



AMPLEXUS ADVANTAGE FEATURES LIST

NOTE: FEATURES AND SPECIFICATIONS ARE SUBJECT TO CHANGE WITHOUT NOTICE. "STANDARD" AMPLEXUS PACKAGE VARIES ACCORDING TO DEALER IN EACH VERTICAL MARKET.

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*** May be an optional module, not included in the standard package.**

Table of Contents

Accounts Payable.....	1
Accounts Receivable.....	3
Bar Coding	5
Bill of Materials.....	6
Catch Weight	6
Catalog Interface*	7
Commission	7
Contact List	7
Credit Hold	8
Customer Master	9
EDI - Electronic Data Interchange	11
Economic Order Quantity (EOQ) - Automatic Replenishment System*	11
Export and Interface Specialty Modules*	13
Fax and Email Server - Intrepid*	14
General Ledger	14
Imaging	15
Inter-office Messaging	16
Inventory Management	17
Job Cost*	18
Kits	19
Laser Forms.....	19
Lot Traceability.....	20
On-line Help and Training Videos	15
Order Entry	20
Order Dispatch*	23
Password Security	23
Payroll*	24
Point-of-Sale Cashiering	25
Pricing	26
Product Master	28
Purchasing.....	30
Quotes.....	32
Radio-Frequency (RF) Data Terminals and Wireless Functions*	32
Recurring Billing*	33
Rentals*	33
Repairs*	33
Report Generator.....	34
Sales Analysis and History	35
Sales Force Automation*	36
Sales Route Analysis Report	37
Sales Prospecting	38
Serial Numbering*	38
Special Order Processing.....	38
Timeclock*	39
UPS WorldShip™ Export Module*	40
Vendor EOQ (Economic Order Quantity)*	40
Vendor Pricelist Updates*	41
Warehouse Transfer.....	41

ACCOUNTS PAYABLE

- Easy vendor lookup:
 - Cross-reference by phone number, contact name or any word in the vendor name
 - Find hard to spell vendor names with "sounds like" cross-reference ability
 - Find vendors using user-defined terms such as abbreviated vendor name
- Use comprehensive vendor "ledger card" to:
 - Show all open and paid vouchers (vendor invoices) with payment history
 - Show proposed and taken cash discounts
 - Flag individual items in voucher for payment
 - Display prepayments for vouchers not yet received
- Multiple bank accounts and checkbooks:
 - Quickly create and void checks
 - Write manual or computer checks for all or a portion of a voucher
 - Review intended payments before printing checks with the payment edit report
 - Batch reconciliation forces deposits entered into checkbook to tie to balances posted to cash through cash receipts entry by batch number
- During voucher entry:
 - Enter unlimited number of vouchers per vendor
 - Unlimited number of general ledger distributions per voucher
 - Access purchase order and receiving information while entering voucher
 - Apply deductions on a vendor invoice
 - Display product receipt detail from the voucher entry screen
 - Take cash discounts, even if expired
- Cash requirements report projects needed cash for cash discounts
- Show accounts payable aging reports:
 - by vendor payment priority
 - by due date
 - by vendor
- Select items to pay by:
 - voucher date

ADVANTAGE FEATURES

- voucher's required pay date
- vendor earned discounts
- items flagged for payment on vendor's "ledger card"
- Warnings if purchase order, receiving document, and voucher totals vary
- Ability to make accounts payable adjustments
- Ability to simultaneously process next month's vouchers and last month's vouchers before running end-of-month reports
- Payment edit report lets you review intended payments before printing checks
- Process 1099 forms

ACCOUNTS RECEIVABLE

- Maintain invoices, accounts receivable, and payment detail for a time period you specify; optionally store the detail for an unlimited time
- With a single keystroke access a customer's open and paid invoices:
 - up to the minute 30/60/90 aging
 - amount due with and without interest charges
 - collection comments
 - payment history by item if multiple payments are applied to an invoice
 - see last payment listing with detail on how payments were allocated
 - monthly sales and payment summary history screens for an unlimited time
- Offer cash discounts - accounting functions are fully supported
- Charge and book finance charges with flexibility:
 - apply finance charges to selected customers or to all except those selected
 - pro-forma finance charges look real to customer but stay off-book until collected
- Sales journal and COGS report with subtotals by warehouse
- Detailed aging by:
 - customer number or name
 - invoice date
 - warehouse
 - sales representative
- Ability to generate customer statements for one, all or a group of customers:
 - Automatically send customer statements to specified ship-to locations as desired - statements include only the invoices shipped to those locations
 - Send customer statements to bill-to locations (headquarters) that include invoices for all locations (ship-to branch offices)
- Monthly sales tax journal by user-defined tax jurisdiction
- Keep and display unlimited invoice comments (useful for collection notes) and line item comments
- Add comments by cash receipts line item
- Create automatic bank deposit slips automatically
- Write-off receivable balance to multiple general ledger accounts during cash receipts
- Cashiering functions allow quick over-the-counter sales

- Create a separate monthly invoice to charge interest or charge interest on an invoice-by-invoice basis
- See customer and invoice comments during cash entry
- Apply cash:
 - automatically to oldest open invoice first, until all funds are applied
 - invoice by invoice
- Accept and apply deposits:
 - accept customer cash deposits (unapplied cash)
 - easily transfer customer cash deposits to open invoices
 - apply deposits during invoice creation and cashiering (optional feature)
- Access Customer Master from within the cash receipts program by entering:
 - invoice number
 - customer number
 - any word in the customer name or any predefined customer cross-reference
- From the Customer Master record, view in summary or detail:
 - orders, work orders, pick lists
 - quotes
 - back orders and future orders
 - invoices
 - special orders
 - open balances and payment history
- While entering receipts in the cash receipts program:
 - enter and post a manual invoice to accounts receivable
- From the cash receipts program, view customer "ledger card":
 - open balances and payment history
 - cash comments from the Customer Master
- Ability to process next month's sales before closing last month's transactions.
- Supports recurring receivables* .

BAR CODING*

- Convert any number (UPC, vendor bar code, etc.) to your item number with synonym part number feature:
 - Enter your manufacturer's bar code or other 'foreign' part# almost anywhere in the Advantage system and the system will automatically reference your part number
 - Link a particular bar code number with a specific unit of measure (eaches, cases, package, etc.)
- Use vendor, manufacturer, or your own bar codes to:
 - enter part numbers by scanning bar codes
 - make bin labels
 - enter multiple items in order entry and quickly change quantity and price
 - create relationship between vendor barcode number and your product number "on-the-fly" while scanning codes
- Print bar codes on laser printers, dot matrix printers, and select brands of thermal bar code label printers
- Bar codes are printed using the industry standard 'Code 39' symbology (or your choice of several other symbologies)
- Bar code readers can read multiple bar code formats
- Automatically print bar code labels:
 - when you receive a product
 - when you enter a new PO
 - at the end of day for new products or receipts
- Different bar codes allow for different pack sizes of the same product
- Bar coding supported in order entry, purchase order entry, inventory counting, receiving, and more (example, print bar codes on pick lists and scan to confirm shipment)

BILL OF MATERIALS*

- Bill of materials supports simple assembly or light manufacturing:
 - Formulate subassemblies into finished goods
 - Assign differing valuations for work in process
 - Create batches of unfinished items while assembling
 - Designated "protected stock" is protected from order entry allocation during assembly
- Include items in the assembly unique to a particular finished goods unit of measure:
 - Example: specify different labels and box/bottle sizes for finished goods with differing units of measure
- A BOM may be a component of another BOM. Unlimited levels of BOM items.
- Cost files are changed as required during the end of day process
- Automatic optional cost "rollup" so cost of bill of materials reflects most recent cost of products
- Automatically generate POs for special order items contained on a bill of materials

CATCH WEIGHT

- Catch weight capability allows you to sell an item of variable weight or length by units other than weight or length
 - Example: sell a BOX of goods priced by pound (each box has a different weight)
 - Example: sell a SPOOL of wire priced by foot (each spool has a different length)
 - Example: rent an ITEM and charge for fractional days/weeks/months when charging the customer
- Ability to extend sales order by the actual weight of item
- Items sold by unit, but cost by weight are automatically priced by weight
- Weight consolidated per invoice line item if desired
- In ship-confirmation:
 - accept the weight(s) entered in order entry
 - enter the actual weights for each item
 - enter a single consolidated weight for the items
 - Decimal quantities are supported

CATALOG INTERFACE*

- Upload information from Vendor catalogs
- Choose which records to import
- Import during order entry
- See more features for Vendor Pricelist Update

COMMISSION

- Calculate commissions by profit by line or a percentage of gross by line
- Pay commission based on invoice date or collection date
- Track commissions paid on overdue customer accounts with "Decommission" report
- Customize commission system to meet your needs
- Decrease commission percentage automatically if the product is discounted below user defined levels (commission take back based on line item profit)
- Recalculate commissions as necessary if cost changes are made to the invoice -- even after ship confirmation
- Manually adjust commissions line by line as necessary to process special situations
- Enter a user defined cost in order entry that will apply for commission purposes on a single order line only
- Calculate commission while taking into account rebated manufacturing costs that may apply for sales of a specific item to a specific customer during a specific period
- Define different rates for each sales rep on each commission product class

CONTACT LIST

- Access a contact list personalized for each user
- Contact list includes comments, phone numbers, follow codes, etc.
- Easy contact lookup with multiple search features:
 - find a contact by any word in the contact name, phone number, or e-mail
 - cross reference by "sounds like" words
 - cross reference by additional user-defined lookup words
- Fax and email to contacts using optional integrated fax and email system
- Use contact lists as distribution lists for mailings, follow-up, etc.
- Easily add new contacts "on the fly"
- Print contact report

CREDIT HOLD

- Automatically place accounts on Credit Hold:
 - when assigned credit limit is exceeded
 - an invoice is open beyond a pre-selected number of days (number of days can be different than invoice due date)
- Manually assign customers to Credit Status that prohibits orders under user-defined conditions
- Process orders for customers on Credit Hold with a password override
- See Credit Hold warning message at beginning and end of order entry
- Optionally:
 - prevent printing of pick lists for orders over-credit limit
 - warn when printing picks where some orders are for customers on Credit Hold
- Review daily report of customers who have exceeded credit limits
- Seasonally adjust credit limits for groups of customers
- Print report of accounts on Credit Hold
- Print collections report with phone number and other information to easily contact customers
- Track the number of times per month:
 - an account goes outside of terms
 - bounced checks are received from a customer
- Special Credit Manager's Screen centralizes management of overdue accounts

CUSTOMER MASTER

- Look up customers easily:
 - cross-reference by any word in the customer name
 - cross-reference by customer phone numbers
 - cross-reference by any contact name
 - cross-reference by city or zip code
 - find hard to spell names with "sounds like" cross-reference ability
 - find customers using user-defined cross-references
 - enter quote, order, or invoice number to retrieve associated customer
- Retain multiple phone numbers, contact names, e-mail addresses, etc.
- Use alternate billing address (bill-to) for responsible party (property manager, PO box, etc.)
- Add unlimited shipping addresses for each bill-to address
- Use contract pricing :
 - by product
 - by category by bill-to
 - by category by ship-to
 - by category by both bill-to and ship-to
 - share contract prices between customers
 - set contract pricing by dollar amount
 - set contract pricing by cost plus list minus a percentage
 - set contract pricing by quantity break level
 - set contract pricing by matrix level
- Handle manufacturer credits for sales to a specific customer with rebate costing by item
- Define the format and pattern of the customer number - use letters, numbers, or a combination of the two
- Enter five and nine digit zip codes
- Enter any foreign postal codes including Canadian ones
- Enter and view unlimited comments in the customer record

- Store sales history by ship-to customer and by bill-to customer
- Without leaving the customer master record:
 - see status of all quotes, orders, future orders, backorders, and orders printed not shipped
 - view all quotes, orders, future orders, backorders, and orders printed not shipped with details
 - view status of customer special-order (non-stock) items
 - enter or update an order or quote
 - enter an immediate invoice
 - view customer "ledger card" showing all unpaid and paid invoices with payment history
 - view and update valid entries for all required fields such as ship methods and tax jurisdiction
 - instantly view sales history and last 100 (or more) items purchased by the customer
 - easily access the product master and vendor master
 - view customer Average-Days-to-Pay (aging as of that moment)
 - view Days Open for each invoice (aging as of that moment)
 - view invoices (aging is as of that moment)
 - provide instant "Quick Quote" on individual products
- Follow-up customer activities with integrated follow-up system
- See calculations for all customer discounts including price and how it was calculated
- Track sales history at both the ship-to and bill-to customer level
- Establish contracts for specific items by unit-of-measure with expiration date
- Access all customer documents from the customer record:
 - orders, quotes, printed-not-shipped items, invoices, special orders, back orders and future orders

EDI - ELECTRONIC DATA INTERCHANGE*

- Electronically transmit and convert documents between trading partners via modem
- Automate images/invoicing and sending/receiving electronic mail using EDI
- Electronically send and receive purchase orders (without reentering purchasing choices)
- Send the following forms through EDI:
 - receipts of purchase orders (form 850)
 - purchase order changes (form 860)
 - purchase order acknowledgments (form 997)
 - invoices sent to a vendor (form 810) and more
- Confirm acceptance or rejection of each PO
- Report confirmed POs before transmission
- Create EDI invoices automatically for EDI flagged customers when invoices are printed
- Choose to send Acknowledgments of POs (form 997)
- Optionally print an invoice for your files (with a message not to send the invoice)
- Benefit from more than 15 years of Amplexus experience with EDI

ECONOMIC ORDER QUANTITY (EOQ) - AUTOMATIC REPLENISHMENT SYSTEM*

- Create recommended purchasing report and/or automatically generate purchase order with EOQ analysis
- EOQ uses historical sales information including 'stock out' periods, 'seasonal variations', and 'extraordinary' sales events to predict a use-rate for the product
 - exclude 'bid' sales or special 'one time' sales from EOQ calculation
 - use user-specified weighted-averages over a user-specified number of months
- Specify your choice of days of desired inventory for a product - more accurate than a 'turns' target
- Specify your choice of safety margin of stock (in days of inventory)
- See line point predictions for an entire product line with a structured review cycle
- Override any or all computer calculations for purchasing with your own entries
- Order quantity can be set:

- manually specifying an order quantity
- manually specifying an 'order up to' quantity
- by computer calculation based on desired inventory level, use rate, and safety stock (DOQ)
- by computer calculation based on the cost to carry inventory (warehousing cost), cost to purchase a line item (overhead associated with purchasing), and actual cost to determine an economic order quantity (EOQ)
- by averaging the two computer calculation methods
- Use predefined purchasing cycles if desired
- Review report of overstocks
- Review Recommended Replenishment Report, optionally generate purchase orders
- When automatically generating purchase orders, parts are added to existing (unprinted) purchase orders for the same vendor and warehouse
- Use seasonal weighting to prevent overstocks during off season
- Review out of stock conditions manually
- Use worksheets to help you compare the 'cost to order' a purchase order line item and the cost to carry stock (cost to warehouse)
- See service level display in sales history screen by month, by week, and by day
- Anticipate needs with calculations of lead time, use rate, order point, and order quantity, sales history, receipt history, expected sales, expected receipts, expected inventory levels for future months
- Recalculate lead time, use rate, order point, order quantity on a product by product basis
- View product purchasing recommendations from the product record
- Vendor EOQ (reverse EOQ) aids in line point purchasing (consolidating purchase of several parts from the same vendor on a single PO)

EXPORT AND INTERFACE SPECIALTY MODULES*

- **AFFLINK/NETLINK (APC) Modules** - with AFFLINK/NETLINK Export Module and the AFFLINK Sales Trace Data / Rebate Claim Report, AFFLINK and NETLINK Buying Group members can transfer forms and reports exported from Amplexus Advantage to the group.
- **AUTOQUOTES Interface** - create an order or a quote based on an AutoQuotes Project. AutoQuotes is a third-party electronic catalogue that provides pricing updates and product information for foodservice distributors.
- **Banner Engineering Export** - create a point-of-sale report to export to Banner Engineering. This report details products purchased from this vendor.
- **Dixie Sales Rebate Export** - use file transfer software to send rebate requests (generated by Amplexus Advantage) to supplier Dixie Sales. Amplexus Advantage evaluates products on invoices to determine if rebates apply and will save you money.
- **Ecolab Sales Rebate Export Module** - use file transfer software to send rebate requests (generated by Amplexus Advantage) to supplier Ecolab. Amplexus Advantage evaluates products on invoices to determine if rebates apply and will save you money.
- **Georgia Pacific Rebate Module** - use file transfer software to send rebate requests (generated by Amplexus Advantage) to supplier Georgia Pacific. Amplexus Advantage evaluates products on invoices to determine if rebates apply and will save you money.
- **GOJO Sales Trace Rebate Export Module** - use file transfer software to send rebate requests (generated by Amplexus Advantage) to supplier GOJO. Amplexus Advantage evaluates products on invoices to determine if rebates apply and will save you money.
- **JM Catalog Export Menu Module** - product data and product history reports allow you to send relevant information to J&M Technology for their catalog program.
- **Johnson Diversey (DSIS) Module** - take advantage of the Distributor Sales Intelligence System and submit sales detail and warehouse/cost information in the approved format.
- **Kimberly-Clark Export** and **Kimberly-Clark EDI Export** - share information, contracts, and request rebates from supplier Kimberly-Clark, a world leader in healthcare, janitorial, and personal care products. Avoid re-entry of information and potential mistakes by sending/receiving data directly to/from Kimberly-Clark.
- **Siemens (Machine Division) Export** - create a point-of-sale report to export to Siemens. This report details products purchased from this vendor.
- **Supply America Invoice Export** - electronically submit invoices to Supply America in their approved format. Invoices receive a follow code identifying them as having been sent to Supply America.

FAX AND EMAIL SERVER - INTREPID*

- Fax or email Amplexus print jobs or Windows documents over one phone line from any networked computer
- Send distribution faxes or emails to all the businesses on a pre-defined or one-time-only distribution list
- Fax or email collection letters to multiple companies using a single print job generated by the Advantage Fax Collection Letter Menu
- Fax or email personalized reminders to your customers with “fill-in-the-blank” capability
- Send Internet email with the optional Email Bridge module

GENERAL LEDGER

- Fully integrated General Ledger:
 - post balances daily or monthly, allows daily financials if desired
 - ability to keep many months open at one time
 - ability to post and un-post a journal or rerun end of month reports if necessary
- Ability to hold open accounts payable after the end of the calendar month:
 - Process next month's accounts payable before closing off last month
 - Flexible closing dates, reopen a month if necessary
- Financial statements:
 - by warehouse location or by department
 - user-definable format and user-definable headings, map the GL to a line on the statement
 - financial statement format is not dependent on GL numbering sequence
 - many display options: this year vs. last year; this year vs. budget vs. last year, etc.
- Budgeting by GL#, department, and warehouse
- GL sub-accounts are supported
- GL adjustments:
 - booked --> immediate adjustment to the GL
 - automatic reversing --> automatically reverses the adjustment in the next period

- automatic recurring --> standard adjustment candidate list, edit as necessary and post by batch to the GL
- automatic reversal of accounts payable prepaid to expense (works with accounts payable entry)

HELP & TRAINING VIDEOS

- Review on-line help screens for software functions
- View help screens contextually (screens relate to specific fields and programs)
- See examples and suggestions for use of software
- Customize on-line help **index** to tailor information for specific job functions
- To supplement *Advantage* on-line help and documentation, use hundreds of free training videos to give you on-demand, in-house demonstrations in the areas you use most:
 - Customer Master
 - Manual Post to A/R
 - Product Master
 - Cash Receipts
 - Pricing
 - Order Entry
 - Vendor Master/POs
 - Special Ordering
 - General Ledger
 - EOQ
 - Daily & Monthly Reports and Procedures

IMAGING

- View catalog pictures and illustrations with Synergy terminal emulator imaging capabilities (Tiff, PCX, BMP and more!)
- View images of products, warehouses, salespeople, directions, and other subjects to provide maximum information for your employees and customers

INTER-OFFICE MESSAGING (LEGACY SYSTEM)

- Feel confident using password-protected messaging system
- See messages when logging on
- Set optional notification to check messages when new messages are received
- Send and receive messages from most areas
- Send response-required messages to insure that everyone receives the message
- Easily send mail to one person, a group of people, or all logons
- Create and store personalized distribution lists or use shared distribution lists
- Print mail from screen
- Send future messages to arrive on specified day - great way to remind yourself of tasks or events

INVENTORY MANAGEMENT

- Keep inventory for one or more warehouses
- Show finished inventory and raw materials
- Group sets of items as kits
- Inventory "ledger card" shows all inventory changes on-line, instantly
 - use one central screen to see the detailed transaction item behind every inventory transaction changing on-hand inventory
 - keep history for as long as you wish
- Multiple units of measure
 - buy in one unit of measure and sell in another
 - pick in one unit of measure and price in another
 - cost in one unit and price in another
 - unit of measure table allows each unit quantity to vary by item as needed
 - up to 10 units of measure can be defined for every inventory item
 - supports catch weight for items sold by unit but priced by weight, length etc.
- Count sheets and cycle count by:
 - location description (or warehouse mapping number)
 - vendor
 - product category or subcategory
 - product group
 - entering count "on-the-fly" with radio frequency or PDA bar code entry device
- Sell and receive products without waiting to process count sheets
- Exception reports show receipts processed before counting but not entered until after counting finished
- Discrepancy report generated prior to making an inventory adjustment
- Inventory can be automatically adjusted from the discrepancy report
- Optional use of bar codes. RF data terminals, and PDAs in inventory process
- Value inventory by replacement cost, accounting cost, average cost, or special cost
- Beginning and ending inventory balances for each item for each month can be tracked for as long as desired
- Run an inventory valuation as of a past date using replacement, accounting, average, or special cost

JOB COST*

- Build a job:
 - from your quote or bid
 - directly from an order—no quote required
 - by adding an order to a job
- Use a preexisting job to create a quote to be sure to bid correctly
- Modify jobs easily:
 - add parts to a job
 - add labor hours to a job
 - link to job cost from order entry
 - change orders become fully integrated with little effort
 - conveniently add/change line items in order entry then assign the order to the job
- Monitor costs and materials:
 - add miscellaneous costs to the job directly from accounts payable entry
 - automatic link between accounts payable and job cost master
 - easily control materials required by your customer
 - track cost overruns on screen and by report
 - rely on estimated cost to complete a job - it takes into consideration bid cost, revised cost, cost history to date, and remaining balance to complete
 - manage cash flow requirements with screen display of remaining cash vs. remaining cost
 - see quick summary of the job by phase and/or by task
- Bill by phase and/or by invoice
- Create an unlimited number of concurrent jobs per customer

KITS

- Create kits - lists of products sold together
- Sell stock items individually and/or as kits
- Inventory can be kept by items in a kit or by kit (as one unit)
- Pricing can be assigned by kit or as total price of items in kit plus optional kit discount
- Costs can be kept by kit or by items in kit
- Cost roll-up -- if the cost increases for any item included in a kit, the kit price can increase automatically
- Kitting is accomplished with bill-of-materials style of functionality
- During order entry:
 - kits can be configured "on-the-fly" from a template kit
 - change items in a kit or add items to the kit for a particular customer - the kit template remains unchanged
 - detailed kit line items can be displayed (even when only a single line prints on order)
 - Edit price/quantity, etc. of detail lines
- Place purchase orders for kits for better vendor prices. If desired, receive vendor kits and inventory them as component parts

LASER FORMS

- Use pre-formatted professional laser forms for sales orders, quotes, invoices, pick lists (priced/unpriced), statements, requests for quotations, checks, purchase orders and contract price lists
- Use laser forms so
 - one printer can print all of your forms without changing paper stock
 - no pre-printed forms are required (except for checks)
 - printing expenses for pre-printed forms are eliminated

LOT TRACEABILITY

- Two levels of lot control:
 - lot field on a PO line# as a memo field
 - lot control tracks a product from receipt to sale
- Assign products an internal lot number as they are received (user-assigned or system-generated)
- Use manufacturers' lot numbers as products are received
- Easily change user-specified information
- Split orders into multiple lines at ship confirmation or at the sales counter if one shipment contains multiple lot numbers
- Tracks lot number information from every aspect:
 - by purchase order
 - by lot number
 - by invoice
 - by customer
- Store lot number information indefinitely
- Purge detail records while lot information is preserved

ORDER ENTRY

- Use the same order entry process to create:
 - immediate invoices (over-the-counter)
 - two-step orders (pick/pack slip with confirmation)
 - quotes/bids
 - future orders
 - recurring orders
 - rental orders
 - repair orders
 - returned goods (credit memos)
- Use customer sales history to inform (not dictate) sales process:
 - see automatically displayed customer last sale information including last purchase date, quantity, and price
 - view the last 100 (or more) items purchased by the customer

- override ship-to address at order entry as necessary
- automatically check customer credit before and after order is entered
- include current open orders in credit check
- automatically (or manually) place customers on Credit Hold
- include returned goods (credit memos) on the same order as sales items
- enter unlimited comments for each order entry line
- sell suggestively with pop-up screen of accessory products for sales item, e.g. suggest batteries with a flashlight sale
- Monitor and adjust prices and charges:
 - assign a one-time special cost to an item during order entry with password
 - price items by the ship-to address or by the bill-to address
 - create invoice and instantly update accounts receivables
 - add freight and/or labor charges during order entry or at ship confirmation
- Create invoices with split terms and automatically generate multiple AR items
- Meet target profit margins with helpful aids:
 - see warning during order entry if an order line does not meet a defined profit margin
 - enter password to process an order line below a specified profit margin
 - determine the most competitive bid and desired profit margin by manipulating various combinations of pricing and costing during order and quote entry
- Automatically convert quotes to orders with one step
- Easily purchase and ship special order (non-stock) items with special features:
 - optionally send e-mail notification to purchasing person when special order items are ordered
 - optionally generate an automatic purchase order when special order items are ordered
 - make normal stock item a one-time special order item while ordering
 - mix direct (drop ship), special and stock items, and returns on the same order
- Quickly process drop-ship orders: vendor invoice triggers generation of customer invoice
- Take advantage of multiple warehouses:
 - ship each line on the order from a different warehouse

- ship item from alternate warehouse if a customer's normal shipping warehouse is out of stock
- view available inventory in all warehouses while entering an order
- Access the Product Master from order entry to see detailed product information
- Consolidate like parts from different pick tickets/orders onto one invoice when confirming shipment
- Sort items on order by
 - category
 - department
 - extended price
 - price per unit
 - vendor number
 - description
 - location
 - customer part number
- Easily enter products on orders:
 - find item using any word in the item description
 - enter item using user-defined item number
 - find item with multiple user-defined cross-references like an abbreviation of the item name
 - enter a synonym part number which will automatically convert to internal part number
 - enter item by reading bar code – great for counter sales
 - automatically convert UPC or vendor bar code label to your item number
 - add accessory and alternate items to order from quick entry pop-up screen
 - add items from the contract prices list, list of most recent parts purchased, and more

ORDER DISPATCH*

- Dispatch service orders to service people in the field
- View on-screen and printed reports of dispatched and undischatched orders
- Enter unlimited service order comments and detailed job instructions
- Display summary or detailed customer information display

PASSWORD SECURITY

- Customize password security to meet your needs:
 - password protect any main menu item
 - limit available screens or menus by logon. Accounts payable, for example, has multiple levels of password protection
 - design password protections around job function or job level
- Globally reassign or delete passwords
- Permanently disable passwords to streamline access for all
- Restrict password access to specific times of day
- Restrict password access to specific computer terminals
- Eliminate password prompts for certain logons or logon ports
- Enter passwords invisibly (hidden password entry)
- Create a network of passwords for individualized security - each prompt may have up to 5 legal responses
- Allow supervisors to monitor activities through remote password entry
- Use master password to easily accesses all features (convenient for owner)

PAYROLL *

- Maintain employee information:
 - ID#
 - name
 - password for time clock
 - rate of pay
 - type of pay (hourly, salary, commission or other)
 - supervisor password
 - hire date
 - warehouse and department numbers for GL allocation
 - birth date
 - time clock information
 - vendor#
- Maintain personal information:
 - home address
 - phone numbers
 - exemptions (used for withholding and printing W2)
 - Social Security number
 - emergency contact
 - Withholding History – displays the current year, many years, or compares several deductions for the current year
 - Unlimited freeform comments for each employee
- Process payroll checks for hourly and salaried employees
- Print computerized paychecks (laser or dot-matrix with same standard check stock used for your AP checks) and/or write manual checks
- Print computerized paychecks for more than one bank
- Correct errors:
 - before posting by deleting or changing a pro-forma paycheck
 - after posting by voiding the paycheck
- Review payroll reports including:

- Pro-forma Paycheck Edit Report
- Printed Payroll Checks Report Paycheck
- Summary by Employee#
- Federal Forms 940 & 941 worksheets
- wages by week for specified fiscal period
- W2s are automatically prepared
- Sort Employee Master Reports by birth date, hire date, etc. to use for employee recognition programs
- User-defined GL withholding matrix easily handles 401k and cafeteria-style benefit plans, expense reimbursements, garnishments, loan (salary advance) repayments
- Put salary and commission on one paycheck with different withholding amounts

POINT-OF-SALE CASHIERING

- Sell over-the-counter with special integrated features
- Create and print immediate invoices for walk-in customer sales
- Use bar codes to input products into order
- For greater security, restrict access to other areas of the system (like accounts payable, payroll, etc.) from the sales counter
- Create customizable invoices, quotes, etc. from the sales counter
- Customize what prints on invoices by customer, item, and transaction
- Accept up to three payment types per sales transaction (cash + credit card + check)
- Use built-in cashiering functions to accept payments and take deposits
- Take credit card payments securely with optional Credit Card Verification and Authorization modules that integrate with sales counter functions
- Integrate cash drawer functionality
- Segregate payments by terminal or logon to double check accuracy

PRICING

- Sell products in one unit of measure and price in another, e.g., sell by the each and price by the dozen with the same part number
- Track costs with multiple cost files for each item - accounting cost, replacement cost, etc.
- Protect cost, price, and profit information with multiple levels of passwords
- Maintain separate costs for products by warehouse
- Maintain multiple quantity breaks for each product
- Maintain prices by:
 - customer Price level number
 - columnar (matrix pricing by customer price level number)
 - detailed Pricing and Standard discount lists both supported
 - contracts by customer, by product or product category with an expiration date
 - warehouse location
 - quantity break pricing discounts with support for consolidated aggregate pricing (example: buy two of one item and three of another to receive the five lot price)
 - advertised pricing by location with expiration date
- Prices can be
 - a discount percent from list
 - a markup percent from cost
 - based on Gross Margin
 - a fixed dollar amount
- Pricing can be customized for the customer, product, or product category:
 - special add-on discounts by customer, product, or product category
 - overall discounts can be applied for individual customers
 - date sensitive pricing
 - a minimum discount percent regardless of the quantity purchased
 - quantity break pricing can be turned off for selected customers
- Multiple price book formats available
- Price books can be sorted alphabetically, even if products are not in sorted order

- Quickly change prices for categories and subcategories of products
- Pricing can limit the discount percent to maximum level regardless of the quantity purchased
- Pricing updates from vendors can be integrated into the pricing and costing functions, see VPU
- Set required minimum profit margin for warehouse, product category, or all products
- Track and report all price overrides and highlights low margin sales:
 - password-protect selling an item below a specified margin% set by product category
 - manually override prices at order entry (with optional password)

PRODUCT MASTER

- Format of product identification number can vary from item to item (up to 15 letters/numbers)
- Multiple units of measure are fully supported:
 - establish up to ten units of measure can be established for each item (each, dozen, case, pallet, etc.)
 - price each unit-of-measure individually - price does not have to be a multiple of the base unit of measure
 - purchase items in one unit of measure, receive in another, and sell in another
 - pick items in one unit of measure and price in another (pick by each and price by dozen, etc.)
- Vary cost and price of items by warehouse
- Each item can carry multiple prices:
 - list price
 - quantity discount prices
 - customer type pricing
 - columnar pricing
- Advertised pricing by customer type (column price) with expiration date
- Define synonym part numbers for each item and order using vendor/manufacturer/competitor part numbers
- Selling with kits is supported:
 - sell items you stock as individual items and as a kit (an assembly of those items)
 - items need not be stocked as a kit, kit can be stored as components
 - kitting is accomplished with the use of a bill-of-materials type function
 - kits can be configured "on-the-fly" from a template kit
 - change items in kit during order entry while the kit template product remains unchanged
- Purchase kits (to take advantage of vendor discounts) which can be stocked as component parts
- Easy product look up:
 - cross-reference using any word in the item description
 - create user-defined cross-references like an abbreviated item name or vendor name

- use user-defined product number (synonym part number)
- cross-reference using vendor/manufacturer part numbers
- cross-reference by category and subcategory
- From Product Master record:
 - display the last 100 or more customers who purchased an item
 - display the last sale information for an item including price
 - display the last sale information for an item by customer, including price
 - show purchase order history
 - view inventory availability in all warehouses
 - display sales history by day, week, month or year for an unlimited number of years
 - define a list of substitute products for each item
 - establish alternate vendors for each item with alternate costs for each vendor
 - system will suggest order point and order quantities based on item lead time, demand history and desired stocking levels
- Reorder quantities:
 - can be calculated using the Economic Order Quantity (EOQ) formula
 - can be calculated using the Dynamic Order Point (DOP) formula
- Establish commission rates at the item level
- Track items by serial number
- Assign discounts to customers using price lists - easily adjust pricing for groups of like customers
- Selling prices and safety stock levels for items can vary by warehouse
- Designate items as "Rental" items for special features
- Designate items as "Special Order" items for special features
- Inventory stocking levels are defined at the warehouse level
- Inventory items can be Lot Traceable

PURCHASING

- Easy vendor lookup:
 - Cross-reference by any word in the vendor name
 - Cross-reference by vendor phone numbers
 - Cross-reference by any contact name
 - Find hard to spell vendor names with "sounds like" cross-reference ability
 - Find vendors using user-defined cross-references like vendor area code or abbreviation of vendor name
- Purchase in one unit of measure, receive in another, cost, price and sell in yet another with the same part number
- Economic Order Quantity (EOQ) system:
 - use rate and lead time calculated with weighted averages to "smooth" erratic data
 - recommended purchase report with option to create purchase orders
- Create warehouse transfer sheets prior to transfer
- Ability to change transfer record after printing warehouse transfer sheets
- "Best Buy Analysis" during purchase order entry helps to determine if you should accept the next quantity and the next best pricing, using return on investment (ROI) analysis
- Unlimited lines on purchase orders
- Sort purchase order line items by part number, category, or description
- Report overdue items for each vendor
- Report expected receipts by date
- Show open purchase orders for each vendor
- Cancel un-received items on purchase orders
- Password required to change purchase orders after printing
- For each line on a purchase order with a password:
 - over-receive items
 - partially receive items
 - enter landed cost
 - add additional lines

- Send and receive purchase orders via optional Electronic Data Interchange (EDI)
- Specify a product in purchase order entry by the vendor's part number—it will be automatically converted to your part number
- Specify a product in purchase order entry by your part number and the vendor's part number will also display on the PO
- Display status of special order items by vendor and retrieve them into a PO
- Line Point Buying capability by dollars, weight, cube or quantity
- Easily process special orders (non-stock items) with specially integrated ordering, purchasing, receiving, and shipping features
- Drop-ship from vendor to customer is fully supported in ordering and purchasing
- Access to Product Master from purchasing/receiving etc. to add/update products
- Accept vendor discounts by weights and cubes
- Trace items by lot number with full-featured lot control system
- Request For Quotation (RFQ) module:
 - send list of parts (RFQ) to competing vendors
 - enter parts list manually or import from an order, quote, purchase order, or invoice
 - predefine list of vendors to receive RFQ based-on parts
 - restrict requests for certain parts from being sent to certain vendors
 - view highlighted best pricing from vendor
 - automatically create PO based for your selected vendor
 - store quoted prices in vendor record for future reference

QUOTES

- Copy quotes to a sales order or to another customer's file
- Save quotes and use as an order template to reduce order entry time
- Speed purchasing process from vendor with Request for Quotes feature
- Use any pricing method for a quote

RADIO-FREQUENCY (RF) DATA TERMINALS & WIRELESS*

- Read bar codes, accept keyed entry and communicate with the host system in real time with RF data terminal
- Use RF terminals to process orders, purchase orders and ship confirmations, receive products, and count inventory
- Key a specific vendor bar code number to a specific unit of measure
- Print bar codes on your POs or vendor bar code labels to scan part numbers
- Scan receipts or scan exceptions with RF or wireless connection
- Create relationship between vendor barcode numbers and your product numbers "on-the-fly" while scanning codes
- Amplexus interface with RF bar code reader supports:
 - order entry
 - count sheets
 - warehouse transfers
 - put away
 - PO entry
 - receive POs
 - ship confirmation
- Specify a different unit of measure or change the quantity while scanning
- Includes location information when appropriate (for putaways and count-sheets)
- Wireless inventory counting, receiving and confirmation using PDA devices

RECURRING BILLING*

- Repetitive billing for leases, contracts, split terms billing, club/membership billing and any other type of recurring invoicing where a specified amount is due for a specified number of billing periods
- Billing process is very similar to regular order entry
- Invoices are created automatically a specified number of days before the next payment is due
- List of invoices created and sent-to-date for each "contract"
- Lease payment coupons available

RENTALS*

- Process rentals just like entering a regular order
- Include non-rental parts on rental invoices
- Rent multiple items with different rental cycles on the same invoice
- Allow partial/complete returns of rented items with automatic adjustment of subsequent billings
- Automatically report and bill overdue rentals until the item is returned
- Immediately review printed or on-screen overdue rentals report

REPAIRS*

- Track repair history of items that the customer purchased from you or ones that the customer has purchased elsewhere but brought in for repairs
- Easily enter repair orders:
 - enter and track repairs like a regular sales item or sell and track a repair as a purchased repair "kit"
 - Use "repair-as-a-kit" template for a default list of repair components that can be modified at order entry
 - Charge zero for some items (which may be under warranty) and charge actual price for other items
- Track and report components used for repairs in a number of ways:
 - track all or a selected number of the components used for the repair
 - optionally print repair components on work orders, pick tickets, invoices, quotes, etc.

- restrict printing of components by hiding zero price items, hiding items in a specific department, or by some other customized method
- keep part numbers, etc. "blind" from the customer
- Automatically price the repair:
 - by the list of components used in the repair (including service charges)
 - by a set price assigned to the repair
- Review extensive repair history and analysis:
 - see every repair-related invoice, quote, comment, etc. ever generated on-screen
 - track revenue generated and cost incurred to repair each item by fiscal period

REPORT GENERATOR & PRE-MADE REPORTS

- Create reports to your own specifications
- Run reports on-demand or automatically at designated times singularly or as a group
- Use hundreds of predefined reports
 - Accounting
 - Inventory
 - Sales
 - Commission
 - Purchasing
- Control printing daily and monthly reports

SALES ANALYSIS AND HISTORY

- Review extensive on-screen sales, product, and customer history
- Store history for as long as you desire
- Analyze sales by
 - product category
 - product group
 - product
 - vendor
 - sales representative
 - sales representative by customer
 - sales representative by product
 - customer
 - customer by product
 - product by customer and more
- View receipts from the vendor, product, and accounts payable record
- Track customer purchase activity (increase and decrease) with "saleswatch" report
- See daily reports of:
 - lost sales by product
 - low profit margin
 - price overrides
- View on-line sales and profit by sales representative:
 - by product commission group
 - daily and month-to-date
 - year-to-date totals
 - profit percent
- See report of inventory turns
- Report and rank your top selling items and your top buying customers
- Track trends by customer by product to predict decreasing or increasing sales

SALES FORCE AUTOMATION*

- Use remote desktop technology to access the Amplexus system from anywhere via the Internet
- At your customer's place of business:
 - review customer-specific pricing
 - analyze sales/product use history
 - check product availability
 - place orders from existing quotes
 - make brand new orders
- Create quotes and orders just as if you were in the office
- Optional PDA-sized application is feature-rich in a small package

SALES ROUTE ANALYSIS REPORT

- Use report to analyze customer sales history by displaying:
 - several weeks or several months worth of purchase history
 - last sales information
 - new pricing changes
- See four periods of purchase history: weekly, monthly, two weeks, and two months
- Benefit from evaluation of the use-rate of the items purchased by your customer and projected out-of-stock date based on the last purchase quantity
- Evaluate more than one customer at a time, including "routes" (groups of customers)
- Automatically incorporate increased lead times for special order items
- Review special sales comments screen before making a sales call
- Sales Route Analysis Report shows:
 - part number /description
 - unit of measure
 - list price
 - four periods of quantity history
 - use rate per week or month (calculated)
 - last invoice number
 - last invoice date
 - last quantity
 - the current sell price to the customer
 - a date if the list price of the product has changed since the last invoice
 - a buy recommendation field and a projected run-out-of-stock date
- Use calculated price (the same as regular order entry price) which includes:
 - contract pricing
 - quantity discounts
 - price by customer pricelist number rules
 - most recent price change date

SALES PROSPECTING

- Manage unlimited mail lists of prospective customers
- Assign codes to track prospects through the sales cycle
- Use personalized Contact Lists to maintain contact with prospects
- Create full prospect records with multiple contacts, comments, company type, assigned sales person, etc

SERIAL NUMBERING*

- Assign serial number to any product
- Access serial number information from the Purchasing Master, Product Master, Customer Master, Vendor Master or the Salesperson Master
- Use the Serial Master to display details about a specific serial number
- See history of **all** associated documents, transaction dates, and locations, and status on the Serial Master
- Use enhancements to allow for warranty tracking and service repair
- Assign serial numbers to bill of materials items

SPECIAL ORDER PROCESSING

- Order a special order (non-stock) item and an message will notify designated (purchasing) person
- Automatically create PO for special order item tied to specific customer order
- Drop ship an item from vendor directly to your customer
- Automatically match PO with special order item pick slips
- Designate a stock item as a one-time special order item when ordering
- Review end-of-day non-stock purchase report and open special order report
- Check central screen to view all aspects of special order including detailed status display
- Access central special order screen from customer, vendor, or product records

TIMECLOCK*

- Record employee punch-in/punch-out entries on a 'timecard' system of compensation
- Punch-in/punch-out up to 1000 times a day
- Password prevents unauthorized use of employee clock record
- Keep employees on time with a first-punch-in-time deadline:
 - Punch-ins after the deadline carry a time penalty
 - Punch-ins after deadline can require supervisor approval
- Printed hourly time card summaries include overtime available at the end of each time clock period
- Number of hours worked per day, overtime rate, permitted lunch break are all set system-wide
- Control overtime by mandating supervisor approval for overtime
- All overtime is tracked
- See vacation, sick time, and comp time in on-demand reports
- Have emergency information on hand: person to contact in emergency, physician name, known allergies and/or medications, and general comments
- Assign different passwords for different people (or groups) for the same password prompt
- All menus can be password protected with unique passwords
- Key programs can be password protected with unique passwords
- Changes and/or overrides to key data are password protected

* May be an optional module, not included in the standard package.

UPS WORLDSHIP™ EXPORT MODULE*

- Export shipments to UPS Internet shipping and tracking system (WorldShip Online)
- Utilize computerized name, address, weight, shipping method, etc.
- Simplify shipping by exporting a shipment list to UPS which has been automatically created from a list of orders in Amplexus Advantage
- Automatically estimate weight of the parcel from weights of the products included on the order or get weight from integrated electronic scale
- Electronically send shipment list to UPS for pick up
- Import shipment information from UPS to Amplexus Advantage
- Instantly add weight, shipment date, tracking number, and charges to customer orders
- Freight charges are automatically included on invoices

VENDOR EOQ (ECONOMIC ORDER QUANTITY)*

- Vendor EOQ complements the EOQ system by including vendor requirements/restrictions when creating recommended-purchase reports
- Vendor EOQ aids line-point purchasing (consolidating purchases of several parts from the same vendor on a single PO)
- Solve headaches associated with meeting a vendor's purchasing restrictions or incentives by defining a line point minimum order quantity, dollar, weight, or cubes
- Use suggested adjustments to reach line points within a specified close range
- Define your own number of lead days for vendor (especially useful with new vendors)
- Define penalty amount if vendor purchasing requirements are not met

VENDOR PRICELIST UPDATES*

- Simplify product file maintenance by updating product, costs, and suggested prices automatically via data file supplied by vendor
- Choose which information to update and which to keep
- Update information using manufacturer/vendor product numbers which will automatically be converted to your part number
- Use saved template for each vendor to streamline update process

WAREHOUSE TRANSFERS

- Move a list of products from one warehouse to another
- Move a list of products to defective status within a single warehouse
- Print an inter-warehouse pick list showing quantity to transfer, quantity expected on-hand, unit of measure, etc.
- Use warehouse transfer to "move" a group of items stage by stage through the shipping process or manufacturing cycle
- Vary costs by warehouse location to more accurately reflect value-added labor
- Create warehouse transfer sheets prior to transfer
- Change transfer records as needed, even after printing warehouse transfer sheets
- Support for multiple warehouses includes:
 - all inventory reports available for specified warehouses
 - check inventory status and availability for each warehouse while entering quote, order, purchase order, etc.
 - varied selling prices by warehouse
 - defined safety stock levels by warehouse
 - defined inventory stocking levels by warehouse