New Features of the e-Quantum Release

The new release has many enhancements and new features. We will cover as many of these as possible. Release notes can be found in e-Quantum in the Help Menu.

General or System wide changes:

We have changed our revision date format. You will see this in the lower left corner of the main e-Quantum menu, example V9-9.902. This is also where you can see who the logged in user is.

Under preferences we have added a new tab “User”. This tab has a setting to allow selection by user of the e-Quantum function that will launch on startup. This tab also contains the check boxes to periodically check for QNet orders and/or check to verify that the scheduler is running. The check boxes for Remember pages, Number Notebook Tabs and automatically load CRM interface has also been moved here.

The Supervisor now has the ability to switch between users. This allows the Supervisor to set up various options for users, examples would be what Dashboard displays for the user, the email setting to use the batch pdf function. This can also be used to allow the Supervisor to make changes to security options and see the effect they will have on the
user. To access this you must logon from the desktop as Supervisor. Click on Q above the Word File on the main e-quantum Screen. It is recommended that when you finished using this function you log out of e-Quantum.

**Click on the Q to switch users**

![e-Quantum Interface](image)

**Accounts Receivable**

In client maintenance, contact tab you now have the ability to add multiple contacts. You can designate a contact as the default AP, OE Invoice and or Purchasing contact to be used for e-Quantum reports. You can also add notes on each contact. These notes are for reference only.
In client maintenance we have also added the ability to keep credit card information at the ship to level. You can now list multiple cards either at the client or at the ship to level and specific one as the default. If you select a card as a default for a ship to e-Quantum will automatically add that card information to purchase orders or release generated from QNet orders.

If you don’t have credit cards set up on the ship to level, you can still choose a default credit card from those listed at the client level and orders generated from QNet use that card.
The Sales Tax Maintenance screen has been redesigned to accommodate the CCH and Washington State import functions. We have added new sort options and new search functions.

When editing sales tax codes we have added City, County and State fields. We have also added a “Use” Tax set up option. You can set up the default tax code used by going to the Preference tab, System options. Once set up you can designate your accounts payable invoices to be added to a “Use” Tax. This information will print at the end of the Sales Tax Report.

For more information on either the CCH or Washington State Tax import functions contact sales@e-quantum.com.

If you would like more information on setting up and using the “Use” Tax function contact support@e-Quantum.com for documentation.

**Accounts Payable**

We have added a sort option to the Select Invoices for Payment screen. The options are Vendor, Invoice number, due date, discount date, amount, discount or bank.
When entering a Vendor invoice in AP you can now add “Use” tax to that invoice. This will print at the end of the Sales Tax Report.

**Order Entry**

We have a new Product Group Sales Analysis Report. This report shows you Sales, Cost, Margin and margin percent for the last 12 periods with comparison data for up to 3 years. It also has totals for the last 12 periods and the last 3 periods. Range selections include the ending period, number of years to compare, clients, consultants, CSRs, SIC codes, and users. You also have the option in include or exclude freight from this report. A sample of the report is on the next page.
Multi Vendor Purchase Orders now has the option to use the same speclet, a custom speclet or no speclet on the multi vendor.
The order entry invoice summary screen has a new tab “Other”. This will be used to display allowance information, payroll deductions information and will list QNet Order Numbers.

When pulling PO’s with multiple line items on to the OE invoice, we have added a selection box of All or None line items to be invoiced.
We have added the ability to un-post a royalty report. This function will display a warning regarding Account Payable invoices that may have been created when the report was originally run.

![Unpost Royalty Report](image)

**WARNING:** You are about to un-post a posted Royalty Report. You should NOT do this if you are only trying to reprint a posted report. If the report created an A/P invoice, you will need to make the necessary adjustments.

Please have a current backup of your data before running this process.

### Inventory

We have moved the Reorder Notes to the Reorder Tab in Item Maintenance. We have also added a Suggested Reorder Quantity field.

![Edit Item (Client MYHAR)](image)

*Reorder Qty:* 25,000  
*Reorder Weeks:* 4  
*Reorder Date:* / /  
*Suggested RO Qty:* 500,000

The Inventory Valuation Report – Cost Summary format, when sorted by Client, Consultant or CSR allows you to click on the dollar amount to drill down to the item details.
When viewing Item maintenance we have added more information at the bottom of the screen. This is in addition to the Notes that were previous available.
The QNet tab has become the QNet button with its own set of tabs. It has been moved to just above the Item description after editing an item.

QNet can also be accessed from the Main Item Maintenance screen. Enter your client ID and highlight the item. Click on the QNet tab at the top of the screen.

Once you have clicked on the QNet button you will see 7 tabs.

The first tab is General; this contains the Upload to Internet flag, template control flag, Upload speclet flat, and the new Allow attachments flag.
This tab also has the check boxes for Treat item as non-stock, requires manager approval, retail item and batched item.

The second tab is Description; this has both the Sort Internet Description which is used in the item list and the long internet description used in the item detail. HTML can be used in both tabs.

The third tab is Image; we now support multiple images for an item. You select the Primary image to be displayed. This tab also contains the alternate image text field, used for search engine optimization.

See next page for the results on line.
The fourth tab is Qty/Price; this allows you to select how price plan will be displayed online, what type of input will be used, and allows you to set up order quantities without using price breaks.

The fifth tab is Stk Price; this is where you determine price rules for stock items.
The sixth tab is Category; you can display on line in multiple categories. Your primary category selection is on Page 3 of item maintenance and additional categories are selected here.

Our last tab is Suggested Items. This allows you to add a list of items that the user may want to order when this item is ordered.