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# **New Features in Sage BusinessVision 2019 (7.92.01)**

# Initial Installation and Configuration of BusinessVision 2019

## Overview

Sage BusinessVision 2018 (7.90) or higher must be installed prior to installing Sage BusinessVision 2019 (7.92.01).

## Data File Conversion

Existing sets of Sage BusinessVision data will be converted to version 2019 format when logging in for the first time.



**NOTE:** Once your data has been converted to be compatible with version 2019, it will no longer be compatible with prior versions.

The following table lists data files that are converted, created, or reorganized during the version 2019 file conversion process.

FILE NAME	CONVERSION/NEW/REORGANIZATION
Bvcon.fil	Conversion – initialization of new fields
Customer.btr	Conversion – initialization of existing reserved fields
Slspn.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 2019 (7.92.01)

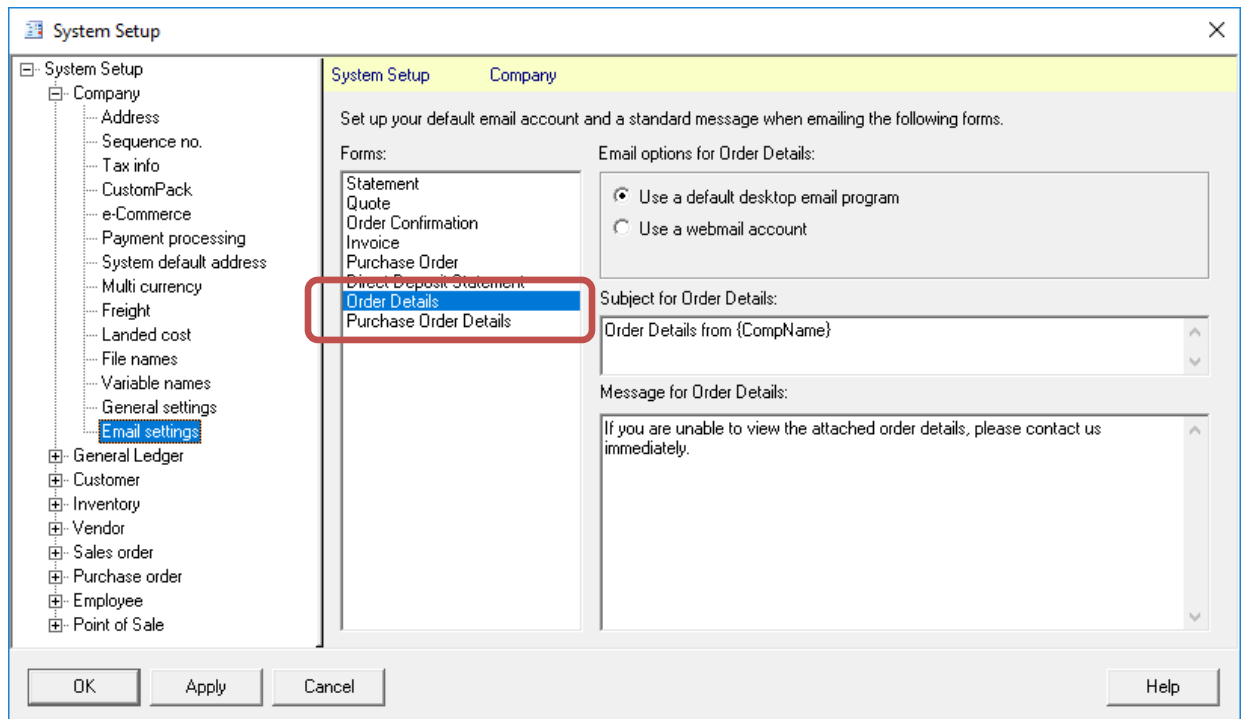
- **100333** – In certain circumstances where timecard data had characters in unused fields, Payroll reports would display the extraneous values.
- **100336** – Order totals in Customer Details > Sales Order tab did not get updated when orders with backorders were invoiced.
- **100338** – When viewing a customer’s invoice details, the “Email invoice” button was disabled if the customer did not have an email address on file at the time the invoice was posted.
- **100339** – When printing Account Statements, a blank document would print when the "Print items closed (paid) in current period" was not selected if none of the customers that met the selected criteria had open transactions in the current period.
- **100340** – When a single foreign currency and a historical fiscal year were selected as report options, the Income Statement would present values from the wrong fiscal year.
- **100342** – In Order Details, repeatedly recalling an existing order, changing the customer, and resaving the order could result in a “File Access Error” message.
- **100345** – When the Order Details module is maximized, and an order is reloaded with more line items than fit on one screen, the first empty line cannot be edited directly in order to add another item.
- **100346** – In Purchase order details, unissuing and then immediately reissuing a purchase order that included non-stocked items resulted in a printed purchase order without totals.
- **100347** – In Order Details, negative quantity break prices were not being honoured.
- **100348** – In Purchase Order details, on the Ship-to tab, copying a warehouse address resulted in the tax labels on screen to change to “N/A” until the purchase order was saved.
- **100349** – In Order Details, inputting a negative backorder for a line item with a positive order quantity was possible.
- **100350** – In Employee Details, the vacation owed field only displayed values up to \$99,999.99.

## System Setup Additions

Additions have been made to System Setup in order to activate and control new and existing features in version 2019.

### Company

In “Company > Email settings”, entries were added to control how Order Details and Purchase Order Details forms are emailed as well as the content of the subject and message body.



### 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 order details, the supported variables are:

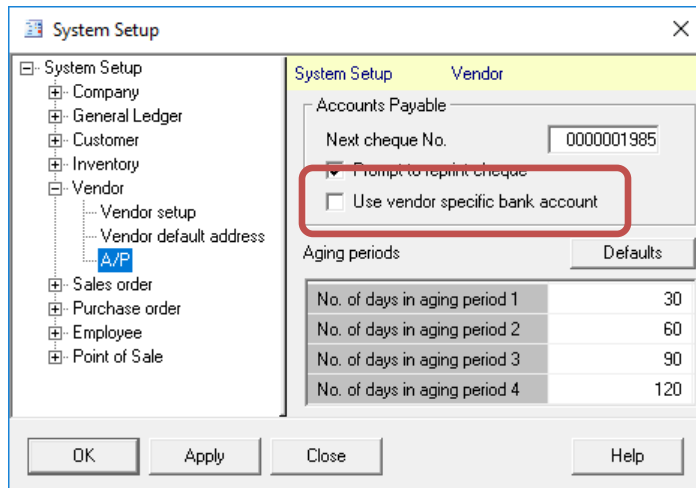
Variable name	Description
{CompName}	Your company's name
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number
{OrderDate}	The order date
{OrderNo}	The order number

For purchase order details, 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

## Vendor

In "Vendor > A/P", an entry was added to control whether or not the vendor specific bank account field should appear in Vendor Details.

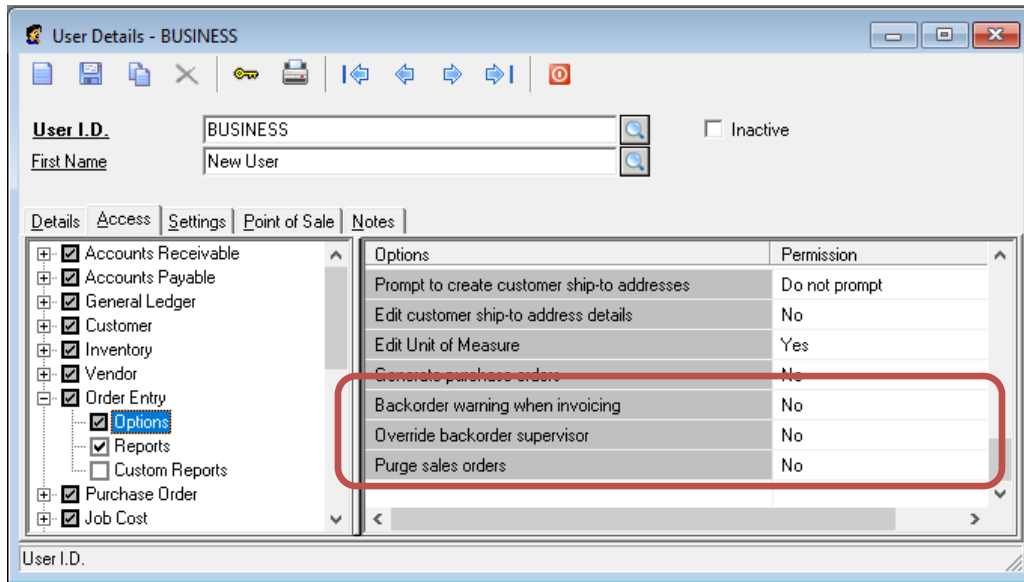


## User Details Additions

Changes have been made to User Details in order to activate and control new and existing features in version 2019.

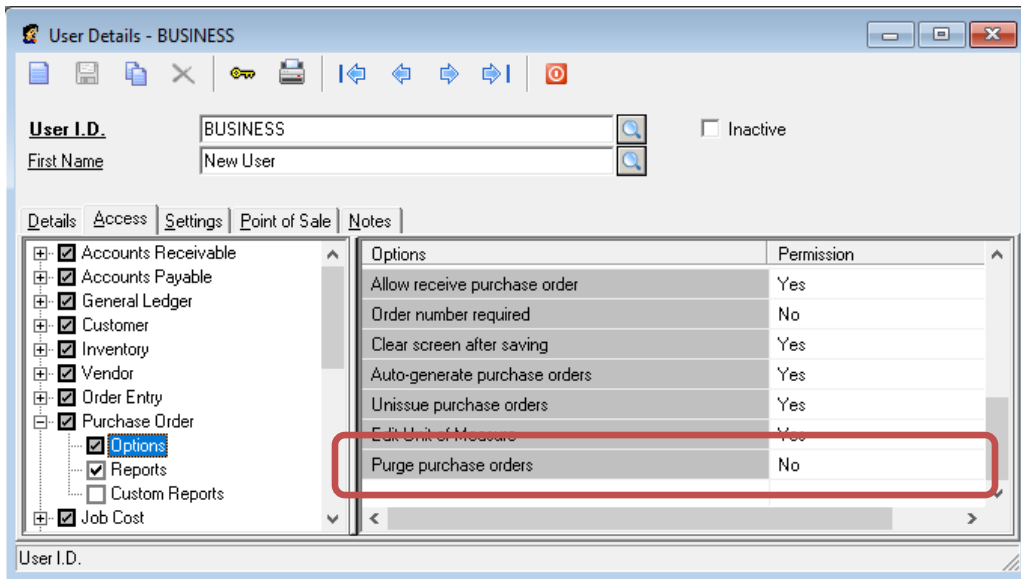
### Access – Order Entry

In “Order Entry > Options”, entries for “Backorder warning when invoicing”, “Override backorder supervisor”, and “Purge sales orders” were added.



### Access – Purchase Order

In “Purchase Order > Options”, an entry for “Purge purchase orders” was added.



## Customer Details Enhancements

In customer details, an additional form destination was added to control whether the order details report produced by the Order Entry module gets printed, emailed, or both printed and emailed.

The screenshot shows the 'Customer Details - (Untitled)' window. The 'Form destination' section is highlighted with a red box. It contains the following fields:

Form destination	Form	Main email
Statement	Form	Main email
Invoice	Form	Main email
Quote	Form	Main email
Order confirmation	Form	Main email
Order details	Form	Main email

Other fields visible in the window include: Customer No., Name, Address, Price disc. code, Discount %, G/L receivables, Credit type, Credit limit, Special code, Prompt for tax, e-Commerce (Transfer to Web-store, Past due notices, Monthly statements), and Accounts Receivable - Trade.

In addition to the main email address, the email address for Contact 1, Contact 2 or Contact 3 can be selected.

## Vendor Details Enhancements

In vendor details, a default bank account can optionally be assigned to each vendor. In order for this field to be visible, the “Use vendor specific bank account” option must be enabled in “System Setup > Vendor > A/P”.

When a bank account is provided for a vendor, payment transactions in the Accounts Payable module will use the vendor’s bank account as the default for payment transactions.

The screenshot shows the 'Vendor Details - (Untitled)' window. At the top, there are fields for 'Vendor No.' and 'Name', both with search icons, and a status dropdown set to 'Active'. Below these are several tabs: 'Address', 'Details', 'Info', 'Purchase information', 'Remit to Address', 'Accounts Payable', 'P.O.s', 'P.O. History', 'Specific Pricing', and 'Receipts'. The 'Accounts Payable' tab is selected. Under the 'Financials' section, there are several rows with search icons: 'G/L payables' (21120-), 'Accounts Payable', 'G/L expense' (82350-), 'Postage Expense', and 'Bank account' (00000-). A red box highlights the 'Bank account' row. To the right of these fields are several checkboxes and dropdowns: 'Print cheques' (checked), 'Account No.', 'Credit type' (Unlimited), 'Credit limit' (0), 'Print CPRS?' (unchecked), 'Identification No. type' (Business No.), and 'Business No.' (00000 0000 \_ 0000). At the bottom, there are two rows for 'Purchase Order' and 'Purchase Order Details', each with a 'Form' dropdown and a 'Main email' dropdown. A red box highlights the 'Purchase Order Details' row. The bottom of the window shows a 'Vendor No.' field.

In vendor details, an additional form destination was added to control whether the order details report produced by the Order Entry module gets printed, emailed, or both printed and emailed.



## Batch Payables Enhancements

In the Batch Payables utility, when selecting items to include in the batch, the option has been added to “Filter vendors by default bank account.” When this option is enabled, only vendors whose default bank account matches the selected account will have transactions included in the batch.

Batch Payables - Selection criteria

Payment date: 04/01/18

Start at Vendor No.  First

End at Vendor No.  Last

Set monetary limit: unlimited

Set vendor limit: unlimited

Take "expired" discounts

Filter vendors by default bank account

Bank Account: 11120-

Buttons: OK, Cancel, Default, Help

If the “Filter vendors by default bank account” option was enabled when creating a batch of items to pay, then a status indicator appears when viewing the list.

Batch Payables

Browse by..: Vendor No. Starting at..: AIRCAN

Amount flagged for payment: 173,858.82 Bank account: Royal Bank

Monetary limit: unlimited

Amount available: unlimited Items flagged: 12

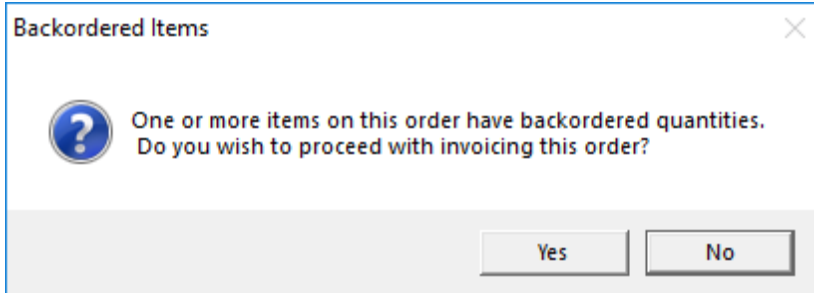
Filtered on vendor's default bank account

Vendor No.	Vendor name	Remit to name	Invoice date	Due date	Net amount	Ref
<input checked="" type="checkbox"/> AIRCAN	Air Canada		31-May-11	31-May-11	624.16	
<input checked="" type="checkbox"/> AMCOMP	Amtron Components		03-May-11	02-Jun-11	9,587.78	
<input type="checkbox"/> AMCOMP	Amtron Components		20-May-11	19-Jun-11	133,457.52	
<input type="checkbox"/> AMCOMP	Amtron Components		20-May-11	19-Jun-11	30,977.13	

## Order Details Enhancements

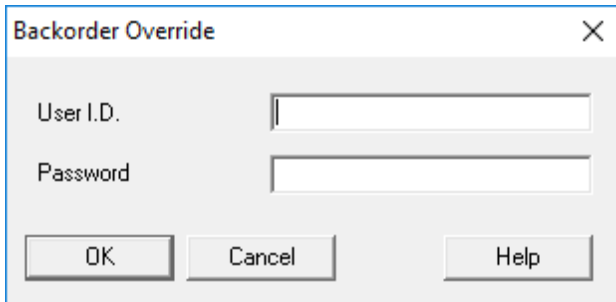
### Backorder warning when invoicing

In Order Entry, a mechanism has been added to provide a warning prior to invoicing an order that has backordered items. The warning can be selectively enabled on a user by user basis. When a user’s “Backorder warning when invoicing” setting is set to “Yes”, they will see the following message if the order they are processing has one or more backordered items.



If they user clicks “Yes”, they will be allowed to proceed with invoicing the order.

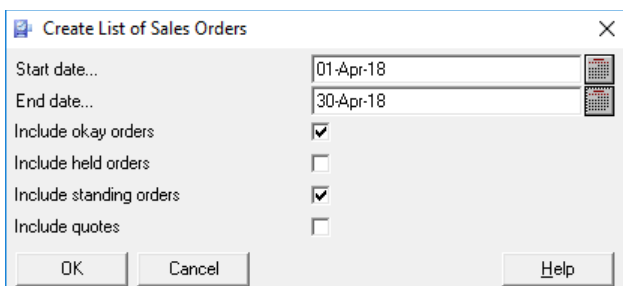
When a user’s “Override backorder supervisor” setting is set to “Yes, prompt for override” and if the order they are processing has one or more backordered items, they will see the warning above. If the user clicks “Yes”, they will be prompted to have a supervisor enter their User I.D. and Password before the order can be invoiced.



When a user’s “Backorder override supervisor” setting is set to “Yes”, they will be able to enter their User I.D. and Password so that an order with backorders can be invoiced by a user who cannot proceed on their own.

### Purge Sales Orders utility

A “Purge Sales Orders” utility has been added that allows multiple sales orders to be deleted in one operation. The utility can be accessed from the menu by choosing “Edit > Order Entry > Purge Sales Orders”. When the utility is launched, the “Create List of Sales Orders” dialog appears. The range of order dates, and the order types selected will be used to identify orders that are candidates for deletion.



When the list of orders appears, none of the orders have been selected for deletion. Orders can be reviewed using the “View Order” button in the toolbar. Individual orders can be selected for deletion by using the checkbox in the Order Number field, and all orders can be selected using the “Select All” button in the toolbar.

Order Number	Customer No.	Customer name	Order Date	Status	Amount
<input type="checkbox"/> 0000700500	INTSYS	Integrated Sound Solutions	05-Jun-2011	OK	9,893.98
<input type="checkbox"/> 0000700501	HARCOM	Hardy Computer Associates	05-Jun-2011	OK	1,290.19
<input type="checkbox"/> 0000700504	ONTSND	Ontario Sound Emporium Inc.	05-Jun-2011	OK	9,186.31
<input type="checkbox"/> 0000700505	HARNEW	Harris & Newland Inc.	05-Jun-2011	OK	1,249.08
<input type="checkbox"/> 0000700506	NYAUDI	North York Audio Specialists	10-Jun-2011	OK	27,438.41
<input type="checkbox"/> 0000700507	MASTER	Masters Computer Systems	10-Jun-2011	Standing	17,154.30
<input type="checkbox"/> 0000700508	HARCOM	Hardy Computer Associates	10-Jun-2011	Standing	43,593.59
<input type="checkbox"/> 0000700510	JACSN	Jackson Electronics	11-Jun-2011	OK	35,809.70
<input type="checkbox"/> 0000700512	TORRAD	Toronto Radio Limited	14-Jun-2011	OK	23,586.94

When one or more orders are selected for deletion, the “Purge” button in the toolbar will be enabled, and confirmation will be required before the selected orders will be deleted.

Order Number	Customer No.	Customer name	Order Date	Status	Amount
<input checked="" type="checkbox"/> 0000700500	INTSYS	Integrated Sound Solutions	05-Jun-2011	OK	9,893.98
<input checked="" type="checkbox"/> 0000700501	HARCOM	Hardy Computer Associates	05-Jun-2011	OK	1,290.19
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<input checked="" type="checkbox"/> 0000700512	TORRAD	Toronto Radio Limited	14-Jun-2011	OK	23,586.94

**Purge Sales Orders**

Do you wish to purge the selected sales orders?

OK Cancel

## Purchase Order Enhancements

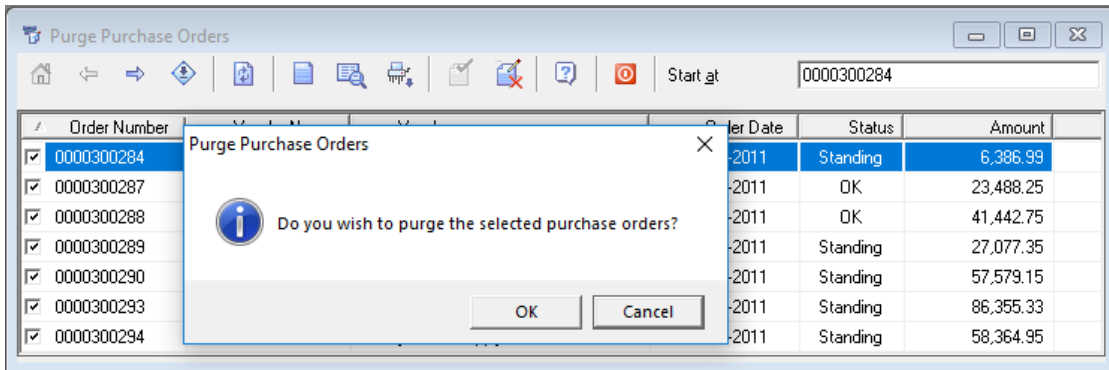
### Purge Purchase Orders utility

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When the list of orders appears, none of the orders have been selected for deletion. Purchase orders can be reviewed using the “View Purchase Order” button in the toolbar. Individual purchase orders can be selected for deletion by using the checkbox in the Order Number field, and all purchase orders can be selected using the “Select All” button in the toolbar.

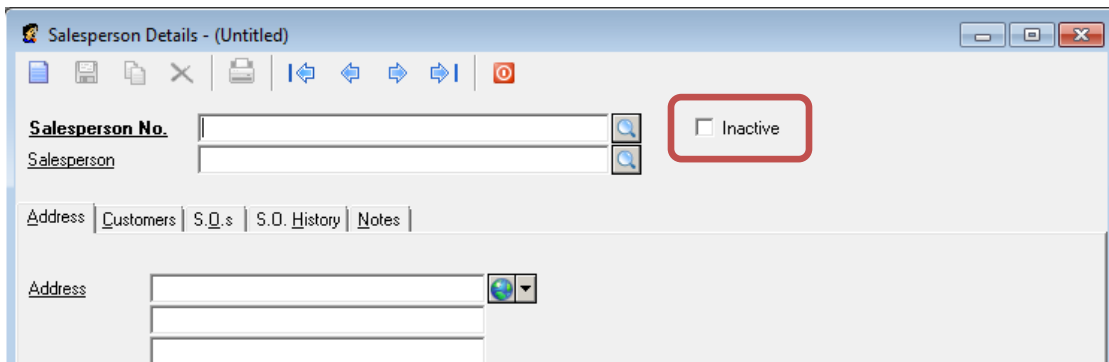
Order Number	Vendor No.	Vendor name	Order Date	Status	Amount
<input type="checkbox"/> 0000300284	AMCOMP	Amtron Components	03-Jun-2011	Standing	6,386.99
<input type="checkbox"/> 0000300287	CNCP	CNCP Music	11-Jun-2011	OK	23,488.25
<input type="checkbox"/> 0000300288	INSSND	International Sound Systems	11-Jun-2011	OK	41,442.75
<input type="checkbox"/> 0000300289	GRTAUD	Great Audio Equipment	04-Jun-2011	Standing	27,077.35
<input type="checkbox"/> 0000300290	DAVELE	Davidson Electronics Supply	04-Jun-2011	Standing	57,579.15
<input type="checkbox"/> 0000300293	CLAIR	Clairons Specialty Supply	11-Jun-2011	Standing	86,355.33
<input type="checkbox"/> 0000300294	BOSAUD	Bosley Audio Supply	05-Jun-2011	Standing	58,364.95

When one or more purchase orders are selected for deletion, the “Purge” button in the toolbar will be enabled, and confirmation will be required before the selected orders will be deleted.



## Salesperson Details Enhancements

In salesperson details, a field was added to allow a salesperson to be marked as inactive.



When browsing by salesperson, the browse now has the option to “Show all salespeople” or to “Show active salespeople only.”

