



76 New Productivity Features Since January 2015

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All Productivity Tools

- By module grouping of functions with new Multi-Company option
- Improved Spanish translations
- Improved French translations
- Ability to hide individual tools without security active
- Force Excel and Word Save and Open dialogs "to top" of Desktop
- Provide Additional Criteria filtering for Sage 300 2012 PU2 and later versions
- Provide support for Sage 300 2016

Accounting Status

Restrict users' views based on security settings

Apply Documents

- Matches and applies unapplied documents to invoices
- Supports manual and auto-apply matching

Complete Purchase Orders

Support is provided for P/O without I/C

Delete Items

- Provides a way to see all inventory items that are safe to delete
- Check for known third party references to items
- Deletes items when safe to delete

Delete Orders

Now protects against deleting orders with un-invoiced shipments

Delete Purchase Orders

Support is provided for P/O without I/C

Extended Customers

- Will now copy customer numbers with leading spaces to other companies
- Support for number changers provided
- Search for customers using search-engine like functionality

Extended G/L Account Groups

Copy account groups from one company to many

Extended G/L Segment Codes

Copy segment codes from one company to many

Extended I/C Segment Codes

Copy segment codes from one company to many

Extended Inventory Items

- An Item In Use button shows all table references to an item
- Add the ability to merge units of measure when copying to other companies

Extended Item Pricing

- Copy item prices from one company to many
- Supports limited copying between companies with different functional currencies

Extended Order Entry

Quick Forms Printing

Ship by Picking Sequence

Create Purchase Order

Edit Kit Details

Quick PJC Entry

- Edit kits without creating hundreds of kit numbers
- Add or delete a few items from a base kit, edit quantities and more
- Print picking slips, quotes, invoices and order confirmations from O/E entry form
- Defaults Contact, Project, Category codes during data entry
- Displays quantities in a section of the entry form
- Unit cost is adjusted in multi-currency situations
- Add an option to add to an existing PO

Item Finder

• Field choices are now completely configurable

Customer Search

• Search for customers using search-engine like functionality





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Extended PO Entry

- Improved item number and date entry controls
- Quick PJC Entry defaults Contact, Project, Category codes during data entry
- Support is provided for P/O without I/C

Extended Shipment Entry

Quick PJC Entry
Ship by Picking Sequence
Item Finder
Customer Search

- Defaults Contact, Project, Category codes during data entry
- Displays quantities in a section of the entry form
- Field choices are now completely configurable
- Search for customers using search-engine like functionality

Extended Vendors

- Will now copy customer numbers with leading spaces to other companies
- Support for number changers provided
- Search for vendors using search-engine like functionality

Invoice Shipments

- Option to provide credentials to override credit limits
- Add the ability to filter by a specific location

Ship Orders

- Option to provide credentials to override credit limits
- Add the ability to filter by a specific location
- Adds the ability to ship orders when calculate back-order quantities is off

Update Orders

- Added option to change ALL items on a price list
- Added the ability to substitute one item for another
- Added the ability to substitute a kit for an item or an item for a kit

Update Purchase Orders

Support is provided for P/O without I/C

Update Shipments

Update hundreds of (un-invoiced) shipments (prices, shipment dates)

Vendor Inquiry

- Adds 20 dynamic tabs of information for managing purchases
- Search for vendors using search-engine like functionality