Site Settings User Guide

Admin Panel

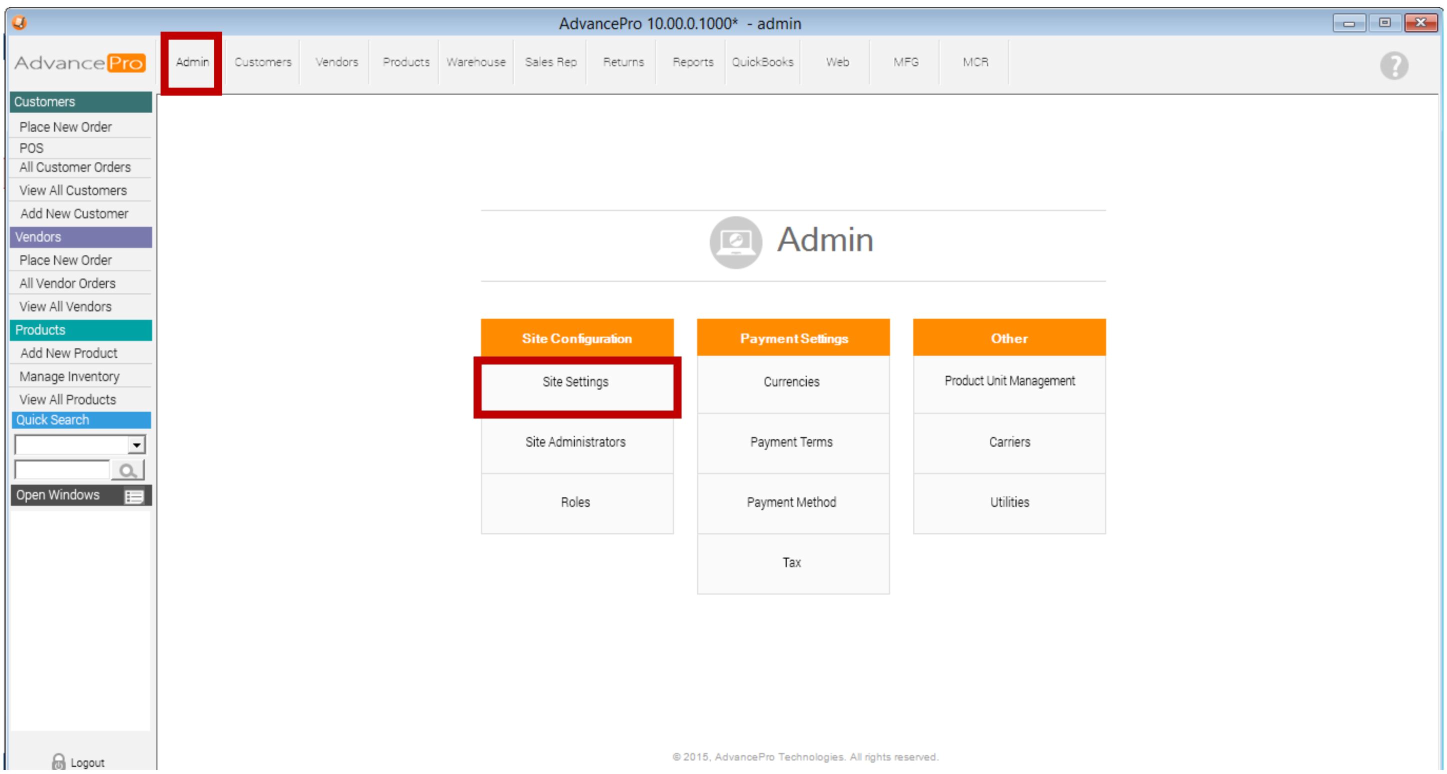
AdvancePro has a wide feature set catering to the needs of users in many industries. Using the Admin panel, AdvancePro can be further customized to meet your specific needs.

Site Settings

The Site Settings section of the Admin panel enables you to setup your workspace and other features that are important when setting up AdvancePro. This feature guide walks you through the various options available to you so you can optimize your setup.

The Site Settings can be accessed by:

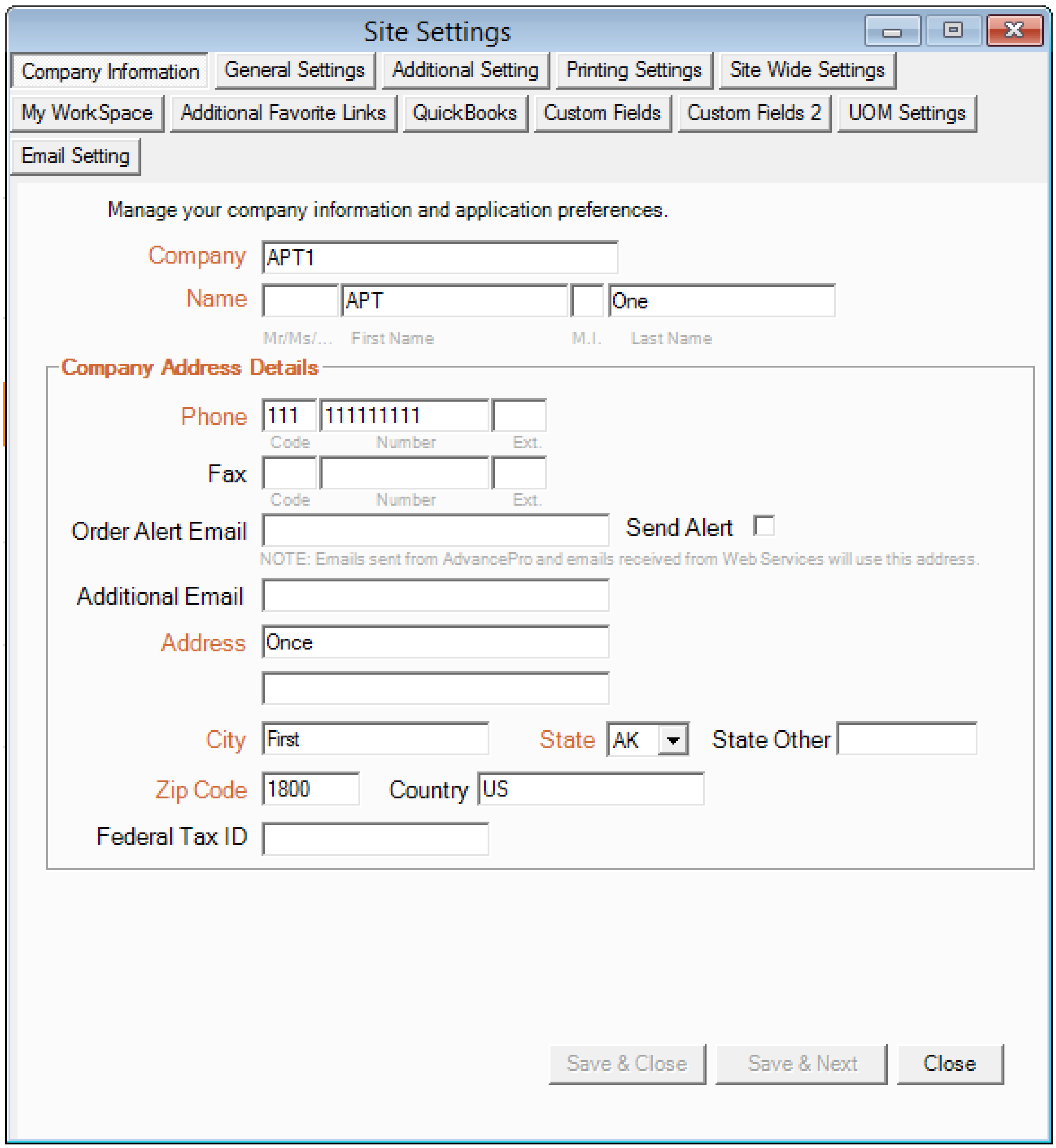
1. Click "Admin"
2. Click "Site Settings"



Company Information

In this screen, you can personalize your copy of AdvancePro by entering your company information.

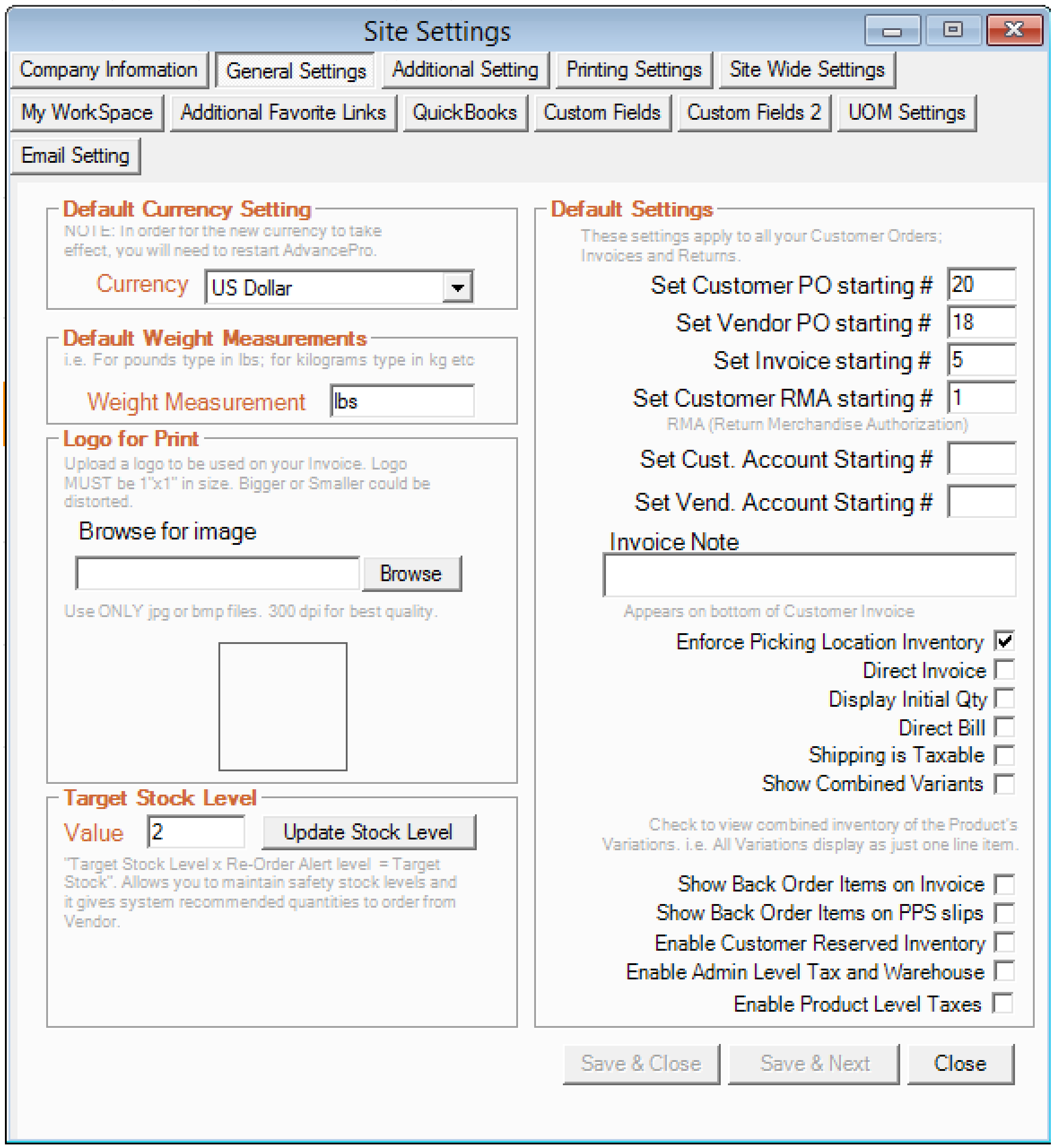
1. Fill in your information. The fields indicated by orange text are mandatory (Company, Name, Phone, Address, City, State and Zip Code).
   NOTE: The "Order Alert Email" field is only applicable for those using AdvancePro Web Services.
2. Save or discard your changes.
   a. Click "Save & Close" to save your changes and close the Site Settings menu.
   b. Click "Save & Next" to save your changes and keep working within the Site Settings menu.
   c. Click "Close" to discard the changes you have made without saving.



General Settings

In this screen, you can set your default currency and weight measurements. You can also set up your logo for printed documents, your target stock level and additional default settings.

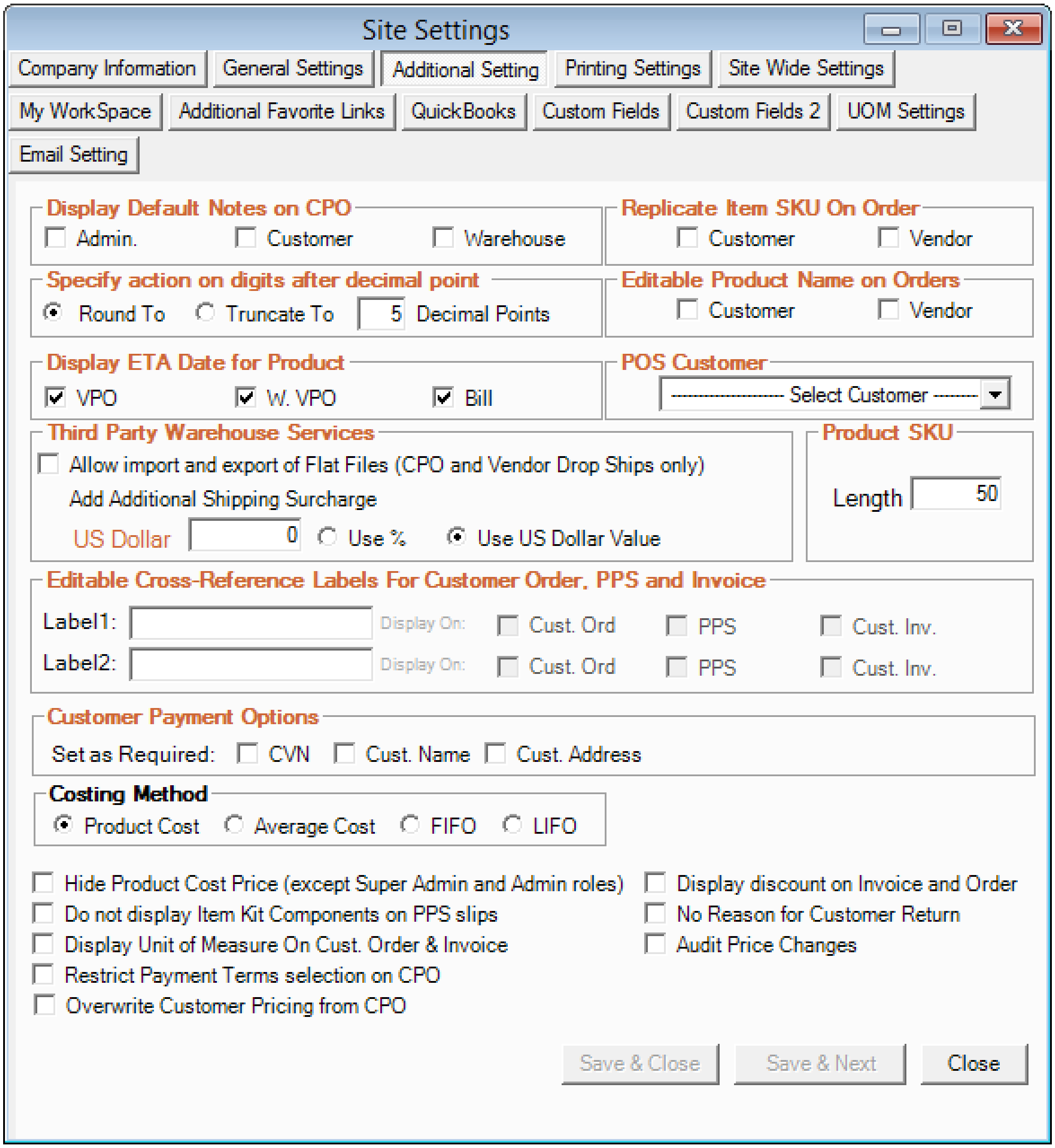
1. Select your default currency.
   NOTE: The list of default currencies is created in the “Admin” menu. If your currency does not appear here, you can always add it from that screen.
2. Select your default weight measurement, whether it is lbs or KG.
3. Select your logo for print. It must be a jpg or bmp file.
   NOTE: For best results:
   1) Logo should be 1 inch x 1 inch in size, otherwise it may appear distorted
   2) Use 300 dpi (dots per inch) for best quality



4. For each product, AdvancePro allows you to set an order alert level. In this field, you can set a default target stock level that is a multiple of the order alert level. Then, AdvancePro will use this information to suggest re-order quantities. This information will appear on the Re-Order Alert Report and the Vendor Order.
   For example, if your order alert level for widgets is 300, and you set your target stock level value to 3, when re-ordering widgets, AdvancePro will suggest you order enough for a stock level of 900.
5. Manage your default settings.
   1) Set the customer PO starting number. All customer purchase orders created after this will go up incrementally from this number.
   2) Repeat step 1) for the vendor PO, invoice, customer RMA, customer and vendor account number settings (all listed below "Default Settings").
      NOTE: You can repeat steps 1) and 2) at any time to reset or change the numbering systems.
   3) Enter a standard footnote that will appear at the bottom of all customer invoices
   4) Choose whether to enforce picking location inventory: If you use multiple picking locations, this feature will prompt you to select a picking location when shipping or receiving.
   5) When "Direct Invoice" is checked, AdvancePro will skip the warehouse processes of picking, packing and shipping. An invoice will be the direct result of processing a customer purchase order. This feature is useful for walk-ins and point of sale orders.
   6) With "Display Initial Quantity" checked, an additional quantity field is displayed on your invoice representing the customer's initially requested quantity. You can use this for the back-order process and/or for reporting. Please note that if the stock is not fully available, you need to process the order using the warehouse, or you need to remove the quantity from the order.
   7) When "Direct Bill" is checked, AdvancePro will skip the warehouse processes of receiving. A bill will be the direct result of processing a vendor purchase order.
   8) Checking "Shipping is Taxable" allows you to tell AdvancePro to apply tax on shipping charges
   9) When "Show Combined Variants" is checked, AdvancePro will combine all of the variants of a single product onto a single line. If unchecked, AdvancePro will display a separate line for each variant (size, color, etc)
   10) Checking "Show Back Order Items on Invoice" will display additional lines on your invoices showing quantities of items that are on backorder.
   11) Checking "Show Back Order Items on PPS slips" will display additional lines on your picking, packing and shipping documents showing quantities of items that are on backorder.
   12) When "Enable Customer Reserved Inventory" is checked, if stock is not available for a customer order, and a vendor order is generated, this option will allow the inventory received from the vendor order to be reserved for the customer. This should only be used if everything you order is based on customer demand.
   13) When "Enable Admin Level Tax and Warehouse" is checked, you can assign a tax term to each individual warehouse. The warehouse from which an order is shipped will then determine the tax on the order. The warehouse and tax association is then made from the Site Administrator form. This feature is typically used in a multiple warehouse setup.
   14) The "Enable Product Level Taxes" feature is available in Canada only. It allows for taxes to be applied at the line item level.

Additional Setting

In this screen, you can change a number of miscellaneous settings.

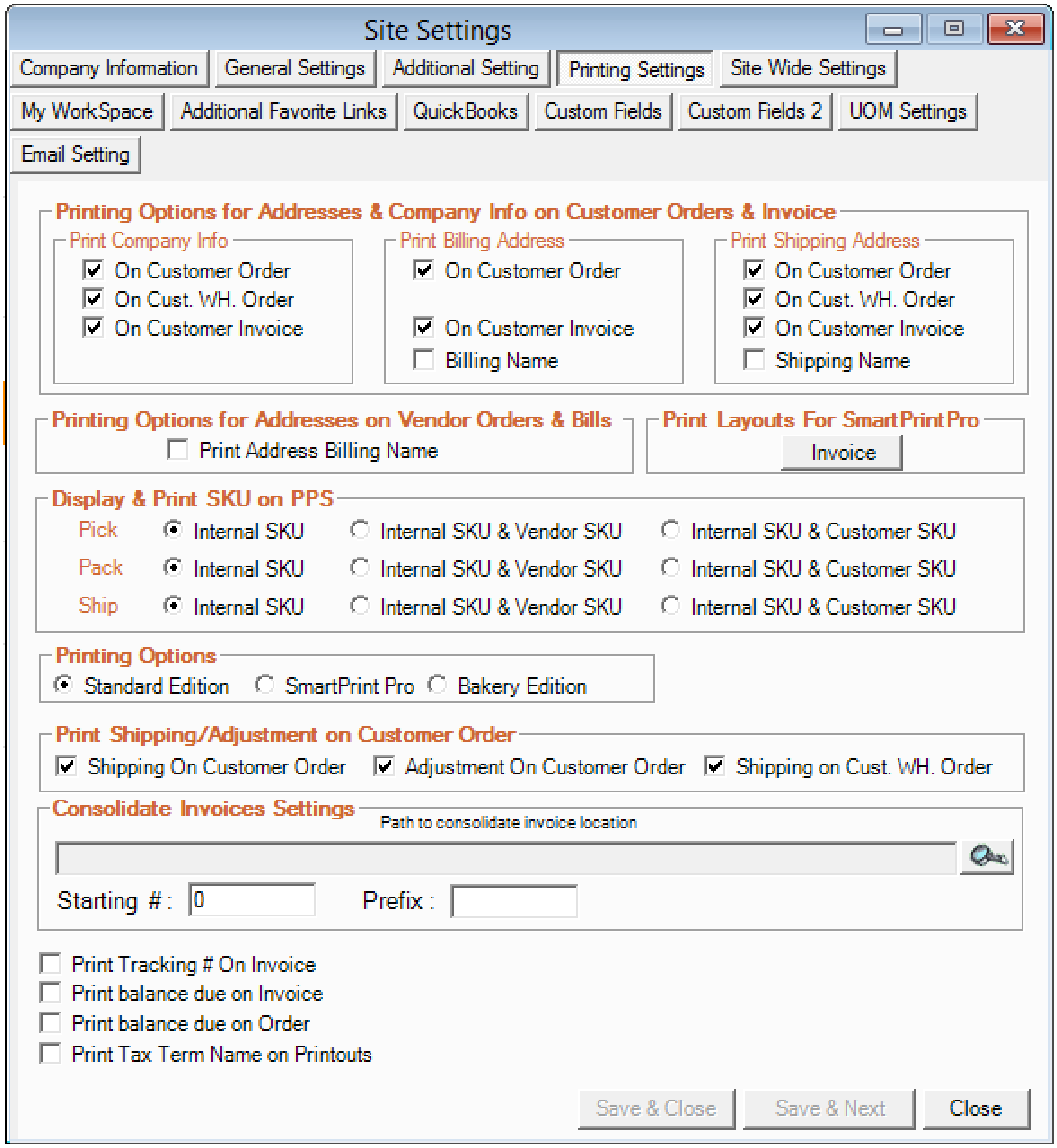


1. “Display Default Notes on CPO”: When creating a customer order, you have the option of creating 3 types of notes:
    1) “Admin” notes are only seen by administrators and are not printed on the customer order. This note is set up on the Site Administrator form
    2) “Customer” notes are printed on customer orders and invoices.
    3) “Warehouse” notes are printed on picking, packing and shipping slips.
2. “Specify action on digits after decimal point” applies when processing customer purchase orders:
    1) “Round To” tells AdvancePro to round to the specified number of decimal points
    2) “Truncate To” tells AdvancePro to shorten prices to the specified number of decimal points

3. “Display ETA date for product”: If you wish to enter an ETA date on vendor orders for individual products (instead of the entire order), you can enable this option.
    1) Select “VPO” for vendor purchase orders
    2) Select “W-VPO” for warehouse vendor purchase orders
    3) Select “Bill” for vendor bills
4. “Replicate Item SKU On Order”: Enable this option to enter the same SKU on more than one product line. Otherwise, you can only have a SKU listed once on an order.
    1) Check “Vendor” to enable this option on Vendor purchase orders
    2) Check “Customer” to enable this option on Customer purchase orders
5. The “Editable Product Name on Orders” option allows you to edit the name of the product. This will not change the product information in AdvancePro but will only apply to the order, picking slips and invoices. The edited name then exports to QuickBooks.
    1) Check “Vendor” to enable this option on Vendor purchase orders
    2) Check “Customer” to enable this option on Customer purchase orders
6. “POS Customer”: For use with AdvancePro’s POS module. You can pre-create and pre-select a “walk-in” or “cash” customer to process POS orders. When you process a customer order using this customer, the order will be POS.
7. “Third Party Warehouse Services”: If you use a third party warehouse, select this to import flat files and to apply a shipping surcharge on customer orders.
8. “Product SKU”: Use this field to set the maximum number of characters in product SKUs. 50 is the system maximum.
9. “Editable Cross-Reference Labels on Customer Order, PPS and Invoice”: You can create up to 2 extra fields on customer orders that can be cross-referenced on the customer order, invoice, and picking, packing and shipping slips.
10. “Customer Payment Options”: Allows you to select what information your customers must provide when placing an online order.
11. “Costing Method”: Allows you to tell AdvancePro which method you would like to use to calculate your inventory cost
12. “Hide Product Cost Price (except Super Admin and Admin roles)”: This setting allows you to keep your cost prices hidden from all users of AdvancePro except for those with Super Admin or Admin permission levels.
13. “Do not display Item Kit Components on PPS slips”: Allows you to display only the item kit, without displaying it’s components on pick, pack and ship slips.
14. “Display Unit of Measure on Cust. Order & Invoice”: Checking this box results in units of measure being displayed on customer orders and invoices.
15. “Restrict Payment Terms selection on CPO”: When this box is checked, AdvancePro will use the pre-set payment terms for that particular customer. The option to change the payment terms will not be available.
16. “Overwrite Customer Pricing from CPO”: Checking this box enables the person entering an order to overwrite customer pricing from within the customer purchase order.
17. “Display discount on Invoice and Order” allows you to have the line item discount percentage and discount dollar amount displayed on customer orders and invoices.
18. “No Reason for Customer Return”: When this box is checked, AdvancePro allows you to process customer returns without entering a reason for the return. By default, a reason is required.
19. “Audit Price Changes”: When this setting is checked, AdvancePro requires you to enter a reason any time the price of a product is changes.

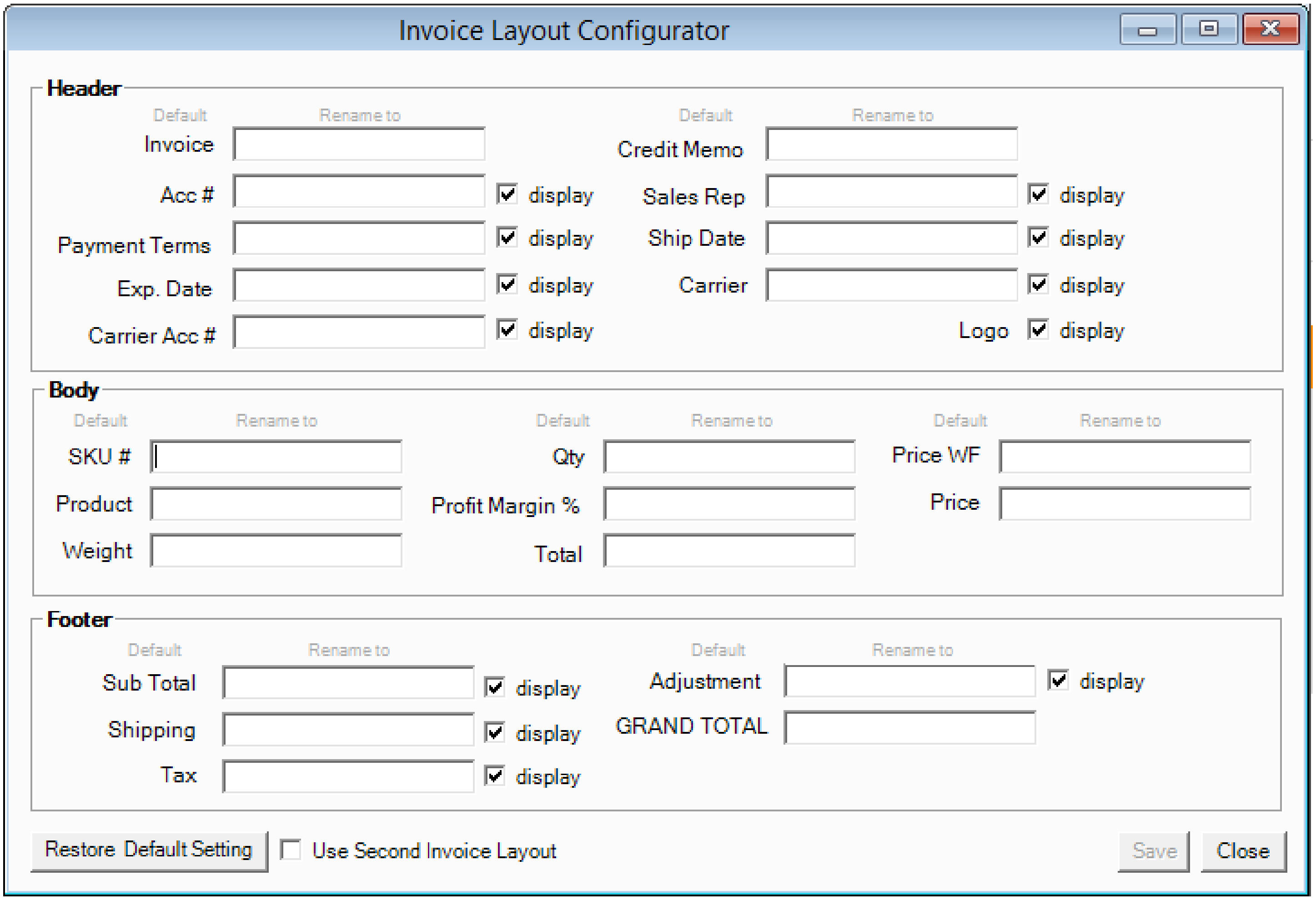
Printing Settings

In this screen, we can customize printed documents that come out of AdvancePro.



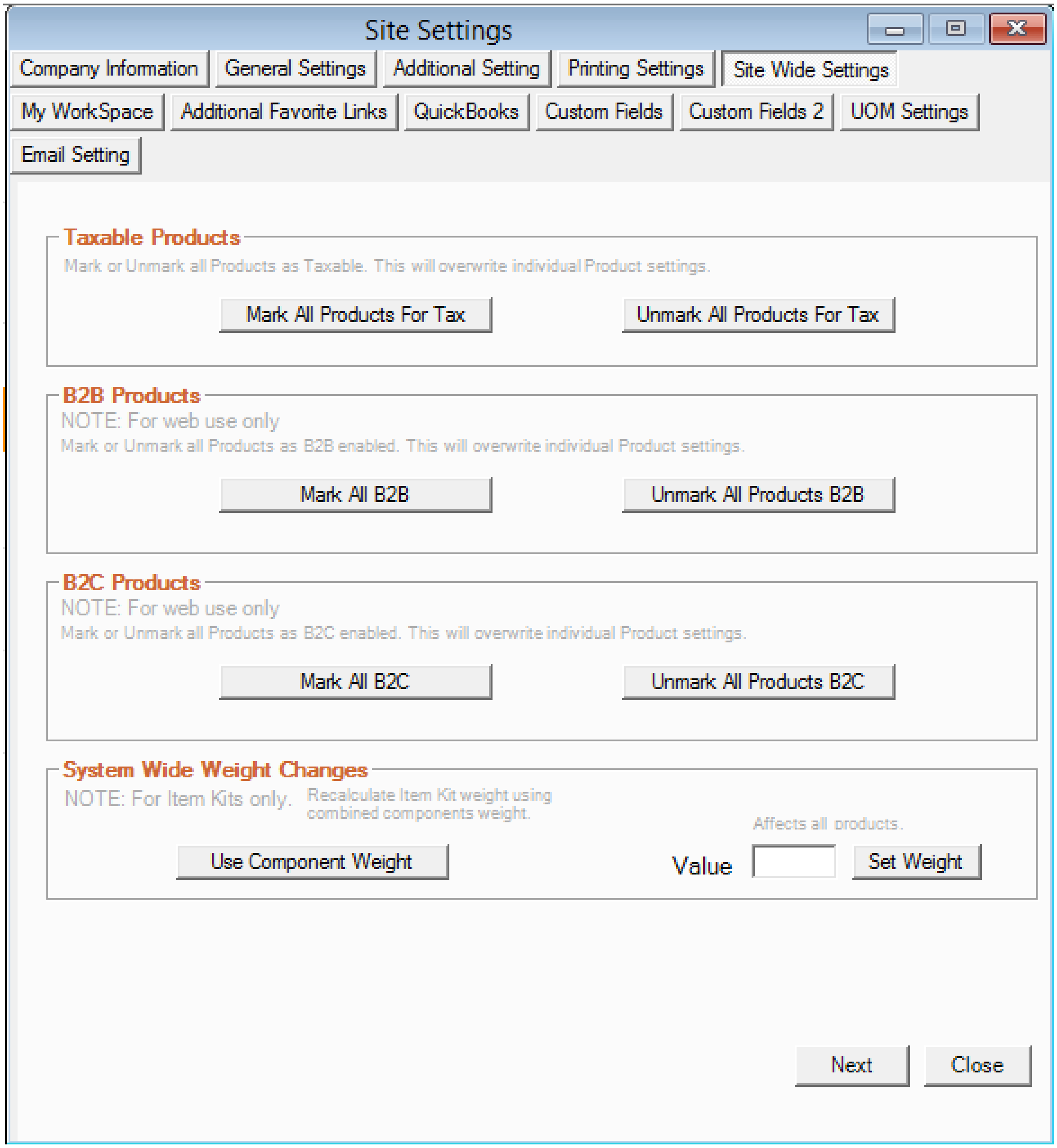
1. “Printing Options for Addresses & Company Info on Customer Orders & Invoice” allows you to select the printed documents on which you would like your company info, billing address and shipping address to appear.
2. “Printing Options for Addresses on Vendor Orders & Bills” allows you to select whether you want your billing name printed on vendor orders and bills.

3. “Print Layouts for SmartPrint Pro” allows you to further customize your Invoice by renaming the listed fields when selecting the SmartPrint Pro option.



4. “Display & Print SKU on PPS” allows you to specify which SKUs you would like to appear on your picking, packing and shipping documents.
5. “Printing Options” allows you to select from three printing template styles: Standard Edition, SmartPrint Pro, and Bakery Edition. Each template shows slightly different information for CPO, PPS and invoice printouts. The SmartPrint Pro template looks like the Standard edition, but it may have some additional info and it will re-size columns and fonts to best suit your paper selection. This button is available on all printouts.
6. “Print Shipping/Adjustment on Customer Order” allows you to select further printing options.
7. “Consolidate Invoices Settings” allows you to specify where you would like your consolidated invoices to be saved in a PDF format. It also allows you to specify your starting invoice number and attach a prefix to your consolidated invoice numbers.
8. “Print Tracking # On Invoice” allows you to have your tracking number printed on invoices.
9. “Print balance due on Invoice” will print the balance owing on invoices.
10. “Print balance due on Order” will print the balance owing on the customer order.
11. “Print Tax Term Name on Printouts” allows you to have the name of your tax, such as “State Tax” on printouts.

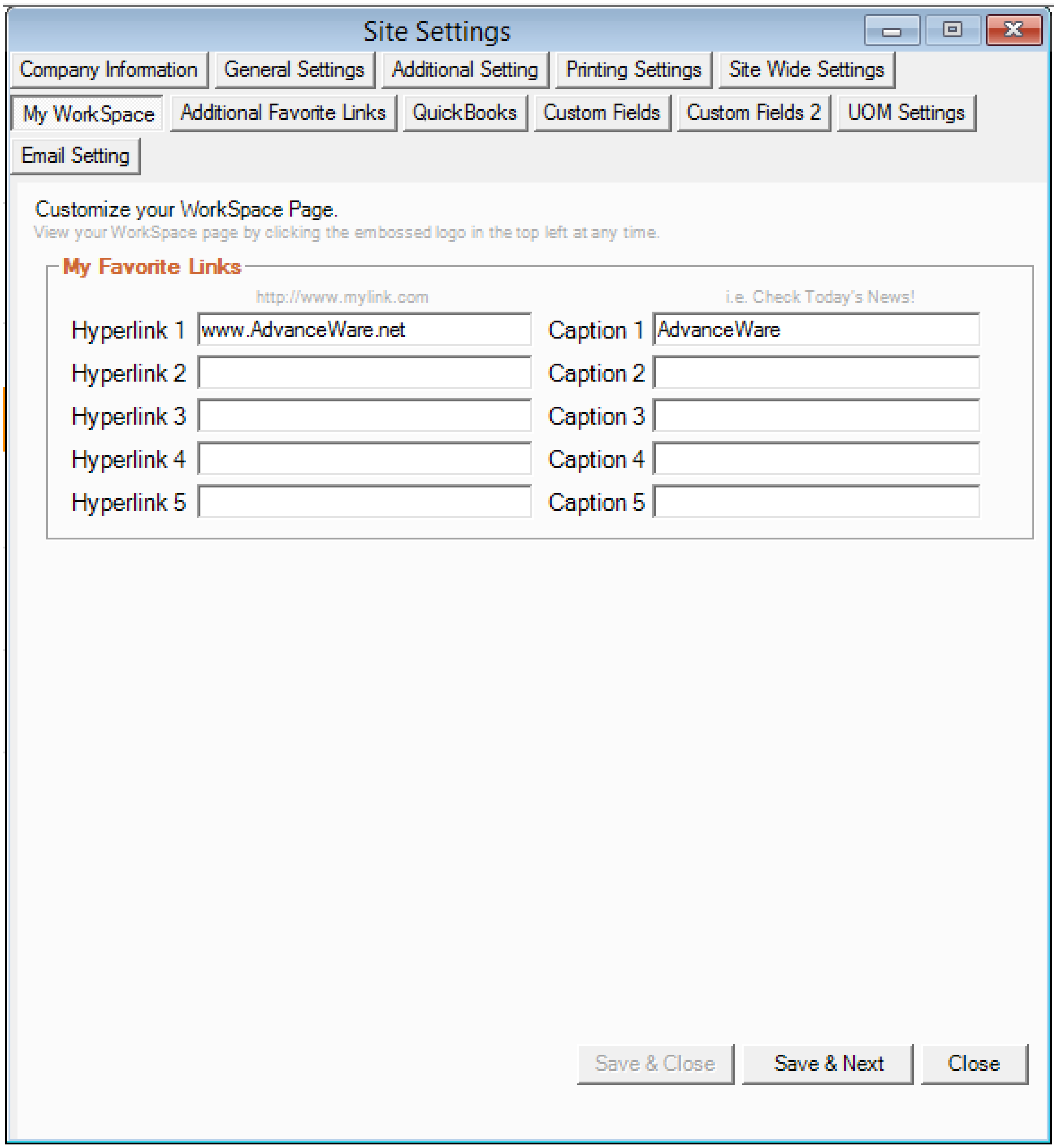
Site Wide Settings



1. "Taxable Products": These settings override individual product tax settings.
2. "B2B Products": Using these check-boxes, you can enable or disable all products to be available for your B2B site
3. "B2C Products": Using these check-boxes, you can enable or disable all products to be available for your B2C site
4. "System Wide Weight Changes": For item kits, you can assign a weight when creating the kit. Click Use Component Weight to calculate the kit weight based on the component weights instead. Also, you can assign a default weight to all your products in the "Value" text box by clicking Set Weight

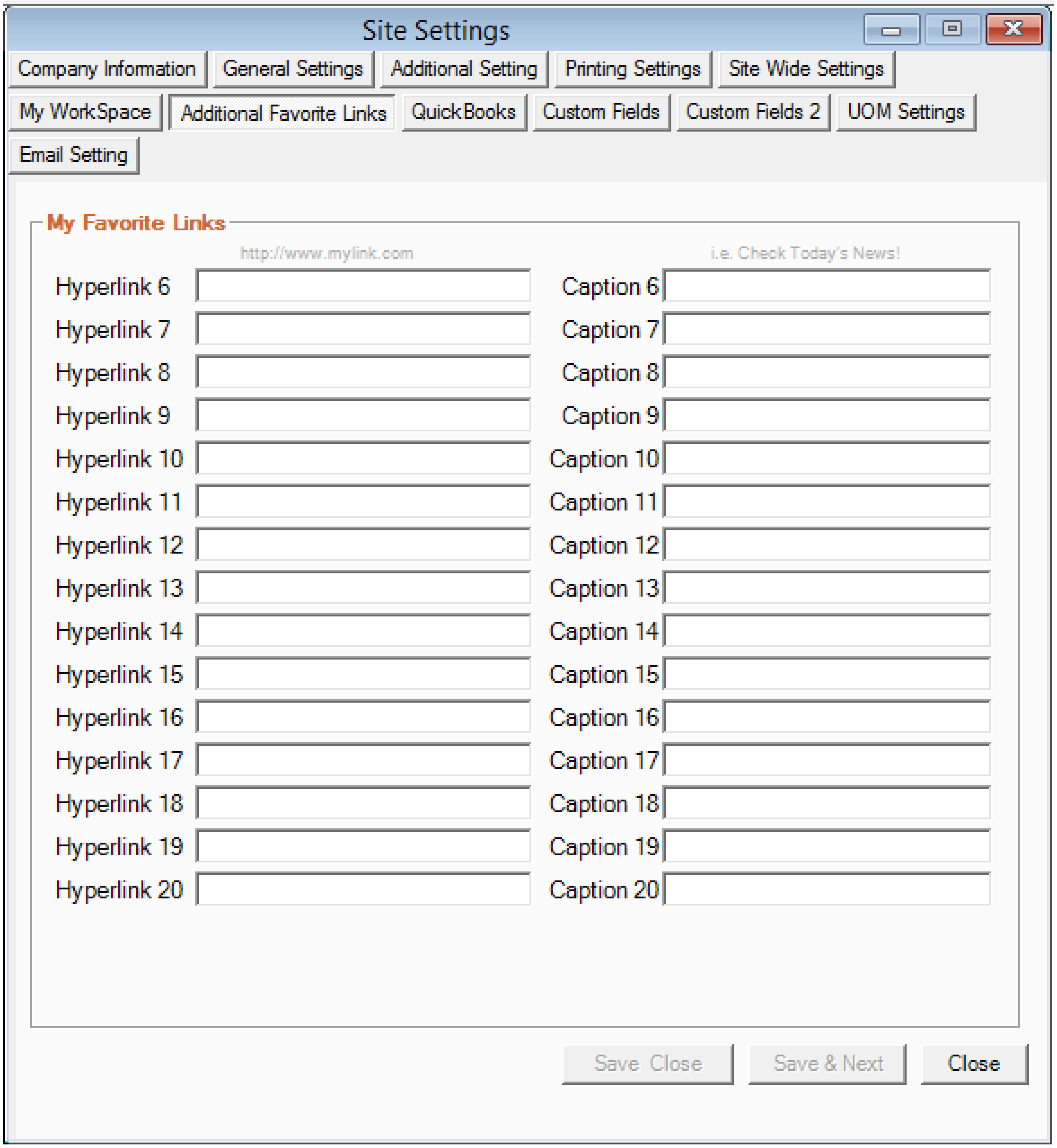
My Workspace

When you log into *AdvancePro*, you will notice that your Workspace shows your 5 favorite links. You can set those links here for quick access to your favorite sites.

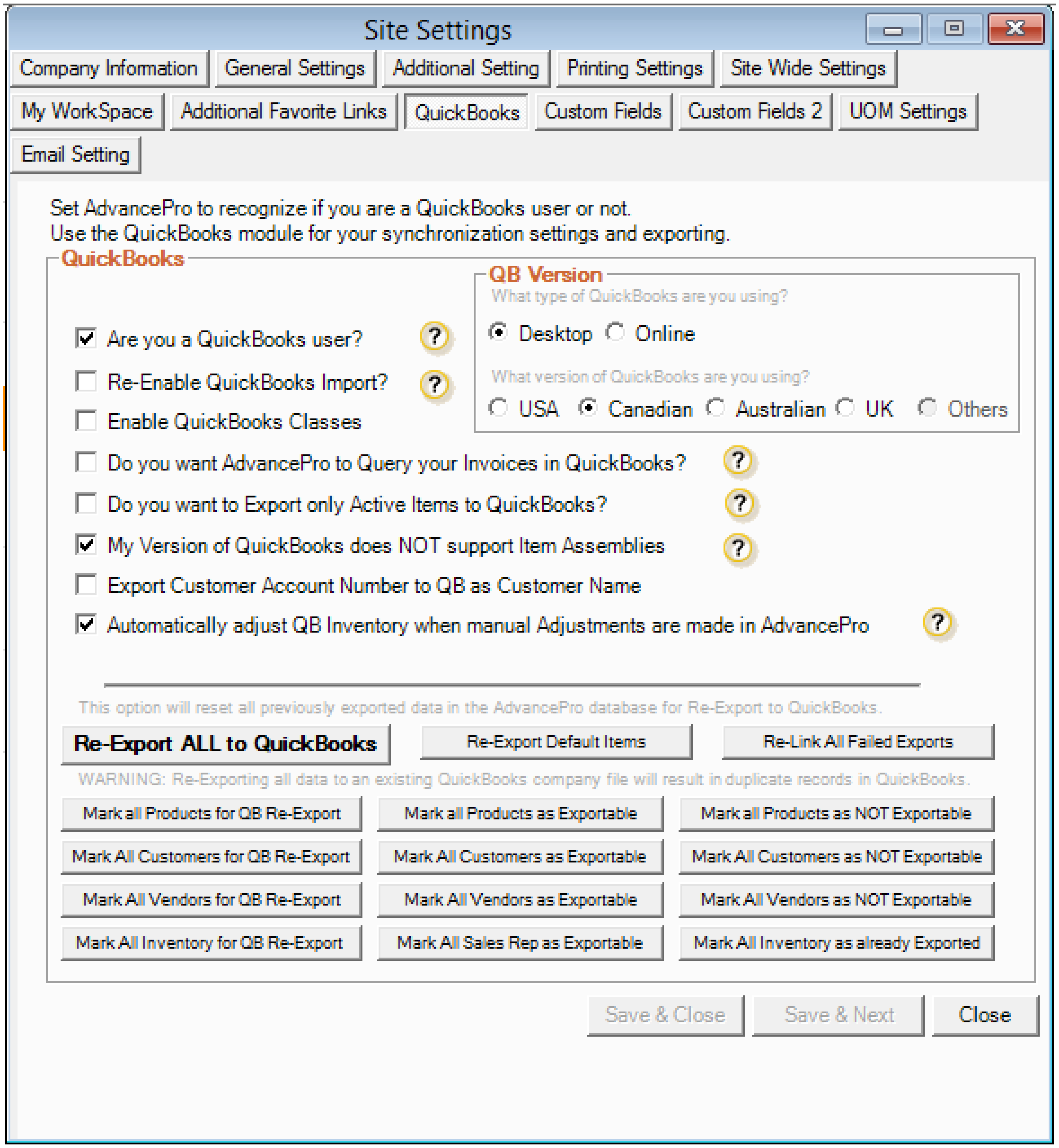


Additional Favorite Links

This screen allows you to specify additional links for quick access to your favorite sites.



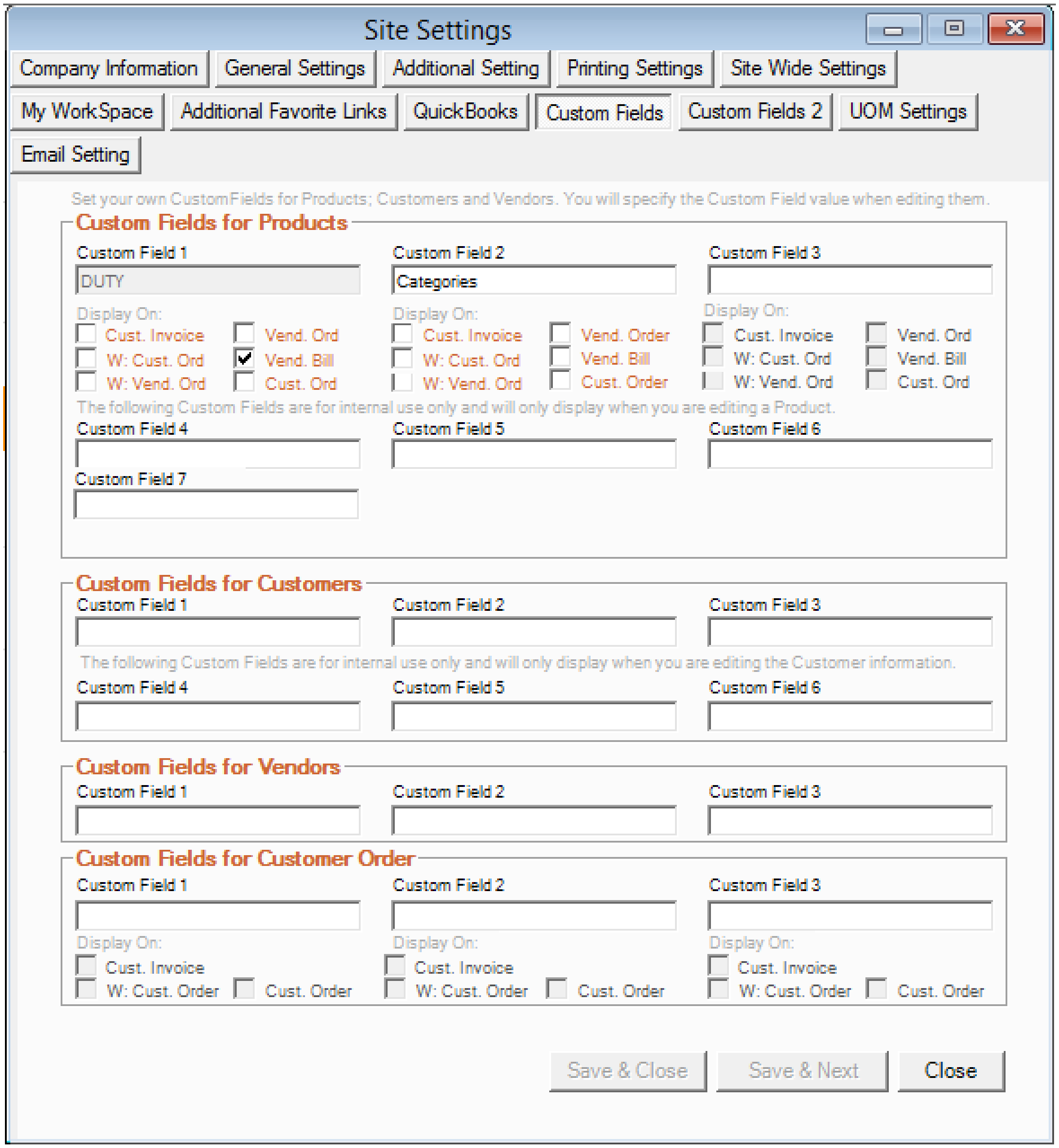
QuickBooks



1. “Are You a QuickBooks User?: This should be set to yes, and use the options on the right to indicate which version you use.
   NOTE: Switching versions of QuickBooks will delete the *AdvancePro* database. If you need to change versions, be sure to back up the database first**.**
2. “Re-Enable QuickBooks Import**”:** We do not recommend enabling this option, as you may duplicate important information. Enable this if you want to re-import the data.
3. “Enable QuickBooks Classes**”:** If you use classes in QuickBooks, you can import them into AdvancePro and associate the same references onto invoices and bills. Then, when you export to QuickBooks, this will help you run reports using classes. Classes can be associated with customer and vendor accounts too.
4. “Do you want AdvancePro to query your invoices in QuickBooks?**”:** If you accept payments in QuickBooks, enable this option. During export, *AdvancePro* will look for the payments and apply them to the *AdvancePro* invoices.

5. "Do you want to export only active items to QuickBooks?": This will export only items that are actually used on invoices or bills. Use this option if you are approaching QuickBooks maximum number of SKUs (at least 14,000).
6. "My version of QuickBooks does not support item assemblies**":** If you use kits in AdvancePro, first check in QuickBooks to make sure your version supports assemblies. You can check this option even if QuickBooks supports assemblies. The item kit will then be exported from AdvancePro as non-inventory products. If you do not click this option then the item kit will export to QuickBooks as an Item Assembly. You will also be required to "build" the Item Assemblies in QuickBooks each time you sell an Item Kit and the invoice exports from *AdvancePro* to QuickBooks
7. "Export Customer Account umber to QuickBooks as Customer Name**":** By default, customer name in *AdvancePro* exports to customer name in QuickBooks.
8. "Automatically adjust QuickBooks inventory when manual adjustments are made in AdvancePro": This exports manual adjustments to QuickBooks. Inventory adjustments will therefore be the same in both, but your end inventory may be different.
9. Export options: At the bottom of the screen are a variety of export options.

Custom Fields

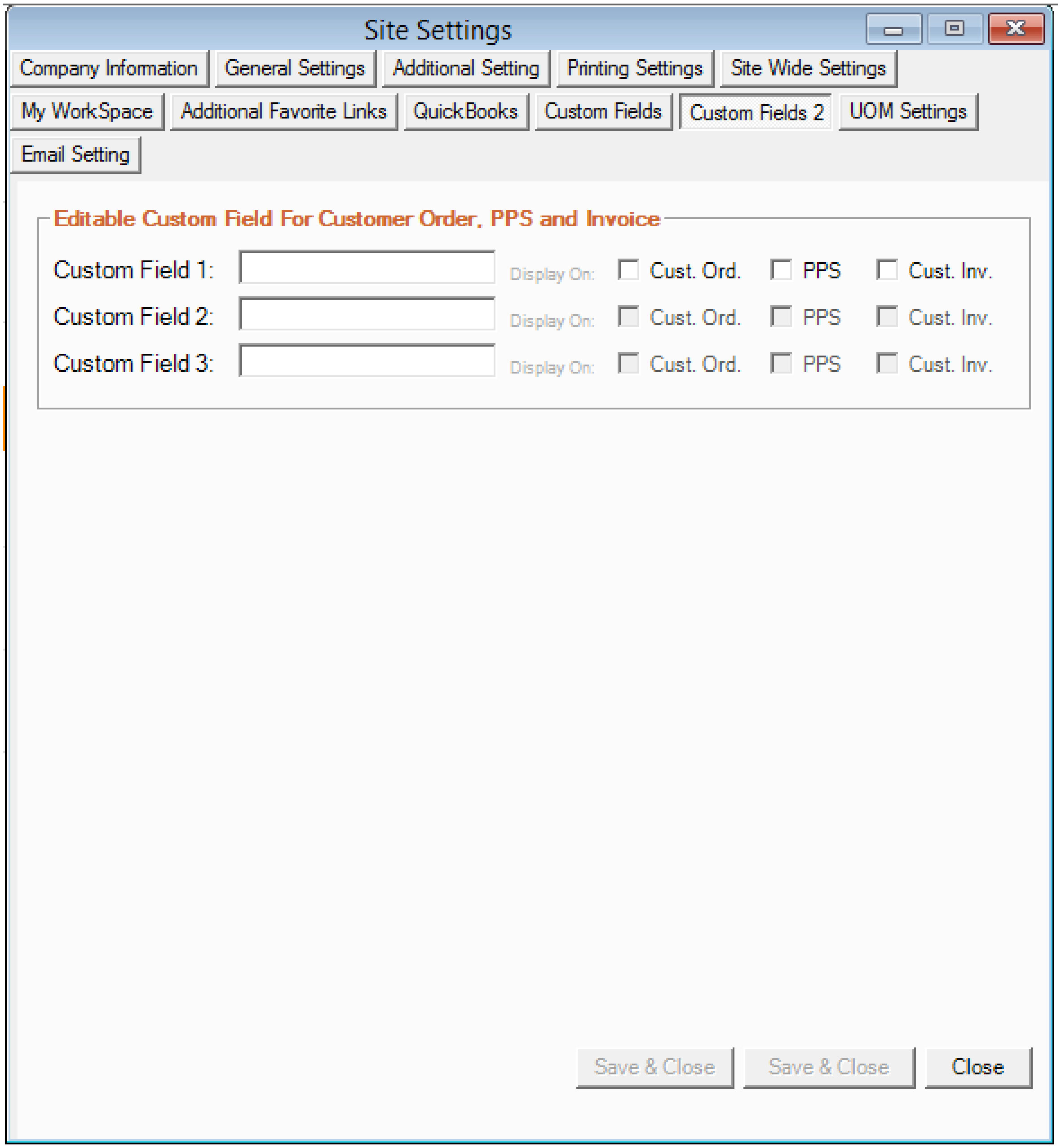


1. There are 6 custom fields for products, 3 of which are internal and will only appear on the edit product / product info forms. For the other 3, you can set where you would like them to appear and print.
2. There are 6 custom fields for customers
3. There are 3 custom fields for vendors

There are 3 custom fields for customer orders. You can set where you would like these fields to appear and print. Then, on the CPO, you can enter the custom field info

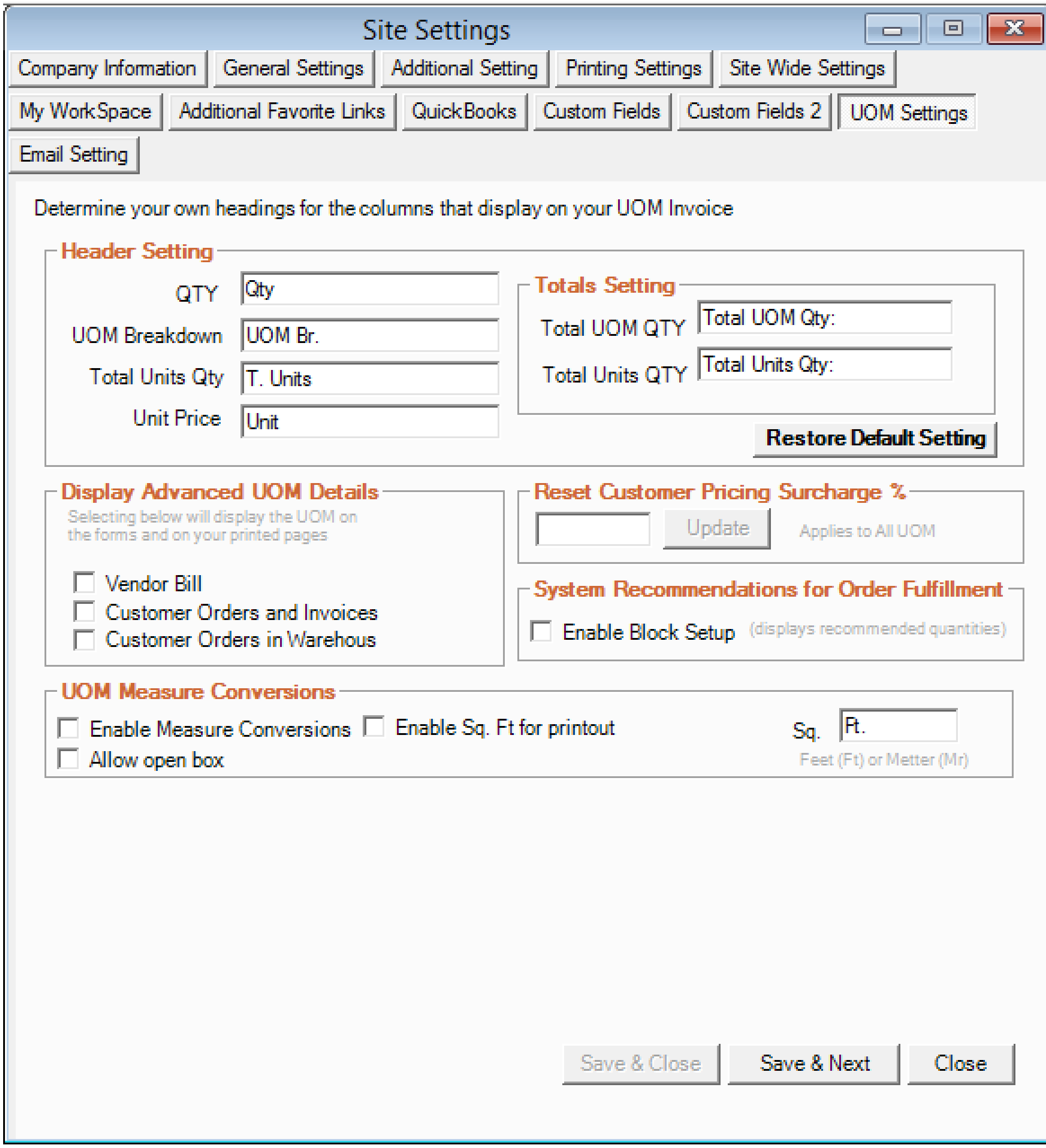
Custom Fields 2

1. There are 3 editable custom field for products that will appear on your choice of: customer order, PPS slips, and/or invoices.



UOM Settings

AdvancePro comes equipped to handle the needs of companies that purchase and sell products in multiple units of measure.

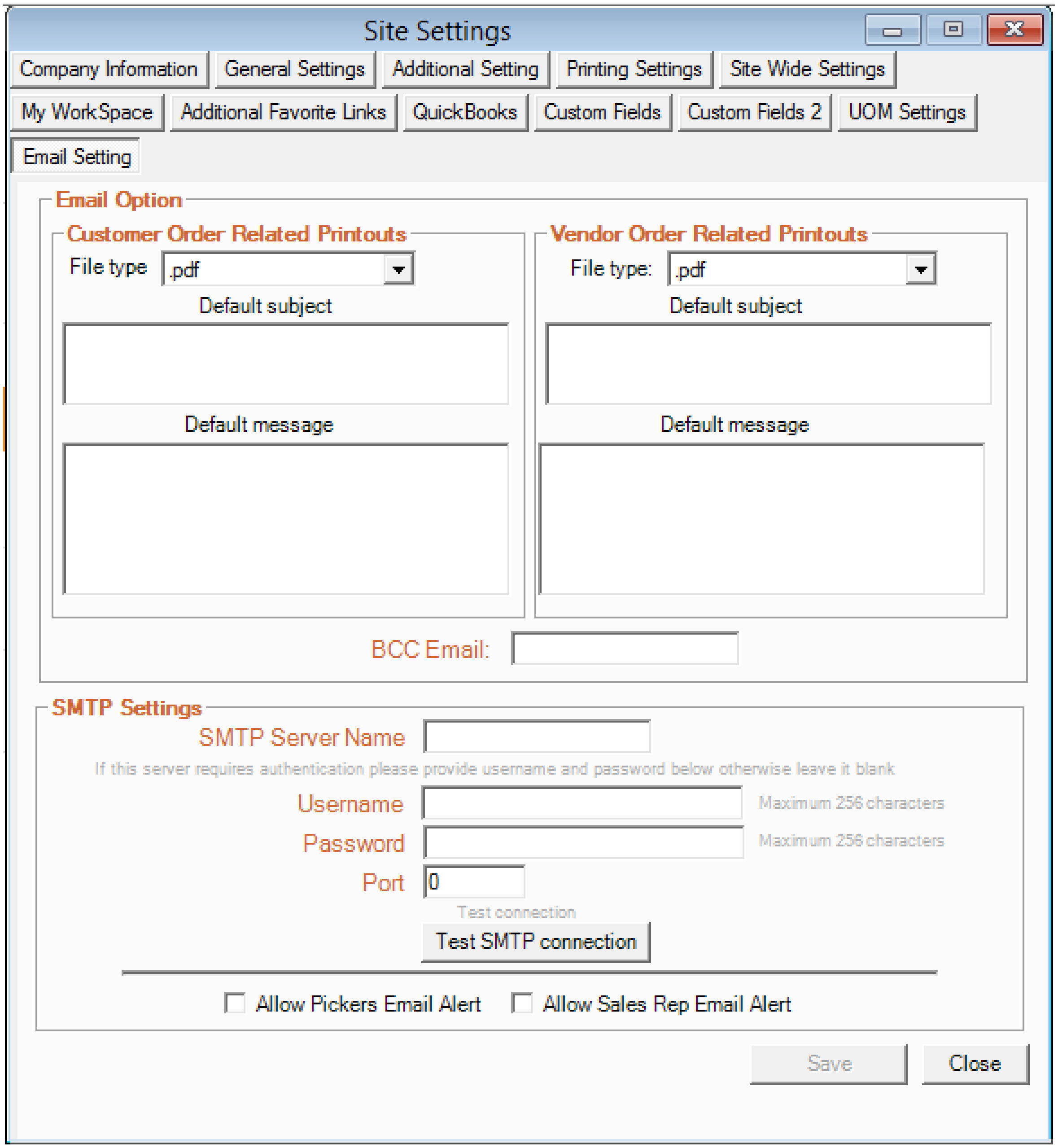


1. Access the “UOM Settings” tab to set units of measure (UOM). We recommend that you start by setting the column header for the lowest unit of measure (for “each” item) and then for the higher ones (for example, a carton).
2. Under “Display Advanced UOM Details”, you can choose where you would like the UOM details to display (on the vendor bill, on customer orders and invoices, and/or on customer orders in the warehouse).
3. You can also set a customer surcharge for advanced units of measure in the “Reset Customer Pricing Surcharge %” text box.

4. Click “Enable Block Setup” to have AdvancePro suggest corresponding units to create a uniform block. This is useful industry types such as Lumber where system recommended quantities ensure equitable distribution of goods by a % during order entry. These units and their distribution are automatically generated by AdvancePro.

Email Setting

In this screen, AdvancePro’s email defaults can be set.



1. By default, customer order and vendor order attachments in AdvancePro are PDF, but you can choose to send the orders as .xls files.
2. AdvancePro allows you to set a BCC address as well. This is useful if you would like to save a copy of the emails you send from AdvancePro.
3. If you wish to alert pickers or sales reps of orders by email (using the check-boxes at the bottom of this dialog), you must set up the SMTP settings. If you do not want to enable these alerts, then you do not need to set up SMTP

settings. The sales rep alerts are sent out whenever a CPO is placed or edited for a customer assigned to that sales rep.

4. For further help, visit the knowledge base.