

# integraERP 2.20

## Work Fast and Work Smart

Available Now

integraERP and integraWMS update 2.20 is all about increasing efficiency while cutting workload. Managing a business is a lot of work, let us keep track of vital business processes. Easily sort Orders and Product Inquiries, maintain crucial records, and speed up warehouse function.

### integraERP

#### Sort OE Orders by Date

We've added the invoice date to the OE inquiry. This may seem like a simple change, but the impact can be significant when it comes to staff productivity and customer satisfaction. The addition of this field makes it quick and easy for your staff to determine if and when an order was invoiced and then efficiently convey that information directly to your customers.

Customer Number:  Notes

Ship To Number:  Notes

Product Number:  Notes

Warehouse Number:

Type:

Stage:

Maple Ridge Resort

Turmeric Pellets

Display Order:

Print:

Printer Device:

Status: A

Unit: PCS

On Hand: 88931.00

Reserved: 47286.50-

On Order: 151030.00

Received: 57323.00

6 Month Net:

Ord Number	Ty	Stg	Ref	PO#	SlsRep	Req Date	Inv. Date	Qty	Ship Unit	Whse	Price	Ap
703562-000	SO	PCK			1	06/22/21		16.00	PCS	1	12.54	N
703511-000	SO	ORD			2	05/05/21		10.00	PCS	1	12.54	Y
703497-000	SO	ORD	Cindy	12321654	1	04/27/21		12.00	PCS	1	36.00	N
703416-000	SO	INV			1	02/23/21	02/23/21	10.00	PCS	1	12.54	Y
703414-000	SO	ORD			1	02/18/21		10.00	PCS	1	12.54	N
703413-000	CS	INV			1	02/18/21	02/18/21	20.00	PCS	1	12.54	N
703403-000	SO	PCK			1	12/16/20		10.00	PCS	1	16.12	N
703386-000	SO	PCK			1	12/01/20		7.00	PCS	1	16.12	N
703384-000	SO	PCK			1	12/01/20		4.00	PCS	1	16.12	N
703143-000	GO	ORD			1	11/03/20		20.00	PCS	1	16.95	N
703072-000	SO	PCK			1	09/10/20		20.00	PCS	1	16.95	N
703065-000	SO	ORD			1	08/25/20		16.00	PCS	1	16.95	H
703063-000	GO	ORD			1	08/25/20		12.00	PCS	1	16.95	H
703053-000	SO	ORD			1	08/13/20		6.00	PCS	1	16.95	H
703048-000	SO	PCK			1	08/13/20		2.00	PCS	1	16.95	N
703021-000	SO	PCK			1	08/04/20		10.00	PCS	1	14.95	N
702972-000	SO	PCK			1	07/22/20		10.00	PCS	1	14.95	N
702834-000	SO	PCK			1	06/16/20		10.00	PCS	1	14.95	N
702814-000	SO	INV			1	06/04/20	06/04/20	4.00	PCS	1	14.95	N
702545-000	BO	INV			1	03/10/20	07/07/20	6.00	PCS	1	14.95	N

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## View OE Product Inquiries by Date

Purchasing and Sales personnel, especially, will appreciate the addition of the invoice date field to the OE Orders by Product inquiry. At-a-glance, they can determine how quickly orders are being input & invoiced(shipped) providing quick visual insight into product movement, availability, and trend, all of which equates to improved inventory management, cost reduction and customer satisfaction. This small change can make a big impact!

Order Number	Type	Stage	Customer Reference	PO#	StsRep	Req. Date	Inv. Date	Qty	Ship Unit	Whse	Price	Ap
987654321-000	DO	CAN	129		8	11/19/09	07/07/20	0.00	PCS	1	5.00	Y
987654321-000	DO	CAN	129		8	11/19/09	07/07/20	0.00	PCS	1	1.00	Y
135001598-003	BO	PCK	136		1	07/19/20		1.00	PCS	1	14.95	N
135001598-002	BO	PCK	136		1	07/19/20		4.00	PCS	1	14.95	N
135001598-001	BO	PCK	136		1	07/19/20		3.00	PCS	1	14.95	N
135001598-000	SO	PCK	136		1	07/19/20		2.00	PCS	1	14.95	N
135001597-000	SO	PCK	136		1	07/19/20		10.00	PCS	1	14.95	N
8855421-000	SO	INV	15621		1	02/01/20	06/03/20	25.00	PCS	1	14.95	N
7775543-000	SO	PCK	15621		1	02/01/20		30.00	PCS	1	14.95	N
703783-000	SO	CAN	15623		1	10/05/21		0.00	PCS	1	43.95	H
703781-000	SO	CAN	15623		1	10/05/21		0.00	PCS	1	43.95	N
703780-000	SO	INV	15623		1	10/05/21	10/12/21	70.00	PCS	1	43.95	N
703779-000	SO	PCK	15623		1	10/05/21		62.00	PCS	1	43.95	N
703778-000	SO	ORD	15623		1	10/05/21		50.00	PCS	1	43.95	H
703777-000	SO	PCK	15623		1	10/05/21		35.00	PCS	1	43.95	N
703773-000	SO	ORD	32		5814	10/05/21		50.00	PCS	1	43.95	N
703772-000	SO	ORD	32		5814	10/05/21		40.00	PCS	1	43.95	N
703771-000	SO	ORD	32		5814	10/05/21		40.00	PCS	1	43.95	N
703770-000	SO	ORD	32		5814	10/05/21		20.00	PCS	1	43.95	N
703769-000	SO	ORD	32		5814	10/05/21		40.00	PCS	1	43.95	N

## Speed Up Your Bidding Processes by Duplicating Bids!

Generating bids has never been more efficient or cost-effective! This new feature provides for several innovative options for updating costs and prices when generating a new bid/quote using the Bid Management Copy function. Users have the option to retain the costs found on existing bid or bring in updated costs from IC. In addition, margins can be copied or zeroed out which will impact prices on the bids/quotes. Greater control over both costs and prices when generating bids/quotes increases efficiency, reduces costs, and can have a substantial impact on your bottom line!

**Copy Existing Bid**

Quote To Copy:

New Quote Number:

Update to Current Std Cost:

Set All Margins to Zero:

Copy All Customers:

## Quickly access previous GL Trial Balances and Balance Sheets

We have made it faster and more efficient than ever to access previous years financials when generating your Trial Balance and/or Balance Sheet. Quickly access previous years financial data, simply by entering the year and let the software quickly and efficiently generate your financials from prior years data.

Program Settings	
Use Ext Budgeting & Prior Period History Balance Storage. . .	<input checked="" type="checkbox"/>
Use Extended Descriptions. . . . .	<input type="checkbox"/>
Use CO#1 For Non Normal Accounts During Reporting . . . . .	<input type="checkbox"/>

★

Consolidated Report . . . . .

Print Zero Balance Accounts. . . . .

Print PTD Balances. . . . .

Report Period. . . . .

Use Previous Year Data . . . . .

Report Date. . . . .

Beginning Asset GL Number. . . . .

Report Title. . . . .

All Companies. . . . .  ▼

1.	<input type="text" value="01"/>	6.	<input type="text"/>	11.	<input type="text"/>	16.	<input type="text"/>	21.	<input type="text"/>
2.	<input type="text"/>	7.	<input type="text"/>	12.	<input type="text"/>	17.	<input type="text"/>	22.	<input type="text"/>
3.	<input type="text"/>	8.	<input type="text"/>	13.	<input type="text"/>	18.	<input type="text"/>	23.	<input type="text"/>
4.	<input type="text"/>	9.	<input type="text"/>	14.	<input type="text"/>	19.	<input type="text"/>	24.	<input type="text"/>
5.	<input type="text"/>	10.	<input type="text"/>	15.	<input type="text"/>	20.	<input type="text"/>	25.	<input type="text"/>

Sequence File Name . . . . .

Begin Department Number. . . . .

End Department Number. . . . .

Report By Department. . . . .

Printer Device. . . . .  ▼

## Record Vital Customer Info Via Sales Reporting

We continue to implement features and functionality designed to provide greater insights and access into the data that keeps your company viable and strong. In this release, we have added fourteen key Customer fields which can be exported to a CSV format via the integraSoft Sales Reporting Customer report. These fields provide additional customer contact and sales information which can be utilized to enhance and streamline communication between your customers and sales reps in a timely and efficient manner.

## Allow a single picker to handle several orders at once!

Optimize every step an employee takes with Group Pick from integraWMS. In 2.20, we've added exciting functionality to the picking process. Give pickers the ability to pick multiple orders with each pass through the warehouse. This enables employees to up their order count and increase productivity.



## Always Know Where Your Product is and Why

Search, Sort, and Filter Bin Movement History by any User, Product, and Bin. See how and why your product moves through the warehouse while simultaneously keeping tabs on employee efficiency.

Date	From Bin	From Bin Type	From Product Bin Type	To Bin	To Bin Type	To Product Bin Type	Product #	Product Description	Qua...	Move...	Moved By	Document Type	Document #	Li...
12/08/2021 08:46:00 AM	VLM	Product	Primary	PACK01	Transient	Temporary	140-81	3/4 & 7/8 Brick Joiner	3	Pick	Tomh	OE	1112021-0	6
12/08/2021 06:31:47 AM	PACK01	Transient	Temporary	PACK01	Transient	Temporary	98006	1/2C 3/8L CHISEL 10M/B EGALV 22GA 18B/C 2.82LBS 720/S 921197670 0206624	5	WTS	Natep	WTS	2493-0	1
12/08/2021 06:31:27 AM	PACK01	Transient	Temporary	PACK01	Transient	Temporary	98006	1/2C 3/8L CHISEL 10M/B EGALV 22GA 18B/C 2.82LBS 720/S 921197670 0206624	5	WTS	Natep	WTS	2493-0	1
12/08/2021 06:28:53 AM	A04.06.01	Product	Anywhere	PACK01	Transient	Temporary	98006	1/2C 3/8L CHISEL 10M/B EGALV 22GA 18B/C 2.82LBS 720/S 921197670 0206624	5	WTS	Natep	WTS	2493-0	1
12/08/2021 06:26:50 AM	PACK01	Transient	Temporary	A04.06.01	Product	Anywhere	98006	1/2C 3/8L CHISEL 10M/B EGALV 22GA 18B/C 2.82LBS 720/S 921197670 0206624	5	WTS	Natep	WTS		
12/08/2021 06:26:14 AM	A04.06.01	Product	Anywhere	PACK01	Transient	Temporary	98006	1/2C 3/8L CHISEL 10M/B EGALV 22GA 18B/C 2.82LBS 720/S 921197670 0206624	5	WTS	Natep	WTS	2493-0	1
12/07/2021 16:04:10 PM	PACK01	Transient	Temporary	PACK01	Transient	Temporary	001068	SCREW	6	CONT	CINDY	CONT	1112082-0	2
12/07/2021 15:59:11 PM	RELABEL	Transient	Temporary	PACK01	Transient	Temporary	001068	SCREW	6	OE	Cindy	OE	1112082-0	2
12/07/2021 15:54:26 PM	RELABEL	Transient	Temporary	RELABEL	Transient	Temporary	001068	SCREW	12	CONT	CINDY	CONT	1112081-0	2
12/07/2021 15:51:52 PM	RELABEL	Transient	Temporary	RELABEL	Transient	Temporary	001068	SCREW	12	OE	Cindy	OE	1112081-0	2
12/07/2021 15:29:01 PM	RELABEL	Transient	Temporary	SHIPPING	Transient	Temporary	162-12284	SINGLE 14mm Hex L-wrench-Short 36mm	6	OE	Cindy	OE	1112080-0	4
12/07/2021 15:28:45 PM	RELABEL	Transient	Temporary	SHIPPING	Transient	Temporary	001068	SCREW	16	OE	Cindy	OE	1112080-0	2