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A. System Wide Changes

A1 – “Copy All” Feature in Browse Mode

a. **Overview:** While browsing records in any section of OnSite click the “Copy All” button. This copies all on screen record information onto your clipboard which can then be pasted into an Excel or Word document for modification.

b. **Implementation:** None.

A2 – Data Archiving Tools

a. **Overview:** A new feature that allows system administrators to delete outdated or old information in your system. Can be used for systems that are slowing down due to excessive data.

b. **Implementation:** Read the section of the manual on implementation. Should be used only when the system is in “single user mode”.

B. Order Entry

B1 – New Order Types for “Assembly”

a. **Overview:** Create and manage “kit” or “assembly” type orders in the system. This new order type has many applications and allows you to sell an item that is “constructed” of other items, similar to a manufacturing system. Some examples where these could be useful: awards or trophy assembly, digital printing, kitting.

b. **Implementation:** There is a new part type and new order type that allow you to manage these orders. More detail is in the OnSite documentation. You will need to understand completely how this new powerful feature works before implementing.

B2 – Backorders

a. **Overview:** Create and manage backorders for sales orders. Your new backorder will act and look like any other order in the system. An order (parent) and it’s backorders (children) are linked together and color coded for easy access.

b. **Implementation:** Creation of backorders can be done from any of the main screens while viewing a sales order. Entry to this feature is driven by each user’s employee access.

B3 – Line Item Modification

a. **Overview:** Bulk deletion of line items on sales orders.

c. **Implementation:** Used on a case by case basis. Look for this button next to the "add" button during order entry.

B4 – Added Information to Line Items on Sales Orders

a. **Overview:** When viewing line items on a sales order much more information is presented. Color ways can be assigned when creating line items as well as other functionality.

b. **Implementation:** When viewing line items on a sales order you will have more functionality.

B5 – Convert to Text Vertical Format

a. **Overview:** When converting orders to text you now have the option of a "vertical" arrangement of line item information. This feature aligns line item quantities next to the sizes for a different appearance and allowing for a more compatible email format.

b. **Implementation:** Access this from the text tab during order entry.

B6 – Hold Message and Rush Override

a. **Overview:** When a hold is put on an order a text message will now be displayed throughout the program when viewing the order. Also, user access can be given so that the "rush" on an order can be overridden.

b. **Implementation:** Users must specify "hold" text from within the Company Setup portion of the program under the button "Custom Text Indicator".

B7 – Added Printing Preferences

a. **Overview:** This feature allows you to specify the set of forms you would like to print out during order entry. These preferences are saved for each user. This makes printing forms much easier. Can also print out forms "in bulk" for multiple orders instead of having to print them out one order at a time.

b. **Implementation:** See "print" tab in order entry for noticeable changes to the screen.

B8 – Invoicing Activity

a. **Overview:** You can now have the system create an activity for you each time an order is marked as invoiced or marked as not invoiced. The activity is hidden on order entry but is recorded in the activity file which a manager or owner can see.

b. **Implementation:** Adjust this setting from Company Setup under the button "System Preferences." Feature can be turned on or off.

B9 – Preprint Deducting From Inventory

a. **Overview:** "Okay to All" and "Deduct All" have been incorporated into one button. This reduces the number of steps required to pull items from inventory.

b. **Implementation:** See button on the "Order" tab of all your Preprint Sales Orders. You will also have the option to automatically print your "pick sheet".

B10 – Multiple Design Order Type Option

a. **Overview:** A new order type option has been created that allows you to have sales orders with more than one design. Created specifically for multi-media type orders but can also have other uses.

b. **Implementation:** When setting up an order type you will now have an option for "single" or "multiple" designs being able to be applied to an order.

C. Customer Database

C1 – Create Bulk Activities

a. **Overview:** Create marketing activities for multiple customers at the same time instead of having to do from each customer individually.

b. **Implementation:** Access this while browsing customers from the customer module. Look for the "Bulk Activity" button at the bottom of the screen.

C2 – Added Storage Fields and Contact Sorting

a. **Overview:** A field for "Country" has been added to the address portion. Also control the display order of your contacts.

b. **Implementation:** Requires users to enter numbers in the field to the left of each contacts first name when viewing a customer. They will then be sorted this way throughout the program.

C3 – Customer Activity and Pre-Customer Activity

a. **Overview:** When looking at a customers account users can view and compare marketing activity from when the customer was in the marketing database.

b. **Implementation:** This can be seen from the “Marketing” tab of any customer you are viewing. Customer must have been in a Marketing database and have been converted to a customer from Marketing for the information to be linked.

C4 – Customer Quote Activity and Pre-Customer Quote Activity

a. **Overview:** Tabs have been added that will allow a user to view quotes for a customer when they were a marketing contact.

b. **Implementation:** This tab can be seen while looking under the “Quote” tab of any customer in your system.

C5 – View Designs

a. **Overview:** View design related information while looking at a customer.

b. **Implementation:** See new tab when viewing a customer.

C6 – Customer Specific Invoice Notes

a. **Overview:** Assign customer specific notes to appear on printed invoices. In previous versions there was only a single default note for the entire system. The single default note is still in company setup but each customer can be given their own invoice notes as well.

b. **Implementation:** Control this feature from the “Notes” tab within a customer.

D. Designs

D1 – Bulk Deletion of Thumbnails

a. **Overview:** Regular maintenance of your designs database is necessary if you are utilizing the thumbnail feature. The OnSite design file could potentially fill up with too many records or large thumbnail images. Use this feature to bulk delete design thumbnails when necessary.

b. **Implementation:** Look for the “Delete Thumbnails” button at the bottom of the screen when browsing thumbnails in your system.

E. Marketing

E1 – Bulk Creation of Activities

a. **Overview:** Similar to the customer module, bulk activities can be created for multiple records at the same time.

b. **Implementation:** When browsing a set of marketing contacts look for the “Bulk Activity” button at the bottom of the screen.

E2 – Source Information from an Activity

a. **Overview:** Additional “drill down” capability has been added to the Activity Calendar that allow you to go to the source transaction. This was not possible in previous versions.

b. **Implementation:** Look for the “View Source” button whenever you are looking at activity detail from the activity calendar.

E3 – Customer and Quote related activity.

a. **Overview:** Tabs have been added that will allow a user to view quote history for a marketing contact that has been converted to a customer.

b. **Implementation**: See “Quotes” and “Contacts” tab while viewing a marketing contact.

F. Payables

F1 – Date Modification

a. **Overview:** "Due Date" on a payable is usually calculated based on the date the payable was entered and the terms for the vendor. You can now manually override this due date. The date will continue to be figured by the set Terms but the ability to adjust it has been added.

b. **Implementation:** When entering payables you are now able to modify the field "Date Due".

F2 – Mapping of PO amounts to GL

a. **Overview:** When entering payables you can now have the system automatically map certain payable information to your GL and default entries. This will save time during bill entry and increase productivity. This information (shipping amounts, sales tax amounts etc.) can be pulled directly from the related PO.

b. **Implementation:** There are default preferences set in the Vendors file which dictates how default GL codes will function for that vendor.

F3 – Manual Check Address

a. **Overview:** Change or modify the address when writing a manual check. In previous versions the address on a check was taken from the vendors file and could not be changed.

b. **Implementation:** Edit address fields on a check-by-check basis when writing Manual Checks.

G. Receivables

G1 – Stop Order

a. **Overview:** Added capability to "Customer Status" allows you to prevent users from entering new orders for customers that you have decided cannot place orders anymore.

b. **Implementation:** You will need to tie this new feature into existing collections procedures and an overall approach to customer management.

G2 – Overdue Status

a. **Overview:** You can now setup an "Overdue" stamp to appear on invoices that are past due. If an invoice is past terms the "Overdue" message will automatically appear on any re-printed invoices.

b. **Implementation:** This can be modified in the "Company Setup" portion of the program under the button "Custom Text Indicators".

H. Purchasing & Inventory

H1 – Purchasing from Inventory Reconciliation

a. **Overview:** A new utility has been added to Inventory Management that allows you to create PO's based on the Inventory Reconciliation. This tool is very useful for users who want to run "Produce To Order" fulfillment programs that use very little stored inventory. Will save time for all users in creating Preprint Production orders.

b. **Implementation:** Access rights control who can use this feature. Procedures should be developed regarding who and when this tool is used.

H2 – Inventory Bin Information

a. **Overview:** Track and search current inventory levels by bin location.

b. **Implementation:** By viewing current levels you will now see the field for "Bin Location". These locations are added from the Company Setup portion of the program under the button "Inventory Bin Locations."

H3 – New Notes field that links Purchasing to Accounts Payable

a. **Overview:** The ability to send a note to Accounts Payable related to a specific Purchase Order has been added. If a purchasing agent adds a note to a PO it will be viewed by the person entering the payable and is linked by PO #.

b. **Implementation:** When viewing a purchase order click on the “Notes” tab. The new field will appear as “Notes to Payables”.

H4 – Min/Max Inventory Levels

a. **Overview:** Setup and control Minimum and Maximum Inventory levels for your blank and preprinted inventory. Then produce orders to replenish your current levels based on these minimum values.

b. **Implementation:** Each current level will be required to have this setup manually if you plan on using it properly.

H5 – Purchase Order Addresses

a. **Overview:** When viewing or issuing a Purchase order you are now able to search the Vendor and Customer “Ship To” databases for addresses to put on your PO’s. This is particularly useful for purchase orders issued to subcontractors or promotional product vendors where they will be drop shipping product directly to your customer or even another vendor.

b. **Implementation:** While on a Purchase Order, look for the “Find” button which will allow you to search the databases and select an address.

I – Vendors

I1 – Store and Reference Vendor Art Requirements

a. **Overview:** Certain vendors may have special requirements for how they handle artwork. This information can now be stored with your vendor and then is brought into a sales order or Purchase Order as notes. Useful for managing art requirements for subcontractors and promotional product suppliers.

b. **Implementation:** See the field “Vendor Requirements” when viewing a vendor. During order entry you will see a additional button in the “Notes” section that allows you to copy these vendor requirements to any notes field.

I2 – Store Up to 3 Default GL Accounts

a. **Overview:** This new feature allows you to specify three default GL accounts per vendor. These accounts can assist in entering payables in that more information can be pulled from a PO and assigned to a GL account when entering a payable.

b. **Implementation:** Adjust this from the vendors' module by viewing a vendor and selecting the default account of your choice.

I3 – Sales Tax on Issued PO's

a. **Overview:** OnSite now allows you to apply two applicable sales tax accounts if n necessary to a purchase order.

b. **Implementation:** Purchase orders now have two separate sales tax fields.

I4 – Merge Vendor Accounts

a. **Overview:** New feature allows you to "merge" Vendor accounts. Similar to merge function added to the Customer file in version 5.0. Useful for managing Vendor accounts and eliminating unnecessary vendors.

b. **Implementation:** This is employee-access controlled. Look for the "Merge" function when viewing a Vendor.

J – Production

J1 – Event Based Production Scheduling

a. **Overview:** An entirely new way to production schedule has been added. Schedule a job across multiple machines and days. Create schedules for any type of machinery. Gaant chart style production scheduling gives you full control over jobs and machinery. This is a full-featured schedule that has a lot of power.

b. **Implementation:** Requires understanding of new Production module and correct setup of production machinery and Production Events/Calendars. More involved than order-based production scheduling but allows much more power/flexibility. Probably more attractive to larger shops.

K – Accounting

K1 – Multi-Level Chart Of Accounts

a. **Overview:** The COA has been expanded to include up to three levels of sub-accounts. This gives users much more power in defining their accounts as well as presenting financial information.

b. **Implementation:** Use of this requires modification to your current set of accounts and an overall understanding of the entire accounting module of the program.

K2 – New Financial Statement Functionality

a. **Overview:** The generation and presentation of financial statements has been greatly improved. Users can compare periods, see percentages and in general have a lot more control over financial statements.

b. **Implementation:** This can be used immediately for current or past financials and requires no implementation except to become familiar with the new feature itself.

K3 – Closed/Open Month Control

a. **Overview:** Users now have full control over opening and closing months including the ability to “Bulk Open” all closed months.

b. **Implementation:** This feature can be used immediately. Access to this is assigned on a user level.

K4 – Unlimited Financial Storage

a. **Overview:** Onsite now allows you to save all Profit/Loss Statements and Balance Sheets. All months will be available for you to view and reprint. In previous versions of OnSite users could only view the last 12 months of closed periods.

b. **Implementation:** A new button replaces your old “View Financials” button. The new screen replaces the old one which only displayed 12 months worth of data.

K5 – Improved Bank Reconciliation

a. **Overview:** Some modifications have been made when doing Bank Reconciliations that will make the process even easier..

b. **Implementation:** This feature can be used immediately and only requires that a user have knowledge of the bank reconciliation and proper access.

L – Other

L1 – View Sales Orders From Line Item Analysis

a. **Overview:** You can now view sales orders while doing line item analysis.

b. **Implementation:** Requires none and can be used immediately when viewing a list of line items. Look for the "View" button to the left of each line item.