

AYA ASSOCIATES, INC.

Comp-U-Floor

The Flooring Industry... Covered

Web ERP Documentation for Version 1.11.1
04/07/2023

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ADMIN MENU

User Master

The Modify User Permissions program was migrated from Comp-U-Floor Classic into the ERP User Master program with the same information.

Additional controls were added to activate or deactivate all programs within a category: Activities, Reports and Inquiries (if any) or the entire module (menu).

The User Master has the same information.

Note: The Classic Modify Users program is currently still needed to create new users.

INVENTORY MENU

Inventory Purge

The Inventory Purge program was migrated from Comp-U-Floor Classic with the same information.

Note: The “Delete all carpet and vinyl rolls with less than or equal to” prompt defaults to 1 LF and can be changed.

The “Print List of Delete Records” prompt defaults to checked.

MAINTENANCE MENU

Company Information

Several new optional controls were added to execute an unattended scheduled job every day (early AM) to send an email notice for the following:

Company Information

Background Jobs

Hold Order Expiration Notice

Low Inventory

Purchase Order Received Email Notice

Purchase Order ETA Change Email Notice

Purchase Order Status Change Email Notice

Note: A Sales Associate or Estimator must have their login User and Email address populated in their Sales Associate Master to receive email notifications.


Hold Order Expiration Notice

If checked, send an email notice to Sales Associate #1 and the Estimator regarding any Hold Order that has expired or will expire within the last 48 hours; one email per Hold Order.

Low Inventory

If checked, send an email notice to the email address assigned to the Low Inventory control (checked) attached to the Stock Reorder Report (checked) in the Report section of the ERP Inventory Menu. This control must be set for each user to receive the Low Inventory email notification; refer to the new above User Master on the Admin Menu. The Stock Reorder Report for the Basic report type (stock available plus quantity on order less quantity on back order with all default report criteria) will be attached to the email.

Stock Reorder Report

Low Inventory 

Email

Purchase Order Received Email Notice

If checked, send an email notice to the Sales Order Estimator regarding material received within the last 24 hours on a detail line linked to a Sales Order.

A report will be attached to the email with the following information for each detail line:

Estimator	Sales Associate #1	WH S	Sales Order #	Purchase Order #	Item Style	Item Color	Roll/Lot	Item Style Description	Item Color Description	Ship Quantity	B/O Quantity	Order U/M
Bob Dee	HOUSE	1	190618	190301	ALAD10	BEIGE	190248	Moonlight Serenade	12 LF	240	0	SY

Purchase Order ETA Change Email Notice

If checked, send an email notice to the Sales Order Estimator regarding an ETA change on a detail line linked to a Sales Order.

A report will be attached to the email with the following information for each detail line:

Old ETA	New ETA	WH S	Sales Order #	Customer	Style	Color	Roll/Lot	Style Description	Color Description	Purchase Order #
3/31/2023 12:00:00 AM	4/4/2023 12:00:00 AM	1	190615	ABC Floors	AO7522	102	B/O	Glazed Ceramic Wall Tile	4"x 4" Sky Blue	190299
4/5/2023 12:00:00 AM	4/6/2023 12:00:00 AM	1	190617	ABC Floors	AO7522	132	B/O	Glazed Ceramic Wall Tile	4"x 4" Snow White	190300

Purchase Order Status Email Notice

If checked, send an email notice to the Sales Order Estimator regarding a line status change on a detail line linked to a Sales Order.

A report will be attached to the email with the following information for each detail line:

Old Status	New Status	WHS	Sales Order #	Customer	Style	Color	Roll/Lot	Style Description	Color Description	Purchase Order #
On The Water	In Customs	1	190614	ABC FLOORS	ALAD10	BEIGE	B/O	Moonlight Serenade	12 LF	190298

Freight On Board

Resolved the issue regarding failure to display a “Location is used and cannot be removed” Validation Error if assigned to a Sales Order or Purchase Order.

Deleting a Location in use was always prevented but a message was not displayed.

Item Master

A Report button was added to the Info screen and if selected, the report criteria screen is displayed and includes:

- Item Range (Starting and Ending Style and Color, default is First to Last)
- Vendor (All or one, default is All)
- Item Type (All or one, default is All)
- Discontinued Filter (All, Discontinued Only or Active Only, default is All)
- Sort By (Item Number, Item Description or Product Class, default is Item Number)

Ship Via

The Ship Via program was migrated from Comp-U-Floor Classic with the same information and added as a tab within the Sales Categorization program.

Note: To add a new record, enter the Company (name), check the Default Location (if applicable) and click the “Add New” button.

PURCHASING MENU

Entry / Maintenance

Resolved the issue regarding receipt of a quantity greater than the order quantity and posted to a linked Sales Order using the “Close Back Order” option to post the entire quantity received to the Sales Order failing to update the Sales Order Cost and Inventory Allocated quantity for the Ship quantity instead of the Order quantity.

If the Sales Order cost and Inventory Allocated quantity were not corrected:

- The Cut/Pick Ticket listed the correct Ship quantity but the actual inventory shipped is updated for the Order quantity leaving Inventory On Hand that does not exist.
- The customer invoice, corresponding G/L Journal and all Sales Analysis reports are updated for the incorrect cost and quantity.

SALES MENU

Entry / Maintenance

Comment Line

A Comment line can now be highlighted by clicking the “Highlight” checkbox when entering or editing the Comment. If checked, the Comment line will be highlighted in yellow for display only on the Sales Order Details screen and is intended for visibly grouping multiple detail lines.

The screenshot displays the 'SALES ORDER LINE DETAILS' interface. A 'Comment Line' section is visible, containing a 'Comment' field with the text '**** LIVING ROOM ****'. Below this, an 'Options' section includes checkboxes for 'Add-Ons', 'Sub-Contracts', 'Invoices', 'Pick Tickets', and 'SO Tickets', all of which are checked. The 'Highlight' checkbox is also checked, and the entire 'Comment Line' section is highlighted in yellow. The bottom of the screen shows a yellow navigation bar with the number '2', a list icon, a edit icon, and the text '**** LIVING ROOM ****'.

Sales Order Details screen

Bundle Wizard

Resolved the issue regarding incorrectly repositioning the driving line assigned the bundle price to be the first line displayed and printed for the bundled lines. The driving line will now remain in the same display position.

Sales Orders Inquiry

The Open Orders Inquiry program was migrated from Comp-U-Floor Classic as Sales Orders Inquiry with the same and additional information.

All orders are displayed in summary but clicking the ">" button on the left side of any detail line will display all of the order detail lines.

View Options

This feature provides a pull-down for selection of any one order type or any one of the following groupings:

- Canceled Orders
- All Back Orders
- Open Back Orders
- Order with Deposit
- Orders with Zero Cost – orders invoiced or not updated
- Orders with Zero Cost – open orders
- Ready to Schedule
- Scheduled
- Completed
- Confirmed
- Picked
- Ready to Invoice
- Invoiced

Configure Columns

This feature provides for configuration of any combination of 37 different column options.

Canceled All Expired

This button provides the option to cancel expired Quotes, Hold Orders and Samples.

Note: This feature is not completed and will be available in the next ERP Update.

Reports

This button provides the option to print a Detail or Summary Report of the orders selected for display.

END