



New Release Information

Version 2.1

August 13, 2013

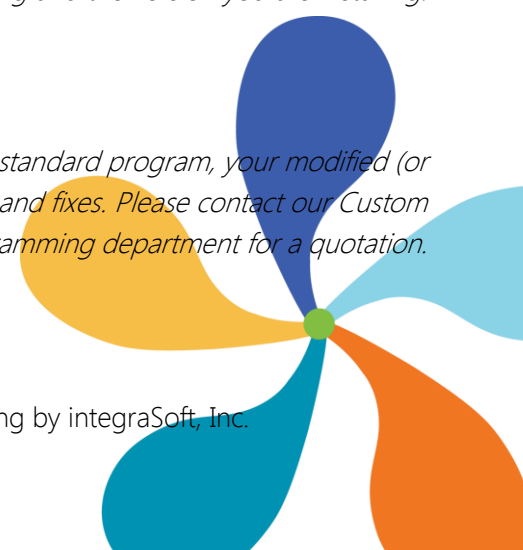
Presented by:

integraSoft, Inc.

Follow the Installation Instructions to install this version of integraSoft. Perform the Special Software Instructions for ALL Release Notes between the version you are running and the version you are installing.

If you have modified integraSoft programs and integraSoft enhances or fixes the standard program, your modified (or custom) program must be updated to take advantage of the enhancements and fixes. Please contact our Custom Programming department for a quotation.

All usage of the integraSoft® logo or integraSoft® symbol must be authorized in writing by integraSoft, Inc.



Installation Instructions

Definition

The following instructions must be performed in the order given. If you have any questions, please contact your support consultant.

1. Make sure you have a verified backup prior to installing the new integraERP update and remove all media (i.e. tapes & diskettes) from your system.
2. Ensure the Maximum MF Directory Server Object Count is set to 4096. From the MF Enterprise Server Administration, Select Options under Configure and then select the General Tab.
3. Ensure all operators are out of the integraERP & integraPOS software and insert the installation CD.
4. From the console login as root:

Login: root (Press ENTER)

Password: #### (Enter your password and press ENTER)

5. cd /isweb
6. Perform the command below depending on the Operating System you are on:

For LINUX Operating System:

```
tar zxvf distintegraERP.tar.gz
```

For the UNIXWARE Operating System:

```
gntar zxvf distintegraERP.tar.gz
```

7. sh install/integraERPinstall.sh (press ENTER)

Special Software Instructions

Definition

No special instructions are needed for this release.

New Features

Landing Page / Dashboard

New Message / New Report Notification

- When a message or report is received in the My Messages or My Reports section of the dashboard, a message displays in the lower right corner and a chime sounds.
- The message displays on top of any integraERP window that may be open and displays the number of unread messages or reports on your dashboard. The message displays until you close the message.
- If the message is displaying when additional messages or reports are received, the new messages and new reports counts continue to update until the message box is closed. (TB-130730-23)





Accounts Payable / Posting / Direct Payment

Attachment Feature

- You may add an attachment to an invoice that is being created during the Direct Payment function. Select the Attachment icon to display the File Attachment page.
- When adding an attachment, the Browse button on the File Attachment page allows you to view the location of documents. When browsing for the document, you can preview the document by selecting the *Show the Preview Pane* icon in the upper right section of the File Upload page. (TB-130809-42)

Order Entry / Posting / Enter Orders

Ability to re-price Quote Orders

- When maintaining a quote order, the Re-Price button in the upper right corner of the General page allows you to update the order with the latest prices, discounts, cost, and commission.
- The Re-Price button only displays when the order is in the Ordered Stage.
- When a quote order has been re-priced, *Quote Order xxx-xxx Was Re-Priced* prints on the journal.
- When a line's price or cost has been manually overridden, the line will not be re-priced. When this occurs, it will be noted on the journal: *Lines With Manual Price/Cost Overrides Have Not Been Updated*. (TB-130710-15)

Tools / Data Import

Ability to Import External File Data into General Ledger / Posting / Transactions

- The Tools / Data Import function allows entry of General Ledger Transactions from a comma delimited file.
- The transactions will be created through the *General Ledger / Posting / Transactions* function. A journal prints with details of the postings.
- The postings will only be made when Debits and Credits are equal. (TB-130528-55)

System Administrator / Application Options / Email Settings

Ability to Setup and Manage Email

- The Email Settings function has been added to the *System Administrator / Application Options* Menu. This enables you to manage your email settings for emails sent from within integraERP. It allows you to update the email settings when changing the password for your email provider or changing email providers. (TB-130806-99)

System Administrator / Application Options / System Printer Settings

Ability to Setup and Manage System Printers

- The System Printer Settings function has been added to the *System Administrator / Application Options* Menu. This function allows easier setup and management of printers used in integraERP. (TB-130806-99)

Tools / Email Log

Ability to view the Email log for emails sent from within integraERP

- The Email Log function has been added to the *Tools* Menu. This enables you to easily view the email logs created from emailing within integraERP. (TB-130806-99)



Modified Features

All Posting Functions

Enhanced Error Messages

- When attempting to post into a period beyond your current fiscal year, a pop up now displays that: You are attempting to post into your new fiscal year. General Ledger must be year ended for the current year before posting into the new fiscal year.
- When attempting to post into a period outside of the valid posting range, a pop up now displays: You are attempting to post outside of the General Ledger / Setup / Valid Posting Range. Please contact your System Administrator for assistance. (TB-130614-93)

Accounts Payable / Posting / Transactions

Browse Feature for Attachment

- The ability to Browse for the file location of an attachment has been added.
- When adding an attachment, the Browse button on the File Attachment page allows you to view the location of documents. When browsing for the document, you can preview the document by selecting the *Show the Preview Pane* icon in the upper right section of the File Upload page. (TB-130528-64)

General Ledger / Posting / Reverse Posting Batch & Optionally Repost

Ability to Change Date and Period of Reverse Posting

- When reversing a journal's posting, you may now reverse the entries with a date and period different from the original posting.
- On the Reverse Posting Batch page, select Yes in the Reverse In Different Date And Period field. Additional fields display for entry of the Reversal Date and Reversal Period. (TB-130605-27)

General Ledger / Setup / Valid Posting Range

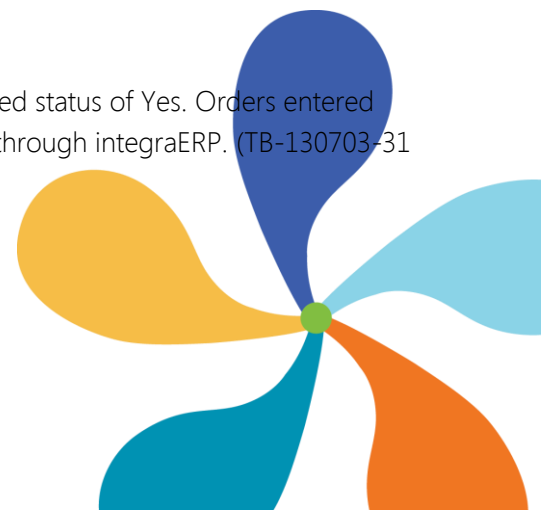
Valid Posting Range fields moved from System Administrator / Application Options / General Ledger

- The setup for the Optional Valid Posting Range has been removed from System Administrator / Application Options / General Ledger.
- The Optional Valid Posting Range fields are now part of a new function: General Ledger / Setup / Valid Posting Range. (TB-130614-56)

Order Entry / Posting / Enter Orders

integraRep orders approval

- Orders entered through integraRep will no longer be created with an approved status of Yes. Orders entered through integraRep will use the same criteria for approval as orders entered through integraERP. (TB-130703-31)



Purchase Orders / Posting / Costing

Browse Feature for Attachment

- The ability to Browse for the file location of an attachment has been added.
- When adding an attachment, the Browse button on the File Attachment page allows you to view the location of documents. When browsing for the document, you can preview the document by selecting the *Show the Preview Pane* icon in the upper right section of the File Upload page. (TB-130528-25)

System Administrator / Year-End Processing

Error when attempting to year-end modules more than once

- A user will be prevented from year-ending modules more than once.
- When a module is year-ended, the date is written to a file.
- If a user attempts to year-end a module within 6 months of the previous year-ending, an error message displays and the function is not allowed.
- Accounts Payable can be year-ended twice in one year to allow for the additional year-ending for 1099 accounts.
- When year-ending General Ledger, the field value for *Enter The First Calendar Period Of The New Year* will automatically default for customers where General Ledger is set for calendar year. (TB-130614-87)

