the user that has records to see today
- correct Communications popping up on a Sales Order or Purchase Order when Completed date is past
- remove access to Create Purchase Order button when user does not have permission in Users, Purchase Orders, Auto Generate Purchases

## **5.1.0 & 5.1.1 & 5.1.2 Internal Release April 25, 2011**

### **Database Changes!**

**Note – All custom reports using any of these tables will need to have a "database verify" performed in Crystal Reports.**

**\*BVE\_Batch**

**\*BVE\_Bombuild**

**\*BVE\_Bombuild\_dtl**

**\*BVE\_Inv\_Adj**

**\*BVE\_Inv\_Adj\_Dtl**

**\*BVE\_Inventory**

**\*BVE\_Levy**

**\*BVE\_Inv\_Adj**

**\*BVE\_Order**

**\*BVE\_Order\_Del**

**\*BVE\_Order\_Dtl**

**\*BVE\_Order\_Pmt**

**\*BVE\_Order**

**\*BVE\_Price\_Matrix**

**\*BVE\_Promo\_Code**

**\*BVE\_Purchase\_Order**

**\*BVE\_Purchase\_Order\_D**

**\*BVE\_SalesHist\_Detail**

**\*BVE\_SalesHist\_Header**

**\*BVE\_Upc**

### **New Tables**

- \*BVE\_Phase**
- \*BVE\_Phase\_Dtl**
- \*BVE\_Requisition**
- \*BVE\_User\_Type**

### **Additions**

- add Production Order Phase tracking support
- add Reports for Production Order Phases
- convert previous Phase values (numbered 1 – 9) to new Phases
- DDF Files for Crystal Report Development are now installed to  
C:\ProgramData\BVEssentials on Windows Vista and Windows 7.  
C:\Documents and Settings\All Users\Application Data\BVEssentials\DDF on Windows XP
- add Reserved fields to BVEssentials database tables for use in future upgrades
- add Vendor field to Production Order detail line. Populate with default vendor but allow it to be changed
- add current Phase field to Production Order header

### **Corrections**

- allow date fields in Communications to be blanked out
- improve speed on Pending Inventory Adjustments and Post Inventory Adjustments Reports
- force ShipToIDs to be uppercase only

## **5.0.8 Release July 9, 2011**

### **Corrections**

- correctly support non inventory items on Purchase Order
- correctly support Unicode text in email message body
- expand Order comment section as needed for large comments
- correct locating a ShipTo address record with lowercase ShipToID
- correct Edit capability in Production Order components

## **5.0.7 Release June 27, 2011**

### **Corrections**

- correct error on Lock Windows Settings
- add UOM column in Inventory Component tab and Purchase History tab
- add UOM column in Vendor Purchase History tab
- correct Serial number dialog not popping on subsequent builds after the initial build
- correct Serial numbers not being allocated properly on subsequent builds
- correct error when opening a History PO created by Production Orders with serial numbers
- correct user name error when licensing a new Version 5.x installation
- update ContractPrice module for 5.x
- correct string index error in communications
- do not allow ability to drag toolbars off the screen
- correct subject line on emails containing more than one attachment

## **5.0.6 Release June 17, 2011**

### **Corrections**

- correct zeroing default duty and freight when adjusting or transferring Inventory

## **5.0.5 Release June 15, 2011**

### **Additions**

- add warning in Inventory Part Code change that other users should be out of BVEssentials
- add BV setting to Company Setup to prompt for Serialized items upon Receipt
- specify which part number has an invalid code when transferring to another warehouse where the part number needs to be created

- add Navigation buttons to Sales Orders screen when in Edit Customer and Edit Inventory, Sales Order tabs
- add Toolbar to Price Matrix screen

### **Corrections**

- correct isMinimized error and crash when trying to open a Sales Order that has been minimized
- correct BVEssentials performing math in Sales Order Unit price field when typing a number that selects another price level
- correct ability to type first letter of Payment Method in Payment screen
- correct POS line display after pressing F6 to go to Sales Order and F6 to come back to POS
- correct multiple record selection in Price Matrix
- correct crash on Price Matrix Update button (now Edit button)
- allow a Production Order to be edited even if no BOM records exist for the Top Level Item
- correctly pop the Serial/Lot number screen when receiving on a PO
- correct Job Headers from having an Ordered and Shipped quantity after copying a Sales Order
- correct Deposits transfer to BackOrders when set to "Always Post" and Sales Orders set to use suffix
- correct load address records when creating a Purchase Order
- correct Saving of setting for Sales Orders, Allow overcommitting Inventory
- correct Yellow colour on Customer Notes on Sales Order Header
- correct Pending Inventory Adjustment Report being blank
- do not load or save Freight and Duty defaults on Inventory Adjustment or Inventory Transfer
- correct freeze on User Selectable Kit screen
- correct crash when no company is selected during login process
- correct crash on Historical Purchase Order print with phone number formatting
- hide Cost columns in Inventory Statistics when users do not have permission to see Inventory Cost
- do not show comment screen when double clicking on a Job Header
- correctly store flags in User Report Permissions
- improve toolbar and cleanup in Vendor Price screen
- correct Save and Save & Close behavior in Edit Vendor, Inventory and Customer for consistency
- remove extra Company Dashboard Report
- populate Receive Number in Inventory Adjustments when Save is clicked
- create error when printing Purchase History Report without a Vendor Code
- limit Customer Type to 10 characters in Price Matrix
- correctly copy Job Header from History Invoice
- correctly show records in Price Matrix on initial screen opening
- filter out Control Accounts in G/L lookup on the Sales Order Detail line
- respect Customer Credit settings when batching Sales Orders that have not been Invoiced
- respect User Permissions for POS

## **5.0.4 Release May 25, 2011**

### **Additions**

- add default Transfer Unit of Measure in Inventory Transfer screen

### **Corrections**

- correct Serial / Lot selection to Build Process in Production Orders
- correct Reports button in Edit Inventory. Lot tab
- only allow Payables account selection in Edit Vendor, Billing tab
- correct Sales Order auto check prices on every line
- clarify Print / Pop sections in Communications
- correct crash when the Posted Invoice report is selected to print on a batched Invoice

## **5.0.3 Release May 12, 2011**

### **Additions**

- add email process to Process button

#### **Corrections**

- do not allow freight percentage field to be null in a Purchase Order causing an error
- do not duplicate tax structure when copy a Sales History Invoice to an Order. Use customer's new tax settings
- do not allow a Levy code to be deleted if it is in use on a Sales Order or been set on an Inventory item
- change the word "Change" to "Transfer" on Payment method screen when deposit is being transferred to the Back Order
- remove serial number when Inventory Adjustment, Purchase Order or Sales Order Return is deleted and never received
- respect only lines highlighted when printing Inventory Labels from Purchase History
- allow Production Order to be created even if Warehouse Address is missing
- respect "view Purchase History" user permission setting in Edit Inventory
- allow Customer or Vendor record to open even if no Address record exists

### **5.0.2 Internal Release May 3, 2011**

#### **Corrections**

- pop error message when opening a Production Order where the Finished Goods part number is no longer set as Manufactured

### **5.0.1 Internal Release April 27, 2011**

#### **Corrections**

- leave taxes blank when you add a new customer in US version
- allow Vendor name to be 60 characters long
- correctly delete all address records when deleting a customer or vendor master record
- correct tooltips in Company Setup
- correct error when no warehouse address exists building a Production Order
- support all Windows Date formats in Login screen

### **5.0.0 Internal Release February 23, 2011**

#### **Additions**

- re-factor Production Orders to support new User Interface and in grid editing
- add Navigation to Production Orders
- improve Add to Order feature in Edit Order Sales History tab
- add HTML view to POS left screen
- Change Main Icon text labels to Sales, Production, Purchase, Vendor, and Adjust Inventory
- implement Company List for sign on screen into registry so that it is now User specific.
- removed Auto Launch feature and have BVEssentials remember the top window that was open when BVEssentials was last closed. Communications will pop on top, automatically, if there are records for the current user, applicable for today
- improve saving of Windows Size and Position
- add Pack Size to Inventory List
- move all Save and Print buttons from the bottom of dialogs to the toolbar of the dialog
- change Sales History icon
- change F4 Edit Item icon in POS
- remember last database used and userID at logon
- remove Batching option "Ask when Invoicing"
- correct BVEssentials crash and dump file when no printers exist

#### **Corrections**

- add btr extension to Note\_Type and Promo\_Code file names
- correctly ask to Save changes when closing Edit Customer and edit Inventory
- correct date comparison in Communications with Logged On date
- correctly support Tab off of Lookup fields