New Features in Sage BusinessVision 2018 (version 7.9)

Initial Installation and Configuration of BusinessVision 2018

Overview

The installation of Sage BusinessVision 2018 follows the same process as version 2017. During the installation, you will be prompted to enter the Product ID/Serial number, and Activation code for each product or add-on that you are installing.

NOTE: It is not necessary to reinstall CustomPack, e-BusinessVision, LAN Packs or Multiple Currency Manager if they have already been installed with v7.1 or higher. The existing licenses will continue to be honoured.

FOR MORE INFORMATION: For general information for clients upgrading from previous versions, refer to "Readme.rtf" which is located in the \Readme folder of the Sage BusinessVision install.

Data File Conversion

Existing sets of Sage BusinessVision data will be converted to version 2018 format when logging in for the first time.

NOTE: Once your data has been converted to be compatible with version 2018, it will no longer be compatible with prior versions.

The following table lists data files that are converted, created, or reorganized during the version 2018 file conversion process.

FILE NAME	CONVERSION/NEW/REORGANIZATION
Bvcon.fil	Conversion – initialization of new fields
Addrs.btr	Conversion – initialization of existing reserved fields
Customer.btr	Conversion – initialization of existing reserved fields
Invent.btr	Conversion – initialization of existing reserved fields
Ordaddrs.btr	Conversion – initialization of existing reserved fields
Supplier.btr	Conversion – initialization of existing reserved fields

Issues Resolved

The following issues are resolved in Sage BusinessVision 2018 (7.90)

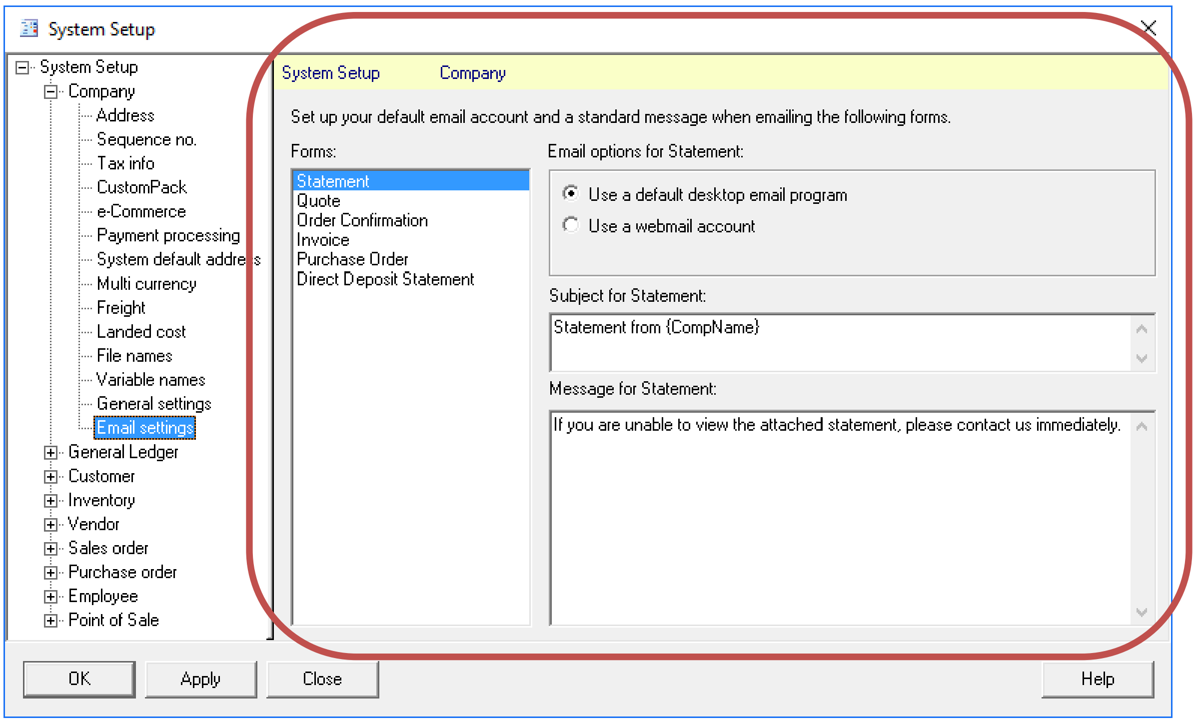
- **100326** – In Order Details, converting a quote to an order and immediately invoicing it without resaving resulted in the order discount not being taken into account when calculating sales taxes.
- **100328** – Reprinting a purchase order that had one or more receipts posted against it resulted in an incorrect purchase order discount value on the report.
- **100329** – In Purchase Order Details, the suggested vendor invoice amount was incorrect after multiple receipts and invoices were posted when there was a purchase order discount applied.
- **100330** – In Order Details, new layaway orders that were created by copying an existing layaway invoice from Sales Analysis were not able to be deleted when no customer deposits had been posted.
- **100331** – General Ledger accounts with prior year opening balances could be deleted if they had no transactions and no period end net changes.

System Setup Additions

Additions have been made to System Setup in order to activate and control new and existing features in version 2018.

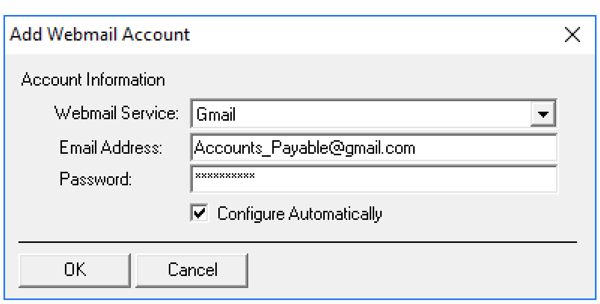
Company

In "Company > Email settings", entries were added to control how emailed forms are sent as well as the content of the subject and message body.

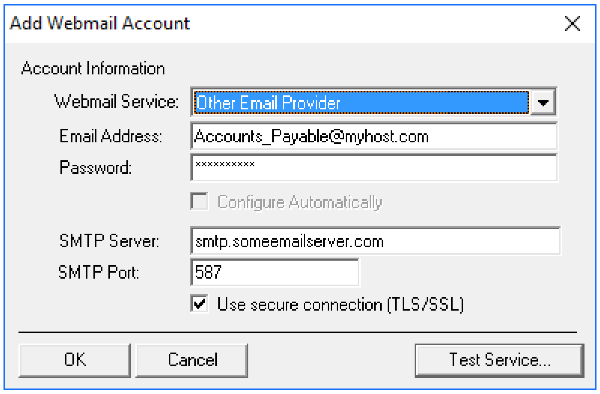


Each of the forms listed (Statement, Quote, Order Confirmation, Invoice, Purchase Order and Direct Deposit Statement) has it's own independent settings.

In "Email options", when "Use a default desktop email program" is selected, forms will be emailed using Microsoft Outlook. If "Use a webmail account" is selected, forms will be emailed using an email service or SMTP server specified.



Default settings are provided in order to use Gmail, Outlook.com or Yahoo webmail accounts, with the only required information being the email address and password of the account that messages will be sent from. If “Other Email Provider” is selected, the SMTP server name and SMTP port also need to be provided. Note that TLS secured connections, which generally use port 587, are supported. SMTPS connections, which generally use port 465, are not supported.



Subject and Message Content

The Subject and Message fields allow standard message content to be modified on a form by form basis. The Subject field accepts up to 128 characters, and the Message field accepts up to 1,024 characters. In addition to regular text, variables can be used in either field that will be replaced at the time a message is emailed. For A/R statements, the supported variables are:

Variable name	Description
{CompName}	Your company’s name
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number

For quotes, the supported variables are:

Variable name	Description
{CompName}	Your company’s name
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number
{OrderDate}	The order date
{QuoteNo}	The quote number

For order confirmations, the supported variables are:

Variable name	Description
{CompName}	Your company's name
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number
{OrderDate}	The order date
{OrderNo}	The order number

For invoices, the supported variables are:

Variable name	Description
{CompName}	Your company's name
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number
{InvoiceDate}	The invoice date
{InvoiceNo}	The invoice number
{OrderNo}	The order number

For purchase orders, the supported variables are:

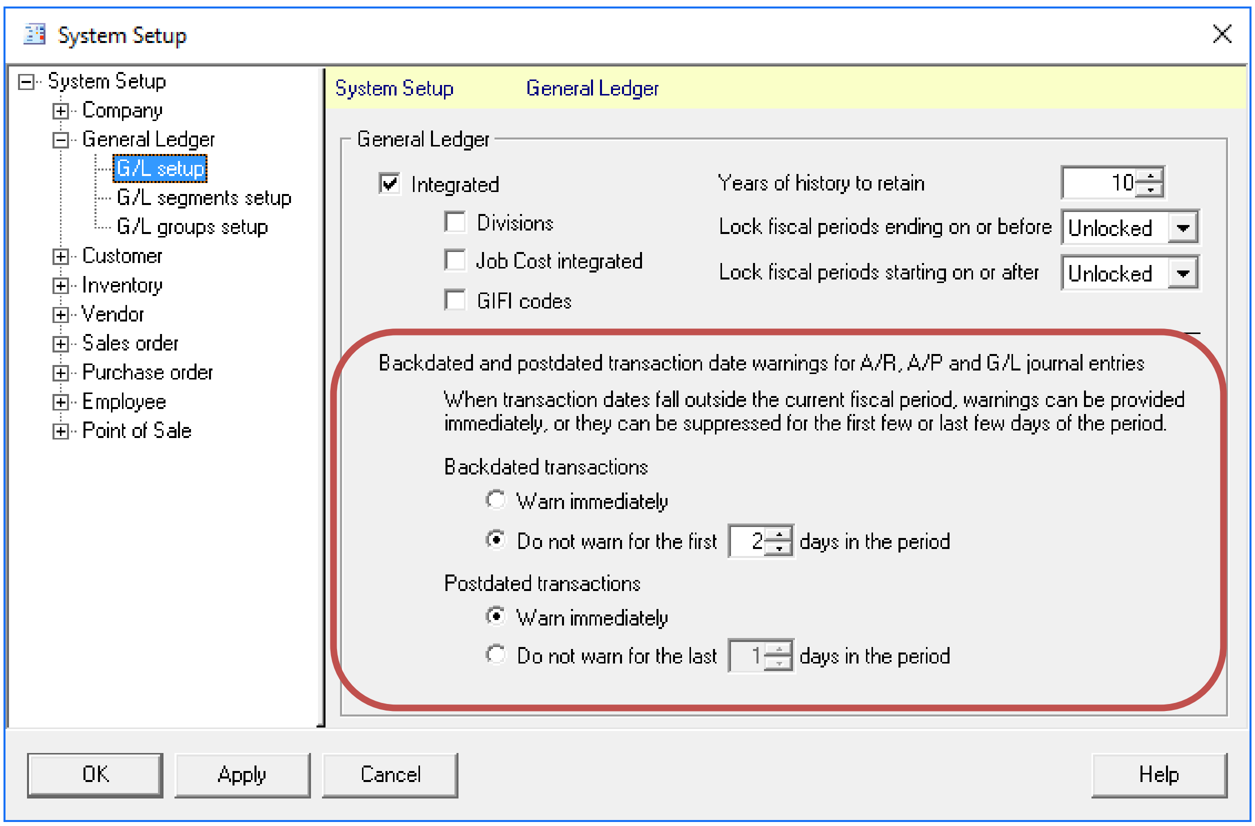
Variable name	Description
{CompName}	Your company's name
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{PODate}	The purchase order date
{PONo}	The purchase order number
{VendNo}	The vendor number

For Direct Deposit Statements, the supported variable is:

Variable name	Description
{CompName}	Your company's name

General Ledger

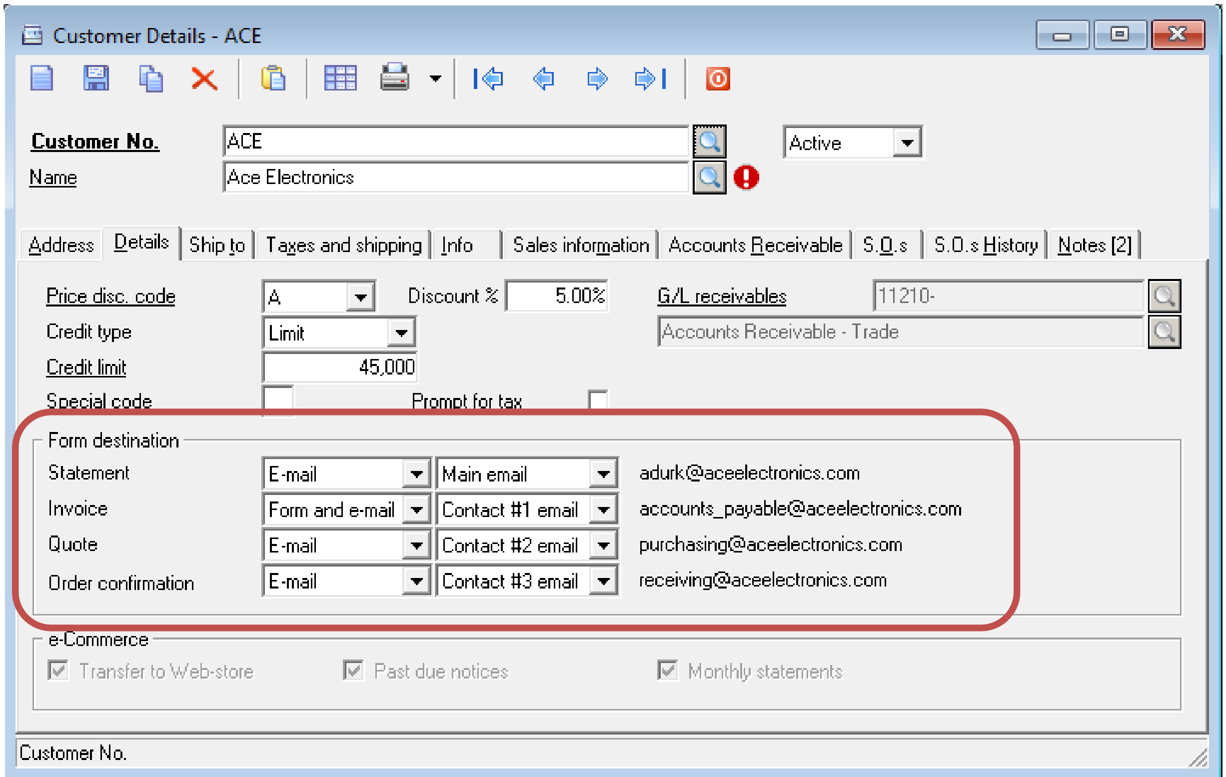
In “General Ledger > G/L setup”, entries were added to control the appearance of warnings when transactions are backdated into the prior fiscal period, or postdated into the next fiscal period. By default, warnings always appear when the transaction date is in a different fiscal period than the log on date. By using the “Do not warn for the first X days in the period” option, backdated warnings can be suppressed temporarily. This could be useful when posting a mix of period-end transactions from the prior period while also posting ongoing current period transactions in the same session. A similar option is available for suppressing postdated warnings. Note that these settings only affect warning messages in Accounts Receivable, Accounts Payable, G/L Journal Entries, the Batch Payables utility, and the Offset Customer/Vendor Balances utility.



Customer Details Enhancements

Form Destination Options

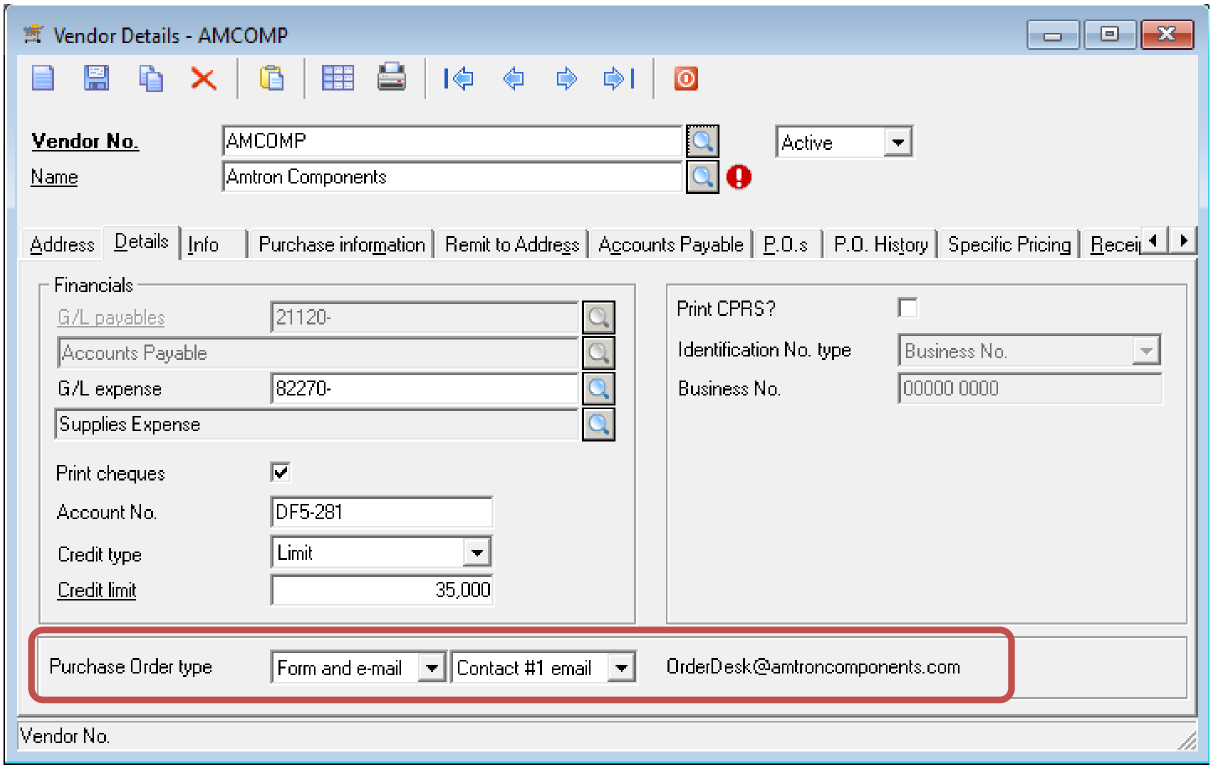
Form destination options have been expanded to allow the selection of email addresses to be used on a per customer per form basis. In addition to the main email address, the email address for Contact 1, Contact 2 or Contact 3 can be selected.



Vendor Details Enhancements

Purchase Order Type Options

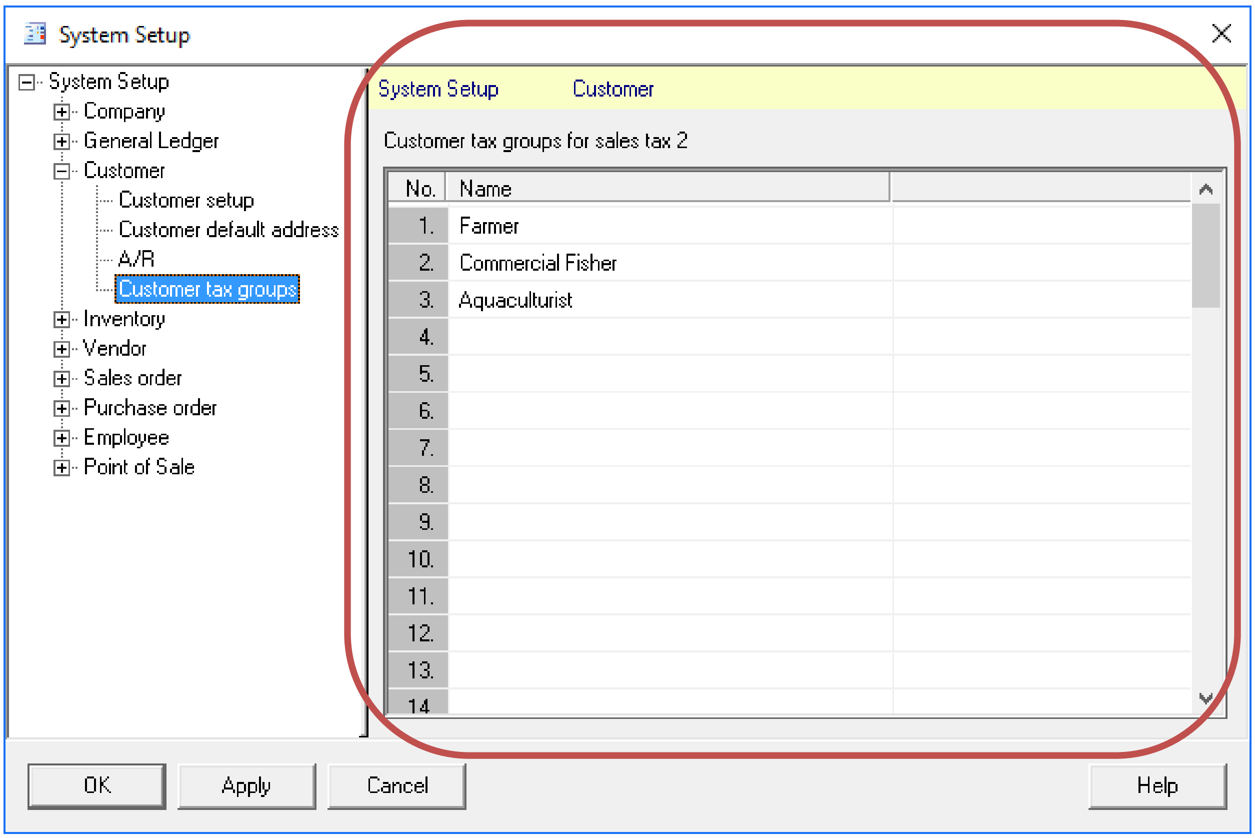
Form destination options have been expanded to allow the selection of email addresses to be used on a per vendor per form basis. In addition to the main email address, the email address for Contact 1, Contact 2 or Contact 3 can be selected.



Canadian Sales Tax Enhancements

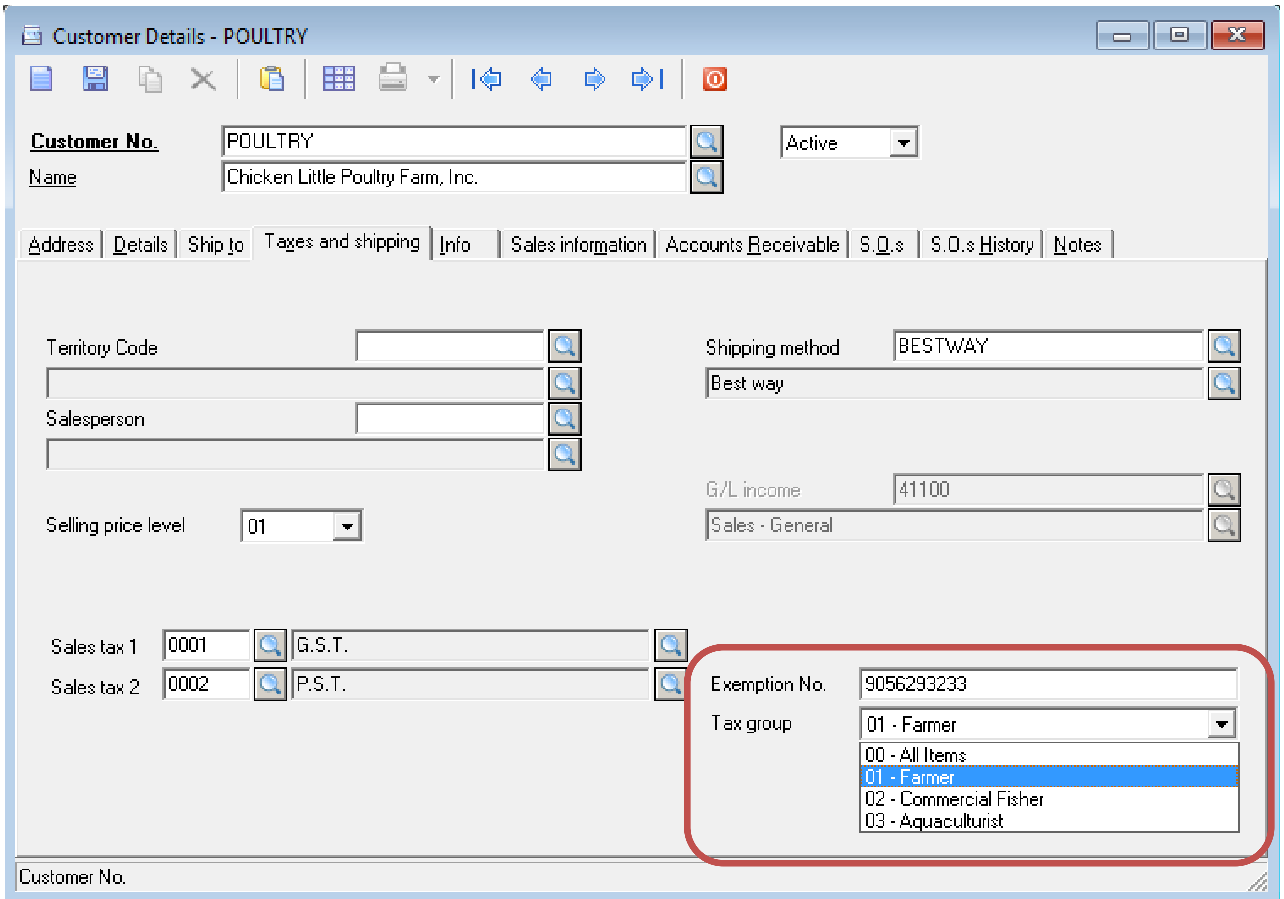
System Setup

In "Customer > Customer tax groups", entries were added to allow customer groups to be defined. These groups are used to define exemptions for sales tax 2 (i.e. P.S.T.) when calculating Canadian sales taxes. Up to sixty different tax groups can be defined. Once tax groups are defined in System Setup, customers can be assigned to groups, and exemptions for group members are defined on an item by item basis in Inventory Details.



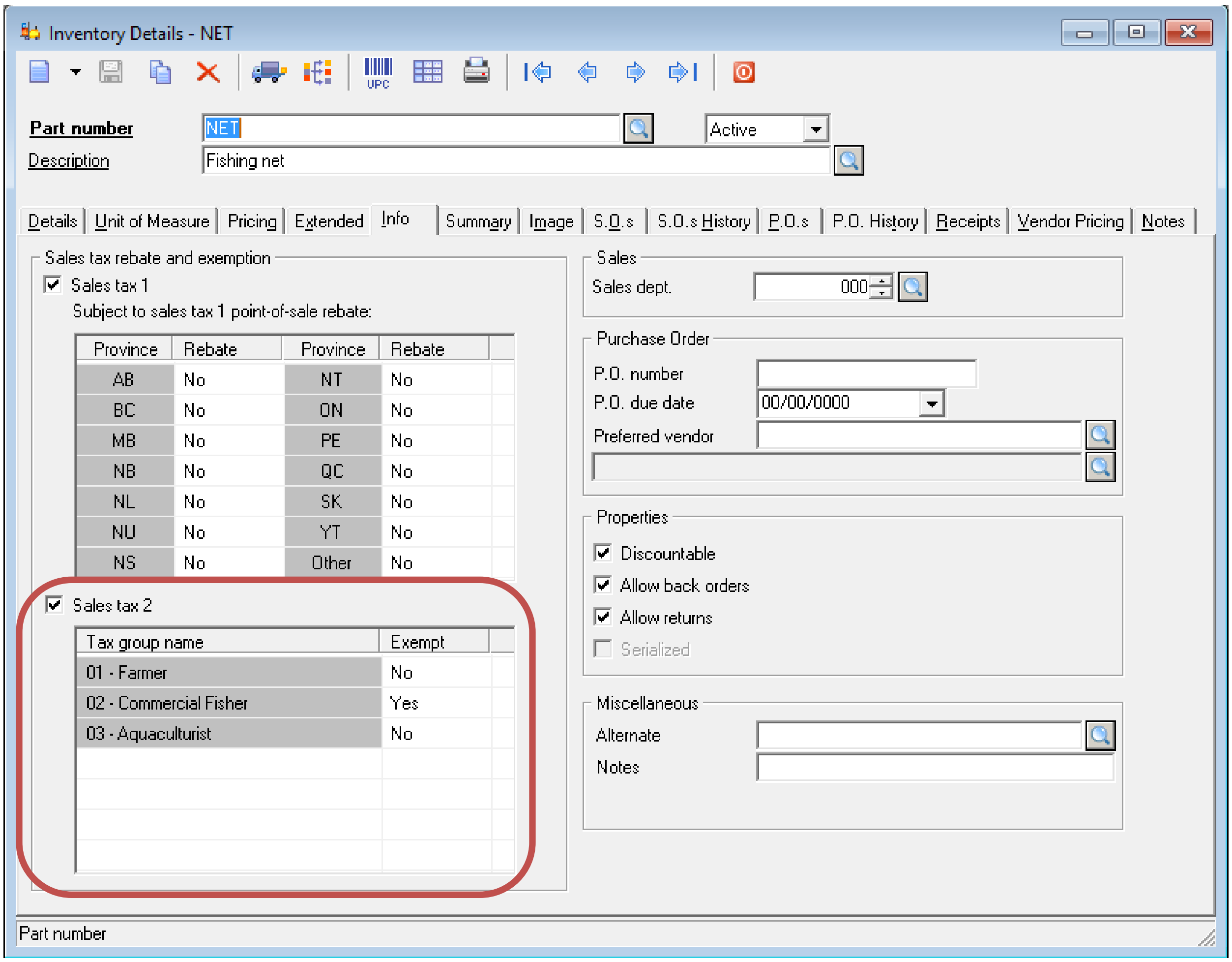
Customer Details

In Customer Details, on the Taxes and shipping tab, the tax group list was added to allow customers to be assigned to tax groups. By adding a customer to a tax group the customer can be selectively exempted from being charged sales tax 2 (P.S.T.) on items they purchase. The default selection is “00 – All items”, which is enabled whenever a sales tax 2 exemption number is provided.



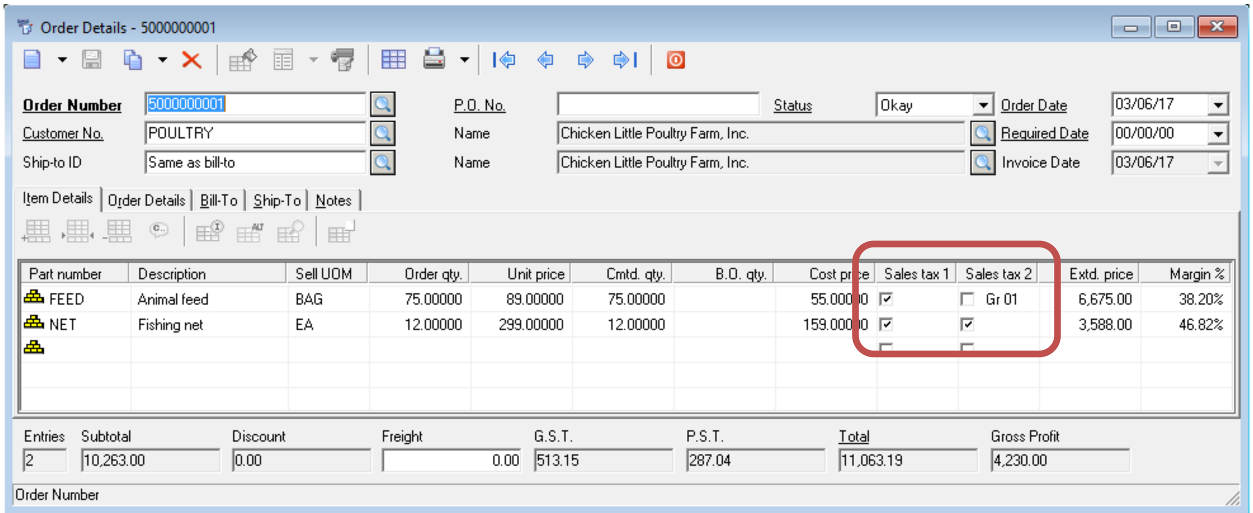
Inventory Details

In Inventory Details, on the Info tab, items that are subject to sales tax 2 (P.S.T.) can be selectively exempted for customers within one or more customer groups. Customers in groups marked "No" will be charged sales tax 2 when purchasing this item, whereas customers in groups marked "Yes" will be exempted from being charged sales tax 2 on this item.



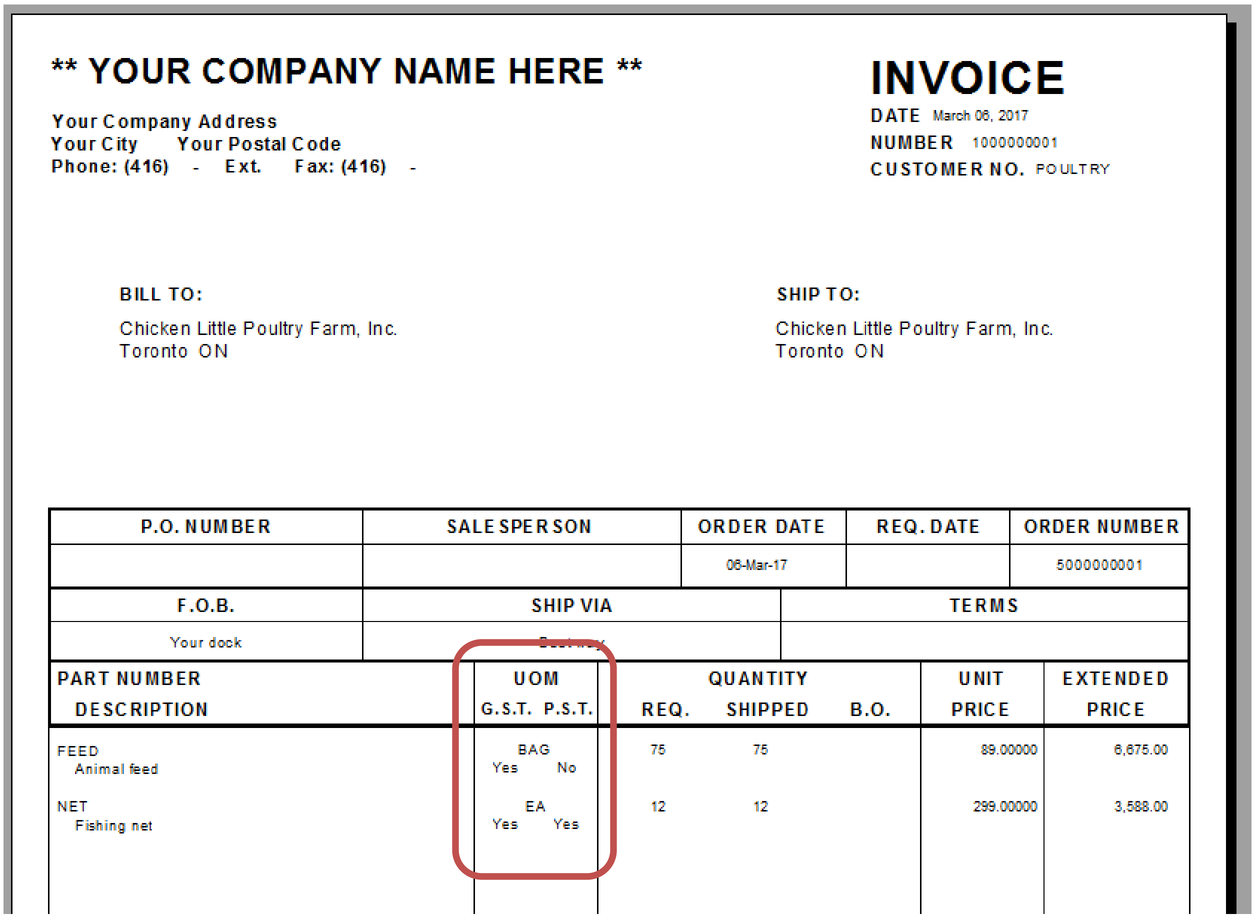
Order Details

In Order Details, when selling an item to a customer who qualifies for a customer group based exemption on sales tax 2 (P.S.T.), the group number is displayed in the Sales tax 2 column for exempted items.



Invoice form

A new invoice form option (“Invoice - Plain Paper - with tax indicators.rpt”) has been provided that indicates whether sales tax 1 and/or sales tax 2 have ben charged on a line item basis.



** YOUR COMPANY NAME HERE **

Your Company Address
Your City Your Postal Code
Phone: (416) - Ext. Fax: (416) -

INVOICE

DATE March 06, 2017
NUMBER 1000000001
CUSTOMER NO. POULTRY

BILL TO:

Chicken Little Poultry Farm, Inc.
Toronto ON

SHIP TO:

Chicken Little Poultry Farm, Inc.
Toronto ON

P.O. NUMBER	SALESPERSON	ORDER DATE	REQ. DATE	ORDER NUMBER
		06-Mar-17		5000000001

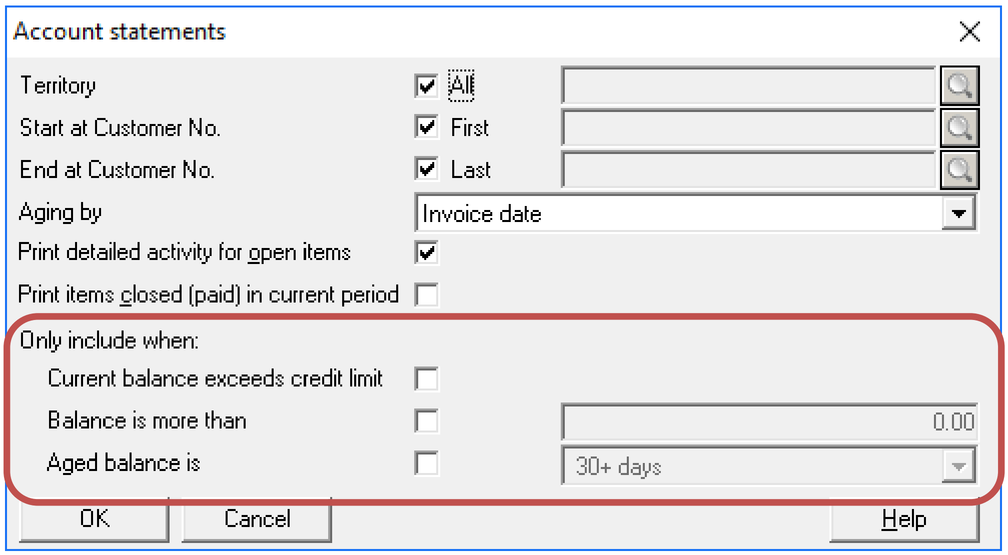
F.O.B.	SHIP VIA	TERMS
Your dock	Best way	

PART NUMBER / DESCRIPTION	UOM / G.S.T. P.S.T.	QUANTITY REQ.	SHIPPED	B.O.	UNIT PRICE	EXTENDED PRICE
FEED Animal feed	BAG Yes No	75	75		89.00000	6,675.00
NET Fishing net	EA Yes Yes	12	12		299.00000	3,588.00

Report Suite Enhancements

Account Statement Options

Additional criteria can be specified when printing customer account statements.



Only include when:	Description
Current balance exceeds credit limit	This includes customers only if their present balance exceeds their credit limit.
Balance is more than	This includes customers only if their present balance exceeds the threshold value specified. For foreign currency customers, the value is applied to the customer based on their currency. For example, if "100.00" is entered here, this will include Canadian customers with balances greater than $100.00 CAD, US customers with balances greater than $100.00 USD, and British customers with balances greater than £100.00 GBP.
Aged balance is	This includes customers only if they have outstanding balances owing in or beyond the specified aging period. (Customers with outstanding credits are not included.)