

Release Notes for Version 8.6

This PDF is designed to show you the most important updates for V8.6 if you already use an earlier version (V6 or V7) of Activity Software. You have the ability to run in Compatibility Mode on Vista Business or Ultimate, or Win7.

We no longer use “keys” or “dongles” to secure our software from being duplicated. We now use a keyless licensing program for that purpose. An internet connection is required. The following major new features have been introduced with the general release of V8.6.

Estimating and Invoicing

- ✚ You can track actual costs and margins for a job by printing the Job Profit Report. The report shows the actual costs charged to the job through inventory or vendor purchases and labor charges. You can also track the amount billed for the job.

- ✚ There is a revised Estimate report formatted like the Job Profit report that allows you to see the estimated costs and margin prior to accepting the order.

- ✚ You now have the ability to place Customers On Hold, not allowing estimates or orders to be generated for them.

- ✚ Ability to choose from a list of Introduction Notes or Trailer Notes.

- ✚ Ability to customize classification of Customer Contact Notes.

- ✚ Ability to mark up a currency amount added to a Work Order.

- ✚ Ability to add pictures and graphics to a Work Order while filling it out.

- ✚ Ability to filter Estimate Manager by Customer.

- ✚ Ability to enter up to 3 customer addresses on Estimates or Orders; billing address, ship to address, job location address.

- ✚ Ability to enter a one-time Contact address on Estimates or Orders without saving it permanently to the database.
- ✚ Added Proof 2 Date that can be used for any additional date that needs to be tracked by Order.
- ✚ Ability to restrict Salespeople to viewing their own Orders or Estimates ONLY.
- ✚ Ability to search by Product Description on Estimate/Order Line Item screen.
- ✚ Ability to enter Recurring Invoices for service contracts or other use.
- ✚ Ability to search Customer Notes across Customers.

Products/Inventory

- ✚ Inventory now is automatically updated through Purchase Order Receipts. In prior versions of the software receipts had to be entered manually into the Inventory module.
- ✚ Ability to assign Government Item IDs to your products so that invoices can be generated to government entities showing their required item identification.
- ✚ Added 3 more user definable pricing fields bringing total available to 9.
- ✚ Added ability to control the sort order of Products and Product Categories.
- ✚ Ability to select a list of colors at the Product level. When that product is used in an Estimate or Order, color becomes a drop down field.
- ✚ Addition of a Surcharge capability that can be used for Fuel Surcharges, Ink Disposal, etc.
- ✚ Ability to hide a Product Category from selected Advantage users to prevent the use of that Product.
- ✚ Ability to have Unlimited Pricing Levels by Customer with Customisable labels.

Accounting

- ✚ Ability to manually enter Labor Time spent on a job or Inventory Materials used on a job through the Post Orders module.

- ✚ Ability to enter payments on a customer's account without having to associate them with an existing invoice.

- ✚ Ability to Back Date payments and invoice dates.

- ✚ In Posting Orders, the ability to not have the Balance Due autopopulate the Payment Field.

- ✚ Ability to choose between a Summary General Ledger Export where one line is exported for each Sales account used, or a more Detailed G/L Export where invoice numbers and customer information associated with Sales are exported. (Available for QuickBooks or Excel exports.)

- ✚ Summary General Ledger Export for Peachtree and Simply Accounting.

- ✚ Ability to re-run a G/L Export batch.

- ✚ Revised calculation of A/R Balances on A/R Reports to insure match to G/L Export. Note: this feature may initially make old table discrepancies surface that were not obvious before updating.

- ✚ New A/R Aging Report.

- ✚ New Sales by Product Code Report.

Purchase Orders/Vendors

- ✚ Vendor Management, including a 3-way match between your Product Code, your Vendor's Product Code, and the Manufacturer's Product Code.

- ✚ Ability to enter Purchase Orders, link them with your Sales Orders, track receipts of Purchase Order Items, and enter Vendor Invoices into Advantage. Vendor Invoices must be exported to another Accounting Package to write checks to Vendors.

- ✚ Ability to queue Orders to minimize Vendor Purchase Orders and Shipping Costs.

Web Components

- ✚ Ability to use Art Approval with Estimates.
- ✚ In Shop Floor, ability to do Automatic Planning. Note: Does not include automatic rescheduling.
- ✚ In Shop Floor, ability to place a marker on a Process indicating that future Processes should not be planned until that Process is complete.
- ✚ Ability to enter time in Shop Floor after the fact.
- ✚ Ability to set up users that do not appear on the Drop Down Sign In list on the Main Menu. Shop Floor users who do not access core components do not need to appear on the list.

Other

- ✚ The Toolbar can be positioned on either the right or left side of the screen.
- ✚ The Toolbar can be turned off until needed by pressing CTRL- F12. The software can be closed and reopened and the Toolbar will remain OFF until the CTRL-F12 is pressed again.
- ✚ Ability to track Employees' home contact information in Human Resources.
- ✚ Ability to add line items to Packing List through the Shipping Center screen.
- ✚ Ability to ship one order to multiple addresses in Shipping Center.
- ✚ Ability to track allowed Overs in Shipping Center to prevent shipping too many items.
- ✚ Emailing has been revised to work with any POP3 Email client. MS Outlook is no longer required. You can automatically email a pdf file to your clients.
- ✚ If desired, these pdf files may be saved to your hard drive.