

FLEXX[®]

Version 7.0L0

Upgrade Guide

△ Databyte

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1. Introduction

This manual contains descriptions of all upgrades to FLEXX in **Version 7.0L0**. Only those functions affected in this version are described. Please refer to the previous Upgrade Guides for descriptions of any earlier FLEXX upgrades.

- FLEXX 6.4L2 Upgrade Guide is the first Upgrade Guide produced, and describes upgrades from Version 6.3L1 up to and including Version 6.4L2.
- FLEXX 6.4L3 Upgrade Guide – upgrades in the 6.4L3 version only
- FLEXX 6.5L1 Upgrade Guide – upgrades in the 6.5L1 version only
- FLEXX 6.5L2 Upgrade Guide – upgrades in the 6.5L2 version only.
- FLEXX 6.5L3 Upgrade Guide – upgrades in the 6.5L3 version only.
- FLEXX 6.5L4 Upgrade Guide – upgrades in the 6.5L4 version only.
- FLEXX 6.6L0 Upgrade Guide – upgrades in the 6.6L0 version only.

This manual is not meant to provide complete details on each new function. The standard FLEXX Reference manuals and the Procedures Guides should still be referenced for this information. All FLEXX manuals can be accessed/viewed on the Databyte website at <http://www.databyte.com/> and accessing the Customer Support page.

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2. FLEXX 7.0L0 Enhancements

The latest release of the Flexx brings the business system up-to-date with the latest Microsoft Windows environments. Flexx is now fully operational in all flavors of the Windows 7 and Windows 2008 server environments including all 64 bit installations. This release also provides a number of basic functional corrections along with new Crystal Reports based analysis reports. This is the first release of Flexx to support the 64 bit environment and for those wishing to operate in that mode upgrading to Flexx 7.0 is required.

General System

64 bit

Flexx has been re-engineered to work on Windows 7 and Server 2008 64 bit installations. No prior release of Flexx was able to operate in the 64 bit environment and so upgrading to the 7.0 release is mandatory if you need to operate Flexx on a workstation running a 64 bit O/S. This new feature prepares Flexx for the next generation of the Windows environment as well.

Crystal Reports

The run-time routines of Crystal have been upgraded to provide improved integration with the Excel spreadsheet. This allows for a more stream-lined exporting of data from the Flexx report into the spreadsheet.

3. Accounts Receivable

3.1 Invoice Detail Enhancement

The Invoice Detail form has been changed with the addition of the Cost Center user-defined field.

The screenshot shows the 'Invoice Detail' window with the following data:

Group	Description	Type	Units	Rate	Total
1	PARTS	head0	0.0	0.0	0.00
2	Cedar Wood Spindle 200mm	part	1.0	95.0	95.00
3	Li-On Cell Battery S4	part	1.0	25.0	25.00
4	Parts GST 6%	GST7	120.0	0.05	6.00
5	Washington State Tax 8.25%	WA	120.0	0.0825	9.90

Summary fields at the bottom of the table:

- Job Code: J3112
- Resource: none
- Cost Center: **hq** (highlighted with a circle)
- Total: 137.10

Additional form fields include:

- Status: 0
- Currency: USD
- Recurring:
- Print:
- P/ST Payable:
- Type: Y
- VAT Type: Y
- Code: GST7
- Debit Account: tape 1000
- GL Trans.: n
- GL Period: 201110
- Dept.: sale
- Salesperson: 0009
- Analysis: *****
- Order/WO: 3112
- Sell Units: 1.0
- Sell Uom: EA
- Sell Priced:

This field can be manually selected at time of invoice creation, or if the invoice is generated from a WO, the Cost Center value entered on the WO Detail will be copied into this field.

The **Cost Centre** field is a user-defined field only and no FLEXX processing is performed using that entry. Any desired value can be entered. As with all other User-defined fields, the label (e.g. Cost Center) can be changed to any desired value by accessing the Master Type Header for this field (which is Master Type # 2345) and entering the desired value in the Heading field. Then the allowable values for the field are entered into the corresponding Master Type Detail table which will then be listed in the drop-down box.

4. Accounts Payable

4.1 Manual Payment Enhancement

The Manual Payment function in AP has been enhanced with the addition of the **Update Bank Check #** field. This allows the check numbering to be incremented for any following payments.

Previously without this option, or with the box unchecked, the check number would not be updated with the generation of this manually created check. This is perfectly acceptable if the manual check being generated is not part of the automatic AP Payment Generation process and so you would not want to update the check number.

The screenshot shows a software window titled "Manual Payment Creation". The window has a menu bar with "Form", "Edit", "Field", and "Help". Below the menu bar are several icons. The main area contains a form with the following fields and values:

- Create new payment?**
- Company** tucker
- Voucher #** 20530
- Payment Number** 999999
- Payment Description** [Empty]
- Batch Number** [Empty]
- Bank** ncnb
- Cheque Number** 436
- Cheque Date** 10/04/11
- Discount Date** 10/04/11
- Period** tape 201110
- Discount Account** tape 8500
- Foreign Exchange Gain/Loss** [Empty]
- Exchange Rate** 1.0

At the bottom of the form, there are three summary fields:

- Current Payment Amount** [Empty]
- Total Discount Taken** [Empty]
- Total AP Debit** [Empty]

A blue callout box labeled "Current Cash Position" points to the "Update Bank Check#" checkbox, which is checked. The checkbox is circled in black.

In the above example, the next check generated would be # 437.

5. Time Billing

5.1 WO Detail Enhancement

The following new fields have been added to the Work Order Detail (Parts) form:

- Price Adjusted box
- Cost Centre field

Seq	E/A	Status	SKU code	Plan	UOM	Ilo. Units	P.Type	Unit Price	Ext. Amount	Txt
1	act	a	cws-200		EA	2.0	d	125.0	250.00	Y
2	act	a	cws-201		EA	1.0	d	35.0	35.00	N

Whenever the **Unit Price** is changed on the WO Detail, the **Price Adjusted** flag will be set. With this set, any changes made to the detail entry will use the existing Price value.

The **Cost Centre** field is a user-defined field only and no FLEXX processing is performed using that entry. Any desired value can be entered. This value will also be copied to the invoice created from the WO. As with all other User-defined fields, the label can be changed to any desired value by accessing the Master Type Header for this field (which is Header # 2345) and entering the desired value in the Heading field. Then the allowable values for the field are entered into the corresponding Master Type Detail table.

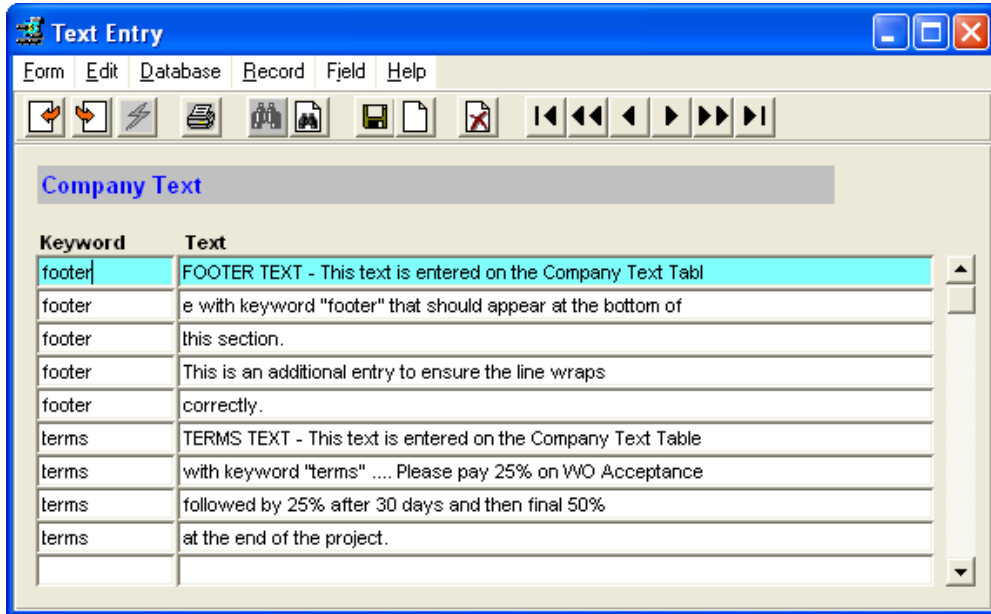
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5.2 WO Proposal Report

Two new text fields have been added to the WO Proposal Report (wopropc):

- Terms
- Footer

These are defined on the Company Text Table with keywords “terms” and “footer”.



Any desired text can be entered up to a maximum of about 260 characters (this is not exact as it depends on the total size of the text message and some characters take up more space than others (upper case vs. lower case, etc.)). This text data will be printed in the lower portion of the WO Proposal report as shown below.

We propose hereby to furnish material and labor-complete in accordance with above specification for the price of:	\$528.75 + Tax
Tucker Tape Supply, Inc. (flexx66L1) Authorization _____ Note: This proposal may be withdrawn by us if not accepted within 30 days. TERMS TEXT - This text is entered on the Company Text Table with keyword "terms" Please pay 25% on WO Acceptance followed by 25% after 30 days and then final 50% at the end of the project. More text to see what the maximum size limit is 123456789012 FOOTER TEXT - This text is entered on the Company Text Table with keyword "footer" that should appear at the bottom of this section. This is an additional entry to ensure the line wraps correctly. More text to see what the maximum size limit is 123456789	
Acme Parts Ltd. Acceptance by (Print Name & Title) _____	
P.O.# <u>132</u>	
Date of Acceptance: _____ Signature: _____	
The above prices, specifications and conditions are satisfactory and are hereby accepted. Payment will be made as outlined above. Details not defined in proposal or project description will not be considered	

