Vulcan Software LLC

Apex 10.7

Introducing Apex 10.7

Import Wizard Formats:

- Text (*.txt)
- Word (*.doc)
- Clipboard
- Excel (*.xls)
- Lotus 1-2-3 (*.wk1)
- QuattroPro (*.wq1)
- SPSS (*.sav)
- OpenOffice (*.odt)
- Paradox (*.db)
- Dbase (*.dbf)
- Access (*.mdb)
- ADO Connection
- Advantage (*.adt)
- DBISAM (*.dat)
- Clarion (*.dat)
- HTML (*.htm)
- XML (*.xml)

Apex 10.7 contains a number of features that will make your work easier. Many of you are already running versions of Apex between 10 and 10.6 to handle specific issues that you requested. Now that there are over 30 enhancements I decided that there should be something for everyone. It is time to ship!

As you might expect, the Online Center got a big overhaul. Sending purchase orders electronically and receiving back acknowledgments has made a big change in how Apex operates at many companies. By the end of this year we should have transacted over $100M through the Online Center!
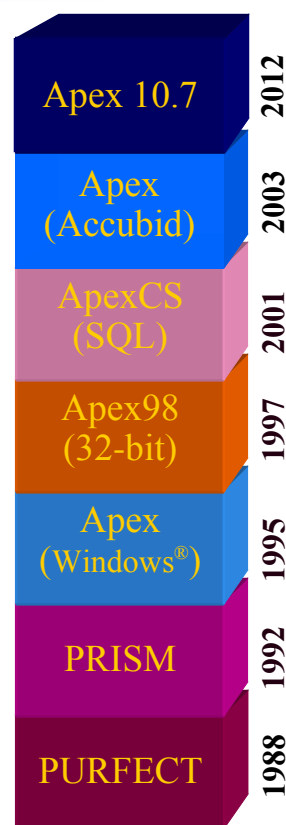
Are you unfamiliar with the Online Center? The new Apex "Tip of the Day" can help. Each day you are given a tidbit of information about the Apex program. My hope is that these tips will remind you about features in Apex that can assist you in your daily work.

To find more information about Apex, please consult:

- The Apex help system, or
- The Apex Customer Portal at www.apexpurchasing.com

We hope you enjoy the new Apex 10.7 features. As always, we welcome your feedback.

Version	Year
Apex 10.7	2012
Apex (Accubid)	2003
ApexCS (SQL)	2001
Apex98 (32-bit)	1997
Apex (Windows®)	1995
PRISM	1992
PURFECT	1988

Import Wizard Enhancements

The Import Wizards are important tools that help you load data into your Apex purchase orders and vendor prices. There are many formats that this data can come in.

Up to this point you have probably been working primarily with text, csv (comma separated value), or Excel files.

Now, though, even Excel files come in several formats. There are normal Excel files, Excel 12 workbooks, Excel 12 macro-enabled workbooks, Excel 12 binary workbooks, and more.

I have updated Apex to be able to import all variations of Excel files and many other new file types. On the upper left corner of this page you can see a complete list of all of the file types that are supported.

The P/O Maintenance import wizard has a new "UPC" field that will let you import a UPC number as a single 11-digit field. Previously you had to have the six-digit manufacturer number and the five-digit item numbers separated.

When you specify the UPC field Apex will automatically separate the manufacturer and item parts for you.

Business-to-Business Communications

Apex communicates directly with your distributors using the Online Center and through the "Transmit to Vendor" button in P/O Maintenance. Using these tools you can transmit your purchase orders directly from your computer to the distributor's computer, without having to attach them to emails first. You can also download acknowledgments and reconcile them against your existing purchase orders, or even build new ones!

The end result is that market efficiency is increased because only the buyer or seller has to enter a purchase order depending on where it originated.

There are already many distributors that can participate. Currently we are working with Gexpro, Graybar (three divisions), North Coast, Platt, Stoneway, Wesco, and others.

We will also work with your local vendors to get this set up, depending on their capabilities. All you have to do is ask and we will assist you. Apex already has everything you need to do this built in.

Acknowledgments

As more and more distributor acknowledgments were received it became clear that the Online Center could get very busy. Often a distributor would acknowledge a single purchase order several times as it flowed through their systems.

Apex will now only show you the most recent acknowledgment for a purchase order. By definition this acknowledgment is the latest word, so there is no reason to look at previous ones.

Since you only have to look at one acknowledgment for each purchase order you can now jump around in your list of acknowledgments and select the ones that are most important.

If you "accept" an acknowledgment you can choose specifically what parts of your purchase order you want to update: the vendor, ship-to, purchase order header, or purchase order lines. This gives you more control over how accepting an acknowledgment impacts your order.

The comparison between your Apex purchase order and the distributor's acknowledgment is now laid out more clearly so that you can quickly see the differences.

You can also automatically reject acknowledgments older than a specified date. This helps you clean up any acknowledgments that are no longer relevant.

There is no cost to you for doing business-to-business communications outside of your annual support and enhancement agreement

P/O Search

By popular demand you can now search for purchase orders by vendor name and ship-to name. You no longer have to know the vendor's IDs or your job numbers. The vendor ID and job number searches are still available, of course.

So that you don't have to type the whole name a new "contains" operator has been

added. For example, you can search for vendor names that contain "Coast". This might match "North Coast Electric", "Coast Construction", and "Coast Crane".

Instead of having to search for purchase order lines by putting a "*" in the keyword field, you can now simply select whether you want the results to show

purchase orders or individual lines.

Many new fields have been added to the search results grid, including your user-defined fields. Virtually anything that could be useful is available.

Be sure to check out the column selector so that you can choose the fields that you need.

Tip of the Day

The first time you launch Apex each day you will be shown a "Tip of the day". Each tip is a short paragraph with important information about Apex.

When Apex was first implemented at your company we would have discussed different options about how Apex can be set up. We would have talked about advanced security options. We would have discussed whether the purchasing department at your company is involved in vendor invoice reconciliation.

Since then it might not be fresh in your mind that Apex has an advanced security option including running multiple companies out of a single installation, or that Apex can help you do vendor invoice reconciliation.

The tip of the day is designed to refresh your memory about these features.

The "Tip of the day" screen uses the same technology as the Online Center. The tips are downloaded from a Vulcan Software server. That means that you will need an Internet connection to get them. The advantage is that the tips are always fresh and new ones can be added as support issues come up.

If you want to manually see a tip it is available on the help menu under Help -> Tip of the Day.

Email Options

Sometimes it isn't convenient to use Outlook® or another email program to send emails from Apex. A good example is if you are running Apex on a terminal server and your system administrator doesn't want to configure an email program for each person.

That's why Apex now can send its own emails, without the use of an external email client. Email addresses are accumulated from your contacts, vendors, and jobs to form your "address book".

This is also very helpful if you use the MSE (Material Spreadsheet Emailing) utility. The newer versions of Outlook are very concerned about spamming and security, so they will ask you over and over again to approve sending each email. Having Apex send the emails directly will completely bypass all of Outlook's security alerts.

You can choose whether to use an email program or have Apex send the emails by workstation. The MSE utility can also send its own emails whether or not the Apex program does.

For more information, consult the appendix in the Apex help system entitled "Using SMTP Email". You will want to consult your system administrator to use this feature. The help system will make sense to them!

If you have suggestions for tips please let me know. Maybe there will even be a prize!

Document Imaging

New name, same screen

There are far more documents imported into Apex now than are scanned. For this reason the button in P/O Maintenance has been relabeled "Store Documents".

PDF Documents

PDF is now unquestionably the ubiquitous document format. Many of you import PDF files into your Apex P/O documents and depending on where the files come from there can still be problems with Apex 10.

There are a lot of different kinds of PDF files, and sometimes even Adobe's own Acrobat program cannot read them all.

Apex 10 tried to convert the PDF files into a different form. This was time consuming and difficult. Apex 10.7 now stores them
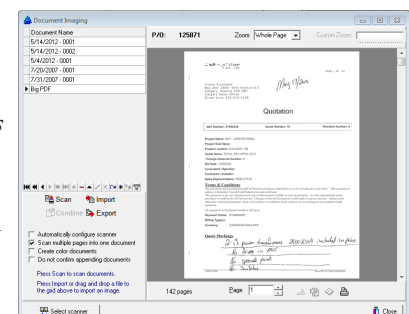
Errata

Other changes to Apex include:

- The "Transmit to Vendor" process does not send a UPC number if your material description does not match the dbItem description. (These are the "green" items.)
- If you use the "Transmit to Vendor" button with a P/O that has stored documents, you are warned that these documents will not be sent to the vendor automatically.
- When you receive UPC numbers on lines in an Online Center acknowledgment, Apex will automatically look up the correct item descriptions from your database. These descriptions are often more appropriate than the descriptions that the distributer used.
- When you accept an acknowledgment through the Online Center you can specify whether you want the P/O to be automatically triggered to be resent to your accounting system.
- A new option is available in P/O Maintenance where you can choose to only show active jobs in the ship-to list.
- If you change the ship-to name (thereby selecting a different job number for the ship-to), Apex will now prompt you whether you want to change the job number on the P/O or not.
- There is now a filter field on the top of the message library. If you type something into this filter you can quickly find message titles that contain that text.
- The Cost Code by Job report now gets the "Invoiced" information from the Vendor Invoice Reconciliation info, and has added a new "Un-invoiced" column.
- If you have a user-defined P/O line field specified in your Company Information you can now edit it in P/O Maintenance.
- The Analysis Cube no longer incorrectly displays "Double-click in the search results to open that P/O in P/O Mainte-

nance". Any given number can be the result of many P/Os (if not hundreds), so this made no sense.
- You can no longer export a previewed report into Excel. You should use the "Export" button from the grid instead. For reports this means first previewing your report in an Interactive Grid.
- Report previews can no longer be minimized. This reinforces that you must print, save, email, or close the report before you can resume Apex operations. Otherwise it was easy to accidentally minimize your report preview and then it looked like Apex was locked up. It wasn't — it was just waiting for the Preview screen to close.
- The workstation is now identified in your P/O Audit information without having to enter it first in the BDE Administrator.
- Advanced security works better with new SQL servers and Windows servers. In some circumstances their enhanced password protection features were preventing Apex from setting new user passwords.
- The Consolidated Material Report now asks if you want to "Show UPC Number". Previously it erroneously asked about the "EDP Number".
- On a multi-company receiving journal, the receiver number is always printed on the first page.
- The receiving history table now contains the received date from the receiving journal date instead of the date it was posted.
- Under some circumstances Apex had trouble assigning the next P/O line number in a multi-user environment on a Citrix server. This has been corrected.

Document Imaging

in your database in their native PDF format.

That doesn't mean that Apex will be able to display every PDF file correctly. If Adobe invented the PDF format and even their own programs can't always display PDF files consistently then there is little hope that Apex would be able to do a better job.

What Apex will do, though, is try the best it can to display the documents inside the Apex program and let you export the file as a PDF if you need to open it in another program.

This also means that you can easily store PDF documents with hundreds of pages!

Stored Document Count

If there are documents stored for your purchase order you are shown a count on the "Store Documents" button.