CDMS Update

CDMS 8.02.00 Highlights

Here are some of the new features and corrections you can find in CDMS Version 8.02.00.
For a complete list, please read the **CDMS 8.02.00 Release Notes**.

Automatically Freeze Customer's Credit Status

When a customer exceeds their credit limit, the credit `HOLD` status on their customer record can now automatically be set. The date that the customer was put on hold is also maintained in their record. When the customer is initially created using the add customer record feature in Order Entry, Point of Sale Entry or Estimate Entry, their available credit line is set to the value in the Miscellaneous Customer's record.

This feature can be used optionally by setting a new flag in the Inventory Control File. The 8.2 update procedure has turned this option off. Refer to the **Automatically Freeze Customer's Credit Status** A/R user manual addendum for all of the details concerning this new feature.

B2B Purchase Orders

Purchase Orders can now be transmitted electronically to many of your current suppliers. This feature enables you to transmit the PO for needed items directly from Point of Sale or Order Entry as well as from the Purchase Order application. Upon receipt, the supplier immediately responds with an order confirmation number and an available ship date. This information is automatically maintained on the PO. To use this feature, you must have an account with Vencom. Refer to the **Transmit Purchase Orders Electronically** Purchase Order user manual addendum for all of the details concerning this new feature.

'All-Store' Customer for Cash Receipts

Cash Receipts can now be applied to one customer with more than one account on file. The 'All Store' customer allows you to apply one check/payment to invoices for different customer accounts in the same or different stores. When using A/R by Store, the Cash Account is determined from the store specified when entering the application. The A/R

‘All Store’ Customer for Cash Receipts
(continued)

Account is determined by the store in the customer’s id number.

While easy to use, this feature requires the assistance of a CDMS Support Representative to activate and set-up. Refer to the **‘All Store’ Customer for Cash Receipts** A/R user manual addendum for all of the details concerning this new feature.

Cash Receipts by Batch

Cash Receipts can now be entered, edited and posted by the batch providing additional audit trails and controls for systems with multiple A/R entry personnel. This new feature assigns a batch number, either manually or system generated, to each user. The assigned batch maintains the user’s CDMS ACCESS as well as the date the batch was assigned. Both the Cash Receipts Edit List and Journal print the ACCESS id of the user running the process as well as the user assigned to the batch. All cash receipts are printed within each batch selected and Batch Totals provided at the end. For more information, refer to the **Cash Receipts by Batch** A/R user manual addendum for all of the details concerning this new feature.

Customer PO Search Added

A search option has been added for use when entering orders and cash receipts to find a specific contract or invoice using the customer’s purchase order number. The purchase order number entered on the contract is now tracked in Accounts Receivable through the history process. A Search by Customer PO is now available in the following applications:

- Order Entry
- Point of Sale Entry
- Sales Floor Inquiry, Search by Order Number
- Sales Floor Inquiry, Contract History Search
- Customer Account Inquiry, both Open and History Searches
- Cash Receipts Entry (apply by PO)

The customer’s purchase order number has also been added to several reports including:

- A/R History Report
- A/R Open Item ASCII Download
- A/R History ASCII Download
- Cash Receipts Edit List and Journal
- A/R Open Item Edit List
- A/R Statements

Installer's Deduction/Earning Balance Tracking

The Balance Due can now be tracked for any deduction or earning code entered in the installer's record. Optionally, the Original Balance and the Balance Due amounts can be entered. Each time the deduction or earning is included on a check, the amount is deducted from the Balance Due until the balance is zero. Voiding a check adds the amount back to the Balance Due. Refer to the **Installer's Deduction/Earning Balance Tracking** Installer user manual addendum for all of the details concerning this new feature.

New Customer Account Inquiry Search Options

New search options and narrow/wide screen modes have been added to the Customer Account Inquiry application. Upon entering the screen, the print size reduces so that more information can be displayed. A PF4 option is always available at any prompt to toggle back and forth between large and small type size.

A History option has been added to the Contract Search and searches by the Customer's PO or Job Number are now available for both Open and History Items. Feel free to experiment with any of the search and size options without locking other users from entry or effecting data.

Net Aging Report Now Available

The Net Aging Report option has been added to the Print Aging Report application in Accounts Receivable. The Net Aging Report takes payments into consideration and ages receivables by the net amount. This enhancement includes features such as:

- Detail and summary versions can be specified.
- Outstanding invoices are aged in one of five aging period columns. The periods are `UNDER 31 DAYS, 31-60 DAYS, 61-90 DAYS, 91-120 DAYS` and `OVER 120` regardless of the aging periods specified in the A/R Control File.
- Totals for each period are provided for each customer as well as grand totals for each salesman (if run in salesman sequence) and report grand totals.
- The Aged A/R Balance, less any open credit, and the final A/R Balance on account are reported for each customer.

This report can be run as often as desired without locking other users or effecting data.

Maintain Customer's Email Address

The `EMAIL ADDRESS` has been added to the customer's record and to the Customer List. The `EMAIL ADDRESS` can be entered when adding a new customer in the Customer File Maintenance application as well as when creating new customers during the Order Entry, Point of Sale and Estimate Maintenance applications.

New Default Taxable and Print Flags

Default the Taxable and Print flags on order items from the product's category record. Because of an overwhelming customer demand, flags were added to the Category Record to default whether or not items on an order should be included in the tax calculation, and whether or not, the order item should print on the invoice. These new flags are only the defaults for new items added to an order and will not affect changing items already entered. Both of these flags have been set to Y for all categories during the 8.2 update procedure.

Note: The Taxable flag will not be used for labor items; labor is taxed based on settings in the Inventory Control File.

Control Use Tax for Freight and Cost Factor Amounts

Freight and Cost Factor flags have been added to the Use Tax Codes for controlling whether or not these amounts are included in the calculation of Use Tax. Each `USE TAX CODE` can be flagged to include freight factor amounts only, include cost factor amounts only, exclude both, or include both amounts. This flag is set to Y for all `USE TAX CODES` during the 8.2 update procedure.

To recalculate open orders currently on file, change the tax code in the ORDER HEADER to a different code and exit the order. Go back into the order and change the tax code to the correct `USE TAX CODE`, causing the system to recalculate the use tax.

To recalculate all supply tickets currently on file, set the `TAX CODE` flag and edit any ticket using the changed tax code. The ticket totals will be recalculated.