

Top New Features in hpCommerce

Integrated Credit Card Processing

- No more retyping credit cards into terminals. Saves you time and up to 20% on processing fees!

Integrated UPS Shipping

- No more retyping and printing tags in Worldship. hpCommerce is a complete Worldship replacement. Streamlines your shipping operation, saves you time and \$\$\$.

Accounts Payable

- Partial payments can now be made against AP invoices. Partial payments are clearly displayed on AP screens and reports.
- AP credits can now be entered and stored on a vendor's account. These AP credits can then be applied as payment to open AP items. Vendor credits are clearly displayed on AP screens and reports.
- Computer printed checks now show a detailed listing of invoices paid on the 2nd and 3rd stubs. Stubs show original balances, previous partial payments and any vendor credits used.
- AP History in Vendor Management now shows invoice detail along with partial payments and vendor credits.
- Payment History in Vendor Management now shows both AP checks and manual checks.
- When displaying a list of open AP items the listing can now be sorted by Due Date or Payee.

Accounts Receivable, Payment and Deposit Processing

- Payments can now be reversed or voided.
- The Statement of Account now contains a listing of all open items that make up the AR balance for the account.
- It is now possible to view and reprint a Refund Receipt from the Customer Management screen.
- Mailing labels can now be printed for all customers who have an open AR balance (M-A-L). Labels can be printed for all customers with an AR balance or just for customers that receive statements. Labels can be printed to any printer and in any supported format.
- Wire Transfer (W) and Adjustment (A) have been added as a Deposit and Payment type.
- The ability to Void a Payment and mark it as due to Insufficient Funds (NSF) or Unavailable Funds (UAF) has been added to the AR Menu.
- A new report called the Collections Worksheet (M-A-F11) has been added to the AR Module. This report lists all customers with an AR balance along with the open invoices that make up the balance. This report has been designed to facilitate collections efforts and includes contact information for each customer listed.
- An electronic PDF copy of statements is now automatically generated during individual and batch statement runs. This allows the paper copy to be mailed to the customer while an identical electronic copy is stored in a folder called "Statements." This folder organizes the statements in folders by the month and year of the statement end date (not the print date). Each PDF file will be created with the customer's account number followed by a letter indicating a specific statement. This allows up to 26 statements to be stored for EACH customer for the same month and year. These PDF files can be deleted or archived to CD and deleted every few years depending on hard drive space.
- The function of Due On 10th terms has been changed so that the Due Date will always fall in the following month.

- If an Invoice Number followed by "IN" is entered into the Account field on the Payment Entry screens (B or M-A-F1) the customer will now be located by invoice number for payment entry.
- "Apply a Payment by Invoice #" (M-A-F2) has been added to the Accounts Receivable Menu. This option allows a payment to be applied to a customer's account if only the invoice number is known. Input can be done by scanning the barcode on an invoice or by hand entering an invoice number.
- When payments are being applied the user is always prompted to use a credit card if the customer has one on file.
- The Customer Address and Invoice Number are now available when accepting credit card payments. There is a new Credit Card Payment screen that is used whenever a credit card is accepted as a form of payment. This screen displays the complete customer address and phone number along with the credit card details.
- It is now possible to see how unused credits were applied to a particular customer's account. When in customer management, choose F5 to view the A/R history. Pressing <ENTER> or double-clicking while selecting an "unused credit" payment will prompt the user for a date to show how unused credit were applied from the desired date.

Banking

- When entering a Manual Check into the Check Register (M-C-1-1) it is now possible to enter a Vendor's Account Number in the Account Number field and it will load the vendor's information onto the check from the Vendor Master.

Customer Management

- The credit card security code (CVV) can now be stored on the customer account along with the card type, card number and expiration date.
- An "Invoice Listing" report has been added to the Customer Management screen (F10). This prints an invoice status listing for a user specified period of time.
- It is now possible to view and reprint a Refund Receipt from the Customer Management screen.
- Open Orders can now be edited directly from the Customer Management screen. F7 brings up a list of open orders for the current customer and pressing "E" takes the user straight into editing the selected order.
- If a new alternate address is used on a Sales Order the user is prompted to save the address to the customer file for future use.
- The function of Due On 10th terms has been changed so that the Due Date will always fall in the following month.
- It is now possible to specify if a customer's shipping account is to be directly billed for all shipment charges.
- It is now possible to see how unused credits were applied to a particular customer's account. When in customer management, choose F5 to view the A/R history. Pressing <ENTER> or double-clicking while selecting an "unused credit" payment will prompt the user for a date to show how unused credit were applied from the desired date.

General Ledger

- It is no longer necessary to recalculate the General Ledger whenever "back dated" entries are posted to the General Ledger. This change dramatically speeds up the process of journaling entries and to making adjustments for month end or year end accounting reporting.

Inventory Management

- Multiple choice options can now be entered on Kits.

- When viewing a part that has committed inventory it is now possible to pop-up a listing of all Sales Orders that make up the committed total.
- Parts can now be quickly duplicated.
- Inventory quantities can now be Increased or Decreased directly from the Part Number Maintenance screen.
- The Average Cost for a part can now be changed directly from the Part Number Maintenance screen.
- The VSI Performance Warehouse part import and price update (M-N-V) has been added to the available part import options along with Motor State's Price Guide Pro import and HPSolutions generic import.
- New features have been added to the part import logging. When the HP or VSI format part import and price updates are used, invalid price levels and parts flagged as "No EPS" are now logged in the log files.
- The new defaults for "Omit from PS" (price sheet) is "NO" and "EPS Update" (price import) is "YES" when adding parts or labor items via Part or Labor Item Maintenance.

Purchasing and Receiving

- Parts can now be created "on-the-fly" when building a Purchase Order.
- The text in the message box that appears at the bottom of a Purchase Order can now be edited. The text can be pasted from a word processor and retain the rich text features such as fonts, bold, italic, and other supported attributes.
- Pre-printing labels for items on open Purchase Orders can now be done (M-S-B). A list of open purchase orders is displayed and labels can be printed based on the quantity ordered for each part.
- It is now possible to re-print part labels for any purchase order (M-S-T). This will print labels for parts based on the last quantity received. This allows labels for closed purchase orders or partially filled purchase orders to be reprinted at any time.
- When receiving inventory from an invoice (L-R) the "Cost/Unit" now defaults to the "Last Cost" for the item and the user is alerted if the "Last Cost" is different from the "True Cost" on file for the item. This has been done to prevent data entry mistakes.
- When receiving inventory from an invoice (L-R) the "True Cost" will not automatically be set to the current "Cost/Unit". If the True Cost is different from the Cost/Unit the user will be prompted to set True Cost equal to the Cost/Unit. This allows True Cost to remain unchanged when promotional pricing or other special costs are involved.

Point of Sale

- An Open Invoice can now be turned back into an open sales order and continue to be edited (M-G-U). The invoice is voided, the original sales order is re-opened and the inventory on the order is placed on-hold for the order.
- The customer account number assigned to an open Sales Order can now be changed.
- Payments can now be reversed or voided.
- Open Orders can now be edited directly from the Customer Management screen. F7 brings up a list of open orders for the current customer and pressing "E" takes the user straight into editing the selecting order.
- Any deposits added to a sales order will have the date the deposit was added to the order instead of the date the sales order was created. This allows multiple deposits made to an order to have the date of deposit.

- The Customer Address and Invoice Number are now available when accepting credit card payments. There is a new Credit Card Payment screen that is used whenever a credit card is accepted as a form of payment. This screen displays the complete customer address, phone number and the invoice number along with the credit card details.
- The Invoice and Sales Order disclaimer can now be formatted. When editing the text that appears at the bottom of the sales order and invoice, the text can be pasted from a word processor and retain the rich text features such as fonts, bold, italic, and other supported attributes.
- Open Sales Orders for a specific salesperson can now be displayed (M-G-F7). The open orders can also be viewed/printed or edited from this screen. Exiting a preview of the sales order will return to the list of open orders to continue viewing other orders.
- When creating or editing an order, it is now possible to edit or add a long description (up to 70 characters) to any part or labor item on the sales order. This is accessible by pressing F7 to change/edit and then F2 to edit the long description. The long description is tied to a particular item and thus sorting doesn't cause the description to separate from the item.
- The total weight of all items on a Sales Order and Invoice is now calculated and shown on the Sales Order printout and the Order Summary (F8). When weight has been specified on inventory items, the estimated weight will now be calculated for the sales order. The weight in the Inventory Module can be specified with two decimal places if needed for accuracy when selling multiple items of small weights. The calculated weight of the items on a sales order can be seen with F8 – Summary. The default weight of the sales order will be passed to the freight calculator or when adding a package to the manifest.
- Parts can now be converted to a different part "on-the-fly" by using the new "X – Conversion" line type on the sales order. This allows the user to select a "source part", a "converted to part" and a quantity to convert on the sales order. The quantity of the source part is then put on-hold when the order is saved. When the order is invoiced the quantity is relieved from the source part, transferred to the converted to part and recorded as a sale. This can be treated as an On-The-Fly BOM and is a great tool for a manufacturing environment. A complete set of reports has been added to the Reports Menu to report sales and usage of converted parts (M-L-F7)
- If a new alternate address is used on a Sales Order the user is prompted to save the address to the customer file for future use.
- When accepting a payment during order entry the user is now first prompted to use "Unused Credits" if the customer has a deposit balance on their account. This can be bypassed if credits are not to be used.
- When a part is out of stock and alternate parts have been set up for the part, the user is prompted to select from the list of alternate parts.
- The country codes for USA and Canada are now listed as US and CA on the Sales Order. This change was made to adhere to UPS shipping requirements.
- The function of Due On 10th terms has been changed so that the Due Date will always fall in the following month.
- It is now possible to collect Past Due balances for a customer when creating a Sales Order. Line Type "A – Additional Balance" has been added to the available line types. By using this line type the user can add an amount to the order that is to be collected, IN ADDITION TO, the amount of the invoice. This amount is automatically added to the COD amount for a UPS COD shipment.
- All Alternate Ship-To Addresses are now assumed to be "Residential" to avoid a UPS charge-back for a residential drop. This can be overridden by specifying the correct shipping type in the Alternate Addresses section of the Customer Management screen.

- Line Types "N – Non Stock Part" and "O – Non Defined Labor" can now have the same Product Line Code and Part Number as in-stock or defined parts and labor. This allows non-stock items that are similar to stocking items to be entered and sold with out impacting the matching stocking item.
- Comments on Kits will now post to the sales order when a Kit is added to an order.
- The customer's UPS account can now be billed for shipping changes. During order entry, it is now possible to specify that the customer's UPS account should be billed for the shipping charges. If the user types "YES" in the "Bill 3rd Pty" field on the order header screen, the "Shipper Number" in Customer Management will be used and freight will not be added to the invoice. UPS will bill the customer because the transmission to UPS and the package label instruct them to do so.
- When invoicing a customer with "Prepaid" terms the users is now always prompted to use the customer's credit card if one is on file.
- In Order Entry, it is now easy to change the terms of the order on-the-fly. This allows a C.O.D. customer to be prepaid when they request to pay by credit card. This also prevents the UPS COD tag from being generated for electronic manifesting. This feature will only allow less restrictive terms to go to more restrictive terms to prevent extending credit during order entry.
- Once a back ordered item has been "filled" on an open sales order the item can now be edited once the order is saved.
- Credit card payments now require an Approval Code be entered into the Approval Code field.
- The PLC for Line Type "L" now automatically defaults to LAB. This can be overridden. This same change affects Labor Item Maintenance, Quotes and Purchase Orders.
- When using the "Advanced Invoice Search", (M-G-F11) the list of invoices will now remain active after previewing an invoice. This allows the user to preview many invoices that met the search criteria without having to search again between previews.
- When voiding an invoice, any packages that were on that invoice will be voided in the UPS manifest as well.

Vendor Management

- It is now possible to list a all vendors alphabetically by vendor name by pressing F1 from the blank Vendor Management screen.
- AP History in Vendor Management now shows invoice detail along with partial payments and vendor credits.
- Payment History in Vendor Management now shows both AP checks and manual checks.

Reports

- The "Gross Sales by Customer" report can now be run for a user specified period of time.
- The "Gross Sales Comparison" report (M-L-F5-F7) has been added to the Reports Menu. This report can be used to compare gross sales for 2 different date ranges. The report can be sorted by customer name or by gross sales. This is a fantastic sales analysis report.
- The "Net Sales Comparison" report (M-L-F5-F8) has been added to the Reports Menu. This report can be used to compare net sales for 2 different date ranges. The report can be sorted by customer name or by net sales. This is a fantastic sales analysis report.
- An "Invoice Listing" report has been added to the Customer Management screen (F10). This prints an invoice status listing for a user specified period of time.
- The Business Activity Summary Report now shows two additional totals. They are "Total

Taxable Sales Including Tax” and “Total Exempt Sales”.

- The Conversion Reports Menu (M-L-F7) has been added to the Reports Menu. This menu has 8 new reports that report against part conversions that are done at the time of sales order entry (line type X – Conversion). These reports are:
 - Conversion Sales Summary
 - Conversion Sales Detail
 - 12 Month Conversion Sales
 - Conversion Usage Summary
 - Conversion Usage Detail
 - 12 Month Conversion Usage
 - Conversion Sales Analysis
 - Conversion Usage Analysis
- The “Inventory Item Change” report (M-L-F1-PGDN-F6) has been added to the Reports Menu. This report lists all inventory items created or modified during a user specified period of time.
- The “Product Line Change” report (M-L-F1-PGDN-F5) has been added to the Reports Menu. This report lists all PLC’s created or modified during a user specified period of time.
- The “AR Adjustment” report has been added to the Accounting Reports Menu (M-L-F4-PGDN-F9). This report lists all Deposits and Payments of type “A – Adjustment” for a user specified period of time.
- The “Payment Void/NSF/UAF” report has been added to the Accounting Reports Menu (M-L-F4-PGDN-F8). This report lists all voided payments for a user specified period of time.
- The “New Inventory Item” report (M-L-F1-PGDN-F11) has been added to the Reports Menu. This report lists all items created during a user specified period of time.

UPS

- All Alternate Ship-To Addresses are now assumed to be “Residential” to avoid a UPS charge-back for a residential drop. This can be overridden by specifying the correct shipping type in the Alternate Addresses section of the Customer Management screen.
- The customer’s UPS account can now be billed for shipping charges. During order entry, it is now possible to specify that the customer’s UPS account should be billed for the shipping charges. If the user types “YES’ in the “Bill 3rd Pty” field on the order header screen, the “Shipper Number” in Customer Management will be used and freight will not be added to the invoice. UPS will bill the customer because the transmission to UPS and the package label instruct them to do so.
- When voiding an invoice, any packages that were on that invoice will be voided in the UPS manifest as well.
- The total weight of all items on a Sales Order and Invoice is now calculated and shown on the Sales Order printout and the Order Summary (F8). When weight has been specified on inventory items, the estimated weight will now be calculated for the sales order. The weight in the Inventory Module can be specified with two decimal places if needed for accuracy when selling multiple items of small weights. The calculated weight of the items on a sales order can be seen with F8 – Summary. The default weight of the sales order will be passed to the freight calculator or when adding a package to the manifest.
- There is now a field in Customer Management that allows the customer to be identified as a customer that has requested that their UPS account be billed (third party billing) for all shipments.
- There is now a function in the UPS module to allow package IDs or invoice numbers of shipped packages from the UPS billing statement to be entered and it will change the residential

shipping indicator as needed. (M-O-C) This function handles alternate addresses as well. It will not change the customer if the shipment is a drop ship.

- USB Scale support is now fully implemented.