



New Features in Sage BusinessVision 2017 (version 7.8)

Initial Installation and Configuration of BusinessVision 2017

Overview

The installation of Sage BusinessVision 2017 follows the same process as version 2014/2015. During the installation, you will be prompted to enter the Product ID/Serial number, and Activation code for each product or add-on that you are installing.



NOTE: It is not necessary to reinstall CustomPack, e-BusinessVision, LAN Packs or Multiple Currency Manager if they have already been installed with v7.1 or higher. The existing licenses will continue to be honoured.



FOR MORE INFORMATION: For general information for clients upgrading from previous versions, refer to "Readme.rtf" which is located in the \Readme folder of the Sage BusinessVision install.

Data File Conversion

Existing sets of Sage BusinessVision data will be converted to version 2017 format when logging in for the first time.



NOTE: Once your data has been converted to be compatible with version 2017, it will no longer be compatible with prior versions.

The following table lists data files that are converted, created, or reorganized during the version 2017 file conversion process.

FILE NAME	CONVERSION/NEW/REORGANIZATION
Bvcon.fil	Conversion – initialization of new fields

Issues Resolved

The following issues are resolved in Sage BusinessVision 2017 (7.80)

- **Ability to log on to Sage BusinessVision using dates greater than December 31, 2020** – The log on dialog did not allow entry of dates after December 31, 2020. This has been modified to allow log on dates up to December 31, 2085.
- **100317** – In Purchase order details, unissuing and then immediately reissuing a modified purchase order resulted in a printed purchase order without totals.
- **100319** – In Canadian Payroll, the Record of Employment function did not correctly format contact telephone extension numbers that were less than 4 characters.
- **100320** – In Timecard import, the default account for vacation pay is not used when the GL account is not defined.
- **100321** – In Account Payable, the scroll bar in the A/P payment dialog disappears after maximizing the dialog.
- **100322** – The File Reorganization utility did not recalculate average days to pay for customers with customer numbers longer than 10 characters.
- **100323** – In Canadian Payroll, the Record of Employment function did not correctly format values entered in text fields that included special characters.
- **100324** – In Job Cost, transactions that were voided in Accounts Payable continued to be included in job account totals.

System Setup Additions

Several additions have been made to System Setup in order to activate and control new and existing features in version 2017.

Customer

In “Customer > A/R”, entries were added for “Use customized name for email attachments” and “Use customized name and path as a form export option”.

The screenshot shows the 'System Setup' window with the 'Customer' tab selected. The left-hand tree view shows the hierarchy: System Setup > Customer > A/R. The main pane displays settings for Accounts Receivable, including 'Monthly interest' (1.25%), 'Include overdue items in credit checking' (checked), and 'Aging periods' (30, 60, 90, 120 days). The 'Average days to pay' section has 'Active' unchecked. The 'Email attachment and export options for A/R statements' section is highlighted with a red box and contains the following settings:

- ☒ Use customized name for email attachments
- Attachment: Statement_{CustNo}_{Date}.pdf
- ☒ Use customized name and path as a form export option
- Export path: C:\BusinessVision\DATA\Export
- File name: Statement_{CustNo}_{Date}.pdf

When either of these options are enabled, it becomes possible to set up variable based naming rules for statements sent as email attachments to customers, or for the creation of archive copies to be saved locally. (Note – when this feature is not enabled, email attachment names are based on the form name chosen in Printer Setup). For A/R statements, the possible variables are:

Variable name	Description
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number

Sales order

In “Sales order > Sales order setup”, entries were added for “Use customized name for email attachments” and “Use customized name and path as a form export option”. Each of the additional options can be applied to Invoices, Order Confirmations, or Quotes.

The screenshot shows the 'System Setup' dialog box with the 'Sales order' tab selected. The 'Sales Orders' section contains several checkboxes: 'Prompt for line discounts', 'Display average cost', 'Convert quotes using next order no.', 'Show line item required date', and 'Prompt for salesperson'. Below these are text boxes for 'Next Order No.' (0000700545), 'Next Invoice No.' (0000100600), and 'Next Quote No.' (Q000000003). The 'Email attachment and export options for' section is highlighted with a red box. It shows a dropdown menu set to 'Invoice'. The 'Use customized name for email attachments' checkbox is checked, and the 'Attachment' text box contains 'Invoice_{InvoiceNo}_{InvoiceDate}.pdf'. The 'Use customized name and path as a form export option' checkbox is also checked. The 'Export path' text box contains 'C:\BusinessVision\DATA\Export' and the 'File name' text box contains 'INV_{CustNo}_{InvoiceNo}_{InvoiceDate}_{OrderNo}.pdf'. At the bottom are 'OK', 'Apply', 'Cancel', and 'Help' buttons.

When either of these options are enabled, it becomes possible to set up variable based naming rules for invoices, order confirmations, and quotes sent as email attachments to customers, or for the creation of archive copies to be saved locally. (Note – when this feature is not enabled, email attachment names are based on the form name chosen in Printer Setup). For invoices, the possible variables are:

Variable name	Description
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number
{InvoiceDate}	The invoice date
{InvoiceNo}	The invoice number
{OrderNo}	The order number

For order confirmations, the possible variables are:

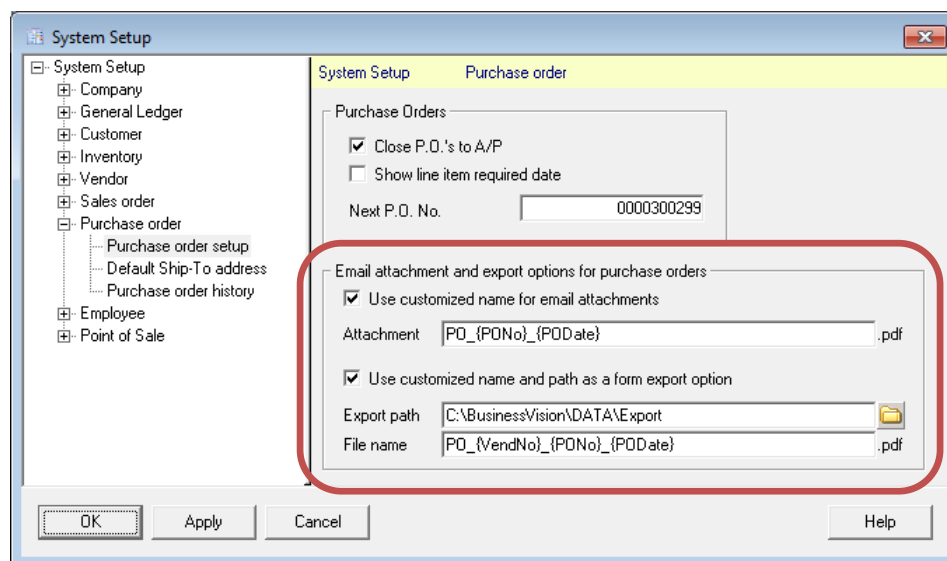
Variable name	Description
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number
{OrderDate}	The order date
{OrderNo}	The order number

For quotes, the possible variables are:

Variable name	Description
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{CustNo}	The customer number
{OrderDate}	The order date
{QuoteNo}	The quote number

Purchase order

In Purchase order, entries were added for “Use customized name for email attachments” and “Use customized name and path as a form export option”.



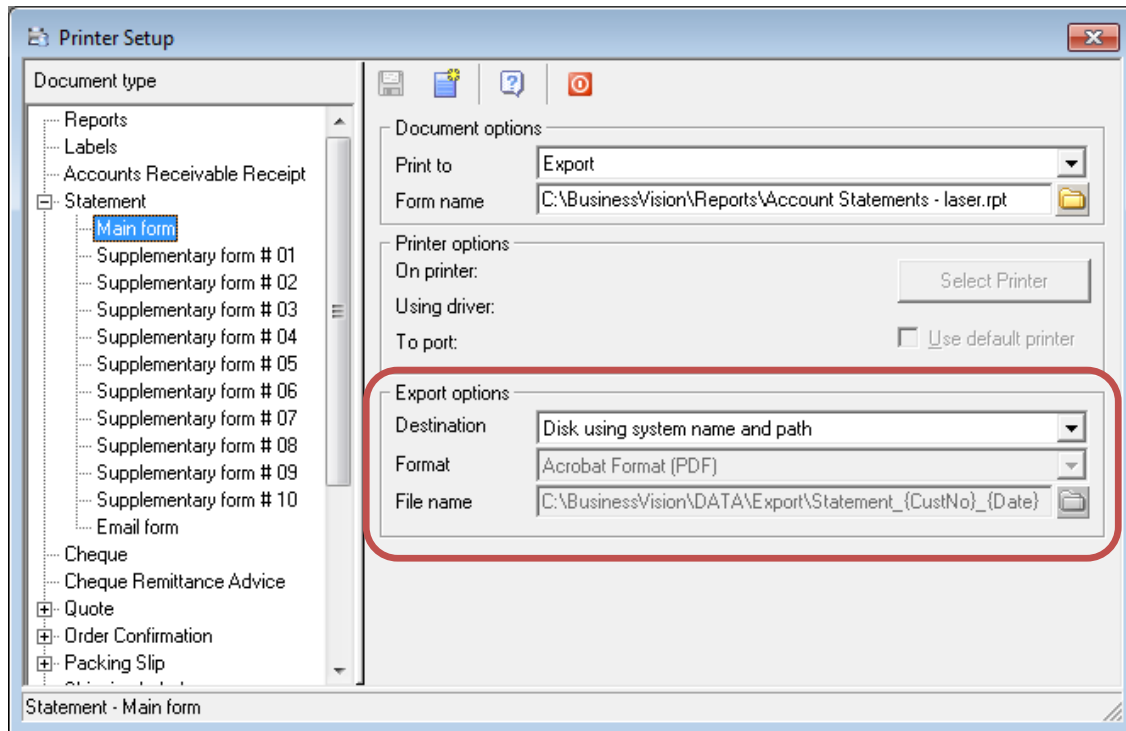
When either of these options are enabled, it becomes possible to set up variable based naming rules for purchase orders sent as email attachments to vendors, or for the creation of archive copies to be saved locally. (Note – when this feature is not enabled, email attachment names are based on the form name chosen in Printer Setup). For purchase orders, the possible variables are:

Variable name	Description
{Date}	The current log-on date entered when logging on to Sage BusinessVision
{PODate}	The purchase order date
{PONO}	The purchase order number
{VendNo}	The vendor number

Printer Setup Enhancements

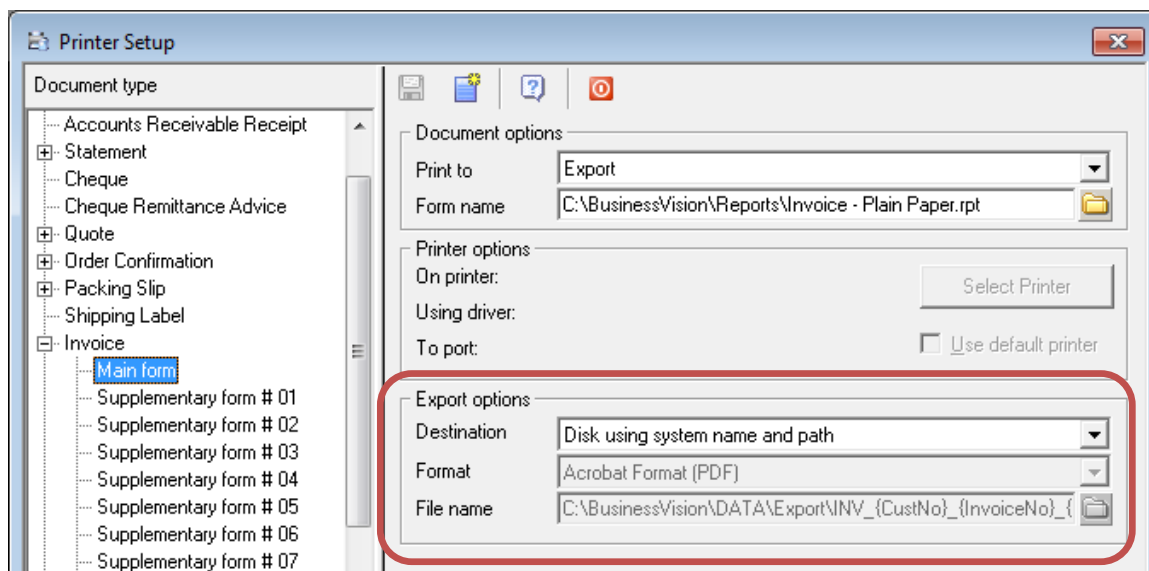
Export AR Statements to disk using system name and path

The option to export AR statements to disk using system name and path is now available for the main form. In order for this additional export destination option to appear in the destination list, the “Use customized name and path as a form export option” option must be enabled in “System Setup > Customer > AR”.



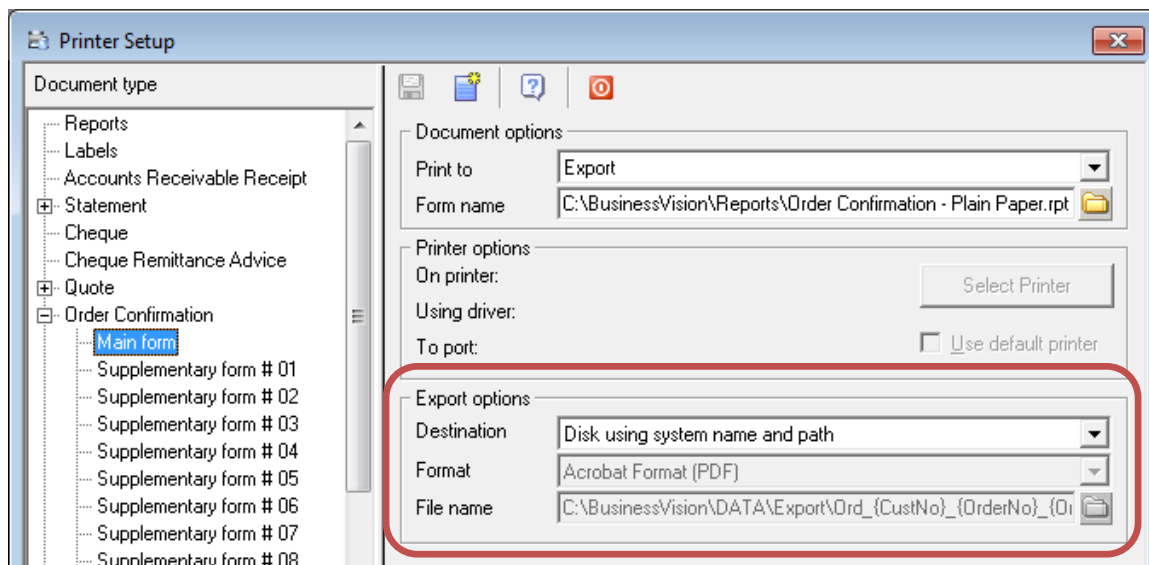
Export Invoices to disk using system name and path

The option to export Invoices to disk using system name and path is now available for the main form. In order for this additional export destination option to appear in the destination list, the “Use customized name and path as a form export option” option must be enabled in “System Setup > Sales order > Sales order setup”.



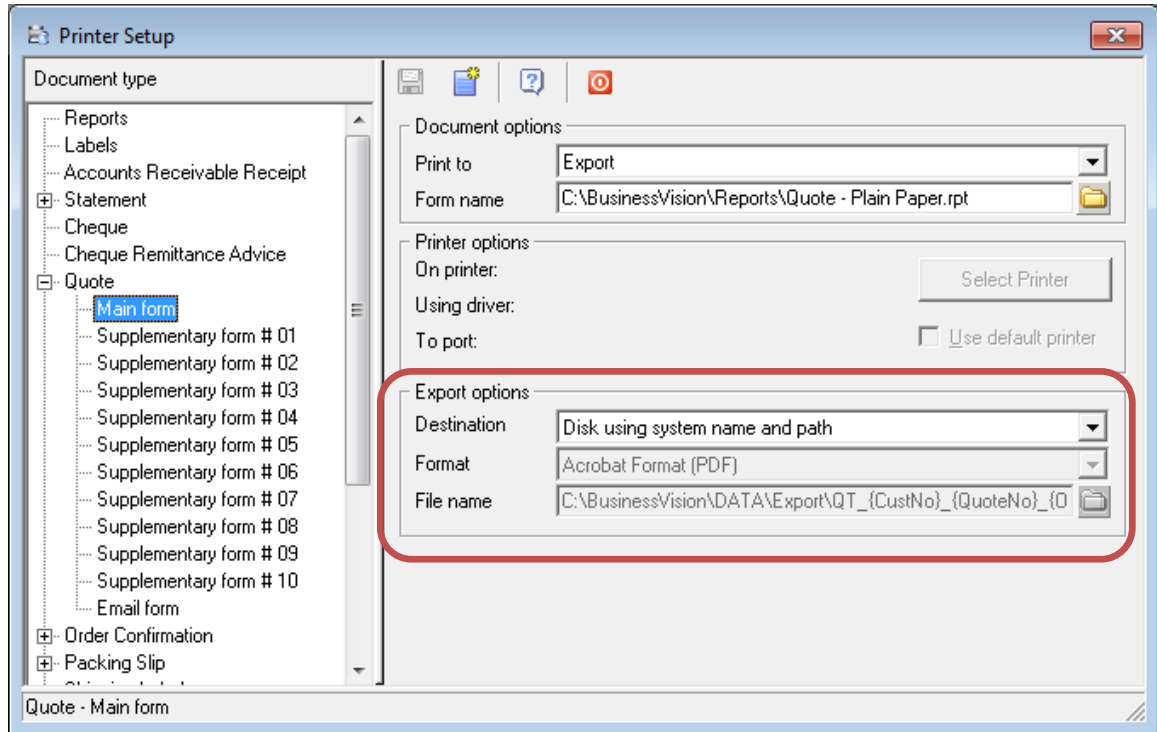
Export Order Confirmations to disk using system name and path

The option to export Order Confirmations to disk using system name and path is now available for the main form. In order for this additional export destination option to appear in the destination list, the “Use customized name and path as a form export option” option must be enabled in “System Setup > Sales order > Sales order setup”.



Export Quotes to disk using system name and path

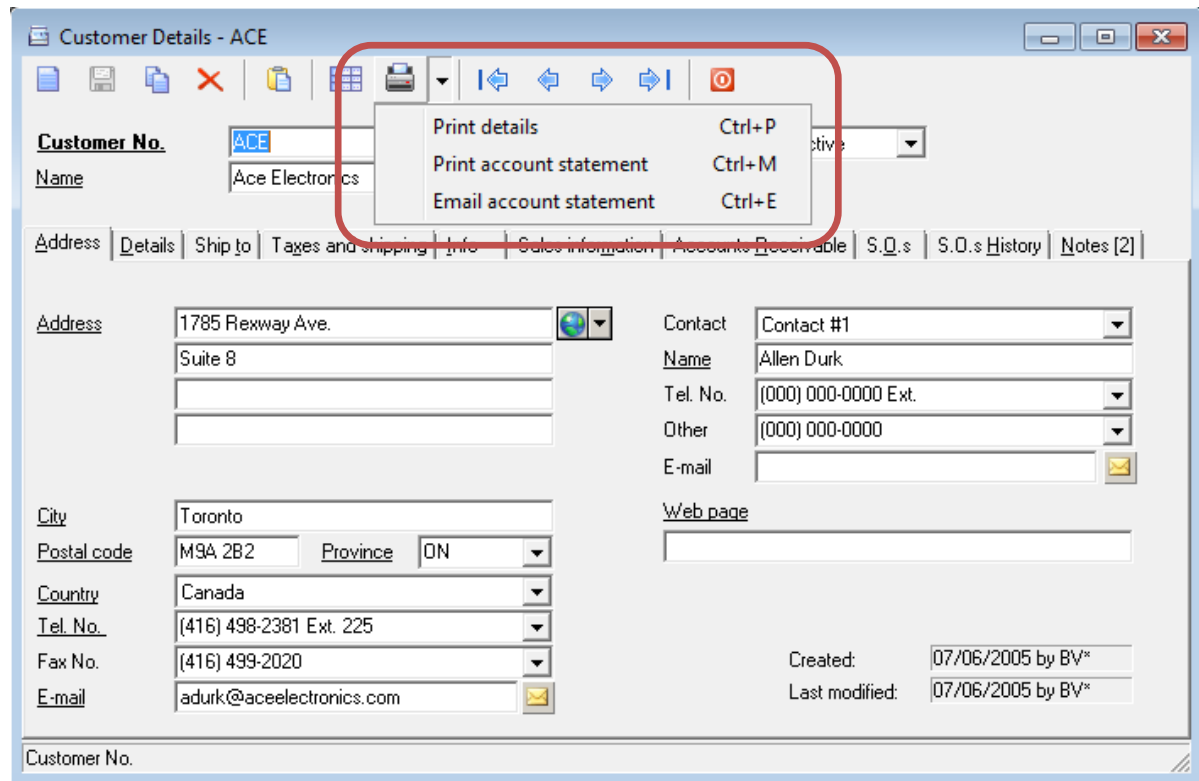
The option to export Quotes to disk using system name and path is now available for the main form. In order for this additional export destination option to appear in the destination list, the “Use customized name and path as a form export option” option must be enabled in “System Setup > Sales order > Sales order setup”.



Customer Details Enhancements

Print or email AR statements

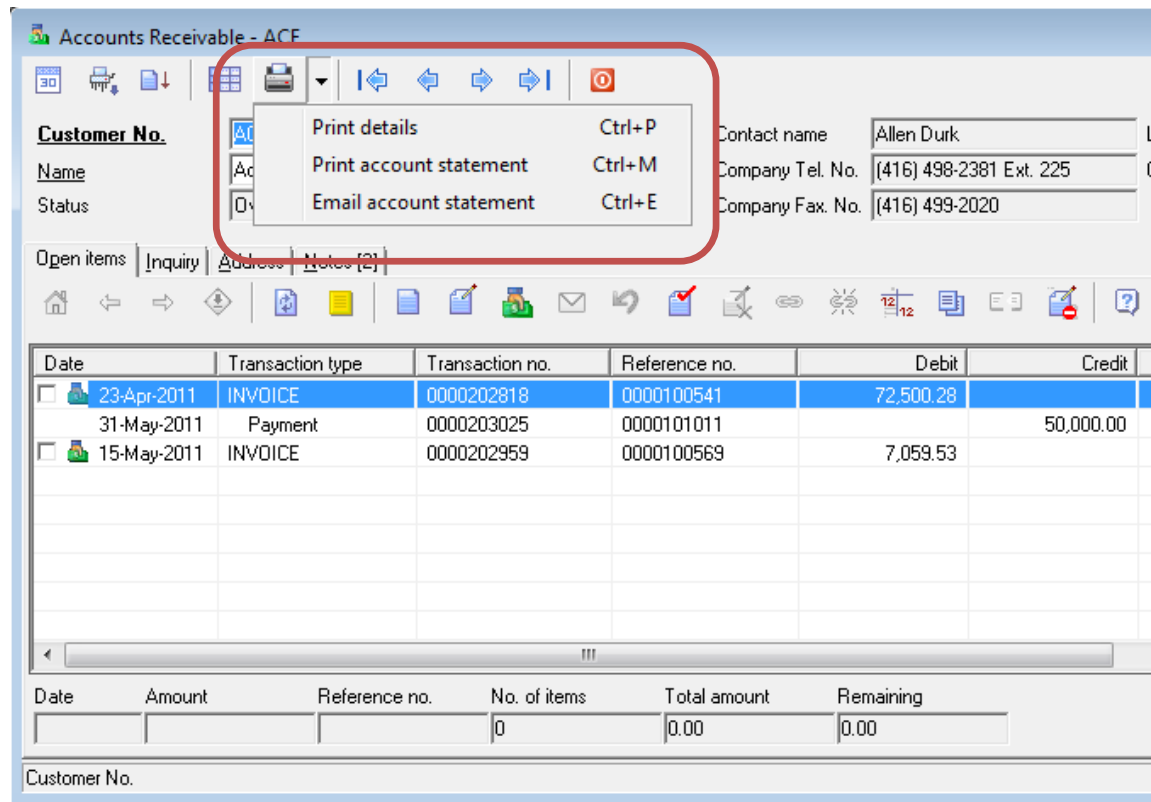
The option to print or email account statements has been added to the Customer Details module toolbar. The “Email account statement” option will only appear if the customer being viewed has an email address.



Accounts Receivable Enhancements

Print or email AR statements

The option to print or email account statements has been added to the Accounts Receivable module toolbar. The "Email account statement" option will only appear if the customer being viewed has an email address.



Order Entry Enhancements

View Customer PO number in Accounts Receivable

When invoices are posted by Order Details or Batch Billing, the value in the “P.O. No.” field will be visible in Accounts Receivable in the “Memo” field.

Order Details - 0000700515

Order Number: 0000700515
 Customer No.: CANSPK
 Ship-to ID: Same as bill-to

P.O. No.: PK99987
 Name: Canadian Speakers Limited
 Status: Okay

Part number	Description	Sell UOM	Order qty.	Unit price	Comtd. qty.	B.O.
V1-4A	Hi-fi Stereo 4 Head VCR	EA	0.00000	473.90000	10.00000	
V1-2A	Digital VHS VCR with HDTV-Recording	EA	1.00000	193.50000	1.00000	
UAC-300	Recoton Universal AC Adapter	EA	20.00000	9.99000	20.00000	
TV-5200	52" Dolby Pro Logic Surround Sound TV	EA	1.00000	658.90000	1.00000	
TV-2100	20" TV with Flat Picture Tube	EA	6.00000	336.70000	6.00000	

Accounts Receivable - CANSPK

Customer No.: CANSPK
 Name: Canadian Speakers Limited
 Status: Overdue items

Contact name: Mrs. Lisa Oulette
 Company Tel. No.: (416) 656-3300 Ext.
 Company Fax. No.: (416) 656-3301

Last invoice: 0000100599 on 17-Jun-2011
 Credit limit: Unlimited

Open items | Inquiry | Address | Notes [11]

Date	Transaction type	Transaction no.	Reference no.	Debit	Credit	Item balance	Due date	User	Terms	Memo
23-Apr-2011	INVOICE	0000202821	0000100544	8,871.47		1,871.47	23-Apr-2011	BV*	C.O.D.	
31-May-2011	Payment	0000203030	0000192876		7,000.00			BV*		
15-May-2011	INVOICE	0000202958	0000100568	25,318.31		25,318.31	15-May-2011	BV*	C.O.D.	
14-Jun-2011	INVOICE	0000203114	0000100558	3,056.61		3,056.61	14-Jun-2011	BV	C.O.D.	
17-Jun-2011	INVOICE	0000203131	0000100599	8,826.88		8,826.88	17-Jun-2011	BV*	Net 30 days	PK99987