Spire Features BusinessVision Users Will Love

Navigation

List Views	Data is presented as a list in grid fashion so all records for that module can be seen at once. Columns can be moved and sorted in any order, which facilitates maintaining, understanding and updating the data.
Filters	Filters can be used to analyze data right on screen and can be saved for future reference. Examples include: sales orders that are shipped and are ready to be invoiced, customers with accounts receivable over 90 days that need to be contacted, or inventory items where the suggested order quantity is greater than 0 and they need to be purchased.
Search	Information can be easily found based on single and multiple word searches and the entire module is scanned for the search. For example, a search in inventory returns information found in fields such as the item code, description, extended description, notes and vendor part number.
Multiple Windows	Modules can be opened in a new window, so that multiple modules can be open and available at the same time. For any information on a screen, the related module can be opened. For example, if you are entering a sales order, you can open the full inventory item to see everything about that item and even make edits. Also, multiple screens of the same module can be open, such as more than one sales order, customer or inventory item.
Complete Integration	Sales orders and purchase orders can be opened and maintained wherever they appear, such as in Customer, Vendor or Inventory. Likewise, Customers, Vendors or Inventory items can be opened and maintained wherever they appear, such as in Sales Orders, Sales History, Purchase Orders, Purchase History.
Reports and forms	All reports can be found in the related module. Also, the forms or reports to be printed are selected at print time, and do not have to be specified in advance. Multiple different reports and forms can be printed at once. All forms and reports can be emailed without having to manually pdf and save them first. For example, customer statements can be sent automatically to selected customers directly from the filtered or unfiltered accounts receivable list.
User Settings	List views for a User, of Customers or Inventory items can be restricted to show only those assigned to a particular Territory or Salesperson.

New or Expanded Modules

Requisitions	This module integrates purchasing requirements derived from inventory, sales orders and production orders. If an item is backordered on a sales order, it can be easily added to the requisition list; in Inventory, a 'suggested order quantity' field, which calculates quantities committed on customer sales orders, less those quantities already on issued purchase orders, less what's on hand, plus customer backorders plus re-order point (if specified), allows you to isolate items that need to be ordered and can be easily added to the requisition screen. Purchase Orders can then be easily created for items on the requisition list.
Price Matrix	Customer pricing can be set based on a wide range of variables, such as specific customer/inventory combinations, types of customers, inventory product codes, or territories. The module also supports multiple price points based on volume and date ranges. It also offers cost plus pricing and cumulative price breaks, and has the ability to push customer specific pricing to the matrix from an order or quote making it easy to setup Contract Pricing. When customer's are getting an automatic special price because of the Price Matrix setup, it appears in a different colour in the Sales Order so your staff know.
Communications – To do list	The Communications module can be used to create items for follow up that can be assigned to yourself or other people, enabling a light CRM system within Spire.
Communications - Alerts	Using the Communications module, 'Alerts' can be created that pop up a message regarding a specific customer, vendor, inventory item or employee whenever that information is relevant. For example, an alert could notify the user entering an order that the salesperson requires a copy of the order for that particular customer. Or, the user could be notified that an item is being discontinued so they can ask the customer if they want to buy the remaining stock.
Phases	Phases can track all activity for a sales order, purchase order or production order. For example, for a sales order, phases can track the date, time and user entering, authorizing, pricing, shipping and invoicing the order. Phases can be configured to create custom workflows, and can be used for reporting order fulfilment timeframes.
Labels	Labels, including bar codes, can be easily created for inventory, purchase orders and sales orders. The suggested quantity of labels is based on the number of items on the order, but can be set to 1 or amended as required.

General Features

Email templates	Any form or report can be emailed using a template, which is a user defined set of standard messages that can be edited as the email is being sent, and that includes data from the form, such as invoice number or invoice date. The email window makes all email addresses associated with that order, invoice, purchase order, etc. available to choose at time of sending.
Email Extra Attachments	Send extra attachments with any email. For example, when emailing a Quote you could also attach Product Specifications, a Company Profile or other documents.
Email History	Anything emailed from Spire is stored so that you can easily see what went and when. This is especially useful for tracking A/R Collections activity but has many other uses. Easily resend any previously sent email and its attachments.
User Defined Fields	Create new fields in any of the modules. Fields that are meaningful to you and your business. For example, create a field on Inventory items called ‘Seasonality’ and make it a drop-down, i.e. Summer, Winter, All. Adding drop-downs ensures your staff are adhering to a standard answer. Use that field to give you a filtered list of all your Summer items and print a report, or just work with the items in the list view. Or create a field for Employees to indicate their Last WHMIS Certification Date or other key Employee/HR information. The possibilities are endless!
Export	Data can be exported easily to Excel from all module~~s~~ lists, filtered or unfiltered; all data on screen exports in the same column and row format as what is on the screen. Excel can automatically be opened from within Spire once the export is complete.
Web Browser Modules	If you choose, you can have additional web browser views of some of your Spire data, making it accessible on other devices like Mac’s, tablets, cell phones, even your web enabled car! Imagine taking a tablet into a customer’s site and entering their order while you’re with them. Or, if you have technicians on the road, stopping in at Home Depot or Canadian Tire to purchase parts, they can create a PO right on the fly. There are web browser views and functions for Sales Orders, Sales History, Purchase Orders, Customers and Vendors.
Languages	Spire can be run in English, French or Spanish!
Unlimited Contacts	Store and unlimited number of contacts on Customers, Vendors, Employees.
Reprint Bank Reconciliations	Ability to reprint bank reconciliations, even after they’ve been posted!

Customer and Inventory Related Features

Mass Edit	Available in Customer and Inventory, this allows a group of items to be edited at once, such as the sales rep for specific customers, or reassigning inventory items to new product codes.
Colours in Customer, Inventory and Sales Orders	Customers, inventory and types of sales orders can be assigned different foreground and background colours, making it easy to highlight information such as important customers or discounted inventory. Different order types can be visually distinguished. For example, quotes could be one colour, sales orders another, standing orders another.
Customer, Vendor and Inventory Code Change	Customer codes, Vendor codes and Inventory Part Numbers can be amended where changes are required to reflect revised part numbers or customers/vendors whose names have changed. The function updates all files affected, such as open orders, sales history and purchase history, etc.
Inventory Adjustments and Transfers	Inventory adjustments and transfers can be done in a batch, not just one item at a time. This is very useful for transferring goods between warehouses and for physical inventory counts. The transfers are stored in Purchase History for future reference or analysis.
Inventory Components	Inventory components (BOMs) can be created for any manufactured or kitted item, which can be built even without the Production Manager.
Lot Tracking	Ability to track lots from purchasing through manufacturing through sales. Excellent feature to aid in recalls.
Customer Mail Merge	A Word mail merge is available in the Customer module to send marketing and other materials to a specific set of customers, possibly isolated using custom filters (discussed above).
Customer Pre-Authorized Debit	Customer pre-authorized debits can be exported and submitted to the bank, significantly improving the collection process.
Inventory Landed Costs	Default landed cost % can be established by item. Landed cost % can be disbursed by each item's weight on a PO receipt.
Last Sale Date/Last Receipt Date in Inventory List	Filter/sort by/view Last Sale Date or Last Receipt Date in your inventory list.
Create Sales Order from Customer or Inventory Item	If you're looking up an inventory item for a customer that has called in and they tell you to go ahead and send them one, you can start a new order right from that item and it will put that item on the order for you automatically. Similarly,

	if you're on the customer screen, you can start an order from there and it will automatically pick that customer on the order. Speedy data entry perks!!
Inventory Movement View	View a list of every single transaction an inventory item has had and sort in any way you like. This helps you see all the In's and Out's in one simple list.
Freight in Inventory Transfers	Account for freight expenses when transferring from one of your warehouses to another.
Drop Ship	Easy Drop Ship of Purchase Orders directly to your customers.

Sales Order Related Features

Customer History View in Sales Order	A customer's sales history can be viewed from within a sales order. What a great sales tool! The sales history can be quickly filtered for the items already on the order, enabling the view of what the customer paid in the past. When the filter is turned off, all other items that the customer has previously purchased are visible with the ability to add items into the order with a single click This is a great tool for customer service to make sure the customer is maximizing their order.
Desired Margin Visual Aid	Once the desired margin by product code is established, the margin will turn red on each line item that falls below that desired margin in sales orders, alerting order entry staff to pricing issues.
Scanning capability	Fill Order tab in Sales Orders and Receive Order tab in Purchases are designed to work with bar codes for scanning of items to improve order and receiving accuracy and efficiency.
Cumulative Discounts	Discounts can be offered based on a minimum quantity of items purchased over multiple items matching a certain criteria (ie Product Code). For example, buy any 10 of one *type* of item, and get 10% off.
Sales History Edit	Non-financial information on an invoice can be edited in Sales History, such as customer PO number, salesperson, territory, or item description. User Settings determine which users have the capability to do this.
Freight Tracking Hyperlinks	Include a Freight Tracking hyperlink when you email your customer their Invoice or other document. A+ for customer service!
Sales Order Job Headers	Headings/sections can be created in the sales order line detail section to better organize items, such as between services and parts. With report / form customization, these can be sub-totalled if desired. Or, maybe you want to split

	up an invoice by location, room in a house, different piece of equipment. The possibilities are endless.
User Selectable Kits	Components for a kitted inventory item can be specified; when that item is added to an order, the system can prompt to ask which items should be included in that order. This can be used for size/colour inventory, or where different components can be substituted in regularly.
Job Costing by Invoice Detail	Job Costing can be done on a line-by-line basis on a sales order or purchase order.
Automated Repeat Orders	Sales Orders can be set to repeat at specified intervals, where, when due, they are automatically created as new orders awaiting processing. Great for regularly recurring customer orders, even if they change slightly each time.
Sortable Detail Lines	If activated, a line # column in the detail section allows the user to see how many items have been entered on an order. Detail lines can also be sorted by Location for printing of the Pick Slip, then re-sorted back to line # order, or the order items were originally entered, before printing the packing slip or invoice. The printed forms can be customized to print in whatever order you like as well.
Incoterms	If you know what Incoterms are, and you know you need them, we got 'em.
Quote Expiry Date	Enter an Expiry Date on your quotes so that your salespeople can easily stay on top of current opportunities. Sales Managers will love it too!

Accounts Payable

Cheque attachment	If the number of detail items on a cheque surpasses the setting established in Company Settings, Spire prompts to print attachment, which gives the user time to take out cheques and put in plain paper, thereby not wasting a cheque form.

Accounts Receivable

Customize Aging Report	Customizing the aging days in Company Settings > Accounts Receivable results in the aging report printing with the same structure…no report customizations necessary.
Refund Customers with a Cheque	Easily print a cheque to refund a customer with a credit balance.

See Customer A/R Balance from Sales Order	While your staff are taking orders, or entering quotes, they will have immediate visible access to the customer's current balance and a visual indicator if they are overdue or over their credit limit. Don't waste a salesperson's time again, assisting a customer that hasn't taken care of their account balance. Maybe they can collect the outstanding amount right then and there to move on and help the customer.

Payroll

Unlimited Pay Types	Add custom pay types such as Stat Pay and any other Earning Codes you want.
Track Key Dates	Add communications to employees that will show up on your Spire calendar as reminders on key dates, i.e. Review Dates, Certification Expiry Dates, etc.
Source Deduction Remittance Tool	Easily remit your Source Deductions with this handy tool. All the work is practically done for you!

Add-ons

Production Orders	The Production Orders module is used by manufacturers to efficiently plan and execute production. Production Orders specify the quantity, components, and timing of goods to be produced, and utilize Templates, or Bills of Materials, which can have multiple versions to allow for customization. Raw materials are committed to production, enabling proper management of inventory purchasing. Both the Requisition and Phase modules are fully integrated into Production Orders.
Service Orders	This module is used by companies that need to track equipment, such as a garage that services cars, or an HVAC company servicing homes or business, etc. All sales and purchases are tracked against specific pieces of equipment; data such as odometer readings are recorded with each transaction. Some field names are customizable to match the type of equipment being tracked; an odometer reading could be changed to number of copies for example. If the piece of equipment gets sold, you can move it to the new customer in Spire and still maintain all the historical service records providing great customer service!
Integrated Debit/Credit Card machines	Utilize one of the payment processors that integrates with Spire to tie your Debit/Credit card machines, or your 'card not present' activity directly into Spire.

EDI	Utilize Electronic Data Interchange (EDI) for those customers or vendors that require it.
Automated Email	We have many clients that are using automated emails in really meaningful ways. It's really a game changer. Check out our blog post Automations can help your business! (edgeims.com) Don't miss out on this invaluable tool!

Technical Considerations

Database	Spire uses PostgreSQL, a more modern, more powerful database engine than BusinessVision's Pervasive database.
API	Spire has a comprehensive Advanced Program Interface (API), which allows third party developers to easily read from and update Spire. Software developers can seamlessly integrate e-commerce, warehousing, financial reporting and other custom programs.
Scalability	Users can be added one at a time, not in groups of 5 or 10. There is no change in technology as a company grows from one user to an unlimited number of users.
Security and Backup	Spire data is more secure than BusinessVision's because it resides in a proper database that is password protected. Backups are fast and can be taken even if users are logged in.