Feature Highlights

This document summarizes a handful of top-level features of each available module and component of Blue Link, including optional components. Please note that this document is not an all-inclusive list.

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<th>Module/Component</th>
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| Common/Overall Feature Highlights | ✓ Multi-user and multi-company  
✓ Robust and reliable - Microsoft SQL-Server database  
✓ Multi-currency (unlimited number of currencies)  
✓ International – configurable for Canada, USA, the Caribbean and other jurisdictions, including sales taxes and terminology  
✓ Real-time system – provides up-to-the minute information for inventory, accounting etc.  
✓ Drill down interface – easy to access information  
✓ API (application programming interface) facilitates seamless integration with 3rd party front end applications  
✓ User Defined Fields (UDFs) enable users to add custom details and notes to Customers, Vendors, Sales, Products and Purchases  
✓ Detailed screens have individual user controlled columns, ordering and filtering  
✓ Change-logging of key fields noting before and after values as well as who and when changed  
✓ System-wide security restrictions based on user-login  
✓ Centralized customer and vendor notes that are available wherever Customers and Vendors are used  
✓ Reports can be exported directly into Microsoft Excel and data can be live-linked with Excel  
✓ Open database structure supports end user reporting with 3rd party tools such as Microsoft Excel and Crystal Reports (based on security)  
✓ Quick Lookup Toolbar – instant access to specified orders, invoices, quotes, etc.  
✓ Uses SQL Reporting Services for scheduled / emailed exception and management reporting |
| General Ledger | ✓ Financial Report Writer – unlimited financial statement formats, with the ability to consolidate multiple companies on a single report  
✓ Reversing and recurring entries  
✓ Executive Summary – snapshot of key financial information, including ratios  
✓ Unlimited profit centers / departments  
✓ Drill down to transaction detail  
✓ Restrict transaction dates based on user-definable sliding window  
✓ Posting integrity rules prevent trial balance or control accounts from going out of balance |
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| **Accounts Receivable**        | • Collections screen – reduced collection period, eliminates paper and includes ability to email PDF invoice copies and statements  
   • Detailed or summary aging – current or retroactive  
   • Payment history report – shows how payments previously received were applied to outstanding invoices  
   • Customer Groups – facilitates head office / branch scenarios where head office pays branch invoices  
   • Customer-specific language and pricing rules  
   • Credit checking and credit hold functions  |
| **Accounts Payable**           | • Detailed or summary aging – current or retroactive  
   • Vendor payment history – provides detailed history of payments made against invoices and discounts taken  
   • Alternate vendor payments – for credit cards, and for transferring liabilities from one vendor to another  
   • Recurring transactions  
   • Vendor prepayments and offsets  
   • Sales tax remittance screen for reconciling and paying sales taxes  |
| **Bank Management**            | • Unlimited bank accounts – all currencies  
   • Bank reconciliation function  
   • Deposit processing – prints deposit summary and maintains deposit history  
   • Quick payment functions – for miscellaneous items, vendor prepayments and customer refunds  
   • Transfer funds and track exchange differences  |
| Excel Financial Reporting      | • Spreadsheet Server transforms Excel into a tightly integrated analytical tool for your ERP data  
   • Access live GL information stored within Blue Link from inside Excel for reporting, budgeting and distribution purposes  
   • Design, build and share a variety of financial reports in Excel such as Profit and Loss Statements, Balance Sheets and Statement of Changes with information pulled from Blue Link  |
| Payment Processing            | • Single screen for almost all payment processing  
   • Multiple open payment runs  
   • Payment authorization/segregation of duties options  
   • Date and discount sensitive ‘items to pay’ lists  
   • Support for online payments and Electronic Funds Transfer (EFT)  |
| Payroll                        | • Integration with PayMate payroll software  |
| Contact Management             | • Single point of entry for all names and address information  
   • Tracks prospects as well as customers and suppliers  
   • Create quotes for prospects or customers  
   • Quotes respect customer contract pricing rules (price lists)  
   • Convert quotes to orders – one click  
   • Tracks multiple contact persons per company and multiple companies per individual  
   • Log verbal and email communication for prospects, customers and vendors  |
| CRM – Lead Opportunity Management (Optional Component) | ✓ Comprehensive, flexible lead opportunity tracking and management  
✓ Steps and processes are user-defined according to your workflow  
✓ Marketing list management  
✓ Microsoft Office integration, including emailing via Outlook and merging with Word templates  
✓ Acts as a sales dashboard for next actions and follow-ups complete with task scheduling |
|-----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inventory Management                                 | ✓ Multiple warehouses  
✓ Handles serialized inventory  
✓ Multiple units of measure  
✓ Flexible multiple pricing models - product and customer driven  
✓ Automated reorder management - multiple methods to determine order levels and quantities with auto creation of purchase orders  
✓ ‘Available to Promise’ to display future quantity availability based on currently recorded open purchases and sales  
✓ Inventory configurator – flexible and easy to use – available from sales order, quote and purchase order screens  
✓ Easy setup of bills of material for use as kits or assembled products  
✓ Inventory counts – full and cycle counts |
| Order Entry/Invoicing                               | ✓ Powerful order entry includes backorder processing  
✓ Flexible product lookups by class, description and other attributes, with ability to quickly add multiple items to an order  
✓ Ability to reverse posted invoices and reinstate as sales orders – with complete audit trail  
✓ Credit check and credit hold rules with ability to record payments and apply credits from within the sales order  
✓ Recurring sales orders  
✓ Create purchase orders linked to sales order with optional drop ship functionality  
✓ Multiple shipments/invoices per order with backorder management  
✓ Flexibility in display of items on sales orders and associated documents  
✓ Crystal Reports option for invoice allowing full end-user customization of printed invoice with multiple language support  
✓ Sales Analysis – flexible sales reporting  
✓ Unlimited customer contract pricing and discount rules (price lists)  
✓ All pertinent information about customers and products is available directly from the sales order screen |
| Pricing Rules | ✓ Contract pricing — specify prices by product/customer with contract expiry dates  
| | □ Multiple contracts / price lists per customer, with contract priority or “best price” options for each customer  
| | ✓ Volume discounts  
| | ✓ Define price matrices for automatic price discounts dependent on “categories” of customers  
| | ✓ Make global price changes across products by amount or percentage and for given ranges or categories of product  
| Workflow/Review Screens (Sales orders, Quotes, Purchase Orders, Production) | ✓ Single list access to all open sales orders or quotes etc.  
| | ✓ User-defined layout controls what is displayed, including the order it’s displayed in and what subsets of data to display  
| | ✓ Create multiple, task driven ‘views’ or ‘filters’ of the list that can be available to all users or just the individual, supporting workflow and segregation of duties for users  
| | ✓ Perform tasks based on selected orders such as print documents, update statuses or post  
| Purchase Orders | ✓ Default pricing from vendor records or last purchase (optional)  
| | ✓ Track job costing at the detail level on purchase orders  
| | ✓ Print, fax or email purchase orders  
| | ✓ Handles backorders – over or under receive  
| | ✓ Receive purchase orders with or without supplier’s invoice  
| | ✓ Linked sales orders with backorders are automatically updated by received POs  
| Purchase Order Returns | ✓ Records/reserves items to be returned and removes them from available inventory  
| | ✓ Track vendor RMA numbers  
| | ✓ Print picking and packing documents  
| | ✓ Record restocking charges  
| | ✓ On shipping, reduce inventory and record accounting transactions  
| | ✓ Create accounts payable credits  
| Job/Project Costings | ✓ Integrates with sales orders, purchase orders, accounts receivable and payable, etc.  
| | ✓ Create estimates and track changes via change orders  
| | ✓ Compare estimates with actual to date, report variances  
| | ✓ Job profit and loss, and detailed cost reports available  
| | ✓ Time card entry tracks employee costs directly to jobs and optionally integrates with Payroll solution  
| | ✓ Allocate inventory (and related costs) directly to a job as used |
| Bill of Materials/Production Control | ✓ Production control supports assembly and build to specification production  
✓ Track “soft costs” such as labor and overhead  
✓ 3 step assembly process, which can optionally be run as a single step for “after the fact” recording  
✓ Print work order document for production department  
✓ Tracks and posts work in progress (WIP)  
✓ Automated production from sales order for made-to-order assemblies |
| Return Merchandise Authorization (RMA) | ✓ Track expected product returns from customers  
✓ Issue RMA number to receive against  
✓ Handles serialized and lot tracked items  
✓ Return to stock, or scrap  
✓ Handles re-stocking charges |
| Reporting and Analytics | ✓ Ability to create a report based on data within the system which can then be updated on an automatic basis for real-time insight into business health  
✓ Used for automatic emailing of invoices, order confirmations and many other documents and reports  
✓ Reports may be sent to external recipients (such as customers) or internal recipients (such as salespeople) |
| Remote System Access/Remote Sales Rep (Order Entry) | ✓ Access the system anywhere in the world via an internet connection  
✓ Take orders in the field or at tradeshows, online or offline, with RepZio, a sales app for remote sales reps, tradeshows and showrooms  
✓ B2B customers and/or sales reps can place orders with our online order portal  
☐ More information on our ordering portal is available further down the list.  
✓ Both components are completely integrated in real-time with Blue Link’s back-end ERP |
| Commission Processing | ✓ Commission split and basic reporting |
| Advanced Commission Processing (Optional Component) | ✓ Optional Component: Advanced Commission Processing  
✓ 4-way commission splits per order  
✓ Commission schedules allow granular definition of percentage paid – depending on both salesperson and products sold  
✓ Commission Payment Processing Screen calculates commissions to be paid, generates accounts payable transactions automatically  
✓ Holdbacks can be retained, and paid out at a later date  
✓ Handles adjustments plus delay / accelerate commission payments  
✓ Support for “effective dates” for commission percentage elements  
✓ Split timing between invoiced and paid  
✓ Optionally restrict salespeople to their own accounts |
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| **Barcode Scanning**            | ✓ Out of the box, Blue Link allows for barcode scanning and barcode printing  
✓ Use verification scanning when packing product ready to be shipped  |
| **Wireless Handheld Scanner Barcode Integration for Mobile Picking (Optional Component)** | ✓ Dedicated wireless barcode scanning solution for:  
☐ Inventory look-ups  
☐ Picking and packing  
☐ Receiving inventory  
✓ The solution is available as an iOS app for use on iPhones/iPods/iPads  
✓ Wireless handheld picking of sales order  
✓ Wireless PO receipt and wireless put-away  
✓ Perform inventory inquiry and updating of inventory locations for lot tracked items  
✓ Perform inventory counts |
| **Lot Tracking (Traceability)/Costing (Optional Component)** | ✓ Full lifecycle lot tracking (from purchase through inventory to sales history)  
✓ Tracks internal and external lot numbers  
✓ Auto or manual lot number assignment  
✓ Optionally use lot (specific) costing  
✓ Tracks expiry and best before dates to help prevent obsolete inventory  
✓ “Where used” reports facilitate product recalls and health alerts  
✓ Assists with regulatory requirements such as FDA / ISO / CIFA |
| **Advanced Landed Cost Tracking – Accruals (Optional Component)** | ✓ Define expected landed costs on purchase orders and factor these into inventory costs – for accurate product costing  
✓ Ability to specify default landed cost factors by product  
✓ Ability to apply each landed cost factor to each line on a purchase order using one of several pro-rated methods - or enter individually  
✓ Ability to reassign landed cost components to different vendors after receipt of purchase orders  
✓ Complete sub-ledger system – reconciles with General Ledger control accounts, with variance reporting  
✓ On-screen lookups and drill down to landed cost details from inventory screen  
✓ Drill down to landed cost details from Purchase Order History |
| **Product (Color/Size) Matrix (Optional Component)** | ✓ Originally for apparel industry, useful for any industry that has a base product that varies in one or two elements  
✓ Simplified creation of inventory items for the related group  
✓ Table-view quantity selection for matrix products on purchasing and quotes/sales  
✓ Product availability views as a group  
✓ Products also available through non-matrix/standard purchasing and sales |
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| **Electronic Document Management** (Optional Component) | ✓ Store and index electronic documents for easy retrieval  
✓ Link or view documents from within Blue Link related to a field and instantly get a list of documents associated with that field  
✓ Zoom, rotate, annotate and redact documents  
✓ Automatically index documents for quick storage and data population |
| **Tablet App for Sales Reps and Tradeshows** (Optional Component) | ✓ Take orders in the field or at tradeshows, online or offline, with **RepZio**, a sales application for remote sales reps, tradeshows and showrooms  
✓ Completely integrated in real-time with Blue Link’s back-end ERP |
| **Sales Order Accruals** (Optional Component) | ✓ Define anticipated selling costs with defaults  
✓ Attach selling costs (estimates / actual) to sales order  
✓ Costs may be factored into profitability and commission calculations  
✓ Ability to reassign sales accruals to different vendors after invoicing  
✓ Complete sub-ledger system – reconciles with General Ledger control accounts, with variance reporting |
| **Inter-Warehouse and Inter-Company Inventory Transfer** (Optional Component) | ✓ Automates transfers between locations within the same company  
✓ If the inter-company feature has been enabled, then this screen will also allow for transfers between companies  
✓ Transfers of serialized and lot tracked items between locations  
✓ Tracks items in transit between locations  
✓ Prints picking / packing slips for transfer |
| **Warehouse Shipping** (Optional Component) | ✓ This component allows a warehouse employee to select an order to ship, enter shipment details, print the documents required to accompany the order, and mark the order as shipped  
✓ Based on rules defined in the system, the act of “shipping” the order may also result in an invoice being printed (that could accompany the shipment), and even posted  
✓ Use this screen to:  
  - Enter ship quantities  
  - Record serial numbers  
  - Print Picking Slips, Packing Slips, and Invoices (based on security)  
  - Mark the order as “shipped” |
| **Warehouse Management Lite** (Optional Component) | ✓ Advanced WMS functionality  
✓ Empty bin and shelf availability – system will show available locations in the warehouse to add SKUs when receiving product based on what space is empty  
✓ Integration with barcode scanning devices  
✓ Ability to set up stocking and non-stocking locations to show the true count of inventory available in the warehouse – product will show as available or already allocated to an existing order  
✓ Stocking location priorities and ratings for more efficient picking  
✓ Movement tracking of product within the warehouse  
✓ Cross docking – ability to receive and ship product without putting it away |
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| **Backorder Management (Optional Component)** | ✓ Comprehensive component for filling backorders, based on rules that can be user-configured  
✓ Preview allocations based on your defined rules - user can edit before updating the actual orders  
✓ Backorders may be filled based on requested ship date  
✓ Optionally exclude (or include) orders on credit hold  
✓ Additional factors that may be specified include:  
  - “Ready” Orders  
  - Fill priority  
  - Ship Complete  
✓ Automatically print picking/packing slips for orders filled (optional) |
| **Transformational Purchase Orders (Optional Component)** | ✓ Enables the transformation of one existing inventory item, through the use of a third party Vendor, into one or more different items  
✓ Transformed items have the cost of both the original root product as well as the incremental processing cost of the 3rd Party Vendor  
✓ In multi-step transformations using multiple Vendors, new purchase orders and drop ship information can be automatically created  
✓ Payables for the incremental costs are created automatically  
✓ Transformation PO can be used to tear apart assembled inventory |
| **Sales Budgets/Estimates (Optional Component)** | ✓ Create sales budgets/estimates by Customer/Product/Salesperson  
✓ Record separate budgets by fiscal or calendar year, broken down into periods within the year  
✓ Maintain multiple years of estimates concurrently  
✓ Track current and prior historical estimates for each period  
✓ Compare actual to current or prior estimates for the period(s)  
✓ Organize data by Customer, Product, Categories or Classes |
| **Online Order Portal (Optional Component)** | ✓ Online order portal for use by B2B customers and/or sales reps  
✓ Online product and price lookups (uses customer-specific pricing)  
✓ B2B customers can place orders online  
✓ Online order status tracking  
✓ Salespeople can sign in to place orders, view inventory, check pricing etc. for their customers  
✓ Multiple language support  
✓ User-definable text, screen colors, images, buttons and labels  
✓ Language specific product images and descriptions  
✓ Configured from within the user interface, no HTML required  
✓ Completely integrated in real-time with Blue Link’s back-end ERP (inventory, orders, shipments and payments) |
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| **B2C eCommerce Integration - Web Services** (Optional Component) | ✓ Facilitates complete two-way integration with B2C eCommerce webstores  
✓ Up-to-minute live updates between Blue Link and the webstore (inventory, orders, shipments, and payments)  
✓ Includes pack-to-container allowing you to identify what products were placed into which containers for tracking purposes  
✓ Links to 3rd party sites (such as Purolator) to enable shipment tracking  
✓ Two-way integration requires implementation of web services on the eCommerce webstore |
| **Point of Sale** (Optional Component) | ✓ **Point of Sale Component** integrates with Blue Link ERP accounting data  
✓ Access to Inventory, Customers, and Pricing  
✓ Supports payments in multiple currencies including split currency payments  
✓ Supports split payments between types of payment (cash, credit cards, and others)  
✓ Supports the use of gift cards  
✓ Supports payment on account  
✓ Operates standard cash drawers, bar code scanners  
✓ Print to full page invoices or narrow column receipt printers  
✓ Configurable manager override options  
✓ Works offline |
| **Credit Card Processing Gateway** (Optional Component) | ✓ Automates processing of credit cards from within Blue Link ERP  
✓ Generates credit card charge and returns the authorization number  
✓ Handles pre-authorizations  
✓ Requires 3rd party software |
| **Credit Card Data Vault** (Optional Component) | ✓ Useful when customers pay with the same credit card multiple times  
✓ Credit card information is stored in a triple-encrypted separate database  
✓ This component will assist with PCI compliance |
| **EDI** (Optional Component) | ✓ Part of the functionality offered by Blue Link's webservices API  
✓ Facilitates integration with EDI translation services  
✓ Imports and exports EDI transactions between Blue Link and approved EDI service providers |
| **Service Manager** (Optional Component) | ✓ Tracks service orders – ideal for in-shop service and repairs  
✓ Track multiple service requests per order  
✓ Assign service requests against specific equipment items  
✓ Track parts and labor against service requests |
| **Scheduling for Service and Sales** (Optional Component) | ✓ Schedule service technician appointments with the Service Component  
✓ Schedule sales meetings with the Lead Opportunity component  
✓ Allows you to create schedule groups (e.g., sales, technicians)  
✓ Allows you to send meeting notification to customers  
✓ Optionally integrates with Outlook/Exchange to sync calendars (requires 3rd party software) |
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| **US Sales Tax Integration Component (Optional Component)** | ✓ For US sales taxes only  
✓ Performs an online tax check and updates the applicable taxes on sales orders  
✓ Requires 3rd party software  
✓ Based on Zip Code (Zip2Tax) or based on address and product category (Avalara) |
| **Electronic Funds Transfer (Optional Component)** | ✓ Ability to process payment runs electronically  
✓ Creates a payment file for transmission to your bank  
✓ Ask for details on supported banks |
| **Pharmaceutical Distributor Component (Optional Component)** | ✓ Sophisticated product tracking and management functionality to help meet industry standards/regulations  
✓ DEA features allows users to identify the type of license, state, license number and expiry for each customer  
✓ Transaction history management enables users to enter information about a specific drug’s route from the manufacturer to your company, in addition to automatic printing and emailing of transaction documents (T3)  
✓ Scheduling features allow users to keep track of which customers received specific groups of products and when they were received  
✓ Aids in DSCSA and FDA Compliance  
✓ Classification capabilities enables users to restrict the type and quantity of controlled drugs that can be sold to specific customers  
☐ **Note:** Lot tracking component must be present for Pharmaceutical Distributor Component to function |
| **Controlled Substance Ordering System – CSOS (Optional Component)** | ✓ [CSOS](#) is built into Blue Link’s Online Order Portal for distribution businesses in order to allow pharmacies and other customers to place orders online for Schedule II drugs  
✓ Certified by the DEA  
✓ Functionality is based on regulations that allow CII items to be ordered electronically, assuming certain criteria have been met  
✓ Eliminates the need for customers to complete and mail/courier DEA Form 222  
✓ Eliminates the need for customers to submit separate sales orders for C2 and “other” products  
✓ Ability for supplier to submit mandatory CSOS Reports every 48 hours  
☐ **Note:** CSOS can only be used with Blue Link’s Online Order Portal component and as part of the hosted (SaaS) environment |