



BABYLON RELEASE

NOTE: This document includes enhancements accumulated since the Vancouver release.

ENHANCEMENT	MODULE
1. A new F1 help function has been developed replacing the Help button. Pressing F1 when the cursor is over any screen component will display BCR help documentation. Authorized users can also add company specific documentation or notes. This enhancement has been implemented in the administration module. Additional documentation is available.	AD
2. The date time user and module information for the creation and last change of a record in a grid is now displayed in a popup when the record is highlighted (indicated by a colored background for the row) and Alt-F10 is pressed.	AD
3. New tax fields have been added to the Edit>Sales Options tab in Edit Customers. You can now enter a "Tax Exemption Date", "Tax Expire Date" and "Type of Exemption". The Tax Expire Date interacts with the new "Tax Form Warning" in System Defaults detailed below.	AD Customers
4. Each contact can now have its own address. Address fields have been added to the Edit Customer and Contact Management Contact tabs.	AD Customers, CM
5. A new customer gift feature has been added. If the "Allow Customer Gifts" option is checked on the AR>Statements tab in System Defaults then the Edit Customer Gifts program will be available in Administration on the Edit menu. This program allows the creation and maintenance of gifts that can be set with a variety of parameters. Users are prompted in order entry on order creation if a customer is due a gift. The gift program can also be used to prompt users to do or say things to certain customers during certain periods. Additional documentation is available.	AD Customers, OE

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6. A default “Collect Shipping Account Number” has been added to the Edit Customers>Edit>Shipping /Regional Options tab and ship to specific account numbers have been added on the Ship To tab (NOTE: The number entered on the Ship To tab applies to the currently selected ship to in the data grid NOT to the Default Ship To Address to its left.) The account number will display on the Shipping/Payments tab in order entry.	AD Customers, OE
7. The Edit Item Class program now includes an Apply To Items tab that allows the application of changes to just selected items within the class.	AD Item Class
8. An additional fifteen (15) user defined fields have been created in the item table. Fields must be assigned a name in System Defaults on the IP>Additional tab in order to appear on the Edit Items>Additional tab.	AD Items
9. A new Notes tab has been added to Edit Items. Post and reply threaded notes can be entered.	AD Items
10. A UPC code field column has been added to the vendor grid on the Edit Items>Vendors tab so that each vendor can have a unique UPC for that item.	AD Items
11. A catalog feature has been added to reference items to catalogs page numbers start and end dates and catalog category. Catalogs are created in Administration from the Edit Catalogs screen on the Edit menu. Items can then be added to a catalog from either that screen using the Items tab or from Edit Items using the Catalogs tab.	AD Items
12. The item quantity pricing unit of measure field has been increased to twelve (12) characters. (Edit Items>Pricing>Qty Discounts)	AD Items
13. The search for items by vendor number (Edit Items>Vendors in item lookup will now search all vendors assigned to items.	AD Items
14. The bill of materials Outline tab in Edit Items has been moved to the BOM tab.	AD Items
15. There is now a “Link Images to Items” utility on the Administration System menu. If you have a folder that contains item images and the image name prior to the extension matches an existing item ID, (e.g., for item A-020 there is an image A-020.jpg) the “Link” button will automatically locate matching items and create the Edit Items>Pictures tab entries for the images for you. You can specify a description, sequence number, type, and e-commerce setting for the items linked.	AD Items
16. Each vendor assigned to an item (Edit Items>Vendor tab) can now have an item and vendor specific note added.	AD Items

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<p>17. Inventory quantities of items can now to be reserved for a customer for a specified date range making that quantity unavailable for allocation to other customers. An “Allowed Customer Reserved Inventory for Availability” option has been added to the IP>Misc tab in System Defaults. Grids to add and maintain items and customers have been added to the Edit Items>Customers tab and the Edit Customers>Items tab. Additional documentation is available.</p>	AD Items & Customers, OE
<p>18. An option has been added to designate an item’s eligibility for drop shipment. There are now selections for Drop Shipments “Allowed”, “Not Allowed”, or “Only Drop Ship” on the Ordering tab in Edit Items. Items with “Not Allowed” cannot have their DS column checked in order entry and cannot be entered on a purchase order with a customer ship to. Items with “Only Drop Ship” must have their DS column checked (it is automatically checked when the item is entered) and can only be entered on POs with a customer ship to.</p>	AD Items, OE, IP
<p>19. An item Non-stocked Type of “Absolute Misc” has been added on the Edit Items>Ordering tab. An Absolute Misc. item always has an initial selling price of zero and the user must enter a selling price in order entry, even if it is zero. This might be used for miscellaneous charges that are not preset or predictable.</p>	AD Items, OE
<p>20. Edit Items now has a Relationships tab. On this tab any number of items can be listed as Substitute items and any number of items can be listed as Related items. Items are not cross-referenced so item A can be a substitute or related to item B but B may not be the same to A. A new Relate tab at the bottom of the Detail tab in order entry includes Substitutes and Related tabs as well as the Alt and Eqv tabs.</p>	AD Items, OE
<p>21. A drop ship minimum order amount can now be specified for each vendor assigned to an item (Edit Items>Vendors tab DropShip Min Qty.) Users cannot enter an order quantity below the minimum and check the DS column for the item on the Detail tab in order entry.</p>	AD Items, OE
<p>22. An option has been added to designate an item as ineligible for return. If “Don’t allow return of this item” is checked on the Edit Items>Pricing tab then a user will not be allowed to enter that item on a credit note or as a negative sales order quantity on an order or an invoice in order entry.</p>	AD Items, OE
<p>23. A rounding option (Edit Items>Pricing>Auto Round Multiples) can now be set for item Selling Multiples at the item level to “Don’t Round” (Default. Quantities must be changed to a multiple.) or to automatically round sales quantities to higher (“Round Up”) or lower (“Round Down”) multiples in order entry.</p>	AD Items, OE

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<p>24. Previously the components of a Bill of Material (BoM) item could be changed in Edit Items and in the IP>Inventory>Build Assemblies screen. Users in order entry can now change components in the Auto-build sub-screen for Bill of Materials items as well. This allows “on the fly” assemblies from order entry. An item must have the “Auto-Build on Demand in Order Entry” option checked. When the “Allow Changes to BOM during Assembly” option is also checked then the “Allow Changes to BOM During OE Build Assembly” option will appear as well and can be checked. When an item with these options all checked is entered and the Auto-Build button is clicked the components change sub-screen will automatically appear.</p>	AD Items, OE
<p>25. There is now a pricing matrix (Pricing Matrix on the Administration>Edit menu) that cross references Pricing Categories with groups of customers to allow specified discounts on specified price levels for those customers. The matrix discounts fall between price levels and price lists in the pricing hierarchy. The matrix gives more definition to pricing beyond price levels while making it easy to affect the discounting for numerous items and customers with minimal effort. Additional documentation is available.</p>	AD Pricing
<p>26. There is now an option for customer price list prices to override the item minimum price. (System Defaults>OE>Switches>PriceList Price Overrides Min Price)</p>	AD Pricing
<p>27. An option has been added to allow an item’s Sale Price (within valid date range) to override a customer’s price list price if the sale price is lower. The checkbox “Use item sale price if lower than price list” is located on the Edit Price List>Price List tab and is selectable for each item on the list. The checkbox will also appear on the Edit Items>Pricing tab above the Price List dropdown if a price list containing that item is selected.</p>	AD Pricing, OE
<p>28. The item purchasing Max can now be set to be the order quantity instead of the “order up to” quantity. (System Defaults>IP>EOQ>Max (up to) is Order Quantity) When set and item with four (4) available and a MAX of ten (10) would suggest an order of ten (10) instead of six (6).</p>	AD Sys Dflts, IP
<p>29. A user defined date column (System Defaults>OE>User Defined Fields tab OEDET User Defined Date) can be added to order entry Detail tab. Entry of a field name will cause the column to appear.</p>	AD Sys Dflts, OE
<p>30. A “Tax Form Warning” option has been added in System Defaults on the OE>Doc#/Misc tab. The option can be set to “Don’t Warn User” (default) “Warn On Document Creation” or “Prohibit Document Creation”. The option is triggered in order entry when the customer “Taxable?” box is not checked and either the customer has a Tax ID (Edit Customers>Edit>Sales Options tab) entered and the On File box is not checked or a date entered in the Tax Expire Date is passed.</p>	AD Sys Dflts, OE

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31. Most batch processes in transaction flows can now be skipped. (System Defaults>GL>Auto-Posting switches.) Contact BCR support for further information and assistance before making any changes to your current configuration.	AD Sys Dflts, OE, IP, AR, AP, PR, FA, MF
32. Bill-To address fields have been added to the company's Office Locations and can be added to forms such as purchase orders. The Office Locations Billto Info tab is accessed from the browser button (...) to the right of the Multiple Office Locations switch on the System Defaults OE>Switches tab.	AD Sys Dflts
33. In Setup Users, users can now be assigned to Groups. One user's settings can then be applied to all other users in the same group.	AD Users
34. Authorized users (Setup Users>Accounts Receivable Allow User to Create a New Customer by Copying an existing Customer) to copy one customer to a new customer. The authorized user will be able to select an existing customer to copy from (typically a template customer) and then click a Copy button in Edit Customers or customer lookup screens. The system will then prompt for an ID for the new customer. Limited appropriate fields (such as pricing and order entry options) are copied but no customer specific fields (such as names and addresses) are copied.	AD Users
35. An alternating color can be set in Setup Users (double click to display a color selector in the User Grid Alternating Color field on the List>Custom Display tab) so that data in screen grids is easier to read. This enhancement has been implemented in the administration module.	AD Users
36. Users can now be allowed added control (Setup Users>Custom Display>Grid Fonts) of the font, font size, and bold attribute of data displayed in grids. This enhancement has been implemented in the administration module. Additional documentation is available.	AD Users
37. Users can now be allowed added control (Setup Users>Custom Display>Header Fonts) of their screen labels' text font size and bold attribute. This enhancement has been implemented in the administration module. Note that changes to screen header fonts can conflict with screen layouts where there is insufficient screen space to display the entire header with a larger or bold font. Additional documentation is available.	AD Users
38. Users can now be allowed (Setup Users>List>Custom Display>Allow Form Design Mode) to customize screen appearances by moving fields and field labels to new locations on the screen and saving that layout. And users can change and save the order and size of columns in data grids. This enhancement has been implemented in the administration module. Note that changes to screen fields and field labels can produce undesirable results if not done carefully and should not be done without supervision or the assistance of BCR support. Additional documentation is available.	AD Users
39. The window appearance (skin) can now be set for each user at Setup Users>Default Settings>Default Skin. Note that most skins require additional screen space and may conflict with some screen layouts.	AD Users

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40. An “Always Clear the Customer ID on the New Tab” option has been added to Setup Users (Order Entry>Document and Header tab.)	AD Users, OE
41. Item classes can now be assigned vendor specific cost discounts for purchasing. Discounts setup in the vendor record for an item class (Edit Vendors>Vend/Class Discount) will be applied when items with that class or placed on a purchase order for that vendor. Additional documentation is available.	AD Vendors
42. A Minimum Direct Ship \$ amount has been added to the Edit Vendor>Edit tab. A direct (drop) ship purchase order for the vendor cannot be posted for less than the minimum amount.	AD Vendors, OE
43. Users can now search for Check#s on the Payments tab in Display Invoices on the Reports menu in the AP module.	AP
44. A new Check Register screen on the Entry menu in GL has been added which allows the user to filter checks by date range, source, specific debit or credit amounts, and specific check number. The resulting screen listing includes a running balance can be exported to a spreadsheet by clicking the Excel button.	AP
45. An option “Locked in CM” has been added in Setup Users on the List tab beneath the Default Salesperson dropdown. A user can now be assigned to one salesperson in order entry and/or contact management. A locked user will not be able to view customers in contact management that are assigned other sales staff.	CM
46. The speed of Financial Reports Preparation on the Reports menu in the General Ledger module has been dramatically improved.	GL
47. Inventory transfers (Enter/Edit Transfers in the IP module) can now post differences between the normal transfer cost and an overridden cost (overridden by changing the extended cost on the transfer) to a “Transfer Revenue” account (on the Edit Warehouses sub-screen of the IP>Misc tab in System Defaults.) In the past the total extended cost was posted as a credit to the “from” warehouse location and a debit to the “to” warehouse. If there is a Transfer Revenue account for the “from” warehouse the system will now post a credit to inventory for the normal transfer cost and a credit to the transfer revenue account in that warehouse for the difference between it and the extended amount on the transfer.	IP
48. The Inventory Requirements Report on the Reports menu in Inventory/Purchasing now notes if a vendor is not set for Auto Create POs on the Edit tab of Edit Vendors i.e. the Auto-Generate Purchase Orders program on the Inventory menu would not create POs for this vendors.	IP
49. The requirement that a vendor have an entry in Minimum P.O. \$ in Edit Vendors on the Edit tab in order to generate auto-POs has been removed.	IP

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50. Buttons have been added to the Enter/Edit Buyers List program on the Inventory menu in Inventory/Purchasing to "Purchase All", "Purchase None", "Toggle All", and "Toggle None".	IP
51. Copies of POs can now be printed to different printers. For example, this allows you to print one copy in the purchasing office and another in accounting or sales. Contact BCR support for assistance in setting this up.	IP
52. In purchase order entry the user is now notified if an item number is not found in the item master file but is found in the Enhanced Vendor Catalog. The user then has the option of adding that item to the item file and the purchase order.	IP
53. The vendor catalog import feature in order entry item lookup has been enhanced. When a user picks the "Vendor Catalog" button in item lookup in order entry and picks an item from the catalog, they can "Select" the item, which will add it to the order and add it into the item master file as a "Stock" item. Optionally, they can click the "Non-Stock" button. Clicking Non-Stock will either add a new item ID consisting of the vendor ID prefaced by an "*" as a "Non-Stock Intangible" item, or it will overwrite an existing item with an "*" and that ID with the new item's description, cost and price from the catalog. The vendor ID used is determined by the Vendor Cross-Reference utility (Administrations>System>Vendor Catalogs menu.) If there is no cross reference, a vendor listing screen is displayed to select a vendor ID to be used. Items created in this manner will be set as intangible and will not have stock retained in inventory since the basic information pertaining to the stock will be changed.	OE
54. A number of checkboxes have been added on the Setup Users Order Entry>Detail Tab Info Access tab that control the visibility of columns on the Detail tab in order entry. With all of these boxes unchecked the user will see only a few columns in order entry necessary to the entry of items. This greatly simplifies the view for users that do not need to or are not authorized to view or change certain item information.	OE
55. A new feature in order entry allows users to use a dropdown to locate items on the Detail tab at the Item # prompt similar to the dropdown used to locate customers on the New tab. At the Item # prompt instead of entering a specific item number or using a lookup screen users can simply begin typing an item number and the dropdown will immediately locate items matching that string. When the user stops typing if the item desired is highlighted in the dropdown the user can simply press enter. If not the user can scroll down the box to locate the item they're looking for. This option is set by the "Use OE Extended Lookup" checkbox in System Defaults on the IP>Item Master tab.	OE
56. Contact Management can now be accessed directly from order entry using the button on the New tab or the from General menu in the Order Entry module. When accessed from either the button or the menu Contact Management will automatically fill with the customer currently selected in order entry.	OE
57. The ship to of orders has been added as a column on the Edit tab in order entry.	OE

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58. There is now a “Show Customer Drop Down List on New Tab” option in Setup Users on the Order Entry>Document and Header tab. If this option is not selected the user at companies that have a very large number of customer records may experience significantly faster loading of order entry.	OE
59. An “Always Clear the Customer ID on the New Tab” option has been added in Setup Users on the Order Entry>Document and Header tab. If checked the customer ID on the New tab will always be cleared when the user returns to it forcing the selection of a customer and reducing the chance that an order will accidentally be entered for the wrong customer.	OE
60. There are now four fields on the System Defaults PR tab to accommodate the new social security requirement for separate FICA limits and rates for employers and employees.	PR
61. An enhanced version 2.1 of BCR Notify has been released. This Premier product can send messages and reports via e-mail to a distribution list based on a time frame (e.g. daily or monthly) or upon an event trigger such as the arrival of stock or the shipment of an order. The message or report is defined with the report writer and then scheduled in BCR Notify. Contact BCR support for additional information on this product.	Premier
62. The Report Writer will now export more than 255 characters to one cell.	RW
63. Yearly total fields (TOTAMT TOTCOST and TOTUNITS) have been added to the CUSTHIST and the ITEMHIST tables. This makes it easier to create annual performance reports in the Report Writer.	RW
64. The Report Writer will now export note fields to Excel as text rather than as calculated cells.	RW
65. Report Writer reports of customers can now be exported directly to Contact Management as CM groups. From the Preview tab select Export and select File Type “Build Contact Manager Group.” This will prompt for a new or existing Group ID and whether to Add to or Replace existing customers. For example you could create a report of customers with annual sales in excess of \$10000 (only the customer ID need be in the report but any filters can be used to create the report) and export the customer IDs to a CM Group called 10KCLUB for special email campaigns.	RW CM