January 2017 Newsletter

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Happy New Year!

If you use a proposal, purchase order and/or invoice number prefix that denotes the current year, be sure that you update the "seed number" fields on your System Configuration - Company & System Settings - Company Settings tab.

Your site has been updated to version 3.0.3.  The enhancements in this version are listed below.

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# Version 3.0.3 Features and Enhancements:

Accounts Receivable report export to spreadsheet option.
> The A/R report now includes an export icon to allow you to export the report data to a spreadsheet.

New Permissions for viewing Proposal Summary Profit and Commission dollars.
> Two new permissions have been added to the Users and Groups "Proposals" permissions options.  These new permissions replace the System Configuration controls called "Display Preliminary Profit Dollars on Proposal Summary?" and the "Display Preliminary Commission Dollars on Proposal Summary?".  These two controls have been removed for the System Configuration - System Settings tab.
> The new permissions are called "Display Profit Dollars" and "Display Commission Dollars"  These permissions can be set per User or for Groups.  If these permissions are not selected then the user (or members of the group) will not see the "Total Profit Dollars" or the "Commission" totals on the Proposal Summary.

Vendor Payables default expense account input fields list expanded.
> We have expanded the default expense account selection fields from 3 to 12 fields for entering vendor invoices.  The fields will continue to populate with the account selection that was last used for the selected vendor.

Customer Statement report.
      The Customer Statement report has been updated to include the
      display of customer credits.

Finance Charges on customer invoices.
      The option to apply finance charges on Remaining Balance was using
      the full invoice amount to calculate the charge instead of the
      remaining balance.  This has been corrected.
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**What's Next?**

The development team is always working on several projects that are in
various stages of progress.  The next release is expected to include the
following, as well as several other features and enhancements:

In House purchase order flag
      A new flag is being added to the purchase order create and edit that
      will allow a purchase order to be flagged as an "in-house" purchase
      order.  This type of purchase order will not generate an associated
      vendor invoice.

External purchase order notes
      A new field is being added to the purchase order summary view that
      will allow text to be added to purchase orders and this text will be
      displayed on the purchase order.

Highlighting of punch purchase order and invoice numbers
      Punch purchase order and punch invoice numbers will be highlighted in
      yellow on the Purchase Orders and Customer Invoices tabs for easy
      identification.


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