

**SUMMARY OF FEATURES**



identify and rank  
**YOUR MOST PROFITABLE CUSTOMERS**

Starter Pack A Starter Pack B Starter Pack C Starter Pack D Advanced Edition

	Starter Pack A	Starter Pack B	Starter Pack C	Starter Pack D	Advanced Edition
<b>Financials</b>					
Accounting	X	X	X	X	X
Journal Entries	X	X	X	X	X
Journal Vouchers	X	X	X	X	X
Posting Templates	X	X	X	X	X
Recurring Postings	X	X	X	X	X
Reversing Journal Entries	X	X	X	X	X
Exchange Rate Differences	X	X	X	X	X
Financial Report Templates	X	X	X	X	X
Budgets	X	X	X	X	X
Define Profit Centers	X	X	X	X	X
Define Distribution Rules	X	X	X	X	X
Table for Profit Centers & Distribution Rules	X	X	X	X	X
Profit Center Report	X	X	X	X	X
1099 Processing	X	X	X	X	X
<b>Sales Opportunities</b>					
<b>Sales Opportunities</b>	X	X	X	X	X
<b>Sales A/R</b>					
Quotation	X	X	X	X	X
Order	X	X	X	X	X
Delivery	X	X	X	X	X
Returns	X	X	X	X	X
A/R Invoice	X	X	X	X	X
A/R Invoice & Payment	X	X	X	X	X
A/R Credit Memo	X	X	X	X	X
Document Printing	X	X	X	X	X
Automatic Summary Wizard	X	X	X	X	X
Document Drafts	X	X	X	X	X
Dunning Wizard	X	X	X	X	X
<b>Purchasing</b>					
Purchase Order	X	X	X	X	X
Goods Receipt Purchase Order	X	X	X	X	X
Goods Return	X	X	X	X	X
AP Invoice	X	X	X	X	X
A/P Credit Memo	X	X	X	X	X
Landed Costs	X	X	X	X	X
Document Drafts	X	X	X	X	X
Document Printing	X	X	X	X	X

<b>Business Partners</b>					
Activities	X	X	X	X	X
Calendar	X	X	X	X	X
<b>Banking</b>					
Incoming Payments	X	X	X	X	X
Check Fund	X	X	X	X	X
Credit Card Management	X	X	X	X	X
Deposits	X	X	X	X	X
Outgoing Payments	X	X	X	X	X
Payment Wizard	X	X	X	X	X
Voiding Checks	X	X	X	X	X
Bank Statements & Reconciliation	X	X	X	X	X
Reconciliation Wizard	X	X	X	X	X
<b>Inventory</b>					
Item Master Data	X	X	X	X	X
Serial Numbers	X	X	X	X	X
Batches	X	X	X	X	X
Substitute Items	X	X	X	X	X
Define Business Partner Catalogs	X	X	X	X	X
Update Stock Method	X	X	X	X	X
Goods Receipt & Goods Issue	X	X	X	X	X
Stock Transfer	X	X	X	X	X
Inventory Posting	X	X	X	X	X
Cycle Counting System	X	X	X	X	X
Material Revaluation	X	X	X	X	X
Price List	X	X	X	X	X
Special Prices	X	X	X	X	X
Pick & Pack Manager	X	X	X	X	X
<b>Production</b>					
Define BOM	X	X	X	X	X
Production Order	X	X	X	X	X
Receipt from Production	X	X	X	X	X
Issue for Production	X	X	X	X	X
<b>Materials Requirement Planning</b>					
Define Forecasts	X	X	X	X	X
Planning Wizard	X	X	X	X	X
Order Recommendation Report	X	X	X	X	X
<b>Service Management</b>					
Service Call	X	X	X	X	X
Customer Equipment Card	X	X	X	X	X
Service Contract	X	X	X	X	X
Knowledge Base System	X	X	X	X	X
Service Reports	X	X	X	X	X
<b>Human Resources</b>					
Employee Master Data	X	X	X	X	X
<b>Reporting (&gt;60 Reports)</b>					
Built-in Report Writer	X	X	X	X	X
XL Reporter	X	X	X	X	X

<b>Software Developer Kit</b>					
<b>ADVANCED INVENTORY PLANNING</b>					
<b>History</b>					
<i>Roll-up Network Hierarchy History to higher levels (as required)</i>		X	X	X	X
User ability to Modify History (Archives actual)		X	X	X	X
Monthly History - 3 previous years plus current year		X	X	X	X
Excel report export of history		X	X	X	X
Roll-up Customer History to Network Distribution Warehouse					X
Proxy History at the item level		X	X	X	X
Weekly history displayed for up to 52 weeks					X
<b>Forecasting</b>					
Multiple proprietary forecast algorithms including seasonal & multiplicative models		X	X	X	X
System automatically selects best forecast algorithm		X	X	X	X
On Screen Edit Forecast Capability		X	X	X	X
Excel report export of history and forecast		X	X	X	X
New Item Forecasting via Proxy Model		X	X	X	X
Change forecast trend basis (globally for all items)		X	X	X	X
Control seasonal metrics to fine tune seasonal forecasting		X	X	X	X
<b>Planning/Replenishment</b>					
Automatic calculation of optimal Stocking Quantity - SQ (Min)		X	X	X	X
Planning based on optimizing service level		X	X	X	X
Automatic calculation of shortage report for replenishment, transfers & work orders		X	X	X	X
Supports Vendor Rules - lot size, min qty order by item, free freight allowance, etc.		X	X	X	X
Planning for substitute groups					X
Reverse Logistics for aftermarket service parts		X	X	X	X
On Screen User ability to change quantity ordered or transferred		X	X	X	X
Ability to automatically approve all or select items in the plan		X	X	X	X
Automatic calculation of optimal Valogix Order Quantity - VOQ (Max)		X	X	X	X
Displays Min Currency Value (\$) order by item		X	X	X	X
Ability to approve all items within a filtered list					X
User ability to add items to the replenishment plan		X	X	X	X
Ability to enter transfers to and from different locations					X
User ability to change supplier in the Shortage Report\Replenishment Plan		X	X	X	X
Planning Code Threshold automates planning items with infrequent demand		X	X	X	X
Ability to consider entire network on-hand inventory before buying					X
Considers usage multiple requirements in planning transfers					X
<b>Alerts</b>					
Stock-Out					X
New Item					X
Ability to drill into item detail for any alert					X
Demand Change - period to period					X
Trend Change (recent 3 months vs. 12 months)					X
<b>Inventory Analysis</b>					
Ideal (Optimized) vs. actual inventory investment analysis					X
Forward Aging Analysis by active, excess and inactive (obsolete) items					X
<b>Edit/Simulations</b>					

Edit Planning Code at item, group or global level	X	X	X	X
Edit Forecast by Item and Location	X	X	X	X
Modify History by Item and Location	X	X	X	X
Edit Lead Time at item, group or global level				X
Edit Order Frequency at item, group or global level				X
Item/Vendor Lead Time	X	X	X	X
Edit and Control Parameter changes simulate different planning scenarios	X	X	X	X
<b>Reports</b>				
Approved Orders for Purchase	X	X	X	X
Approved Orders for Internal Transfer				X
History and Forecast	X	X	X	X
Recommended Stocking Quantity	X	X	X	X
Export to excel all tables (unfiltered data)	X	X	X	X
Approved Orders for Internal Transfer with Bin location				X
Export to excel all tables based on filtered log-in	X	X	X	X
<b>Processing</b>				
Automatic scheduling of daily updates	X	X	X	X
Automatic scheduling of month-end processes	X	X	X	X
Automatic scheduling of year-end processes	X	X	X	X
<b>Shipping</b>				
Ensures best carrier is selected by shopping Parcel package & LTL carriers (Cost and / or Delivery - Rate Shopping)		X	X	X
Allows configuration of shopping to include any combination of carriers		X	X	X
Supports preference for certain carriers – (i.e., regional vs. national, region to state, etc.)		X	X	X
Numerous Compliance features – like Pallet Building, Order Consolidation, etc.		X	X	X
Enables BOL Printing, BOL Consolidation and Master Shipping Manifest		X	X	X
Discounting • Supports multiple discounts on same package		X	X	X
Supports client specific discounts negotiated with client carriers		X	X	X
Post Rating • Calculates actual freight charges and customer calculated charges		X	X	X
Stores actual charges in DB for comparison		X	X	X
Allows cost of packaging to be included		X	X	X
Allows cost of labor to be included		X	X	X
Supports upload of actual charges, estimated freight charges & Customer Cost to be Invoiced		X	X	X
Configurable calculations for billable freight		X	X	X
Enables passing Actual Charges and Client Charges		X	X	X
Reporting • Generates rated manifests for small package and LTL carriers		X	X	X
Creation and Printing of Foreign Shipping Documents for Parcel International Shipments		X	X	X
Automate Freight Bill Reconciliation with Carriers (let it do the work for you)		X	X	X
Supports EDI transmission and EBOL and Custom reporting made easy		X	X	X
Intelligent Rate Shopping		X	X	X
Rich pre-rate and post-rate functionality		X	X	X
Support for North American LTL, FedEx, UPS, DHL and USPS small package carriers		X	X	X
Intelligent shopping across LTL and small package carriers simultaneously		X	X	X
Highly flexible carrier discounting		X	X	X
Comprehensive cost tracking for shipping, packaging & labor		X	X	X
Rated manifest creation and EDI/ EPDI Compliant		X	X	X
Web based interface and built on Microsoft SQL/VB .net Technology		X	X	X
Automatic carrier rate updates		X	X	X

Certified compliance for FedEx, UPS, DHL, US			X	X	X
<b>WIRELESS WAREHOUSE MANAGEMENT/ BARCODING</b>					
<b>Picking</b>					
Wave Picking, Batch Picking, Product Picking				X	X
Multiple pickers picking a single sales order				X	X
Single picker picking multiple sales orders				X	X
Skipping Picks, Shorting Picks, Over-picking				X	X
Configurable Workflow – bin, packsize, carton				X	X
Ability to generate a packing slip after last pick (label or paper)				X	X
Ability to assign orders to a specific user (displayed when user logs in)				X	X
<b>Receiving</b>					
Receiving Against Purchase Orders				X	X
Multiple receivers receiving a single purchase order				X	X
Single receiver receiving multiple purchase orders				X	X
Over-receiving				X	X
Configurable Workflow – Carrier, Packing Slip, Receive Date, Packsize, Labels, Bin				X	X
Ability to assign orders to a specific user (displayed when user logs in)				X	X
<b>Counting</b>					
Cycle Count by Bin				X	X
Inventory Count / Recount				X	X
Cycle Counting Serialized Items				X	X
Configurable Workflow – Bin					X
<b>Locator</b>					
One-Step and Two-Step Moves				X	X
Hot Replenishment (Letdown and Fill Bin)				X	X
Replenishment by Direct Move				X	X
Reserving Stock / Moving Reserved Stock				X	X
Simple Warehouse Transfers (bin-to-bin)				X	X
<b>Adjustments</b>					
4 Pre-configured Adjustments				X	X
Return from Customer (prompts for Customer Number)				X	X
Return to Vendor (prompts for Vendor Number)				X	X
Miscellaneous Adjustment (uploads to Host)				X	X
Non-PO Receiving Adjustment (uploads to Host)				X	X
Up to 21 Configurable Adjustments					X
Configurable Special Prompts with validation					X
<b>Lots / Serial Tracking</b>					
Bin-level tracking				X	X
Capture at Receiving				X	X
Validate during Picking, Cycle Counting, Direct Move				X	X
Allocate host-specified Lots / Serials				X	X
Allocate Lots by FIFO				X	X
Single/Mixed Attributes and Expiry Allocation					X
2D Barcode Support for Serialized Items					X
<b>Order Allocation</b>					
FIFO Allocation of Sales Orders against inventory				X	X
Restrict Allocation based on Bin Type				X	X

Split lines into case / unit picks			X	X
Infinite Stock			X	X
Hot Replenishment			X	X
Automatically Wave Allocated Orders			X	X
Restrict Allocation based on zones				X
Optimized Allocation in zone sequence				X
Allocation and Replenishment in Pre-defined packsizes				X
Single/Mixed Attribute and Expiry Allocation				X
Days to Expiry Allocation				X
<b>Wave Planning</b>				
Waving from HH or Web			X	X
Printing Pick Tickets, Compliance Labels			X	X
Calculate Number of Labels and print based on Zone,				X
Generate Wave Labels, Pre-Packslip Labels, Packing Planner Labels, Paper Pick Tickets				X
Pack & Hold, Ship With Other Goods				X
<b>Expiry Management</b>				
Expiry Management			X	X
<b>Management Reporting</b>				
Management Reporting			X	X
<b>Multi-Zone</b>				
Restricting Allocation based on Zone: include zones for picking, include zones for replenishment, exclude zones for allocation				X
Multiple pickers working on the same sale order(s) in different zones				X
Calculating the number of labels to print based on zone when waving sales orders				X
Ability to define a separate label printer for each zone, and scatter wave labels to multiple printers				X
<b>Advanced Replenishment</b>				
Issue replenishment requests before stock is required for sales orders based on Velocity or Min/Max				X
Define Min/Max Replenishment levels from the handheld				X
Generate ad-hoc replenishment requests from the handheld				X
<b>Returns</b>				
Returns from Customer through Miscellaneous Adjustment function				X
Return to Vendor through Miscellaneous Adjustment function				X
<b>End of Line (EOL) Workflow</b>				
Forcing a Shipping and/or External step prior to sales orders being uploaded to the host				X
Handheld functionality to capture shipping information (carton shipping, recording shipping information, staging)				X
Automatically printing carton labels after picking and during carton shipping				X
Automatically printing paper packing slips and other documents after picking and during carton shipping				X
<b>Kitting</b>				
Explode on download kits based on BOM				X
Build to stock kits based on BOM				X
Handheld kitting functions, including Pull Kit, Finish Kit, and Reverse Kitting				X