Vulcan Software LLC

Apex 18.1

Introducing Apex 18.1

Partial list of Online Center Distributors:

Acme Construction
Alameda Electric
Anixter Inc.
CED
Coast Construction
Elliott Electric
Fastenal
Gexpro
Graybar (4 divisions)
HD Supply
IE Supply
North Coast Electric
Platt Electric
The Reynolds Group
RSD
Sonepar
Stoneway Electric
WESCO

Apex 18.1 adds up to 33 enhancements to Apex, depending on when you received your last update. Some of them are pretty big, as you will read in the following pages.

For almost eight years now I have been encouraging you to use the Online Center to download electronic acknowledgments, but I have never published a list of the distributors currently doing this.
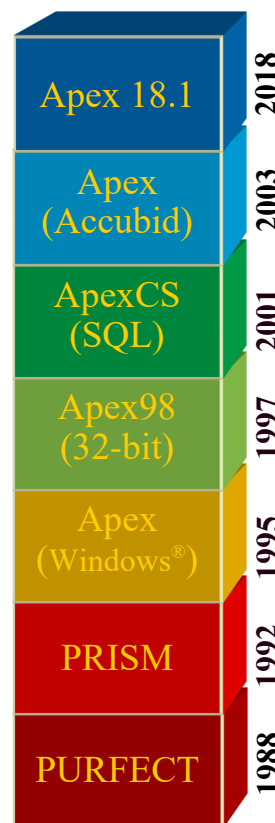
Surprisingly, it is hard for me to come up with a comprehensive list. For example, Sonepar owns distributors like Crawford in Texas, NorthEast in Massachusetts, and both IE Supply and QED in Arizona. The same is true for a lot of the other distributors like CES-

CO ("Stoneway" in WA), CED, and even WESCO (aka Brown Wholesale in the mid-west).

The list on the left shows a partial list of distributors to help you spot check if there are any that you want to set up. You're not limited to this list, but the distributors on the left are already sending acknowledgments so they are the "low hanging fruit".

Start by asking your distributor's salesperson and give them me as your contact. Then I can take it from there!

We hope you enjoy the new Apex 18.1 features. As always, we welcome your feedback.

Apex 18.1	2018
Apex (Accubid)	2003
ApexCS (SQL)	2001
Apex98 (32-bit)	1997
Apex (Windows®)	1995
PRISM	1992
PURFECT	1988

What happened to versions 11 through 17?

Many of you will notice that you are using a version of Apex between 10.9 and 10.9.8. No, you didn't miss out on 7 major updates. I just felt it was time to change how we do our numbering scheme.

Historically, each version of Apex started with a number that introduced a major new feature. For example, Apex 1 (1996) was the first release of the Windows program with the full functionality of

the previous DOS-based PRISM program.

Fast forward to Apex 9 (2006) and you had exporting to multiple formats like PDF and Excel, enhanced price file loading, document imaging, and more. Apex 10 (2010) introduced features like the analysis cube, business-to-business communications, and P/O auditing.

Now that Apex is more mature it makes more sense to have the

version number reflect the year of release and a sequential release number.

"18.1" means that this is the first Apex release in 2018.

Another thing I am thinking about is having Apex available as an Internet download instead of a CD. I can update things more quickly if I just have to put the new programming online. Please let me know your preference.

Queue for Accounting

Believe it or not, in the early days of Apex companies did not always choose to send their purchase orders to their accounting system. A top-10 electrical contractor in the mid 2000s didn't send their purchase orders to accounting. They let Apex figure that part out.

While I still have a handful of customers that don't send their Apex information to accounting, this is now much less common.

If you are sending your purchase orders or invoices to accounting, you have probably heard me talk about how printing your P/O is the "control point" that signifies that it is ready to go. This works, but has two problems:

- You have to go through multiple steps to print the P/O, and

- There is no indication on the P/O Maintenance screen whether the P/O is currently queued to go to accounting or not.

Now there is a button in the *Action* portion of P/O Maintenance where you can control this with one click. You can still print the P/O to queue it for export to accounting, but you don't have to do this.

When the P/O is ready to be sent to accounting, click the *Queue for Export* button.

If the P/O is already queued for export and you want to pull it back, simply make any change to the P/O, or click the same button which is now labelled *Dequeue from Export.*
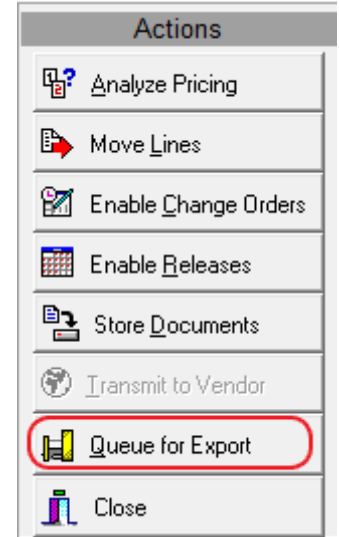
Analysis Cube

I am pleased to see how many of you are using the Analysis Cube. I know that it was a bit of a steep learning curve at first, but once you get the hang of it you have a very powerful and versatile tool.

Two things that we can do to make it even more powerful is to add charts and new fields.

Charts

As you create your cube by dragging and dropping the data, row, and column fields, a chart is automatically generated below
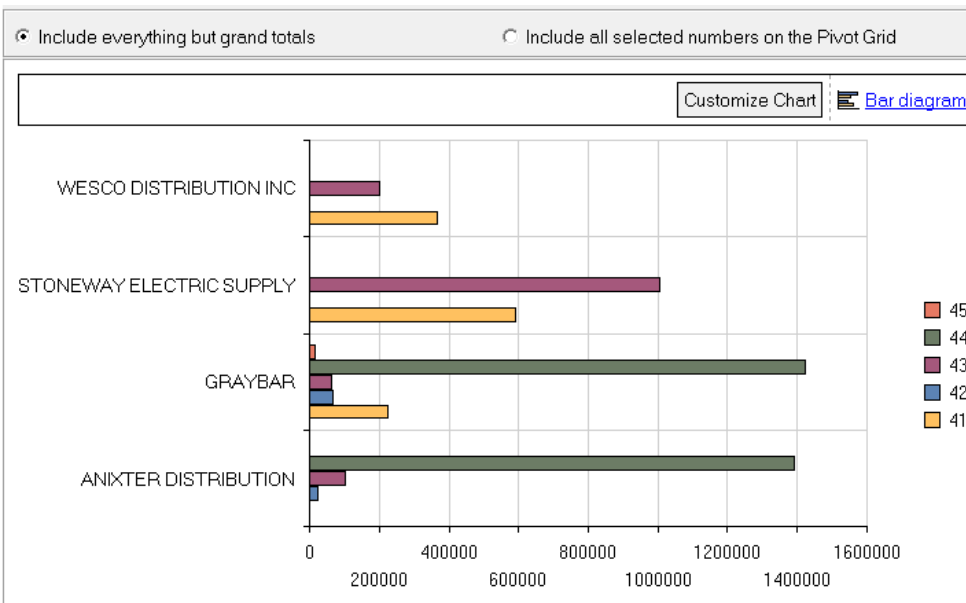
the cube. You can chose what appears on the chart, change the chart type, and "Chart Print" the resulting chart.

Lead Time

A *Lead Time* field (days between Ship Date and Order Date) has been added.

Queue your P/O for export to accounting or de-queue it with just the click of a button.

Read the button text to see the current status.

Consolidated Material Report

The Consolidated Material report was the first report that I was asked to write back in the early 1990s. It is a mainstay for tracking your material purchases.

Although it has always been able to detail your purchases in a number of different ways, one thing that it couldn't do was group your equivalent items together. This often meant that you had to hunt and peck around the report to see what you had purchased in a certain category.

Apex 18.1 adds the capability to detail your purchases by equivalent items. Now that many of you are subscribing to the Trade Service *Comparator* database and may even have quarterly subscriptions, this should be a powerful new option.

Consolidated Material
Vulcan Software LLC
P/O Date between 1/1/2006 and 12/31/2006

Description	Ordered	Amount	Avg Unit
Group: 7933			
ARL 407 2-1/2 STEEL LOCKNUT	60	87.44	1.46
BRDGPORT 107-S 2-1/2 STL CND LKNT	5	-4.65	-0.93
DOTTIE LN250 2-1/2 STEEL LOCKNUT	2	2.45	1.23
EGS L700 2-1/2 STEEL LOCKNUT	4	1.99	0.50
REGAL 807 2-1/2 STEEL LOCKNUT	314	298.21	0.95
	385	385.44	1.00
Group: 7934			
ARL 408 3 STEEL LOCKNUT	115	204.21	1.78
BRDGPORT 108-S 3IN STL CND LOCKNUT	148	175.76	1.19
REGAL 808 3-IN STEEL LOCKNUT	240	322.23	1.34
	503	702.20	1.40

P/O Maintenance

Quantity Multiplier

When you copy line items from a template (or another order) you can now specify a quantity multiplier. This encourages you to think of some of your templates as "kits". For example, imagine you have a template for *Safety Gear* and the line item quantities represent what you need to equip one person.

When you copy the template, enter a multiplier of how many people need safety gear. When the lines are copied, each quantity is multiplied by what you entered.

Line Renumbering

After you prune out unused items that you copied onto a P/O, there may be a lot of gaps in the line numbers. Now when you prune an order the lines are automatically renumbered for you. This only happens if the P/O has not been issued or sent to accounting.

Contact ID

The Contact ID has been added to the P/O Maintenance header. You can choose from the *File -> Lists -> Contacts* list. It is filled in for you when a requisition is received from the Apex Web Application.

Tip: If you have quantities in your template but want to start with zeroes so you can enter everything from scratch, enter a multiplier of zero!

4D Taxes

For those of you in states like California where sales taxes are now defined with up to four decimals of precision, Apex will now show your tax rates with four decimal places.

You will see the tax rate with four decimal places in the vendor, job, and P/O Maintenance screens. If you are printing the tax rate on your P/O forms you will also see 4 decimals there.

Price Load Audit

The report produced when you load vendor prices will now show you the percentage difference between the current vendor price and the new price for each item.

Errata

Other changes to Apex include:

- After you sort the P/O Search screen you are taken to the top row, not to where the row you were viewing is in the list after the sort. Also, sorting is no longer case sensitive. For example, GRAYBAR and Graybar will sort together.

- Sorting P/O lines in P/O Maintenance by clicking on the column titles seemed like a good idea years ago. However, every time I have seen someone do this it was by accident, and then it took some work to get everything back to normal. P/O Maintenance no longer supports line item sorting. It is easy to use P/O Search to show the lines and then you can sort them there.

- If you have a screen with a very high resolution and are using a Windows scaling factor to be able to see things, P/O Printing will now fit document images correctly on the page.

- Trade Service no longer updates all of the items in your db Item database. This has lead to old Column 3 prices sometimes becoming lower than your net prices. Apex will no longer select a zero-percent discount from Column 3 under any circumstance.

- The Material Search screen has a new field where you can search by Quick Code. You can use asterisks as wild cards, just like you do in the other fields. "E*CN", for example, would find all quick codes beginning with an "E" and ending in "CN".

- When importing prices in a custom format, you can use a field that contains 1, 100, and 1000 as the unit of measure. These are then translated to "E", "C", and "M".

- P/O Printing puts the job and work order number on the email subject line.

- The invoice status has been added to the Invoice Search criterion and results.

- You can specify the width of the P/O messages on your forms so that you can make them fit better in the allotted space.

- If Apex was displayed on a secondary monitor and then that monitor is removed (like when you dock a laptop at work and then go home), Apex will put itself back on the primary monitor instead of magically disappearing.

- After you filter for a P/O message and then add it to the P/O the filter is cleared.

- The Online Center will do a better job of comparing prices, and will only warn you if they are off by more than a penny.

- "Cleaning up" P/O revision 0 now works correctly.

- Vendor abbreviations are no longer case sensitive when you are restricting column headings to just that vendor in the Comparative Analysis Report.

- Getting help for the Receiving Maintenance screen takes you to the right place (not to the help for Invoice Maintenance).

- The job number field is now wider for those of you that have ginormous job numbers.

Online Center

In 2010 my vision was that the Online Center could be used to receive acknowledgments, advance shipping notices (ASNs) to drive receiving, and invoices. Since there could be a flurry of activity on a P/O a message log was maintained so you could see a chronology of when things were sent and received.

Eight years later it is pretty clear that ASNs and invoices never got any traction. We did a couple trial implementations over the years but nothing stuck. So, in Apex 18.1 I have removed those buttons from the Online Center. Since we no longer have to tell a story about things that have happened to the P/Os, I have also removed the message log. This leaves you with a single button where you can download acknowledgments.

Invoices are often handled by the accounting system. It may be able to electronically download invoices directly, or there are 3rd party companies that can download them for you.

People that use Apex for vendor invoice reconciliation want a person to check that they are correct, so downloading the invoices automatically defeats the purpose. If you really want to accept invoices electronically without purchasing looking at them then this just makes Apex an unnecessary middleman in the invoicing process.

As always, let me know what you think.

For more information please visit http://www.apexpurchasing.com or consult the Apex Help system.

Apex support is available via email at: support@apexpurchasing.com