



Custom Modification Products

By reviewing what custom modifications we have made for others – you can be inspired to make your business even more efficient too.

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Custom Products for all Modules

Paperless Posting. This feature is setup to print posting reports to a file or if the user elects to individually post them to files, the name will always be the same or must be changed each time to create a unique file name. As posting completes, all of the posting reports for a single posting (e.g. OE, AR, IN, GL) are combined into one text file.

Accounts Payable Custom Products

Salesperson Batch AR – Custom Security. This feature limits the access to batches for sales staff to only be able to access their own batch, yet allow other entities access to the batch via password. This will also limit each sales member access to their customers in AR lookup within OE.

AP Import and Export Function with Company Website. This feature imports a file generated by the company website that will add the information necessary to print checks in the CMS AP module. The export feature takes the checks that were imported and printed in CMS and export a file that the company can then import into their website.

AP Check Account Integration. Integrate AP checks to certain vendors with their associated bank accounts, so that the correct MICR is printed on the checks automatically.

Inventory Custom Products

Update All Locations (MLI). This feature streamlines updates made to stock items at multiple locations. When IN Stock Items are edited upon selection of the save button, the user is prompted to Update All Locations. This feature will work from any module where inventory stock items can be viewed.

Build Kits with Advanced BOM. This feature allows a user to build kits using the IN Adjust Stock Quantities window in IN with Advanced BOM (bill of materials). If a kit item has a quantity greater than 0, then when the user sells it in OE it will use the standard kitting functionality and the sale will only reduce the finished kit quantity but none of the raw materials or sub-kit quantities are impacted. If the kit has 0 quantities then the Advanced BOM functionality kicks in and depending on the user's settings in OE Module Preferences, the kit will "explode" on the invoice and all raw materials will be shown.

Auto-Replenishment and Allow Negative Values. This feature allows IN Stock Maintenance to automatically process and manage replenishment of stock. Two stock items will be used to manage the stock item that will be used to replenish a second stock item (i.e. cartons versus packs). In this feature, the 'Reserved' field is renamed to 'Replenishment' on the IN Stock Window Qty/Price info tab.

Hide Last Cost on IN Stock Master for Certain Users. This feature contains a security setting which prohibits users from seeing the Last Cost of an IN item on the IN Stock window when the Show Last Cost right is denied.



\$0 Last Cost Warning. This feature prompts the user to update the last cost of the item being sold if the value is \$0 by presenting a message window. This feature prohibits the sale of items that do not have a last cost associated with them.

Alt Price 2 Alert. This feature provides the ability to set security on the Alt Price 2 field so that no one can change the selling price for the item to be lower than the price in the Alt Price 2 field without a manager override.

Update Pricing from an Excel Spreadsheet. This feature updates IN Stock Items using an Excel Spreadsheet. It includes an import program that allows the user to update a selectable range of stock items from any Excel file they choose based on their Stock number, Vendor number, Product Type or any combination of these three criteria.

Order Entry Custom Products

Multi-Pack in OE. This feature adds multi-pack codes/pricing to the OE module. This feature integrates with standard, i.e. non-custom, multi-pack features in the IN module.

Product Type Search. Includes the Product Type field in the IN Lookup screen as a searchable column.

Special Search Feature. Allows search by any word in the description, not just the first letter.

Automatic Shipping Calculation. Automatically calculate shipping when adding the line item for freight. Amount is based on shipping zip code and weight of item.

Payroll Custom Products

Time Clock Import and Export. This import feature provides the ability to import data from a time clock file into Payroll.

Create a Check with 16 Deductions. This feature provides a custom version of Create a Check format to work with 16 benefits and deductions. The standard option of printing benefits and deductions on employee check stubs is 12 maximum.

Time Clock Import in Healthcare. Allows payment to employees to be set per patient visit - their time clock software keeps track of the day, time spent, and patient information. Modification imports the data into PR module and prints out on a stub for the records.

Third Party Customization Products

QSP Price Book Import. This feature will import price books from a 3rd party company (QSP Price Book). The modification updates the Vendor tab of the IN Stock window, number and name in AP Vendors window, add parts to the kits if applicable and Repair Labor is added to the kit if applicable. A range or individual repair numbers can be added to the import based on the Repair Number.



Report Customization Products

Custom Budget Report in GL. Modifies the GL Budget Reports to create a combination of the variance report using advanced reporting. The new custom report is available as a custom report option from the GL Reports window.

Commission Report. A commission report that is based on list price of item, actual sale price, and then the associated percentage.

Royalty Report in Payroll. A report based on royalties paid based on item at time monies are collected. Repay a certain amount and only pay royalties when the money collected exceeds that amount. (Example: pay advance of \$2500 w/10% royalty)

FUND Custom Report. A new custom report for all Funds to include MTD, YTD totals, rev and exp with no real detail, and beginning balances. Similar to a Revenue & Expense Budget report that will reference quickly to see how much money is left in a particular FUND.

Electronic Funds Transfer Report in AP. When creating the “Electronic Funds Transfer Report” from BOTH the “Enter Bills” AND “Pay Bills” areas, includes the email address in the last column on the report from the AR Custom file.

Employee History Report in Payroll. Includes the current year actuals and “proposed budget”, the last years actuals and budget and the actuals from three years back.

Custom FELC Budget Summary Report. Includes the current year actuals and “proposed budget”, the last years actuals and budget and the actuals from three years back.

Workers Comp Calculation Report in PR. Creates a custom Workman’s Comp report specific to state regulations. The report is available in the custom report menu on the PR Employee History Report. The report calculates workman’s comp as a percent of the total pay and not including overtime pay.

Rebate Tracking Profit Margin Report in PO. Custom report for a specific company situation, that calculates profit and COGS based on Rebates and charge-backs. Allowed for a 90 + day delay before all rebates and charge-backs were paid.