

Welcome to DacEasy Order Entry

Welcome to DacEasy Order Entry. DacEasy prides itself on providing powerful, yet affordable business software. DacEasy Order Entry makes automating your order entry system a simple process, yet offers you the power and sophistication of order entry systems costing hundreds of dollars more.

The following section lists features new to Version 2010, followed by features introduced in Version 16,15, 14, 13, 12, 11 and 10. For a list of additional features in DacEasy Order Entry, click [here](#).

New Features in Version 2010

Sage Payment Solutions — Make the sales process in Point of Sale and Order Entry even more convenient for your customers with credit card and debit card processing. This new version features seamless integration with Sage Payment Solutions, allowing you to easily process credit card and debit card payments from your customers.

Customer Purchase Lookup — Simplify the product reorder process and make servicing your customers even easier with the new Customer Purchase Lookup feature. DacEasy 2010 allows you to quickly view your customers past purchases so that you can service them intelligently and easily reorder products.

Cancel Multiple Orders — Make cancelling unwanted orders even easier with the Cancel Multiple Orders feature. You can quickly select each order and cancel them all in one process.

Bank Reconciliation — The new Bank Reconciliation features a more intuitive user interface which makes it easier to identify and mark outstanding or cleared transactions. To make it more convenient for upgrade users, this new reconciliation UI is an option which users may select in the System Preferences dialog.

Save Quotes History — Gain greater control and better manage opportunities during the sales process using Quote History and Opportunity Management. Quote History allows you to easily generate quotes based on a previous quote and to retain each version of the quote you supply to customers. Using Quote History, you can quickly recall information previously conveyed to customers and to gain better insight into your sales opportunities.

Bank Ledger — The Bank Ledger feature, also known as Super Bank Ledger, consists of a Bank Account Register where users may easily enter Bank/Cash transactions and maintain an updated running Balance. Using the Bank Ledger, you may enter Cash Receipts for Cash Payments. These can be from/to customers or vendors, or they can be directly distributed to General Ledger.

Assembly Component Management — Configure the component lists for your assemblies in the order that works best for your business. This new tool allows you to enter components on your assemblies where you want to, and let you move components in the order that makes sense for your business, making assembly management even easier.

New Features in Version 16

Increased Item Code Size — The Item code for products and services was increased from 14 characters

Project/Job Tracking — This feature allows you to track revenues and expenses by specific jobs or projects setup in

to a 20 characters maximum. This feature not only allows users to accommodate Inventory coding schemes for specific industries, but it also increases flexibility when using the Inventory Multi.

Change Tax Rate on Order Detail Lines — This feature allows you to modify the tax rate for each detail line on an Order. This is useful selling items that are subject to special surtax rates or for states that are implementing different tax rates for different goods or services.

Additional Form Variables for Billing Invoices and Orders—The DacEasy form designer and generator engine includes new useful variables such as Customer Zone Code, Credit Limit, Balance, Credit Available, Finance Charge, Minimum Finance Charge, Product User Defined Labels, Customers User Defined Labels, Reprint Label, Job Code, Job Description and other special variables such as Line Count, Product Count, and Total Units.

the Jobs Table in DacEasy. To track revenues and expenses for Jobs/Projects, simply create a Job or Project and distribute amounts to it from the Transaction Entry dialogs. Job tracking is supported in General Ledger, Accounts Receivable, Accounts Payable, Billing, Cash Receipts, Cash Payments, Order Entry, and Payroll Transaction entry. The feature includes reports showing revenues and expenses per Customer/Job. Reports can be summarized by Account number or you can also print the detail of all transactions that are distributed to a jobs or project.

Updated Import Functions— Available fields for importing Products, Customers, and Services include all fields available in each table structure. The Available Fields List Box was updated to include every field that is part of the record structure. New available fields include Ship Via, Status, Memo field, and Minimum Finance Charge for the Customer Table; Status, AP Suspense Account, for Vendors; Status and bitmap file name for Products, User Defined Fields, and others.

Business Center Scorecard - This feature consists of four business center panels displaying important indicators for key variables related to the financial, sales, customers, and Inventory Control Performance of the Business.

New Features in Version 15

Customized Lookups — Allows users to select the columns that appear in lookups, and the width of each column displayed. The feature also includes an option to export customized lookups to an ASCII file.

Records which have notes attached will be flagged in the lookup with a note icon..

Emil Reports and Forms— Currently users may select whether to send a given report or form to the Printer, Screen, HTML, Excel, or whether to export the output to a comma delimited or text file. This feature adds email to these options so that a form or a report can be sent to an email address directly from within DacEasy.

Sales Analysis Report in the Business Center—This

Update Forms Designer— This feature expands the support for images in the DacEasy forms print engine. Users are able to visually insert images anywhere in the template for any of the forms supported. The form editor displays the actual image when the user is working with the form template, making it easier to visualize the output of the form and to position all the template elements properly.

The ability to print legacy forms based on templates created in v14 or previous versions is retained in DacEasy V15 as well.

Save Report Parameters— DacEasy remembers the values entered by users for report parameters so that they are recalled as the default values the next time the report is printed.

Remove Unused AutoComplete field data— Today if a

feature adds the Sales Analysis Report from DacEasy Accounting to the 'Instant Reports' in the Business Center..

Use Long file names in export— Export functionality was improved so that any long filename path can be used.

user accidentally types something incorrectly in an AutoComplete field there is no way to correct that mistake. A utility was added to remove unused AutoComplete field data.

New Features in Version 14

Audit Trail— Improve auditing and defend against potential fraud. With this feature, you have a register of user activity in the system. Audit Trail records insertions, deletions, and modifications of the most relevant master and transaction tables in DacEasy. This important enhancement to the security system maintains a record of who modified the information in your system, as well as what information was modified and when. The log is available to print as you desire.

Incorporate bitmaps to Reports and Forms— Strengthen your company's image and branding with more professional looking forms and reports. Now you may include your company logo on reports and forms. In addition, this feature may reduce your company's expense of purchasing forms with your company logo pre-printed. Simply setup a bitmap image of your company Logo on the Company Information Dialog of each DacEasy Module and indicate that you want this image to be printed in the header of all reports. You can also print the logo in your forms by adding the variable {LOGO} to your form templates. DacEasy V14 supports .bmp, .jpg, and .gif bitmap extensions.

Product Illustration— This feature allows you to incorporate illustrations of products in the Products Maintenance dialog in order to easily identify items when needed. Now you can view an image of each product which can reduce mistakes when ordering or selling products that have similar descriptions and price. With this powerful improvement your employees can visually identify a product when they are making changes to that product's attributes.

Active/Inactive Status on most relevant master tables— Reduce the time that it takes you to lookup vendors, customers, services, and more. When you set records as inactive, these records are omitted from reports, lookups, and may not be used when making transactions. Set the status of Customers, Products, or Services to Inactive when you want DacEasy to ignore these records without physically removing them from the company database. You may change the status of Inactive to Active when you are ready to start using these records again.

User Access Rights Security— Increase the level of control for current user access rights by assigning add, edit, or delete rights for defined functions of the application. This feature allows you to determine which users can perform certain tasks within Customer, Product, and Services functions.

Enhanced Promotional Prices— Now you may set up special promotional pricing for specific items based on a price override, a flat discount, or a percentage discount, and create customized price lists for which the promotion applies.

New Features in Version 13

Update the General Ledger Online—If you are interfacing DacEasy Order Entry with DacEasy Accounting, the new Update General Ledger Online feature allows you to create and maintain associated unposted General Ledger transactions when you enter transactions in the Receivables Ledger, Payables Ledger, Cash, Purchasing, Billing, Order Entry and Point of Sale modules. This provides you with an accurate, up-to-the-minute view of your books at any time, including activity from Order Entry! Now you have immediate access to unposted activity using DacAccess and Crystal Reports. For information on setting this preference, refer to the Help topic titled "Setting system preferences" in the Accounting Help.

Easily Locate Cursor in Grids—A border now appears around the field when entering information. This allows you to easily locate your cursor and identify where fields are located.

Update the Check Register Online—If you are interfacing DacEasy Order Entry with DacEasy Accounting, the new Online Check Register feature allows you to create and maintain associated unposted Check Register transactions at the time of entry from the source module, including Order Entry. This feature provides you with a real-time snapshot of all bank activity, including an accurate online balance. You can reconcile your bank accounts at any time so you no longer need to wait until the next posting cycle. When using this feature, the method of payment details from Order Entry are recorded in detail in the DacEasy Accounting Check Register when the transactions are entered or shipped depending on your preference settings. You also have access to unposted bank activity in DacAccess and Crystal Reports. For information on setting this preference, refer to the Help topic titled "Setting system preferences" in the Accounting Help.

Date Selector Button—The new Date Selector button allows you to enter a date using the keyboard, or view a calendar to locate and select a date. This button appears next to any editable date field, just click the button and a calendar appears with the current date selected. You can use it to easily identify last Thursday or six weeks from today. For information on selecting a date, click [here](#).

New features in Version 12

AutoReorder and AutoReturn—Save time when entering orders and returned merchandise authorizations (RMAs) by generating these transactions based on previous sales. For information on AutoReorder, click [here](#). For more information on AutoReturn, click [here](#).

Credit Check—Avoid entering sales for customers that have reached their credit limit or have a past due balance. You can choose to view a warning or prevent the order from being created when the credit check criteria is met. For information on this feature, click [here](#).

Instant Correspondence—The Salesperson [E-mail](#) field allows you to track e-mail addresses

Inventory Value Adjustments—You can now adjust the total value of an item in your inventory without affecting the quantity. This is especially useful if the invoice differs from the value recorded in when you purchased an item. For more information, click [here](#).

Track Product Weights—This new feature allows you to define your own units of measurement, assign weights to products on the **Sales** tab of the product record, and then view the total weight of an invoice from the footer (via the Options menu) during entry. For more information on setting up units of weight, click [here](#).

Protect Customer Credit Card Numbers—Your customers will be grateful that you take

for your sales staff. The new e-mail buttons available on the **Edit Customer**, **Edit Warehouse** and **Edit Salesperson** dialog boxes launches your e-mail application with the recipient's e-mail address already completed. Click [here](#) for more information on sending an e-mail.

Freight Amount for Orders—The [Freight](#) field on the order footer allows you to quickly charge freight to an order.

steps to protect their credit card numbers from getting into the wrong hands. You can now add special credit card variables to the form template header or footer that prevent the entire number from printing on the receipt. For more information, click [here](#).

New features in Version 11

Business Center—The Business Center provides a single entry point for all DacEasy programs and includes a number of features designed to increase productivity. This includes the ability to view multiple windows concurrently, update company information for all DacEasy modules, and back up or restore data without exiting the Business Center. In addition, you get quick access to DacEasy, the Internet and user assistance. If you installed the Business Center, refer to the Business Center Help for more information on the many new features available.

Using Your WebStore—Expand your business using the Internet. If you are subscribing to the DacEasy WebsiteCreator™ and WebsiteTrader™ service, you can be upload products to your Web site and download orders from your WebStore. Click [here](#) for more information on using your WebStore.

Custom Fields—You can add custom fields to your customer, product and service records. You can track up to six additional text fields, four amount fields and two date fields, and then use this information on custom reports generated in DacAccess. Click [here](#) for more information on setting up your custom fields.

Printing Timesavers—Select multiple sort and rank options when printing invoices. Select the number of copies when printing. Exclude non-inventory items from the Product History and Product Activity Detail reports. Add the customer's fax number to forms. Print multiple column bar codes and generate bar codes using the vendor's part number.

Enhanced LookUps—The ability to quickly locate existing data is important to any business. This process is simple when you use the LookUp feature in DacEasy. You can sort in ascending or descending order on any field in the Lookup with the click of a mouse. You can even include a secondary sort to help refine your search. Click [here](#) for more information on using the LookUp.

Publish to HTML—You can now publish data to an HTML file using a cascading style sheet (CSS) to retain the report's formatting. Publishing your company information to the Internet or a company intranet has never been easier or looked more professional. Click [here](#) for more information on publishing to HTML.

Shipping Methods—Add a record for each method of shipping you use. You can click **LookUp** from the Ship Via field to select the shipping method when entering orders and when setting up alternative addresses. Click [here](#) for more information on setting up shipping methods.

Data Entry Timesavers—Add the time or date to notes with the click of your mouse. Globally change the AR Account for customers. Select the sort order on the **Open Company** dialog box.

New features in Version 10

Pervasive.SQL 2000—DacEasy now uses Pervasive.SQL 2000 as the database manager.

Microsoft Office Integration—Office Integration allows you to merge your order entry data into attractive Word 97, 2000 and XP documents that can be e-mailed or printed. It also allows you to produce nicely formatted Excel 97, 2000 and XP worksheets that can assist you in the decision making process. You can then use Excel to create graphical representations of your order entry data. For more information on integrating with Microsoft Office, click [here](#).

Multiple Accounts Receivable Accounts—You can assign each customer to a specific Accounts Receivable account. This allows you to provide detailed reporting on your future cash flows and expenditures. You assign this account when setting up your customers. For information on setting up customers, click [here](#).

Multiple Warehouse Tracking—You can track inventory costing and valuation for multiple warehouse locations. For more information on multiple warehouse locations, click [here](#).

Additional New Features—Persistent moveable windows, edit controls with cut, copy and paste capabilities, persistent resizable note editors with cut, copy and paste capabilities, persistent vertically resizable windows.

New User Guide—New users are prompted to add the sample company or add a new company when they start the program for the first time. They also have the option to view the [Quick Tour](#) provided in the Help or view a list of new features.

Customizable Toolbars—You can determine the position of each toolbar in DacEasy. You can dock the toolbars to any edge of the window, or float the toolbar anywhere on the screen. In addition, you can choose whether or not to display the toolbar as well as the button labels on the toolbar. The main application toolbar can be customized per station ID to meet the needs of your business. For more information on customizing the toolbar click [here](#).

Presentation Quality Reporting—The new printing feature allows you to customize each section of a report. This includes font attributes such as font (including variable pitch fonts), color, size and style. You can also customize the page layout information. For more information on changing the report layout, click [here](#).

Transfer Items to Different Warehouses—The Inventory Adjustments function provides a method of updating the Product file without entering or shipping an order. This is useful for transferring units from one warehouse to another. For more information on inventory adjustments, click [here](#).

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