Release Highlights – November 2007

Alliant Route Accounting

Operations

- On the Invoice Adjustments screen, a checkbox has been added that says "Automatically recalculate ARC/SRC lines". If this box is checked and the user adjusts an item on an invoice that already has ARC or SRC lines, the ARC or SRC amounts will be recalculated based on the adjustment. ARC and SRC lines will also be added, if necessary. (Case 7720)
- Also on the Invoice Adjustments screen, when adjusting a special inventory line with a negative quantity using an adjustment transaction code of SI, the special inventory of the item was being increased by the amount of the adjustment. If a negative quantity is entered with an SI transaction code, the transaction code will be changed to SD, indicating a special decrease rather than in increase. (Case 8571)
- On the Special Invoices/Credits screen, a checkbox was previously added that says "Apply ARC/SRC Charges". In the July release, we made a change to have this box checked automatically. Some users do not want the box checked automatically. This checkbox will now be based on a plant level option on the Report Option 1 tab in Plant Control Maintenance that says "Apply ARC/SRC Charges by default on Specials/Credits". (Case 9251)
- On the Special Invoices/Credits screen, when using the "Add Line" functionality, the user can now enter a price that contains six digits before the decimal. Previously, if more than five digits appeared before the decimal, the fields were showing asterisks. The invoice subtotal and total fields have been expanded to show six digits, as well. (Case 8377)

Reports

- The report heading on the Production Requirements Report branch summary has been changed to provide more detail. The heading will now show each route for which the report is being run. It will also show if a holiday schedule is being included. (Case 7127)
- On the Production Requirements Report, the user has the ability to enter a holiday schedule by route. Functionality has been added so the user can enter a holiday schedule for the entire branch. (Case 8086)
- On the Inventory Minimum Report, located under Reports -> Customer, functionality has been added allowing the user to enter specific SKU's or a range of SKU's. (Case 8635)
- A new option has been added to Physical Inventory Sheets, located under Reports -> Daily. The report can now be run for a specific SKU or range of SKU's. This will help when doing an inventory for specific items at all customers, instead of doing whole inventories. (Case 9205)
- The Customer Contact Report, located under Reports -> Customer, can now be run by Active, Stopped, or All Customers. (Case 9265)

Maintenance

- Previously, the Custom Garment Lease program was taxable based on whether or not the customer was taxable. A new checkbox that says "CGL Taxable" has been added to the General Options 2 tab of Customer Maintenance. This new checkbox determines whether or not the Custom Garment Lease will be taxable. (Case 7452)

- On the Customer Maintenance screen, we recently added the ability to enter individual contacts at the account and department level. At the department level, contacts can be entered by clicking on the “Contacts” button on the General Options tab. Billing or account level contacts can be entered by clicking on the “Contacts” button on the A/R tab. In the November release, a field was added to both grids for storing the contact’s phone extension number. (Case 7554)

- Price type 14 is calculated as the inventory times the unit price, where the soil count prints on the invoice. A checkbox has been added to the General Options 1 tab of Customer Maintenance that says “Only charge one deliv for pt 14 items with price freq 7”. If this box is checked, price type 14 items with a delivery frequency of 8 and price frequency of 7 will only be billed one time for a single delivery on the final invoice of the week. (Case 8134)

- For customers that receive multiple deliveries per week, the loss and abused insurance can now be setup to bill for one day only. These charges are calculated and billed on the last delivery day of the week only. So, if a customer is delivered Monday, Wednesday, and Friday. The charges will be calculated and billed on Friday only. The charges will not be incurred on Monday and Wednesday. The “Insurance” button is located on the Processing 2 tab of Plant Control Maintenance. After clicking on the “Insurance” button, a screen comes up with the insurance options. The new checkbox says “Only bill program charges on customer’s last delivery day”. (Case 7875)

- For Canadian customers, when adding ancillary charges/emblems to an account that has GST tax, the GST checkbox for the ancillary charges/emblems will now be checked by default. The PST checkbox already has this functionality. (Case 9230)

A/R

- On the Plant Control Maintenance screen, if the checkbox "Show Month names on Aging" is selected on the Report Option 2 tab, the month names will now appear above the aging totals on the A/R Inquiry menu instead of the current businesses, current balance, 30, 60, 90, and 120 days. (Case 7424)

- When running the aging report by group, a summary will now be included for each branch, as well as a summary for all branches. These summaries will include all accounts for the groups selected. (Case 8116)

- On the Payment Activity Report, transaction type "N", for "Non-A/R", has been added to the drop down box of specific transaction types. (Case 8767)

- Previously, statement discounts were calculated based on debits (positive amounts) only. A checkbox has been added in Plant Control Maintenance, under the A/R section on Report Opt 2, that says "Include credits in statement discount calculation". If this checkbox is checked, credits (negative amounts) will be taken into account when calculating the statement discount. (Case 8096)

- In A/R Application, the user has the ability to change the session date. Previously, the session date was reset to the current date when the user exited the A/R Application screen and then re-entered it. The program has been changed to remember the date each user enters for their specific A/R session until that session is either updated to A/R or purged. When a new session is entered, it will default to the current date. (Case 7267)

Utilities

- Under Utilities -> Export Customer Contact Information, there are options to export customer or billing information to *Excel*. A column has been added to the spreadsheet showing whether or not the customer is stopped. If the customer is stopped, an “X” will show up in the new column. This will allow the spreadsheet to be sorted by active and stopped customers. This information will help when sending mass mailings. (Case 9267)

Alliant Stockroom

- A checkbox exists under Stockroom -> Maintenance -> System Options that says "Do NOT reduce inventory during Deassign". If this box is checked, the inventory will never be reduced when garments are deassigned. This is used if inventory is reduced manually through Employee Item Maintenance. A new checkbox has been added to the System Options screen that says "Do NOT reduce inventory during Deassign if quantity assigned greater than inventory". If an employee was accidentally assigned more pieces than they have in inventory, this would bring the assignment quantity back down to the inventory quantity. This checkbox only works for items that are stopped. (Case 7890)

- The Requested Repairs report shows garments that were given a service code at one time or another. This report is based off of the garments next delivery date. A checkbox has been added to the screen that says "Use Scan Date". If this box is checked, the report will display data for the date on which the garment received a service code. (Case 9237)

Alliant Mobile 2.0

- If a customer, item, and transaction code are setup to create work orders, a work order will be created when changing an item's inventory on the handheld. This is done by selecting a line item and then going to Options -> Change Inventory. The work orders will go to the release work order screen in Alliant Route Accounting and must be released before the work order is created. This is only designed for the inventory change menu and not when doing invoice adjustments on the handheld. (Case 6892)

- When emailing invoices from Alliant Mobile 2.0, the email subject will now display the invoice number of the invoice being sent. (Case 7833)

- When crediting an invoice and then charging a stop minimum on a handheld, it will now allow for the entry of cash collected. This information will subsequently show on the Cash Collected Report. (Case 8174)

- Special inventory holdout dates and future increases and decreases can now be viewed on the handheld by selecting a line and going to the Options menu. This will allow the route service representative to review the information in front of the customer. The future increase/decrease transaction codes can now be used on handhelds, as well. (Case 8536)

- The Service Notes Report, located under Mobile -> Reports, will now display the route on the line of the service note. (Case 7572)

- On the Invoices/Delivery Tickets screen, invoices that are setup to be faxed or emailed were not previously able to be printed. A checkbox has been added to the screen that says "Include Non-Printed Invoices". If this box is checked, invoices that are setup to be emailed or faxed may be viewed on the screen and subsequently printed. (Case 8317)

- The customer name has been added to the Size Change Requests Report, located under Mobile -> Reports. To accommodate the printing of the customer name, the report will now be printed in landscape format. (Case 9282)

Invoice Central

- When emailing invoices from Invoice Central, the email subject will now display the invoice number of the invoice being sent. (Case 7833)

Statement Central

- When faxing from Statement Central using GFI, the word “statement” and the account number will now be sent to the GFI fax log. (Case 6705)

- When the checkbox “Statements Department/Page” is selected on the Report Option 2 tab of Plant Control Maintenance, the department number prints between each section of invoices. On the setup screen in Statement Central, a checkbox has been added that says “Print Customer Name”. This can only be used if the checkbox “Use Mailer Statement” is checked. If the “Print Customer Name” box is checked, the customer’s name will display under the department number between invoices. This will help large customers with multiple departments better understand their statements. (Case 7509)

Mat Tracking

- On the Mat Load Station screen, the user now has the ability to enter a range of branches. (Case 7812)

- On the Mat Storage Locations screen, the user can now enter specific SKU’s to go to a particular storage location. (Case 7432)

- When working in the Tag Mats in Warehouse screen, the SKU number will now remain in the SKU field unless the user changes it. (Case 9123)