

Vulcan Software LLC

# Apex 10.8

## Introducing Apex 10.8

### New Excel Formats:

- Excel File (\*.xls)
- Excel 12 Workbook (\*.xlsx)
- Excel 12 Macro-Enabled Workbook (\*.xlsm)
- Excel 12 Binary Workbook (\*.xlsb)
- Excel 12 Template (\*.xltx)
- Excel 12 Macro-Enabled Template (\*.xltn)

Apex 10.8 contains 30 enhancements since the last general Apex release. I always look forward to getting great feedback from those of you that are using Apex every day. There is a lot of expertise out there among you providing ideas for improvements in business-to-business communications, new formats for price file loading, “view only” versions of screens for specific users, and much more.

Don’t underestimate the importance of the “Errata” section on the last page. There were some very important changes made to Apex but that don’t need a whole topic to write about them.

You will almost certainly find something in there that is im-

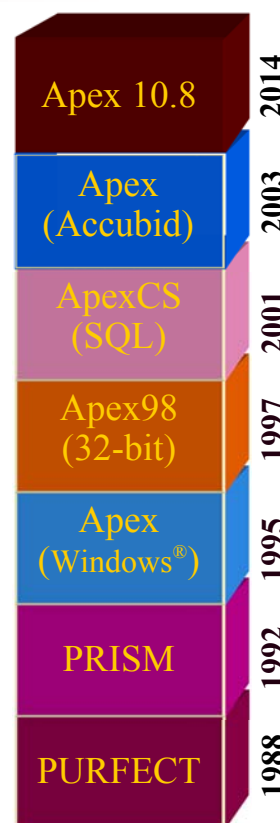
portant to you.

Apex 10.8 is truly the result of your ideas. I hope that you can keep them coming!

To find more information about Apex, please consult:

- The Apex help system, or
- The Apex Customer Portal at [www.apexpurchasing.com](http://www.apexpurchasing.com)

We hope you enjoy the new Apex 10.8 features. As always, we welcome your feedback.



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### Excel Formats

Many of your vendor price files are coming to you in one of the newer Excel spreadsheet formats.

These format are called Excel 12 files, but you might commonly see them called Excel 2007 spreadsheets. You can see a detailed list of these new file formats at the top left of this page.

Previous versions of Apex could actually import some of these files

but it was not intuitive. And, you might have to take my word for this because with some files the import may not have finished with in a normal lifetime.

Apex 10.8 can now eat these files for breakfast. You can step through the new Excel file format just as quickly as you could work with the older Excel file formats.

### MSE

The Material Spreadsheet Emailing utility (MSE) will now let you choose whether you want to send your spreadsheets in the Excel 97-2003 format or in the newer Excel 2007 format. Newer versions of Excel are having problems with the older file format for presumed security reasons so you may wish to consider using the new format.

## Business-to-Business Communications

The Online Center is the heart of Apex's business-to-business communications (B2B). As we bring on more and more distributors the online center continues to evolve and become more useful.

Many of you are now dealing with hundreds of acknowledgments at a time, so Apex 10.8 has dramatically improved the performance of the Online Center. This should really help you manage your acknowledgments more quickly.

You can now transmit your purchase orders to more distributors. I know that a lot of you currently email your purchase orders but once you get used to the "Transmit to Vendor" button it can add up to be a big time saver.

For most of your distributors this puts your orders directly into their system. Obviously, this is a big benefit for them (which I hope they will reflect in better pricing for you). The big benefit for you is that you have virtually eliminated the chance for them to make a transcription error. They even get the UPC numbers that you are using for the line items. These often tie directly into their database, especially if you are using Apex to substitute items using your Comparator data. (More on the Comparator later.)

### Vendor UPC Numbers

One issue that came up with acknowledgments is what to do

with UPC numbers that are not in the Apex database. Earlier versions of Apex kept these UPC codes just in case at some point in the future you loaded that dItem.

This had a few drawbacks, not the least of which that it drove the Comparative Analysis Report crazy. It would also cause the P/O line to turn green, indicating that it was a priced line with a different description even though it wasn't.

Apex 10.8 now clears out any UPC codes from vendors acknowledgments that are not in your database. It also is careful not to copy the cost code from the previous line when it finds one of these items. That sounded good on paper but did not work well at all in practice.

### Accepting Messages

In some cases you may want to accept parts of an acknowledgment to update your P/O, but not update your P/O message. Frankly, some distributors are pretty notorious for putting things in the messages that you don't want and not putting in things that you do.

You can now select whether or not to update your P/O message when you Accept an acknowledgment. You can see the check box in the sample screen above.

Job	PO	Rec Date	Ship Date	Vendor	Vendor Name	Work Ord
7003991	TESTING ONLY	2/28/2012 7:0...	3/25/2012	NCE	NORTH COAST ELECTRIC	
	163198	3/9/2012 7:20...	3/10/2012	4510	WESCO DISTRIBUTION INC	
60020	163211	3/9/2012 11:3...	3/10/2012	4510	WESCO DISTRIBUTION INC	00
51574	62996	6/4/2012 12:1...	2/16/2012	3122	PLATT ELECTRIC	
51572	2002	6/4/2012 2:01...	2/29/2012	3122	PLATT ELECTRIC	
	49078	10/4/2012 12:...	10/3/2012	BROW...	BROWN WHOLESALE	
	123456	1/25/2013 2:5...	7/31/2014	1300	INDEPENDENT ELECTRIC	
	48927	1/31/2013 12:...	7/31/2014	1300	HD SUPPLY	
	202204	2/1/2013 5:44...	7/31/2014	1300	HD SUPPLY	
	101631	2/2/2013 4:51...	7/31/2014	1300	HD SUPPLY	

Reject all acknowledgments older than 7/31/2014

Acknowledgment 163211 received 3/9/2012 11:30:09 AM  
 Job 60020 shipping to SEQUOYAH ELECTRIC/AT:  
 Vendor 4510 WESCO DISTRIBUTION INC  
 Vendor note: Accepted

P/O Header Info	From	To
P/O header matches exactly		

P/O Line Info	From	To	Diff
P/O line 2: CONDUIT 3/4-EMT ELEC METALLIC TBG Description changed.	CONDUIT 3/4-EMT THINWALL CO	CONDUIT 3/4-EMT ELEC METALLIC TBG	Qty 100
P/O line 3: COHC 451 3/4STL 5/SCR EMT CONN			Qty 50

Options  
 \*Accept\* can change:  
 Vendor  
 Ship-to  
 Header  
 Messages  
 Lines  
 Show message after Accept/Reject

Accept Reject Print

### Invoicing

We are now getting more distributor set up to send your invoices electronically. If you are using the Apex Vendor Invoice Reconciliation capability then this could be a big help to you.

Essentially the vendor's electronic invoice automatically populates your Vendor Invoice Reconciliation screen. Apex puts the invoice in a pending state so that it is easy to find them to review.

Often companies have chosen to interface their invoices directly to their accounting system. This means that an electronic vendor invoice can be captured by Apex and then sent directly to your accounting system for payment!

*There is no additional cost to you for doing business-to-business communications — it is part of your annual support and enhancement agreement*



## Comparator Updates

Apex is able to use information about item cross-references when you do a Comparative Analysis Report or move P/O lines to new target P/Os. This can be invaluable because it allows you to order the actual items that your distributor carries, properly priced, instead of generic items that you may have put on your purchase order.

For those of you that haven't thought about this for a long time, here is the idea: Your distributors will have priced the items for you that they carry. You then put items on your purchase order that are based on your own Quick Codes, Item Templates, or other means.

When you run a Comparative Pricing Analysis and let Apex match equivalent items it will find the items that are equivalent and are at a lower cost from your distributors. Since the distributor will have only priced the items that they carry, this effectively lets you pick the correct items from that distributor!

Trade Service continues to update their "Comparator" database. At the time of this writing there are over 200,000 items cross referenced. Apex allows you to create your own cross reference information but if you think about how long it would take you to enter this many of them you might find that buying

the data is a good deal.

However, it is now sold on a subscription basis with new data being provided quarterly. It is also more expensive than it was previously.

I mention this because I know that a lot of you have pretty stale Comparator data now. You may not have some of the more recent updates, like where almost all of the Graybar specific items are cross-referenced.

Oh, and just in case you are wondering, no I don't get a kick-back from Trade Service ☺



## View-Only Screens

There may be instances where you want someone to view your purchase orders in P/O Maintenance or invoices in Vendor Invoice Reconciliation but you want a "Read Only" version so that they cannot change any of the data.

Apex 10.8 now offers this capability. On the Apex menus these are separate selections called "P/O View" and "Invoice View".

Obviously this makes more sense if you are using Apex Advanced Security. In this way

you can restrict users to the "Read Only" versions of these screens. By default users with the "Reporting" role can see the "View Screens".

*If you are not currently using Apex Advanced Security you may want to review what this capability can offer you*

## P/O Search

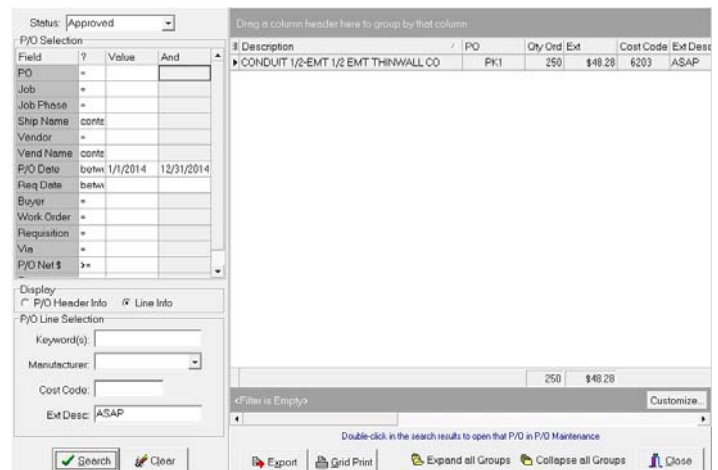
You do a P/O Search. After selecting your criterion you manipulate the result grid to look just how you want. It has the columns, filters, sort order, and grouping just right.

Then you close the screen and go back to it later and you have to manipulate the result grid all

over again.

No more! When you close P/O Search it now remembers how the grid looked, so you go back to the same appearance next time. P/O grids and P/O line grids are both remembered individually.

You can now also search by a partial Extended Description.



## Errata

### *Other changes to Apex include:*

- In preparation for the upcoming improvements to the Apex Web site, you can now specify individually by each contact whether or not they are allowed to view pricing information. This is specified in File -> Lists -> Contacts. Many of you are currently using the Apex Web site to let your project managers and others review their purchases. It is about to “grow up” in the next few weeks to allow you to enter requisitions, receipts, and more!
- The Invoice Cube has been updated to show both the invoice header and the invoice detail, just like the Analysis cube does. It will also now calculate the difference between the P/O total and the invoiced total.
- The Analysis Cube has been enhanced to show some new information such as the user defined fields, P/O count, and the P/O line count.
- In P/O Maintenance you can no longer drag the bottom of the P/O line headers to make the row taller. It was too easy to accidentally make the row so tall that you couldn't see any P/O lines.
- The cost code description may now optionally be printed on the Cost Code by Job report.
- You no longer specify in your Company Tailoring options whether or not you want to use Extended Descriptions. First, I can't think of a company out there that doesn't want to use them now. Secondly, this option was really deprecated the minute that Apex had the grid column selectors, which would allow you to turn it on or off yourself as needed.
- You can now specify that units of measure that begin with “K” are treated the same as those that begin with “M”. This is especially useful in Canada, where you can use “KM” as a unit of measure.
- If you add a new P/O number in P/O Maintenance and it happens to be an existing P/O, Apex will now leave you on that P/O so that you can see it instead of taking you back to the previous P/O.
- Now that there are a *lot* more Comparators items (as discussed in an earlier topic), Apex has been sped up so that it loads new Comparator data about twice as fast as it did previously. So that the screen updates don't become a bottleneck it also now counts by 100s instead of 1s. dbItem loading also now counts by 100s.
- Installing Apex on newer operating systems (Vista+) could be a bit challenging for your IT people. There were a number of articles on ApexPurchasing.com on various ways to do this. Now Apex 10.8 can be installed without any concern about your operating system, from Windows XP and later.
- With some accounting systems Apex can now allow you to enter subcontract purchase orders. Give us a call if this is something that you might like to do.
- Bug Fix: If you scan a new document after importing one, Apex will now handle the new scanned document correctly. Previously it might just copy the previous document.
- The Apex icon will now look a lot better in newer operating systems that have higher resolutions.
- Bug Fix: The saved grid configurations between P/O Maintenance, Receiving Maintenance, and Vendor Invoice Reconciliation could interfere with each other. They could all also interfere with the email sender's address if you are using Apex to send email directly, rather than using an email program such as Outlook. This has been fixed.
- Bug Fix: If you have Apex print purchase orders with multiple forms strung together that are different, each form can now have a different graphic backgrounds (bitmaps). Previously Apex would only use the bitmap from the first P/O form.
- Bug Fix: When you do a Grid Print you can email the results. Apex 10.7.x interim releases lost this capability and it has been restored in Apex 10.8.
- Bug Fix: Invoice Search will now work if you are using Apex Advanced Security. Previously the Invoice Search was *so* secure that it would not return any results.

