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**PLATINUM FOR WINDOWS BY BEST**

**Version 5.2**

**SUMMARY OF CHANGES**

- ◆ Global Cash Account
- ◆ Universal Notes and Attachments
- ◆ Increased Field Sizes
- ◆ Print and Post by User ID
- ◆ GL Provisional Trial Balance
- ◆ Single Voucher per Check
- ◆ Lost or Damaged Check Utility
- ◆ BB Multi - User Journal Entry
- ◆ Enhanced Crystal Reporting
- ◆ Additional UPC Field in Inventory
- ◆ Ability to Customize Find Records Lookup
- ◆ PO Negative Non-Inventory Items
- ◆ Email and Web Page Hyperlinks
- ◆ Pervasive.SQL V8

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Act on your Insights

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**Announcement Date:** May 2003

**Beta Release Date:** June 2003

**Controlled Release Date:** July 2003

**Anticipated Release Date:** September 2003

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## 1. INTRODUCTION

This document is designed to provide Platinum for Windows Channel Partners a high level overview of the new features and functionality included in the Platinum for Windows by Best (PFW) 5.2 release. Please note this release is not compatible with BatchMasterPFW 5.02.

The PFW 5.2 release reflects Best's on-going 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 5.2 introduces several new features and improvements to this award-winning suite of financial, distribution, and process manufacturing applications. The most notable and extensive is the addition of Universal Notes. Notes and attachments have been a common request and we are pleased to deliver this robust functionality along with several additional features in PFW 5.2.

## 2. RELEASE DETAILS

### 2.1. Global Cash Account

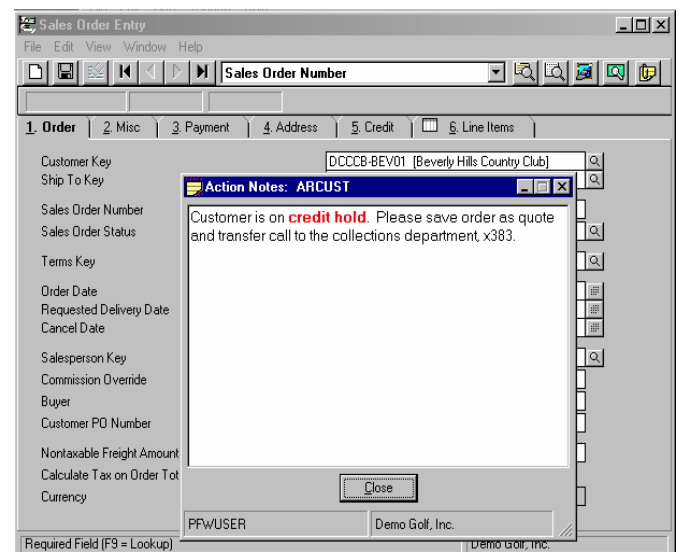
In System Manager, you can now define your cash accounts, banking information, auto-number, and masking information for each bank account. Cash account availability in Accounts Payable will be based on the bank accounts created in System Manager. These bank accounts are also used by the Bank Book module. This design will help streamline setup, and pave the way for future enhancements to Platinum for Windows.

### 2.2. Universal Notes

Universal Notes is a powerful feature that will allow users to view or create both notes and attachments. Monitor resolution should be set to a minimum of 800 x 600 to properly view notes. Notes can be created in various fonts, colors, in bold or italics, and quickly checked for spelling with the click of a button. Users can attach the

notes or other documents directly to master file records, transaction headers or transaction lines, and control their behavior. After all, each note may serve a different purpose. Notes may have the following options:

- Action flags for pop-up note functionality
- Importance setting for sorting and printing
- Effective and expiration dates
- Post with document flag
- Print note flag



Notes can be entered manually in rich-text format or uploaded from files (pictures, .xls, .doc, .pdf, etc.). In fact, it may make sense to include both text notes and an attachment. For example, it may be helpful to provide a diagram and special sales instructions for an inventory item that can be viewed by a salesperson at the time of order entry.

Throughout Platinum for Windows, your toolbar will help you quickly identify master file records or documents that have a note or attachment. Note options control the characteristics of the note. For example, Action notes will automatically appear to the user, and require a response before continuing. In addition, if the note is flagged to “post with the document,” your notes will remain with the document as it moves through the system.

Therefore, a note entered in Sales Order Entry could be posted through the system as the order is processed. Eventually, the notes and attachments could be viewed from the corresponding Accounts Receivable invoice. Just imagine the difference this feature will make in both productivity and efficiency.

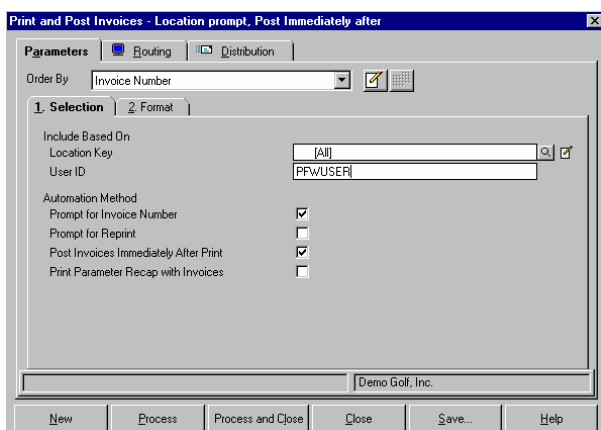
### 2.3. Increased Field Sizes

We provided many field size increases in PFW 5.1, but you wanted more. Here they are! This will be a small impact for data conversion, as they are not document numbers. The field sizes have been increased for:

- Vendor Invoice Number - 20 Characters
- Customer PO Number – 20 Characters
- Requisition Number – 16 Characters
- Manufacturer Part Number – 30 Characters
- Manufacturer Code – 30 Characters

### 2.4. Print and Post by User ID

Platinum for Windows currently offers the ability to print and post batches of transactions by User ID; however, the functionality is available in just a few places. Due to the overwhelming request for this feature to be added throughout PFW, the User ID field has been added to the parameter tab for several print and post menu items and report menu items.



In this release we have extended the print and post functionality by User ID to the following menu items:

- Accounts Payable
  - Select Voucher or Debit Memo to Post
  - Unposted Voucher and Debit Memo Report
  - Post Voucher and Debit Memo
- Accounts Receivable
  - Invoice Edit Report
  - Print and Post Invoice and Credit Memo
  - Cash Receipts Register Report
  - Bank Deposit Slip Report
  - Post Cash Receipts
- Purchasing
  - Open Purchase Order Report
  - Print and Post Purchase Orders
  - Print and Post Purchase Order Receipts
- Sales Order
  - Sales Order Report
  - Print and Post Sales Orders
  - Invoice Edit Report
  - Print and Post Invoices

### 2.5. GL Provisional Trial Balance

The long awaited GL Provisional Trial Balance Report is here! This multi-purpose worksheet has options for including/excluding a range of accounts, zero balances, and adjustment period entries. In addition, the Trial Balance can be used to compare with FRx reports to troubleshoot missing accounts in FRx.

## 2.6. Single Voucher per Check

Many of our Platinum for Windows users are tasked with generating a check for a single voucher. This release makes special circumstances like this a breeze. Now each vendor has a default setting in Vendor Maintenance that can be activated if each voucher should print on a separate check. Alternatively, we have added an option for this feature in Voucher Entry, Additional Cost Entry, Voucher Payment Entry, and Purchase Order Entry, so the processing of the voucher can be determined during the transaction processing cycle.

## 2.7. Lost or Damaged Check Utility

There is no longer a need for creative workarounds to record a lost or damaged check. Now you will have a utility to record a check number as lost or damaged and supply a reason. This information will print on your Accounts Payable Check Register and then be moved to history when the period is closed. In addition, the Lost and Damaged Check Utility will look for a duplicate check number and prompt the user to allow the entry if a duplicate is found.

## 2.8. BB Multi-User Journal Entry

Several enhancement requests were received for multi-user support in Bank Book, so users can enter transactions or make corrections simultaneously. Bank Book Journal Entry and Bank Book Journal Correction now include support for multiple users. We were listening!

## 2.9. Enhanced Crystal Reporting

This Crystal Report enhancement came directly from a group of resellers at our annual conference last year. With PFW 5.2, additional data files can be added to existing PFW Crystal Reports. With this enhancement, you can add additional company data files and custom Btrieve or Access Tables to PFW Access or TTX based Crystal reports. Make sure you first copy the original PFW report to your Custom directory to preserve

customizations. ODBC using Pervasive Server Engine, Btrieve drivers, and Access drivers work great; however, if you will be adding an Access table to a PFW Access based report, you may need to address case sensitivity issues depending on your data. Case sensitivity will not be an issue with Btrieve and ODBC using Pervasive Server Engine.

## 2.10. Additional UPC Field in Inventory

An additional field, UPC, has been added to the Inventory Master file, offering you the ability to include this information on custom Crystal Reports. This field is defined as numeric only with a length of 14 and is blank by default.

## 2.11. Customize Find Record Lookups

By popular demand, you now have the ability to customize the find record lookup windows for the following menu items:

- Accounts Payable
  - Voucher Entry
  - Debit Memo Entry
  - Additional Cost Voucher Entry
- Accounts Receivable
  - Invoice Entry
  - Credit Memo Entry
  - After the Fact Invoice Entry

## 2.12. PO Negative Non-Inventory Items

The ability to add negative non-inventory lines items was added in Accounts Payable during our last release, and was a big hit. Many customers have since requested the same support in Purchase Order, so we added it! Negative non-inventory line items can now be added directly to the purchase order, providing the flexibility to

record the line item to any available chart of account number. For example, add a discount line to your Purchase Order, and select the GL account number to post the transaction to.

### **2.13. Email and Web Page Hyperlinks**

Hyperlinks have been added to Customer and Vendor File Listings, providing a quick method to send an email or open a web page directly from your Vendor or Customer Crystal Listings.

### **2.14. Pervasive.SQL V8**

Pervasive.SQL V8.1 will ship to customers that currently own Pervasive.SQL and have a current client care plan. With this version the user license design has changed, so user counts will be handled with a license key rather than a separate user count diskette. Additional improvements in Pervasive.SQL V8 include:

- Increased Processing Speed
- Improved User Interface
- Auto-Reconnect Technology

### **2.15. Data Conversion**

In comparison to PFW 5.1, this release requires a very small data conversion. Additional indexes have been added for Universal Notes and a few field sizes have been increased.

## **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**

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 point release, it will be distributed to end-users automatically. End users must be on PFW version 5.x, and be current on maintenance as of the release date.

VARs, Authorized Consultants, Solutions Providers, and Master Developers 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 (if version is less than 8.5). 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**

Due to the increased number of users that rely on Citrix and declining customers on Novell Netware, PFW 5.2 will be certified on Citrix. We will no longer be certifying PFW on Novell Netware.

### **Network Operating Systems**

Microsoft Windows NT Server 4.0, Windows 2000 Server, or Citrix Metaframe, using Terminal Server/Services.

### **Minimum Hardware Requirements**

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

### **Hardware Recommendation**

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

### **6.2.2. PFW Client Workstations and Process Applications Servers**

#### **Operating Systems**

Microsoft Windows NT 4.0 Workstation, Windows 2000 Professional, or Windows XP Professional. Microsoft Windows 2000 Professional and Windows XP Professional are preferred.

Note that if you are using a PAS, it is not supported concurrently on a client machine or on the PFW Server.

#### **Minimum Hardware Requirements**

- 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

### **Hardware Recommendation**

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

## **7. PRODUCTS/SUPPORT DISCONTINUED**

### **7.1. Platinum for Windows 4.8a**

Software changes/patches for Versions 4.8a of Platinum for Windows will be discontinued as of September 30, 2003. We will then be maintaining 5.01 and 5.2.

## **8. CONTACT INFORMATION**

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## **9. BETA**

We're looking for a few good beta sites! Please encourage your customers to participate, as this is a great way to ensure a quality product and learn about the latest features in PFW 5.2. Qualified participants who complete the beta process will receive 6 months free maintenance!

If you would like to participate, please contact Scott Saunders at (800) 854-3415 x4652, or send an email to [pfwbeta@bestsoftware.com](mailto:pfwbeta@bestsoftware.com).

