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A powerful tool
to improve your business performance

Announcement Date: July, 2001

Note: You should read this even if you have read the pre-release guides for this product as there are significant changes from prior versions.

Platinum

for Windows by Best

Version 5.0

SUMMARY OF CHANGES

- ◆ Process Application Server (PAS) is now Windows based and optional
- ◆ PAS is now schedulable
- ◆ Remote PAS requires client install
- ◆ All non-FRx reporting is now produced via Crystal Reports.
- ◆ Crystal Reports 8.0 is now supported
- ◆ Number of target printers available is now restricted only by Windows
- ◆ Change in Date Formats Supported
- ◆ Additional Support for International Addresses added
- ◆ Update Utility added
- ◆ Change Vendor Key utility added
- ◆ Generate Period Dates utility added
- ◆ Support for FRx 6.0
- ◆ Documentation only in electronic format
- ◆ Pervasive.SQL 2000 required
- ◆ Queue Manager Auto-Starts/Stops
- ◆ Changes in:
 - ◆ Spreadsheet Import to GL
 - ◆ Pre-Printed Form Support
 - ◆ Company Setup
 - ◆ File Recovery
 - ◆ Queue Repair
 - ◆ Data File Initialization
 - ◆ Form Processing Flow
- ◆ Virtual Warehouse Discontinued

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1. INTRODUCTION

This document is intended to inform Platinum for Windows Channel Partners of the new features and functionality included in the Platinum for Windows 5.0 release.

The 5.0 release reflects Best's commitment to developing the features and functions that are needed by our customers and solution partners, and to continually improve the Platinum for Windows product.

Platinum for Windows 5.0 introduces several new features and improvements to this award-winning suite of financial and distribution applications.

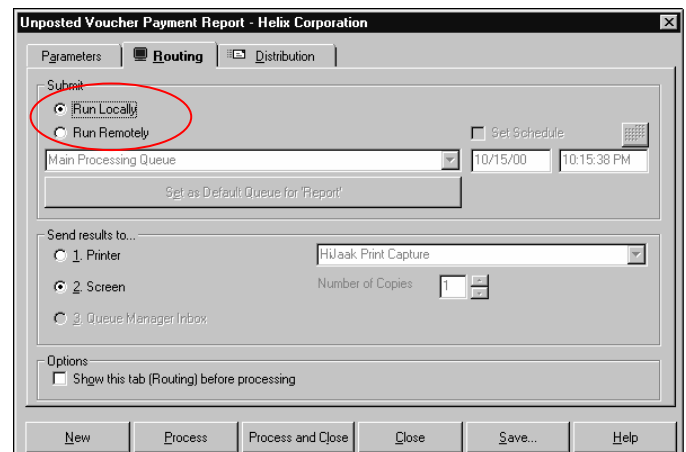
We are pleased to deliver this new version of Platinum for Windows, and are looking forward to working with you on your upgrades and rollouts.

2. RELEASE DETAILS

2.1. Process Application Server (PAS) is now Windows based and optional

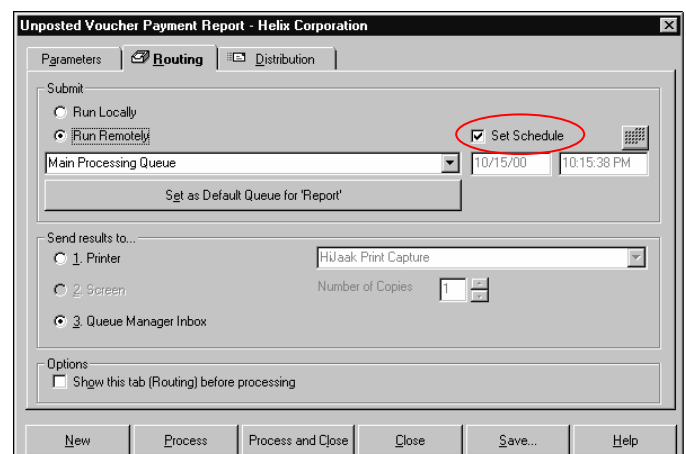
One of the primary and most noticeable of the differences in this release is that the Process Application Server (PAS) that is used to process batch posting and report requests is now optional and is a full 32-bit Windows application.

This means that you will no longer need to wait for an item to be processed on the PAS before another item can start. For example, you might be running a GL Period End on the PAS, and need to quickly pull up a Customer Profile for somebody on the phone. To do this, simply go to the Routing tab before submitting the Customer Profile report, and choose the "Run Locally" option.



2.2. PAS is now schedulable

Items submitted to a PAS may now be designated to run at a fixed time in the future. For example, you may wish to run your Accounts Receivable month-end at night when other processing is not taking place. To do so, simply check the "Set Schedule" box on the routing tab, then click on the button to the right of the date and time to bring up the schedule window. Note that the date and time being used is that of the PAS machine that you are submitting the task to.



2.3. Remote PAS requires client install

In order to insure that certain DLLs are available to programs that may run on the PAS, a PFW Client install is required on all PAS machines.

2.4. All non-FRx reporting is now produced via Crystal Reports

All non-FRx reports are now created via Crystal Reports 8.0. As part of the core report design, we have usually included more data fields in the data sent to the reports than are actually shown on the reports themselves. This allows for easy customization of the reports.

Report (.RPT) files are (in the default U.S. English version) stored in the \PFWRES\MASTER subdirectory. They are named in accordance to their module, process, then function. For example, the Accounts Receivable Customer Label report is named ARLCLbl.RPT (AR for Accounts Receivable, L for Listings, CLbl for Customer Label). If you wish to customize a report:

- Create a subdirectory under \PFWRES\MASTER called \CUSTOM if it does not already exist.
- Copy the report to be modified from \PFWRES\MASTER to \PFWRES\MASTER\CUSTOM. Do not change the name of the report.
- Modify the version in the \CUSTOM subdirectory.

When PFW looks for a report, it looks first in the \CUSTOM subdirectory for the language set being used. If it does not find the report there, it reverts back to the \MASTER (or appropriate language set) subdirectory. If you don't modify the version in the \MASTER subdirectory, it will be easy to revert back to the shipped version of the report for support purposes. Either rename the version of the report in the \CUSTOM subdirectory, or move it out of that directory temporarily.

2.5. Crystal Reports 8.0 is now supported

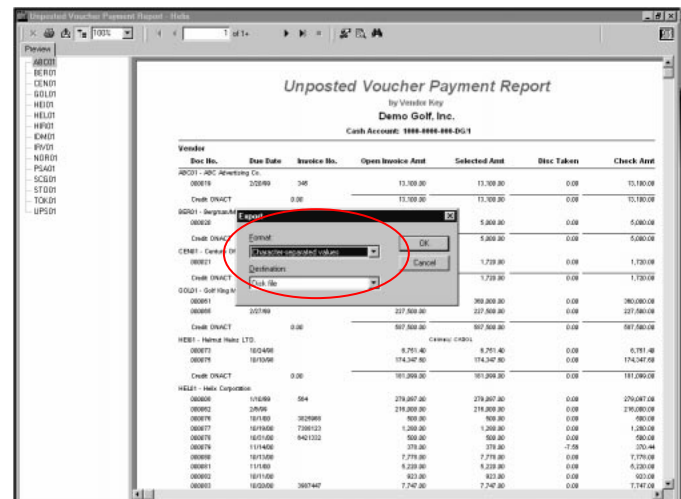
PFW 5.0 now uses Crystal Reports 8.0, with SP1 applied. Before converting an existing client to PFW 5.0, it is recommended that you test, and convert if necessary, existing custom reports

previously developed in Crystal Reports 7.0 to Crystal Reports 8.0.

The restricted version of Crystal Reports 8.0 that is shipped with PFW differs from the unrestricted version available commercially only in the databases supported. Our version only supports Pervasive.SQL, Microsoft Access, Microsoft SQL, Sybase, and FoxPro databases.

The use of Crystal Reports has also allowed us to modify the output choices when a report is generated. If submitted to a PAS, the output options are "Printer" and "Inbox". If run locally, the output options are "Printer" and "Screen". For pre-printed forms and most listings, the only output option is the screen. Note that the "Disk" option has been removed as an option for output.

In reality, the "Disk" option has been replaced by a more capable method of creating data files from reports. Now, if the user wishes to create an external file, they should route the output to "Inbox" or "Screen" as appropriate. In either case, the report will be displayed in the Crystal viewer. From there, Crystal's "Export" button can be pressed, and the report can be exported to 20+ formats.



2.6. Number of target printers available is now restricted only by Windows

In PFW 5.0, all printing is generated via Windows based programs (Crystal Reports 8.0 and FRx 6.0). Therefore, all reports can be printed to any output device that is in the Windows printer list. Uses for this include (with the appropriate additional software):

- Direct faxing of a Customer Statement or Customer Profile
- Creating an Adobe Acrobat .PDF file of a report that the client may wish to archive in soft copy and/or easily distribute to others.
- Printing to printers locally attached to the submitting workstation, even if the job was processed on a PAS.

In order to accomplish this, all PFW based Crystal printing is routed through Queue Manager, even if the report was generated locally. This means that if you shut down Queue Manager, reports will not print or automatically be shown on the screen until the submitting user restarts Queue Manager on the submitting workstation.

2.7. Change in Date Formats Supported

Due to restrictions in Crystal Reports, we will be supporting only the Month/Day/Year, Day/Month/Year or Year/Month/Day date formats. This limitation is found in the version of Crystal Reports that ships with the current PFW product. As we have not received requests from the field indicating that additional date formats are required, we do not anticipate a major impact for the customer base.

2.8. Additional Support for International Addresses added

In PFW 5.0, we have added an additional method of adding in and printing international addresses. The new format will print on Invoices, Checks, Sales Orders, Statement, Purchase Orders and

Labels if the "Print Country" parameter box is checked.

Currently, if a non-blank country is detected, PFW prints:

Customer Name
Address 1 (if not blank)
Address 2 (if not blank)
Address 3 (if not blank)
City

(Note: The State, Zip Code, and Country will not print. However, these fields can be filled in and used for lookups and queries.)

This will continue to be the behavior of the above-mentioned documents if the "Print Country" box is not checked, thus customers will not be forced to update their data to the new format.

The new formatting will be used if the "Print Country" box is checked. In this case, documents with a non-blank Country Code will print the following fields:

Customer Name
Address 1 (if not blank)
Address 2 (if not blank)
Address 3 (if not blank)
City, State Zip Code
Country Name

(Note: The format of the zip code field reflects the country of the customer. For example, if a zip code is 9 characters long, the zip code prints using a US format of 5-4. If the zip code is 6 characters long, the zip code prints using a 3-3 format. All other lengths print as entered.)

2.9. Update Utility added

Since updates and patches are required for all software, PFW 5.0 is including an Update program as part of the default installation. It will be installed in the \UPDATE subdirectory under the \PLATINUM (or whatever you named it) root directory on the server. This new program in PFW 5.0 will ease the installation of updates. When an update is downloaded from the web to the

\UPDATE directory, clients can now install it quickly and easily.

The update program allows the user to update the server files, client files or both. The program will only update currently existing files and adds files as specified in a list file. Updates to the client will install to the user specified PFW directory or to the Windows System or System32 directory as specified. The Update program will also handle registration of files.

2.10. Change Vendor Key utility added

Back by popular demand, the Change Vendor Key utility that had previously been available in the Platinum DOS product has been added to PFW. It is accessed through the Accounts Payable, Utilities menu. In addition to changing vendor keys, it can also be used to merge two existing vendors as long as they both are using the same currency.

2.11. Generate Period Dates utility added

New options have been added under Premier Ledger, Standard Ledger, and Inventory Utilities that will generate period date records for these modules. The utility can be run in trial or final mode. In trial mode, the resulting report will show the results as if the utility were run in final mode, including checking for duplicate records, except that no records will actually be added to the Period Dates file.

2.12. Support for FRx 6.0

PFW 5.0 supports FRx 6.0. This version of FRx has also been available to PFW 4.8a users on maintenance prior to the release of PFW 5.0. If a customer is upgrading that previously had FRx 6.0, they will not be receiving a new copy, as the copy they have is already compatible with PFW 5.0.

2.13. Documentation only in electronic format

In order to be more environmentally friendly, and to help ensure that users are always looking at current versions of the manuals, most documentation is now available only in electronic format. As always, the documentation is available from the Help dropdown menu on the PFW Menu Browser. We will only be shipping hard copies of selected manuals such as Getting Started, Upgrade Guide, and Read This First.

2.14. Pervasive.SQL 2000 required

Pervasive Software has discontinued the sale and support of their Btrieve 6.15 Multi-engine File Sharing (MEFS) product that has previously shipped with PFW. As a result, end users must now purchase the Pervasive.SQL 2000 Workstation engine, or Server engine for either Windows NT/2000 or Novell Netware.

For customers who have previously purchased Pervasive.SQL 2000 from us, and who are current on maintenance, we will be shipping out a new CD with Pervasive.SQL 2000i. This update is also available on Pervasive's web site as Service Pack 3.

Some common questions resulting from this change in database support:

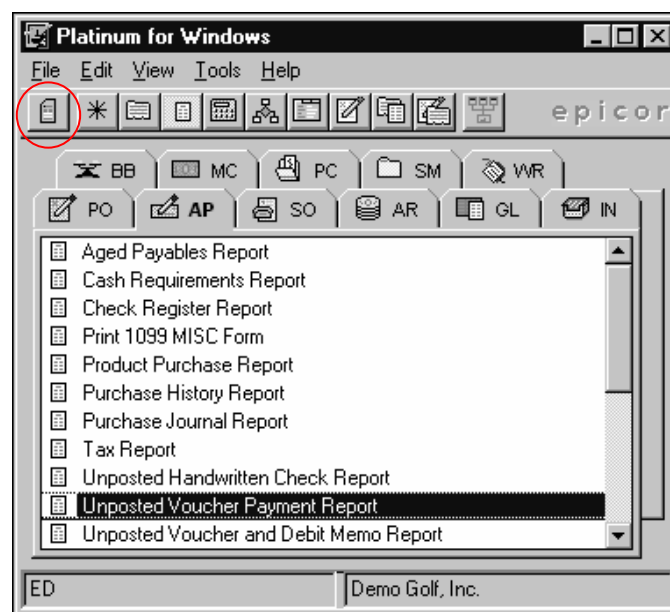
- **Will Pervasive.SQL ship automatically with the product?** No, if the customer has previously used just Btrieve 6.15 MEFS, then Pervasive.SQL must be ordered as a separate line item on the order form. See the above note on the new version being shipped to previous Pervasive.SQL 2000 customers who are current on maintenance.
- **Do you support the Workstation version of Pervasive.SQL 2000?** Yes, for a single user workstation only installation where the PFW database resides on the user's machine. For multiple users or where the database will reside on a server, the server version of Pervasive.SQL 2000 will be required. We will not be supporting the peer-to-peer Workgroup

version of the engine. We have made this decision for three reasons:

- The pricing for the Workgroup version increases with the number of seats used, and becomes more expensive than the server version at about 5 users.
- The implementation of the Workgroup version of Pervasive.SQL does not allow the database to reside on a network file server. Instead, it must reside on one of the workstations. This means that a backup of a server would not back up the accounting database, and we believe that there is too much risk of not having proper backups, particularly in a multi-user environment.
- The performance of that version of Pervasive.SQL 2000 has proven unsatisfactory in testing.
- **Do you support Pervasive.SQL 7?** No. PFW 5.0 has not been tested with this version of Pervasive.SQL as it is a discontinued version of their product.

2.15. Queue Manager Auto Starts/Stops

In order to support print routing as described above, it is now necessary to have Queue Manager running at all times. If Queue Manager is stopped, output will not be automatically routed to the screen or printer. Queue Manager can be restarted by pressing the Queue Manager button on the PFW Menu Browser.



Since Queue Manager is now running at all times, it has been moved from the Task Bar to the System Tray. The icon in the system tray looks like:



To open the Queue Manager, simply double-click on this icon in the system tray. Note: do not exit from Queue Manager, simply minimize it when you are done with it.

2.16. Changes to Spreadsheet Import to GL

The Spreadsheet Import function (in both Standard and Premier GL) has been changed to now read files in Microsoft Excel format. In multi-sheet workbooks, it will read only from the first sheet in the set. The specifications for how to create the spreadsheet are otherwise unchanged. Note that you must have Microsoft Excel installed on the machine that you wish to do the import from.

2.17. Changes in Pre-printed Form Support

All pre-printed forms are also now produced via Crystal Reports 8.0. As shipped, these will be laid

out to support a single pre-printed format (two for checks, single and double stub). No lines or graphics will be printed on the shipped reports.

As with all Crystal Reports, these .RPT files can be modified to fit existing user's forms, with exceptions noted below. In conjunction with the 5.0 release, our preferred forms provider, Altec, will be providing a forms customization service. They will work with you and the end users to design forms to the customer's specifications, and will also modify the .RPT reports to match their forms. For further information, please contact Altec at (949) 727-1248. or (800) 997-9921

With this release we will no longer be supporting "short" forms within PFW. The "short" 7" check format will not be supported due to Crystal limitations.

Note too that with the variations in operating systems and printers, that spacing on individual combinations of pre-printed forms, operating systems, and printer drivers may vary. You should make sure that you have current printer drivers for your printers. You must also have appropriate drivers for dot matrix printers - the generic dot matrix driver does not work properly with Crystal. **Therefore, it is vital for you to test all pre-printed forms prior to conversion.** If you have alignment problems, it is very easy to open the forms in Crystal Reports 8.0, drag the fields to the appropriate locations for your environment, then save the report in the \CUSTOM subdirectory. The following .RPT files are used:

PO Purchase Orders	POPForms.RPT
AP Checks	APPckPrt.RPT
AP 1099's	AP1099.RPT
SO Sales Orders	OEPSOrd.RPT
SO Invoices	OEPInv.RPT
AR Invoices & Credit Memos	ARPIVcm.RPT
AR Statements	ARRStmnt.RPT

Standard stock for the Customer Labels, Shipping Labels, Vendor Labels, and Inventory Labels will

no longer be continuous feed labels, but rather will be Avery form 5162 and 5262. Standard stock for Shipment Labels will be Avery form 5164. All Avery form numbers are for laser generated labels in U.S. 8 ½ x 11 dimensions. Counterparts for ink jet printers and A4 sizes are also available, although some changes in spacing may be required. As with other Crystal Reports, they can be modified to fit end user requirements.

2.18. Changes in Company Setup

In previous versions of PFW, the Company Setup wizard initialized a new company by copying data files from the \DATA subdirectory to the new company subdirectory. Several of these files, such as the ??DEFLTS, ??ONE and ??WPARAMS files already contained data. This allowed for quick and proper setup of the new company, but made file recovery more difficult as it was not possible to recover these files.

With PFW 5.0, a change has been made to this process. All data files in the \DATA subdirectory are now truly empty. New subdirectories can be added under \DATA to contain files with data in them. The first one, to be shipped with PFW 5.0, will be called \DEFAULT.

The modified Company Setup wizard will now copy all of the files necessary from the \DATA subdirectory, will present the user with a list of all subdirectories under the \DATA subdirectory, and will require that the user select one of these subdirectories. The wizard will then overlay data in the new company subdirectory with data from the selected subdirectory.

In the long term, this allows for the development of standard install sets for various industries and/or countries that can simply be added as new subdirectories under \DATA, and that will then appear the next time that the Company Setup wizard is run. This can also be used to set up defaults for a customer that will be setting up a number of companies, and replicating these changes to each company as it is set up.

2.19. Changes in File Recovery

The File Recovery process is now implemented as a Wizard and is available under the Admin pull down menu when the user is logged in as the administrator.

An added bonus in the change of the Company Setup wizard described above is increased ease of use of the File Recovery wizard.

Previously, if you tried to recover a data file whose copy in the \DATA subdirectory had records in it, that recovery would fail with a duplicate key error. Now that those files are truly empty, this error will no longer occur.

2.20. Changes in Queue Repair

The Queue Repair utility is now available under the Admin pull down menu when the user is logged in as the administrator.

2.21. Changes in Data File Initialization

The Data File Initialization utility, which is used to initialize individual data files, is now available under the Admin pull down menu when the user is logged in as the administrator.

2.22. Changes in Form Processing Flow

There is a significant change in the process flow for all pre-printed forms (Purchase Orders, Checks, Sales/Work Orders, Invoices, Customer Statements). During processing, the forms will first be presented to the user using the Crystal viewer. Printing directly to a printer is no longer allowed. If a printed copy is desired at that point, the output must be redirected to the printer via the printer output option of Crystal. There are three primary reasons for this change:

- Request for this processing flow from many users in the field.
- It provides for closer control of the steps in generating and printing the forms.

- It minimizes the exposure of pre-printed forms on the printer, as it is no longer necessary to mount the form until after the documents have been generated.

We have also added an optional recap page to the end of the report printing. It will at a minimum report on the parameters used in the form generation process. The recap will print automatically if an error is detected or the user cancels the process. You may choose not to print the recap by making sure that the parameter recap report box is unchecked in the report parameter screen.

2.23. New Files

Due to other added features, there are two new files in PFW 5.0. They are BBRECONH and ARCRTYPE. The first is used to store Bank Book Reconciliation History, and the second is a master table for Credit Card Types. **If you are upgrading a customer from a prior version of PFW or PFD, and you are using the respective modules, you must copy empty version of these files from the \DATA subdirectory into each company subdirectory.** Failure to do so will cause problems in Bank Book, and in Accounts Receivable and Sales Order respectively.

2.24. Parameter Conversion

If you are on Platinum for Windows 4.7i or later, no data conversion is required. However, due to the new optional nature of the PAS process, and the ability to schedule PAS jobs, it is necessary to convert the Pre-saved Parameters for each company. To do so, simply log in as the administrator, make sure you have selected the company that you want to convert, then select "Parameter Conversion" from the Admin drop down menu. This will take only a few moments to convert each company.

2.25. Virtual Warehouse Discontinued

Due to withdrawal of support from Ingram Micro, the Virtual Warehouse module has been discontinued.

3. PROBLEM REPORTS FIXED

As is normal with each release, we have been able to close a number of outstanding Problem Tracking Report (PTR) items. Please see the Upgrade Guide for a list of the more important issues closed in this release.

4. USER GUIDES AND HELP

Virtually every guide will have changes due to the architectural differences in PFW 5.0. Please also note that there have been a number of smaller improvements in the product that are not documented in this release guide. Refer to the user guides and help as necessary.

5. PRODUCT DISTRIBUTION

As this is a major point release, it will not be distributed to end-users automatically, but rather will require a specific order with associated upgrade fees.

Currently, upgrade pricing is:

- For PFW customers with maintenance and support contracts that are current as of the release date, - 20% of current SRP for the modules and number of users that they already have.
- For PFW customers with expired maintenance and support contracts - 40% of current SRP for the modules and number of users that they already have, plus the purchase of a year of maintenance going forward.
- For PFD customers with maintenance and support contracts that are current as of the release date - 30% of current SRP for the

modules and number of users that they already have.

- For PFD customers with expired maintenance and support contracts - 60% of current SRP for the modules and number of users that they already have, plus the purchase of a year of maintenance going forward.

These prices are for North America and are subject to change. Please contact us directly for applicable international pricing.

Please read the above carefully. The customers must be current on maintenance as of the release date to qualify for the “on maintenance” price. **It will not be possible to place an order for maintenance followed by an upgrade order at the “on maintenance” price.**

VARs, Authorized Consultants, and Solutions Providers will automatically be shipped the GA release.

6. SYSTEM REQUIREMENTS

6.1. Installation

When upgrading client workstations from a previous version of Platinum for Windows, it is critical that you uninstall any previous version of the PFW client and Crystal Reports. Simply installing the new version over the old will not work. A list of Crystal DLLs that we are aware of is in the Upgrade Guide. Please note that this list may be incomplete, particularly with respect to older versions of Crystal. To see if a particular DLL could be an issue, bring up either the \System or \System32 subdirectory, as appropriate to your operating system, in Windows Explorer. Find the .DLL and .EXE files that begin with “CR”. Right click on them and choose “Properties” from the drop-down menu. Go to the “Version” tab. Choose “Company Name” and “Product Version” from the window on the left in order to see those values in the window on the right.

6.2. System Configuration

The minimum system configurations are as follows:

6.2.1. Network File Server

Network Operating Systems

Microsoft Windows NT Server 4.0, Windows 2000 Server, or Novell NetWare 5.x

Hardware

- 500 MHz Pentium processor
- 1 GB or greater free hard disk space
- Monitor: VGA
- 128 MB RAM minimum
- 32-bit NIC

6.2.2. PFW Client Workstations

Operating Systems

Microsoft Windows NT 4.0 Workstation, Windows 2000 Professional, Windows 98SE, or Windows ME. Microsoft Windows NT 4.0 or Windows 2000 Professional are preferred.

Hardware

- 500 MHz Pentium processor
- Monitor: VGA
- 128 MB RAM Minimum
- 300 MB free hard disk space
- CD-ROM drive (one per network)
- 32-bit NIC

6.2.3. Process Application Server(s)

Operating Systems

Microsoft Windows NT 4.0 Workstation, Windows 2000 Professional, Windows 98SE, or Windows ME. Note that if you are planning to run more than one PAS on a single machine, Windows NT Workstation or Windows 2000 Professional is required. Microsoft Windows NT 4.0 or Windows 2000 Professional are preferred.

Hardware

- 500 MHz Pentium processor
- Monitor: VGA
- 128 MB RAM Minimum
- 300 MB free hard disk space
- CD-ROM drive (one per network)
- 32-bit NIC

7. PRODUCTS/SUPPORT DISCONTINUED

7.1. U.S. English Version

Software changes/patches for Versions 4.7 and 4.8 of Platinum for Windows will be discontinued with the shipment of version 5.0. We will then be maintaining PFW 4.8a and 5.0.

7.2. Double Byte Support

Although PFW 5.0's architecture and development environments are inherently double-byte capable, full testing in this environment has not been completed. We strongly encourage our partners wishing to use PFW 5.0 in a double-byte environment to thoroughly test their unique implementations in advance.

As of the writing of this guide, FRx 6.0 is not yet double-byte certified, but we do expect certification in some environments very soon. A general announcement will be made to all partners when we know more about this. For up-to-the-minute information on this, please contact either FRx or us.

8. CONTACT INFORMATION

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