# Release Notes – Build 404

Build 404.1.0 – Released October 27, 2024

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# Overview

## New Sales Analysis and PO Inquiry Screens

This update provides a powerful new reporting tool that allows you to define multi column data sets to analyze your item sales. There is a new PO Inquiry screen that provides read only access to your Purchase Order activity. We have also dramatically improved our load times for all system Data Views and SO/Job list screens.

# System Administrator Task List

## Pre-Installation Recommendations

### Support subscription recommended

We recommend obtaining an ongoing support subscription so that you can submit support tickets if you need any assistance with the product update or any other issues.

### Review resolved programming issues

[Programming Issues Resolved Build 404](Programming Issues Resolved Build 404)

## Optionally install the Training Company to preview the update

Many companies preview updates in the Training company before applying the update to their live company. You can visit the "What's New" area of the support center to get access to the latest program version and download file for the training company. You will need to uninstall any existing training company before installing the latest version.

### You may need to temporarily disable your anti-virus program

Our Training Company installation and program update can get tripped up by many of the different anti-virus programs on the market. If you encounter errors, you can temporarily disable your anti-virus before running the installer routine. Upon completion of the install/update, re-activate your anti-virus program.

## Always make a manual backup!

Always make a manual backup of your main company database, custom form layouts, and documents and images before installing any product update.

### Database

We recommend backing up your main company database using the Backup Manager utility (see below), which automatically detects the database path.

Otherwise, the main company database file (*EJDB.FDB*) is normally located in the following folder -- *(drive letter\program files (x86)\DBA Manufacturing\Database*.

### Custom Form Layouts (*.rtm files)

Custom form layouts are stored as **.rtm* files in the *Reports* folder, normally in this path -- *(drive letter\program files (x86)\DBA Manufacturing\Reports*.

### Documents and Images

Documents and images can be saved into user-selected folders. Back up the appropriate folders as needed.

## Use the Backup Manager

Installation Guide – Backup Manager

The Backup Manager is an external utility that is used to create database backups, to restore from backup when needed, and to optimize your database performance with a simultaneous backup and restore.

### Accessed from the server

The Backup Manager is accessed from the server by clicking *Windows Start – DBA Manufacturing – Utilities – Backup Manager*.

### Used solely for database backups

The Backup Manager is not a generic backup utility that can be used with multiple file types. Its sole purpose is to create database backups to the server and mirror copies to an external drive. These database backups can then be incorporated into your general server backup to the cloud or an off-site location.

### Creates FBK files

When the Backup Manager makes a database backup, it creates an FBK file that can be safely backed up with a generic software program or service. An FBK file is created using the GBAK utility supplied with the Firebird database. Besides backing up the database, the FBK file does the following:

- Rebuilds indices
- Eliminates obsolete record versions ("garbage")
- Defragment database pages
- Rewrites database tables contiguously

Whenever you restore from an FBK backup file, your database is optimized to be leaner and more efficient.

### The backup fails if data corruption is encountered

When an FBK backup file is being created, the backup process will fail if data corruption is encountered that cannot be fixed. The benefit from this is that if yesterday's FBK file was successfully created, you know with confidence that the data corruption occurred in your most recent business day. You can therefore safely restore from yesterday's backup and you minimize any data loss to just one day.

### Incorporate FBK backup files in your daily general backup

You will continue to make a general daily backup of all the critical data folders on your server, not just for DBA but for other applications as well. The general daily backup should incorporate the *(drive letter)\ProgramData\DBABackup* folder, which contains your FBK backup files.

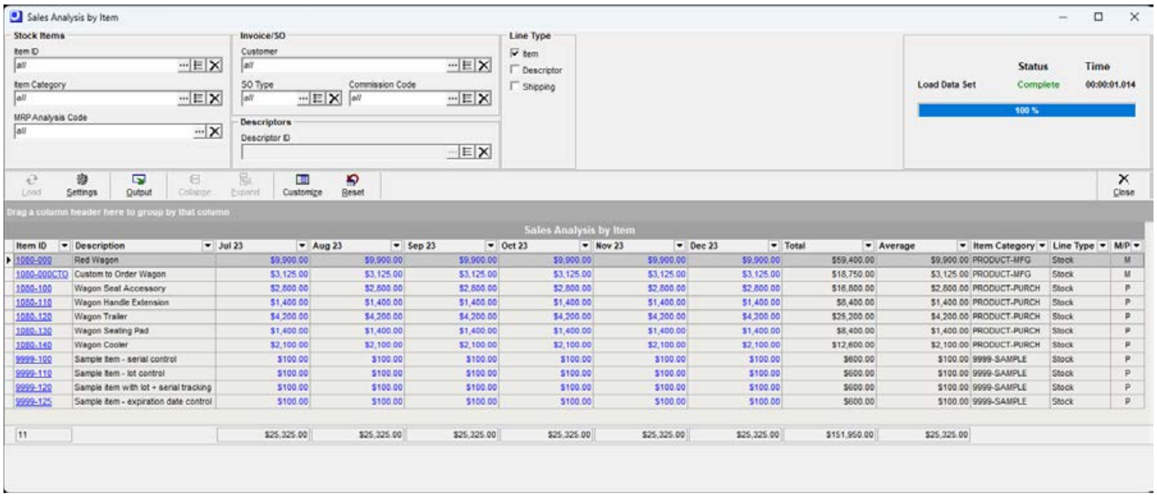
## Build 404 Releases

| | | |
|---|---|---|
| Build 404.0.0 | Main Release | Oct 7, 2024 |
| Build 404.1.0 | Service Pack | Oct 27, 2024 |

# New Features

## New Sales by Item Analysis Screen

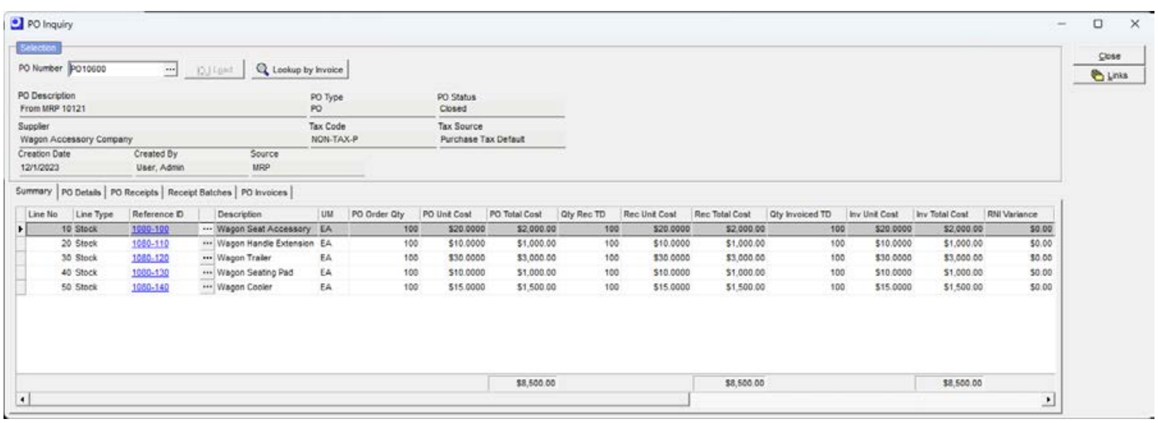
(*Sales > Analysis > Sales by Item*)




We have created a new *Sales by Item* analysis screen that allows you to define multiple data columns to review item invoice transaction trends over time.   You can define a series of columns, compare two columns, sum of columns, average of columns, and report on a peak value of any of your reporting columns.

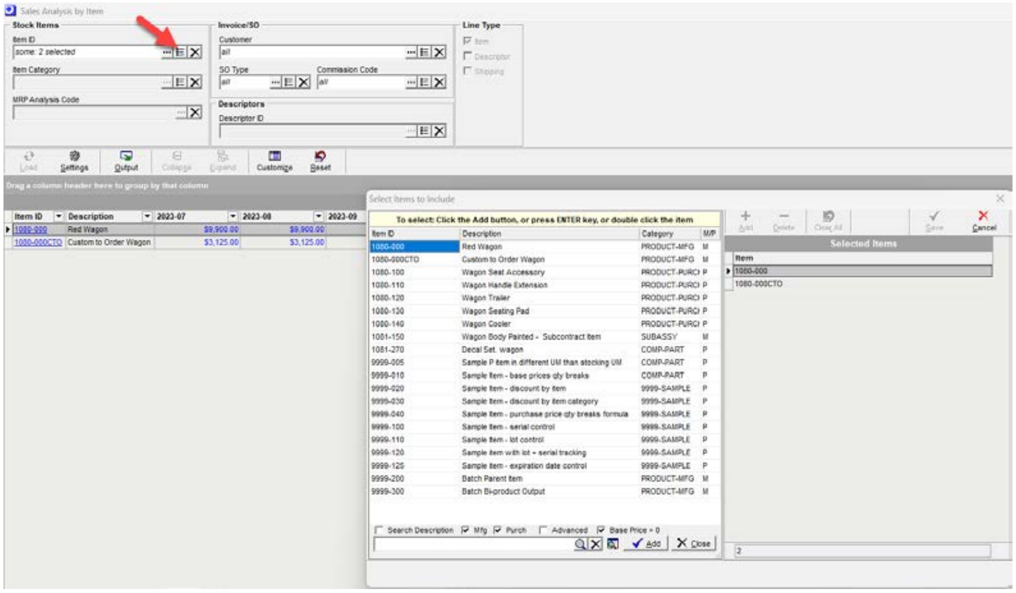
## New PO Inquiry Screen

(*Purch > PO Inquiry)*




We have created a new *PO Inquiry* screen that provides read only access to your Purchase Order transactions.  There are tabs for Summary, PO Details, PO Receipts, Receipt Batches, and PO Invoices.

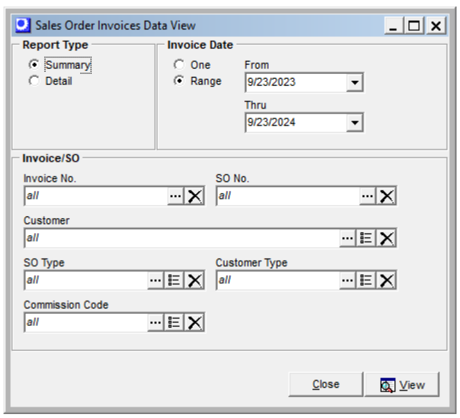
## New reporting filter to handle One, Some, All selections



We have created a new filter selection tool that lets you more easily define your data filtering selections. Our previous “some” filtering had poor performance on larger datasets.

### Significantly improved performance for all Data Views

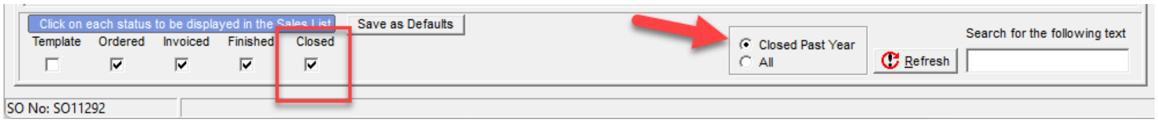
(*Sales > Data Views > Sales Order Invoices*)




We redesigned our Data Views to load larger datasets more efficiently. We are also incorporating our new one, some, all data filter tool into many of our Data View reports.

### New handling of Closed status SOs and Jobs in opening lists

(*Sales > Sales Order List and Jobs > Jobs List)*

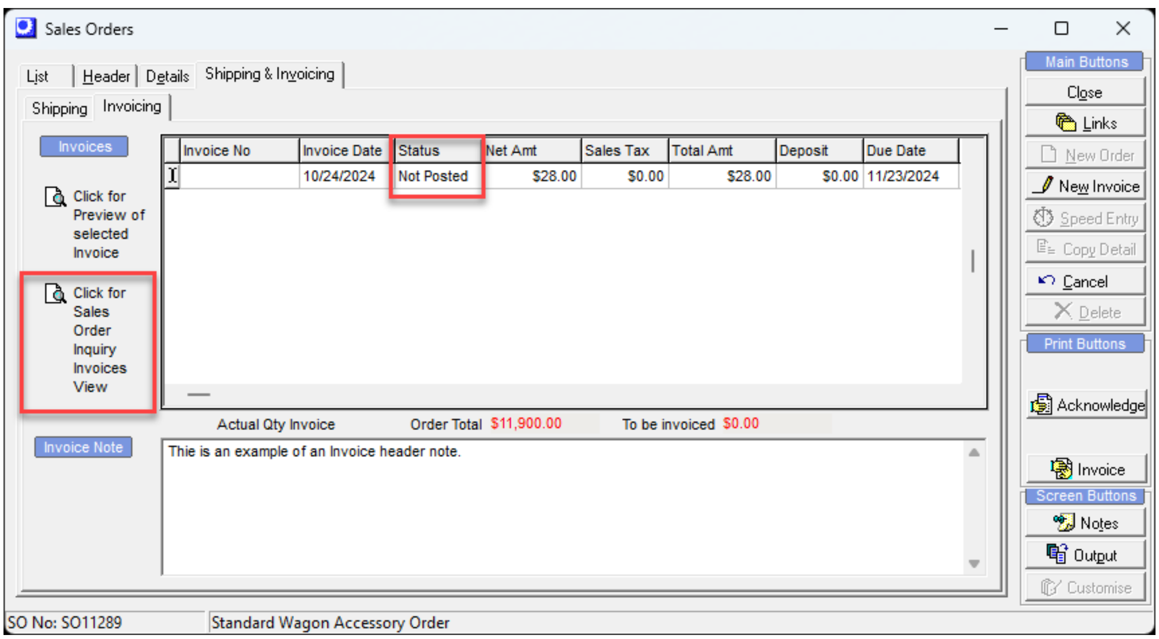



In the Sales Order and Job list screens when you select the Closed status, we will default to including SOs and Jobs closed within the past year. This helps improve system performance and retain the column header sorting functionality. You have the option to select all closed SOs/Jobs if needed.

## Service Pack 404.1.0

### Improved process for previewing invoices prior to posting (printing)

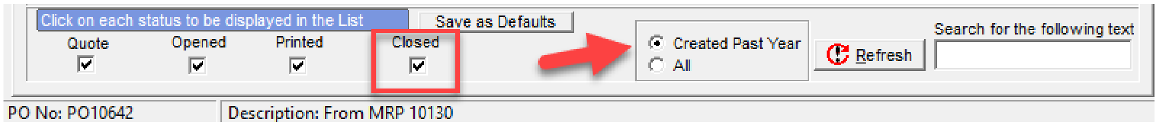
(*Sales Order > Invoicing)*




We have created a new invoice status of *Not Posted* for invoices that are created and not yet posted (printed). We have added a link to the *Sales Order Inquiry* screen where you can review all of the details of an invoice before posting (printing). If you see details that require changes, you can delete the *Not Posted* invoice and go to the SO details tab to make corrections and then create a new invoice. Once you select the *Invoice* button and print, the invoice will be formally posted. A *Printed* invoice can no longer be deleted and requires a *Reversal*.

### New handling of Closed status Purchase Orders

*(Purch> Purchase Order List)*




In the *Purchase Order* list screen when you select the Closed status, we will default to including Purchase Orders created within the past year. This helps improve system performance and retain the column header sorting functionality. You have the option to select all closed POs if needed.

# Documentation

## Videos

[Video – Analysis Sales by Item Series of Columns]

[Video – Analysis Sales by Item Compare Two Columns]

## Screen Help

[Sales by Item Analysis]

[PO Inquiry]

[Sales Order Invoicing]