

# Welcome to SAFE 5.1!

This version of SAFE is more evolution than revolution. It contains a great many ease of use features which have been long-requested by our users. The key changes are in order entry so that is where the bulk of this document is focused. In order to make the transition as smooth as possible, we suggest that you *practice* on several dummy transactions immediately after upgrading to 'get the hang' of the new concepts and features.

## Due Diligence Begins Before Upgrading!

First things first. After you install SAFE 5.0, you will encounter a number of files which will be automatically upgraded to the new format. This is an extremely reliable process, however it is also *extremely* disk intensive so it pays for you to take the following precautions *before* you upgrade to insure a proper upgrade:

1. Make a complete backup of all your TPS files *before* you install SAFE 5.1
2. Check that your backup is good!
3. Run Scan Disk and *then* Defrag with *all* options activated to make certain that your disk is in good shape.
4. Start SAFE 5.1
5. Click on each icon on the Tool Bar (Customers, Vendors, Sales Orders, A/P Bills, Products, etc.) Write down the record count for each browse. (The number is at the lower left of each browse.)
6. Install SAFE 5.1, making certain that no users are logged into SAFE
7. Open SAFE 5.1. Again, make certain that no other users attempt to log into SAFE.
8. Again, open each icon on the Tool Bar. If you see the pale yellow *Upgrading File* window, wait until it completes. Then proceed to the next icon and repeat.  
**Note:** Be patient! The file upgrade process may take up to an hour, depending upon how much data you have saved.
9. After each file is upgraded, check the record counter in the browse and compare it with the record count you write down for the same browse in Step #5. If they do not match, stop immediately and restore your original backup! You will then need to start over from Step #6.

**Again:** If any data file does not properly upgrade, you *must* restore your entire backup. Do not attempt to restore only one or two files in order to save time!

## Changes To Order Entry

### Automatic Blind Line Items

You are now able to set up Product IDs as automatically appearing as 'Blind' in your Sales Order entry. The Product Master now contains a check box to activate this feature on a Product by Product basis.

Of course, such Blind Items may be overridden during Order Entry *or you may specify (in [SASE](#)) that they be locked to prevent any overrides.*

### Minimum Order Quantity Requirement

You can now set up a Minimum Order Quantity for each Product ID and specify that the Order Quantity cannot be below that amount. This quantity may be overridden during Order Entry *or you may specify (in [SASE](#)) that they be locked to prevent overrides.*

## Package Quantity Check (SASE Option)

You are now able to specify that the Order or Ship Quantity of a Product ID *must* be a proper multiple of the item's packaging quantity. In other words, if the order is for business cards that are sold in blocks of 250, SAFE will warn you if you try to order 900 cards total. Again, this warning may be overridden during Order Entry *or you may specify (in [SASE](#)) that it be locked to prevent any overrides.*

## Sales Order Line Item Status Column

SAFE now tracks the Order Status of each Line Item independently, using the same Status Codes as for the Order as a whole:

|   |              |
|---|--------------|
| O | Ordered      |
| A | Acknowledged |
| P | Packed       |
| S | Shipped      |

This allows you to selectively indicate the status of each Line Item on orders where Line Items are at different phases of fulfillment or production. You can click on this column to automatically update the Status of each Line Item.

**TIP:** *This column can be used to reverse the inventory affects of a particular Line Item. For example, you may have marked a Line Item as having been Shipped (which depleted the Line Item from inventory, but then found out that this was an error. Simply by clicking on this column, you can revert the Line Item Status back to 'O' and correct your mistake. (Requires SASE permission, of course!)*

## Inventory

### Automatic Price Break Updates

The Price Update screen (in the Inventory Main Menu) now allows you to automatically update a range of Products with the *same* Price Breaks. In other words, you can enter the following three Price Breaks in this screen:

| Break | Qty | Price | Cost |
|-------|-----|-------|------|
| 1     | 10  | 4.25  | 2.75 |
| 2     | 25  | 4.00  | 2.50 |
| 3     | 50  | 3.75  | 2.25 |

...then use the Query Window to select which Products to apply these breaks to. SAFE will automatically replace the current Price Breaks (or add them if they do not exist) to the qualified Products.

This makes it *much* easier to update pricing on similar Products (such as stock checks) which are all priced the same, but only vary in terms of description, for example.

### Serial Numbered Products

You can now enter a Serial Number when you receive items into inventory. When you sell these items, SAFE lets you enter the Serial # you are drawing from inventory and validate that it is available.

**Note:** *If you wish to add Serial #s to existing inventory, you will need to enter a Count in the F/M Browse for each Product, with one Line Item on the Count for each Product's Serial #.*

**Note:** If you have assigned Serial #s to a Product you may only receive and sell the Product in Quantity of (1) one. SAFE will prevent you from receiving in order shipping such Products in any other Quantity. If you need to ship multiple Serial #s of the same product to a Site, you must enter a separate Site/Quantity for each Serial # on your Line Item.

## Accounting Functions

### Summary A/P Bills!

You can now select vendors whose bills will automatically be summarized during the Auto-Posting from Sales Orders! For example, you could select UPS and SAFE will automatically lump all charges for UPS onto a single A/P invoice. When it comes time to pay (daily or weekly) all bills are together in a single transaction awaiting payment!

### More Flexible Re-Posting From Source Modules

A new option has been added for those editing source transactions (A/P Bills, F/M Transactions, Payments, etc) from prior periods. If your accounting period changes, but you edit a transaction from a prior period *and* that period is not locked, SAFE will prompt you with a choice to post the updated G/L entries to either the Current G/L Period or to the Original Period. If a reversing entry is required, both the reverse and the revised entry are posted to the same period: Current or Original. This feature is global, meaning that it is turned *off* or *on* for all users in SAFE.

### Improved Aging Reports!

Several changes have been made to both the Customer and Vendor Aging Reports. You will now be able to view Average Days Open for each customer/vendor plus a cumulative Average Days Open and Average Days To Pay for all customers/vendors. These columns may also be viewed on screen in the Customer and Vendor Browse Windows.

**Plus!** Aging Reports can now be backdated. That is, you can now print an aging report showing the status of your receivables as of a particular date.

## Reports

### Sales Order Summary With Detail Report (Sales Order Browse Report)

This report shows all line items for a selection of sales orders. The unique feature is that you can select which orders to appear (using the Query Window) based on the contents of a Line Item or a Site or Quantity. For example, you may want to display all orders in which *any* Ship To Address was 'Branch #29'.

As another example, you may wish to get a detail of all orders in which *any* of the Line Items were for *Imaging* services. With this report, you not only would see the Imaging Line Item, but *all* Line Items on each order which contained the word 'Imaging' anywhere in the Product Description.

## Miscellaneous

### HTML Based On-Line Help!

Our new HTMLHelp System will debut. The on-line help will be available not only on your local system, but from your Internet Browser! No need to download revisions to our help system---a completely searchable text that is *always* up to date will be only a click away, including the latest tutorials and demos!

**Note:** You need to obtain a Log In from Suntower Systems in order to view our web-based help system.

## Security Extensions!

### **SASE Integration With SAFE**

If you have Simple Accounting Security Extensions, you can now start it from within SAFE under the UTILITIES menu. You must be logged in as the Default User ID and have the Master Password in order to do so.

*Note: This is leading to our complete integration of SASE and SAFE into a single, integrated setup system which will debut in SAFE 5.2.*

### **SASE Broadcast Messaging!**

You can now go into SASE and send an a **Broadcast Message which automatically pops up on all user's screens within SAFE!**

### **SASE Automatic Shutdown!**

Similar to a Broadcast Message, this feature lets you automatically shut down all running instances of SAFE. This does not shut down the user's computer; just SAFE. This feature runs on SAFE, ThinSAFE and Ollie users. A Broadcast Message is sent to each client letting them know that a shutdown is imminent within an administrator-specified number of minutes.

## Changes To Ollie, ThinSAFE & WebSAFE!

### **Customized E-Mail Acknowledgements (\$299)**

The acknowledging e-mails, which are generated when an order is submitted by an end- user, may now be customized, either by you or us. For example, you could add your logo, different fonts, or text indicating special offers. If this is an order with custom imprinting, the e-mail content might include the text that the user typed in---sort of a Proof.

### **Batch E-Mails (\$299)**

Your End User Administrator can now generate batch e-mails, informing all users of important events. Create your message in our text editor, or any program that can generate HTML. Send the message to all users, individuals Sites or Cost Centers using our Query Window to target just the groups you want. Batch e-mails may also include attachments.

### **Load Balancer (\$1,295)**

All On-Line SAFExtensions (Ollie, WebSAFE, ThinSAFE) can now use our LoadBalancer which automatically routes requests for internet access to the most available web server. In other words, you may add additional servers to your web site and, as each user logs on, LoadBalancer will *automatically* assign the user to the least used server, guaranteeing that each user always gets the best possible performance!