

Vulcan Software LLC

Apex 23.1 & Apex Build

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Introducing Apex 23.1

Welcome to Apex 23.1! Although Apex has been self-updating since version 20.1, there are some things that cannot be self-updated. For example, Apex cannot make changes to the database structure while it is in use with multiple people accessing the program.

The upgrade to Apex 23.1 includes over 50 database changes. Some are used right away in Apex 23.1, while others will be used in upcoming features introduced over the next year.

One of the first things you will notice are longer item descriptions! Items are becoming more and more complex, and we can really use the extra space to describe them. This is especially true for those of you that also do plumbing and mechanical work.

Since most of you are also using Apex Web I am including its new features in this document.

The first thing you need to know is that it has been renamed "Apex Build". Calling it "Apex Web" was too confusing, especially for new users, since it implied that it was the Apex desktop program but in a web browser.

As you know, it is a tool for remote users where they can enter requisitions, releases, receiving, and inquire about their purchases.

We hope you enjoy the new Apex 23.1 and Apex Build features. As always, we welcome your feedback.



Future Apex Updates

You may be holding in your hand the last printed Apex release announcement. I like the format of having a printed document that you can keep on your desk while you are learning the new features. Frankly, I also really enjoy making them.

The problem is that they are not very efficient. Now that Apex is self-updating, I can iterate the program updates much more

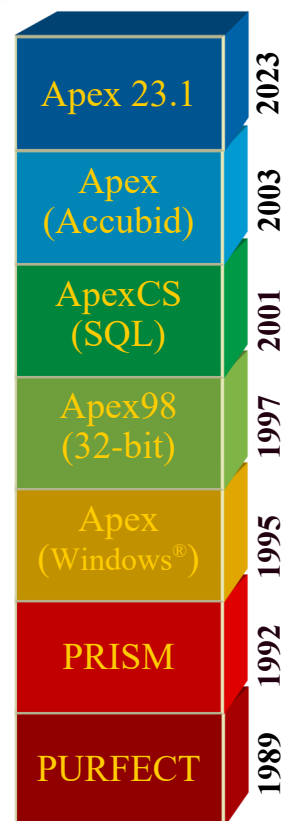
quickly. Instead of having a big new release every year or so, I can add features throughout the year.

They key to doing this is to make sure that you are appraised of the new features. I have always posted the new features on the support web site's "What's New" page.

Apex will tell you that there is an update to the program and install the update, but then it was up to you to go to the web site.

In the future I am going to move to a digital distribution. The release announcements will be emailed to you. I don't want to "spam" anyone, though, so I will only send these emails to people that have signed up on the support web site support.apexpurchasing.com.

Please make sure that you, or at least someone in your company, is signed up to receive these announcements!



Item Descriptions and Notes

Decades ago we adopted a 35-character item description. This was based upon Trade Service's description size. On top of that, we added an "Extended Description" that was 75 characters. The reasoning behind the extended description size was that we didn't want the lines on a P/O to be spaced too far apart so that a line could be missed.

Disc space at that time was expensive and PCs were not as powerful. As we went from tens of thousands of items to over 2 million items we needed to make sure that you could affordably handle that volume of data.

Fast forward to now, and those don't seem to be legitimate concerns any longer. I don't think the distributors are going to miss lines, especially with the ability to digitally transmit the orders straight to them. I analyzed hundreds of thousands of item descriptions, and the sweet spot seemed to be 60 characters. The extended description (now called "Item Notes") has a new size of 2,000 characters. This should give you a lot more flexibility when describing items.

Please remember that the item description will be used for things like the Consolidated Material report. You will want the item descriptions to be succinct so that they will consolidate properly. Additional item notes can then be put in the much longer *Item Note* field where you can enter any clarifications and specifications (i.e.

fixture ballasts, wire colors, etc.)

The business-to-business system has also been revamped to pass along the longer descriptions from the distributors.

Your P/O forms do not need to be changed for these longer field sizes. They will automatically adapt and word-wrap as needed.

Tabbing using the Enter Key

When the P/O line Notes field is open the enter key can be used to enter multiple paragraphs, just like when you are maintaining the P/O messages. However, if you are used to using the Enter key to tab between fields, you can now set this in the P/O Maintenance Options.

* Description	Notes	Qty Ord
MIL 48-22-8731 DEMOLITION GLO	Milwaukee Demolition Work Gloves ...	1
MIL 48-22-8901 DIPPED GLV MED	CUT 1 NITRILE GLOVES - M	2
IDEAL 30-341 TAN TW WIRE NUT-100BX	IDEAL, Wire Connector, Twister, Cond ...	100

Description	Notes
CONDUIT 1-1/4_90DEG_EMT 1-1/4 EMT 9	Your # 114E9
CONDUIT 1-1/4_45DEG_EMT 1-1/4 EMT 4	Your # 114E4
CONDUIT 1-1/4-22-1/2DEG- 1-1/4 EMT	Your # 114E22
P&S CR20-GRY 20A 5-20R DPLX RCPT	
P&S 2097-TRGRY SELFT-TEST GFCI RCPT	
WIC_MCHVST 12/4 SOL BRN ORG YEL GRY 250C AFC 1706842T01 HV	250 FOOT COILSONLY NO CUTTING
BRDGPOR 630-DC2 3/8 DPLX BX CONN	
MILB A8112 4-IN HD INTERCHANGEABLE	
SEPCO LB4CA 11/4 ALUM LB COMBO CONDUIT BODY W/COVER AND GASK	Your # 114ELB
SEPCO LR4CA 11/4 ALUM LR COMBO CONDUIT BODY W/COVER AND GASK	

Purchase Order Maintenance

Order | Material Search | Messages | Properties | Options

Tailoring

- Automatically add vendor and job messages without asking
- Select cost codes from a list
- Fit P/O line columns to the screen width
- Show only active jobs in the Ship-To Name list
- Automatically address emails to the vendor
- Automatically address emails to the contact

Pressing [Enter] in the Item Notes field should Move to the next field

Default new P/O date required to today's date plus days

Default Buyer:

Default Via:

Default FOB:

Default Terms:

Tip: DB Items now have Item Notes. Any notes that you enter into the DB Item will be carried over to the Purchase Order when the item is used.



Things you might have missed...

There were 23 auto-updates to Apex in the last couple years. Unfortunately, unless you went to the apexpurchasing.com web site and looked at “What’s New” you might have missed some of them.

There were many features, like:

- Expanding the Comparative Pricing Analysis to be able to handle 2,999 lines (up from 99).
- Support for very high-resolution screens like Surface laptops,
- Negative prices no longer being allowed since it is more logical to use negative quantities.

- Excel exports being formatted for data rather than appearance, making them much easier to manipulate.
- Dramatic enhancements to what can be printed on your P/O forms.

The “What’s New” list goes on and on, detailing 61 more items.

That means that you might have missed some of the important stuff, like the ability to automatically fill in vendor and contact email addresses to outgoing Apex emails. This is why we are moving to a digital notification format for updates.

Please let me know if you have any questions!

Tailoring

- Automatically add vendor and job messages without asking
- Select cost codes from a list
- Fit P/O line columns to the screen width
- Show only active jobs in the Ship-To Name list
- Automatically address emails to the vendor
- Automatically address emails to the contact

Pressing [Enter] in the Item Notes field should

Default new P/O date required to today's date plus days

Default Buyer:

Default Via:

Default FOB:

Default Terms:

Buyers

Rather than just entering the buyer’s initials in P/O Maintenance, Apex 23.1 has a buyer information table where you can identify your buyers with their initials (now called the “Buyer ID”), name, email, and phone.

ID	Buyer Name	Buyer Email	Buyer Phone
AV	Alexandre Von	AlexandreVon_Simonis@apexpurchasing.com	(672)416-9165
JG	Janick Gerhold	JanickGerhold29@apexpurchasing.com	(263)094-5330
LM	Lonie Mills	LonieMills.Zieme@apexpurchasing.com	(716)120-9921

Tip: Apex 23.2 will allow you to print the buyer information on your purchase orders, and restrict entry to buyers in the buyer table if desired.

Apex License Display

A new license system has been introduced that implements one of the most commonly requested feature: Who is in Apex? The Apex License Manager can now answer that question.

If you are using Apex Advanced

Security the licensing system has been enhanced so that if a user is disconnected and logs back into Apex they are granted the same license they had before. Previous versions of Apex would take a new license and over time you would have to reset your licenses.

User Name	Login Time	WinUser	WinComputer
MIKE	11/21/2022 8:06:05 AM	mwegman	MWEGMAN
btt	11/21/2022 8:14:54 AM	bturner	BTURNER
KEVIN	11/21/2022 8:21:38 AM	kschwieterman	KSWREET
SL	11/21/2022 8:31:44 AM	sliberati	SMCDADE
SHEREE	11/21/2022 9:35:11 AM	sbarton	SBARTON10
RB	11/21/2022 1:01:30 PM	rbramer	RBRAMER10
sa	11/21/2022 3:33:07 PM	pkramer	SVRAPPSCINTI
JR	11/21/2022 3:37:07 PM	jrwilliams	JRWILLIAMS

Grid Print Close

P/O Maintenance Company Catalog Search

One thing we have never been able to do is search the company catalog when entering items. We go from “If you know a quick code you can enter it”, to “If you want to search for something here are your 2.2 million items to choose from...”. This release narrows that gap.

When you are entering an item description, a new button pops up on the right of the column.

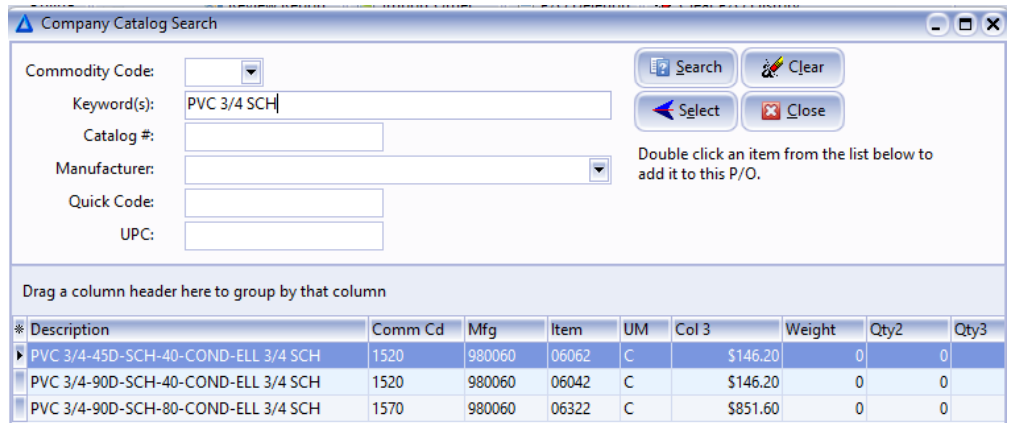
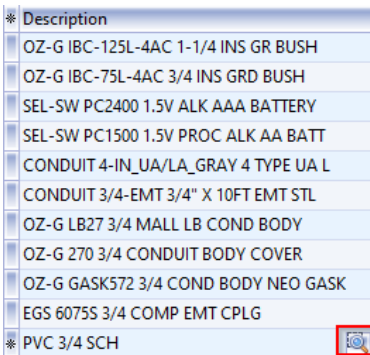
Clicking that button (or using the Ctrl-S shortcut key) takes you to a Company Catalog Search screen, with the text you entered already filled in the keyword spot. You can also just click the button first without entering anything. That might be the quickest option if you want to search for something other than keywords. You have the full searching capability that you

have with the Material Search, but your results come from the Company Catalog, instead of the full DB Item database.

Double click an item from the list and it is added to the P/O!

I’m sure a lot of you with Apex experience know a bunch of quick codes and templates, but for new users this should be a big help. It is hard to tell what you are looking for when confronted with millions of items. Confining your search to the Company Catalog should be more manageable.

Tip: Enter only as much of the description as you need to narrow down your search results. This saves you time and ensures you will get search results.



Price Loading

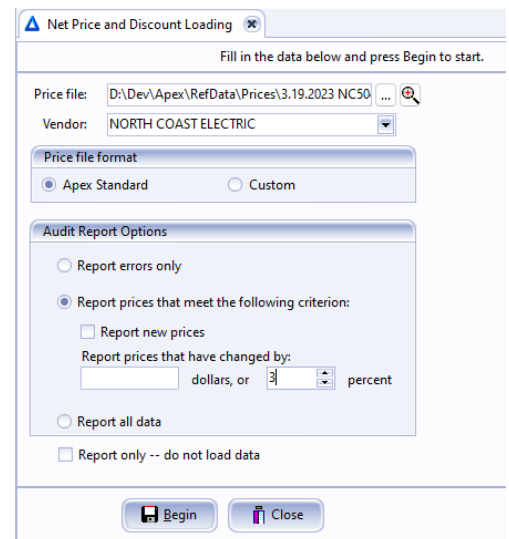
Price loading is now 7 to 12 times faster! This is especially important if you are trying to load prices over a slower network, like when you are working from home. The slower your network connection the more you will notice an improvement.

I am occasionally asked why we continue to load prices this way instead of using a pricing service, like TRA-SER SX. I would like to address this here. There are three reasons:

1. Loading prices from a file is much faster than loading them from the Internet.

2. The Audit Report can prove invaluable. In fact, you can choose to “Report Only” and not load your prices until you have a chance to review them before acceptance.
3. Prices from generic pricing services are often not your specific company prices. I had a distributor in the Boston area, for example, admit to me that the prices from pricing services are usually much more generic and are not curated for your company.

One Washington distributor is providing over 350,000 prices to Apex customers, so this should speed things up!



New Themes

I knew that 1 in 12 men have some degree of visual impairment, along with 1 in 200 women. What didn't connect right away is how many in the Apex community are effected.

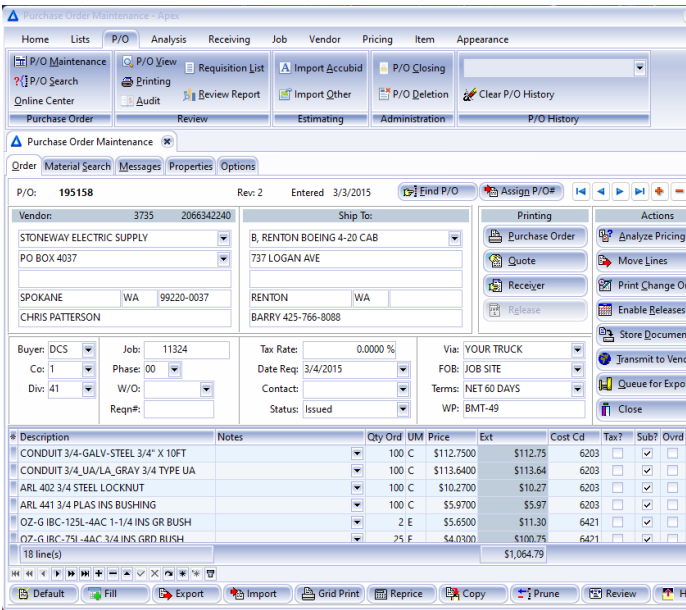
Apex users have mentioned to me that they really like the "Dark" theme — not just because it looks cool — but because it is so much easier for them to read. That's when a light went on for me and I decided to run with that ball.

Apex 23.1 introduces a new "High Contrast" theme. This theme provides the contrast that some users will find much easier to read.

The other two new themes are, well, more just for fun.

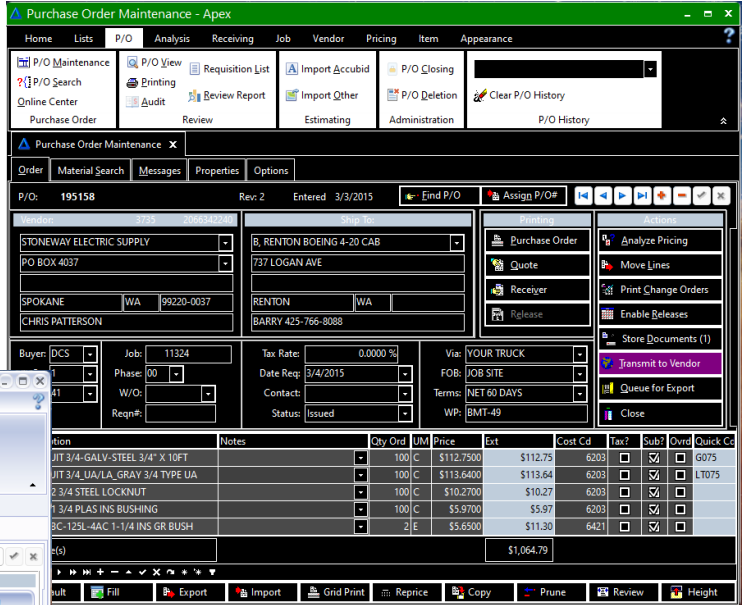
Apex 2023: I liked the gradient shading in the Dark theme, and the modern, rounded buttons from McApex. I also wanted something lighter. That's how the Apex 2023 theme was born.

Blueprint: You are in the construction business, so why shouldn't Apex look like a blueprint?

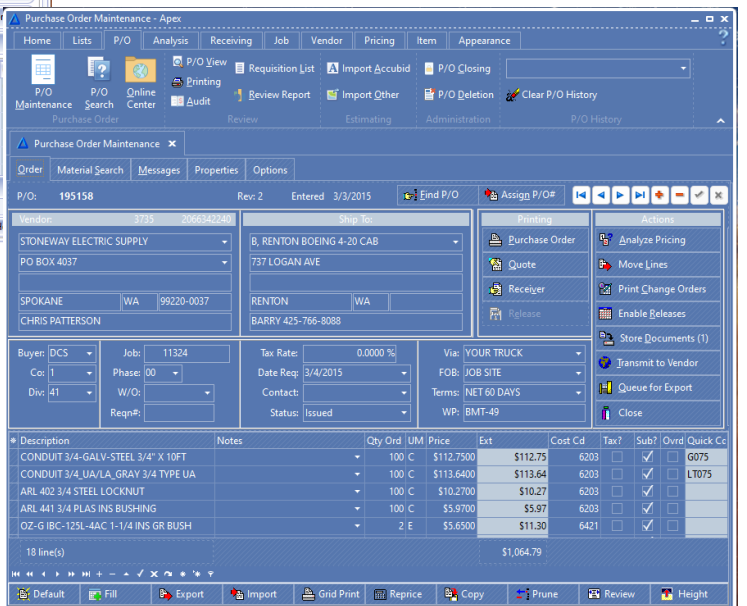


P/O Maintenance using the "Apex 2023" theme.

Tip: Changing themes is very fast, so don't hesitate to adjust Apex to your lighting conditions.



P/O Maintenance using the "High Contrast" theme.



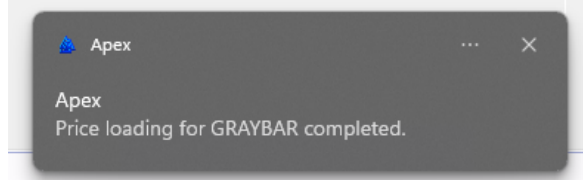
P/O Maintenance using the "Blueprint" theme.

Windows Notifications

Longer running processes, like Price Loading, will now notify you when they are complete using the Windows Notification service. These are the small pop windows that appear on the bottom right of your main screen.

If you have audio on your computer you will also hear a sound when the process completes.

Windows keeps a list of your notifications, so you can look back and confirm exactly what processes were run.



Apex processes that are currently set up for notifications are Price/Discount Copy, Price/Discount Deletion, Comparator Loading, DB Item Loading, P/O Closing, P/O Deletion, Price Loading, SQL Query, and TRA-SER Link.

P/O Line Fields

Previous versions of Apex would let you display some optional P/O Maintenance line item fields, such as Quantity Received.

Apex 23.1 expands those selections, allowing you to see ordered, received, released, and invoiced quantities and amounts. You can also display the “Un” versions (unreceived, unreleased, and uninvoiced quantities and amounts).

Unfortunately, until the Apex mind-reading module is complete, it will not be able to display your unordered quantities.

Job Budgets

Job budgets really took off in 2022, with requests to finally beef up the *Job Cost Code Maintenance* screen.

There were 3 enhancements:

1. Budget amounts are now entered as detail entries and not just one number. This allows you to see the budget changes over time. Your current budget amounts will be carried over into the detail with the description “Apex 23 Conversion”.
2. The Job Cost Code Maintenance screen was designed to make it easy to add occasional budget updates. If you have a “batch” of updates to do, you should use the new Batch Entry button. This takes you to a screen where you can just pound in cost codes and amounts, one after another. When you are done they are post-

ed to the main screen. You only have to enter the description of the batch once at the top of the screen and it is carried over into each budget detail entry.

3. Cost code descriptions are shown during data entry, and there are other efficiency improvements.

Remember that you don’t enter total budget amounts. Rather, you enter detail entries that, when added together, will total to your cost code budget amounts.

Cost Code budget amounts can be displayed in a variety of the Apex Analysis reports.

Be sure to use the *Batch Entry* button to enter a job’s initial budget entries. This is much easier than trying to add things one-at-a-time on the main budget screen.

Cost Code	Description	Budget
> 6000	MATERIALS	\$68,456.00
> 6002	CONCRETE/GRAVEL/FILL/SAND	\$40,000.00
> 6101	FEEDER CONDUIT UNDERGRND	\$23,320.00
> 6102	FEEDER CONDUIT UG MISC	\$781.00
> 6103	FEEDER CONDUIT	\$25,037.00
> 6104	FEEDER CONDUIT OVERHEAD	\$22,193.00
▼ 6105	FEEDER WIRE	\$112,119.99
Change Date Change Amount Description		
11/20/2022 1:55:13...	\$111,769.99	Apex 23 Conversion
11/20/2022 2:14:37...	\$250.00	Demo addition
11/20/2022 2:14:56...	\$100.00	Changes
> 6107	FEEDER WIRE OVER 600V	\$9,750.00
▼ 6108	FEEDER WIRE +600V MISC	\$1,878.00
Change Date Change Amount Description		
11/20/2022 1:55:13...	\$1,878.00	Apex 23 Conversion
> 6109	VAULTS & PULL BOXES	\$80,977.00

Description Synonyms

Apex Web’s “Abbreviations” are now called “Synonyms”, or more specifically “Description Synonyms”. This makes a lot more sense since you could put whole item descriptions in the abbreviation field, which clearly are not abbreviations.

The columns are now named “Search Word” for the grouping word, and the abbreviation is now titled “Synonym”.

The search word is validated to not contain blanks. This was always invalid and would not have worked correctly, but now that is enforced in the program.

If you need to make a correction to an entry you can edit it direct-

ly. You no longer have to delete and add the entry back again.

The synonym can be a word, a partial description, or even an entire item description.

This can make it much easier for your Apex Build users to find their items. If a job site wants to call a Steel City 820-D a “Battleship”, put it in your synonyms so they can find it!

Of course, you can use these same synonyms in Apex item searches as well.

It is much easier to maintain synonyms inside Apex than Apex Build (although Apex Build has also been updated).

The screenshot shows the 'Synonym Maintenance' window with a search box containing 'box' and 'Find' and 'Clear' buttons. Below the search box is a table with columns 'Search Word' and 'Synonym'. The table lists various synonyms for 'box', such as '1/2"', '820D', 'BATTLESHIP', 'BOX', 'BOXES', 'CLIP', 'COVER', 'DECORA', 'DECORATOR', 'DEPTH', 'DUPLEX', and 'FLOORBOX'. Each synonym is followed by a detailed description of the item it refers to.

Search Word	Synonym
1/2"	STL-CTY 58C6 HANDYBOX COVER 1/2 KO
820D	STL-CTY 820-D HOLD-IT BOX SUP-1PR
BATTLESHIP	STL-CTY 820-D HOLD-IT BOX SUP-1PR
BOX	BX
BOX	STL-CTY 58C4 COVER F/RCPT1-19/32DIA
BOX	STL-CTY 58C5 HANDYBOXCVR F/SGL RCPT
BOX	STL-CTY 58C6 HANDYBOX COVER 1/2 KO
BOX	STL-CTY 58C7 HANDYBOXCVR F/DPLXCPT
BOX	STL-CTY 59361-1/2 1-7/8D HANDYBTEXT
BOXES	BXS
CLIP	STL-CTY 820-D HOLD-IT BOX SUP-1PR
COVER	STL-CTY 58C5 HANDYBOXCVR F/SGL RCPT
COVER	STL-CTY 58C7 HANDYBOXCVR F/DPLXCPT
DECORA	STL-CTY 58C16 HANDYBOX COVER
DECORATOR	STL-CTY 58C16 HANDYBOX COVER
DEPTH	STL-CTY SBXC 7/8MAX ADJ SW BOX EXT
DUPLEX	STL-CTY 58C7 HANDYBOXCVR F/DPLXCPT
FLOORBOX	FLRBOX

P/O Problem Log

Apex 23 has a new way to capture information about problem P/Os. We’re going to start out easy, trying to find a good balance between the cost to capture problem information versus the value of the information itself.

On the P/O Maintenance screen’s Messages tab, you will see a new “P/O Problem” field.

Putting something in this field does two things. First, it obviously documents the problem or problems with this P/O. Second, it marks that P/O as having a problem logged.

You can search for P/Os with problems in the P/O Search screen. Make the Problem Logged column visible and you

can then sort, group, and filter it as usual.

The Analysis Cube is also able to display a count of problem purchase orders.

Please let me know how you would like to evolve this feature. We want to figure out what other information would be useful to you for problem tracking.

Many systems, for example, have places where you can enter quantities damaged in shipment, missing, backordered, etc. Does it take too much time to log that much detail with a potentially limited return for your efforts?

Your thoughts?

The screenshot shows a table titled 'Problem Logged' with columns for PO, Vendor Name, and Job Name. The table is filtered to show only 'Problem Logged : Yes' entries. The entries include PO 112474 (NORTH COAST ELECTRIC), PO 143907 (TELECT), PO 143910 (TELECT), PO 143913 (TELECT), and PO 195169 (GRAYBAR).

PO	Vendor Name	Job Name
112474	NORTH COAST ELECTRIC	RUSTON LANDING CONST. 1
143907	TELECT	T, PRE-JOB WORK
143910	TELECT	T, PRE-JOB WORK
143913	TELECT	T, PRE-JOB WORK
195169	GRAYBAR	RUSTON LANDING CONST. 3

The screenshot shows an Analysis Cube summary table with columns for Vendor Name, PO Count, and Problem Count. The table shows a grand total of 56 POs and 3 problem counts across all vendors.

Vendor Name	PO Count	Problem Count
COMMUNICATIONS SUPPLY COR	12	0
TELECT	44	3
Grand Total	56	3

“Dismiss” Acknowledgment

The button in the Online Center that was previously titled “Reject Acknowledgment” has been renamed “Dismiss Acknowledgment”. This is because “rejecting” an acknowledgment had an unnecessarily negative connotation.

For example, if the acknowledgment matches your existing order, there is no reason to “accept” it. That takes more time, and doesn’t update anything since the information was

the same in both documents. There are other reasons that you may want to just quickly dismiss an order.

Note that the distributor is not notified whether you accepted or dismissed an acknowledgment.

Terminal Servers

There is a new way for your IT department to deploy Apex. The self-updating version of Apex is now offered as a “.MSI” file, as well as the standard Setup program that we have traditionally used to install Apex.

This solves an important issue for those of you who work on a Terminal Server (Windows or Citrix). Previously, it was difficult for your IT department to set you up with a self-updating version of Apex in these environments. This could lead to important, missed updates.

I will have documentation specifically for your IT people about this.

TRA-SER Link

The new TRA-SER Link programming allows you to update your DB Item information from TRA-SER. You *do* need a TRA-SER account to do this, but you *don't* need to use any other programming from Trade Service. Apex calls the Trade Service web services directly to get this information.

You start by specifying a list of UPC codes that you want updated. Apex currently offers you two ways to make a list: From your Quick Code items, or by importing a list from a file. The Imported UPC List can be from virtually anywhere. It uses the same Apex Import Wizard that you know from P/O line importing, Price loading, etc. All you need to do is point the wizard to the UPC codes. They can be in one 11-digit field, or broken down into the Mfg and Item parts (just like price loading).

For example, imagine you are about to load a price file but you are not sure that your DB Item data has all of the UPC codes that the vendor is using. You can use that same price load spreadsheet as a list of UPC numbers to give to TRA-SER Link and update your DB Items.

If you have customized your item descriptions, you will want to uncheck the box “Update Item Descriptions”. Then your item descriptions won’t be overwritten by the Trade Service descriptions.

One of the cool things about this new programming is that if you are loading items that have commodity codes not in the Apex database, TRA-SER Link will add them to your list automatically (with the correct description from Trade Service). Same with manufacturers. Any missing manufacturers will be auto-

matically added. This is something that we have not been able to do for years, since Trade Service stopped sending these files on the TRA-SER CDs.

Errata

Other changes to Apex include:

- A lot of the buttons in P/O Maintenance now cause windows to pop up like in previous versions of Apex instead of getting added to the tabs. Adding them to the tabs and then moving between P/Os got confusing and could create errors if you weren't careful what P/O you are on.
- When moving lines on P/Os with divisions, the division was not always being set properly. I traced this bug back to source code from 2004, but it was just discovered! This has been fixed.
- When clearing the item reference on a P/O line the price and cost codes are also cleared out.
- The job and purchasing messages on the Purchase Order Maintenance's *Order* screen now have scroll bars when needed.
- The P/O line prices have been added to the Vendor Invoice Reconciliation screen.
- Item searches in Comparator Maintenance and P/O Maintenance can now search by UPC.
- Obsolete system options have been removed for "Retain Buyer" and "Show Requisitions". Apex will just do the right thing without making a big deal about it.
- Apex continues to play whack-a-mole with PDF files that are not compatible.
- A "Principal Buyer" field has been added to Job Maintenance. This will have some uses in upcoming Apex versions.
- P/O lines can no longer be deleted on purchase orders that have been sent to accounting. Accidentally deleting a P/O line would cause a real mess.
- P/O Auditing is now turned on by default, and is no longer a Company Information option. When this was first introduced 10 years ago there were servers that could struggle doing the P/O audit. This is no longer the case.
- Price loading no longer offers to load discounts instead of prices. I don't think anyone has done that in 10 years.
- Windows 11 rounded corners are now supported.
- Net Price Maintenance now shows prices with 4 decimal points.
- Apex form printing has been enhanced, and can now print very complex forms. Please let Vulcan Software know if you need any adjustments or enhancements to your forms.

These changes and enhancements could be very important to you, but don't need a whole section in this document to describe.

ID	Name	Position	Passw	Email	Approval Email	Apex Build			
						View Pricing?	Allow Admin?	Access All Jobs?	View Attachments?
1000	Mortimer O'Conner	Lead Paradigm Designer		MortimerOConner@apexpurchasing.com	jrwilliams@apexpurchasing.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1001	Corine Kilback	Internal Usability Consultant		CorineKilback@apexpurchasing.com		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1002	Baby Breitenberg	Central Division Technician		BabyBreitenberg@apexpurchasing.com	duanesmith@apexpurchasing.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1003	Beatrice Heller	Dynamic Tactics Analyst		BeatriceHeller@apexpurchasing.com		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1004	Cooper Jerde	Corporate Accounts Mana...		CooperJerde@apexpurchasing.com		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1005	Mariela Steuber	International Creative Adm...		MarielaSteuber@apexpurchasing.com	philkramer@apexpurchasing.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1006	Richmond Bayer	Principal Infrastructure Orc...		RichmondBayer@apexpurchasing.com		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1007	Enid Legros	Customer Metrics Liaison		EnidLegros@apexpurchasing.com	jrwilliams@apexpurchasing.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1008	Miller Stracke	Senior Tactics Analyst		MillerStracke@apexpurchasing.com	jrwilliams@apexpurchasing.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1009	Roderick Upton	Senior Group Officer		RoderickUpton@apexpurchasing.com	jrwilliams@apexpurchasing.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1010	Madie Kautzer	Forward Program Producer		MadieKautzer@apexpurchasing.com	philkramer@apexpurchasing.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1011	Lester Hodkiewicz	Customer Integration Con...		LesterHodkiewicz@apexpurchasing.com	duanesmith@apexpurchasing.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Contact Maintenance using the Apex 2023 theme

Apex Build (version 5)

Now that virtually all of you are using Apex Web, I wanted to include information about the new Apex Build release in this document.

“Apex Web” was the previous name and its latest shipping version was version 4.9.

Starting with version 5.0 the program is now rebranded “Apex Build”.

The Apex and Apex Build programs now “know” about each other. Previously they were developed independently, and we relied on some tricks to get things to work together. For

example, you needed to put an asterisk (“*”) in the Contact’s Position to give them access to all jobs.

Please take a look at the new Contact Maintenance screen at the bottom of the previous page. You can see that there is a new “Apex Build” section where you have fields for Apex Build-specific contact details.

There are many security, performance, and visual enhancements, along with the new features that you will read about in the upcoming pages.



Apex Build

Version 5

Written by Phil Kramer
Vulcan Software LLC

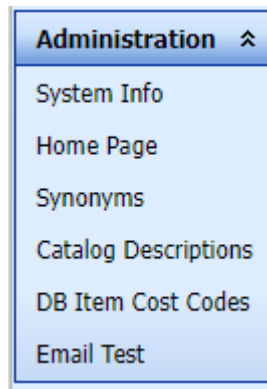
Apex Build Administration

When a Contact is designated as an Apex Build Administrator they will automatically see a new “Administration” menu. On this menu are many important functions that you can use to improve the Apex Build experience for your users.

For example, did you know that you can completely customize the home page so that it displays important information to your

contacts in the field?

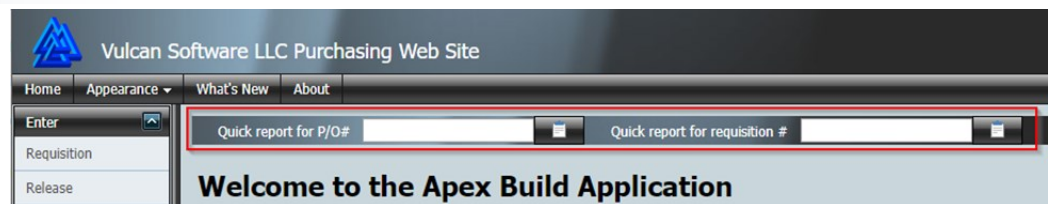
I have seen companies list Prefab items that the company can produce, link to documents regarding excess material (especially EMT and PVC), show purchasing department contacts, link to documents like Parallel Reel Capacity, and much more. Please ask if you have any questions, or you can consult the Apex Build Guide.



Tip: If you are an Apex Build administrator you no longer have to navigate to a “secret” page. Your administration selections are on the home page.

Quick P/O and Release Reports

At the top of the home page is a way to quickly see a single P/O or all of the P/Os for a requisition. This is geared to contract managers and others who access Apex Build but do not place many if any orders.



Material Returns

Apex Build introduces a way for you to enter your material returns directly from the field. It starts by giving you a list of all of the materials purchased for the job. You can then filter, sort, and group the information to find the items that you need returned.

I know that companies use a wide variety of strategies to process material returns. Over the last few years I have taken notes about a dozen different scenarios. The approach built into Apex Build should be generic enough that it can be used by a lot of companies, but has some specifics that should help in a number of those different

scenarios.

When a material return is submitted to purchasing, a bill of material is created with a status of "Requisition/Return".

The email sent to purchasing to notify them of the material return not only has a PDF attachment of the returned items, but also an Excel spreadsheet. The

spreadsheet contains more information about the returns, such as a list of the invoices that have been applied against each purchase order line in the return.




Vulcan Software LLC Material Return
Job 11080, RUSTON LANDING CONST.

View Return Cart (0)

Page 1 of 1 (8 Items) Page size: 200

Add selected items below to return cart Clear quantities

Drag a column header here to group by that column

Items purchased on job 11080												
	PO Vendor Name	P/O	Description	Item Notes	Qty Ord	Qty Returned	Cost Code	Mfg#	Item#	P/O Date	P/O Line	History
			conn									
	STONEWAY ELECTRIC SUPPLY	110796	ARL 38AST 1/2 INSUL FLEX CBL CONN		150	50	00703002	018997	00070	10/12/2005	2	History
	STONEWAY ELECTRIC SUPPLY	111122	ARL 40AST SNAP-IN CONNECTOR		50	0	00703001	018997	00041	10/27/2005	8	History
	STONEWAY ELECTRIC SUPPLY	110796	IDEAL 30-651 SIZE 451 YEL WIRECONN		500	0	00703002	783250	30651	10/12/2005	18	History



Cut Sheets

Cut sheets are now available for your contacts to review when they are entering a requisition. They work much like your part images.

If you put a file in your part images directory that has an 11-digit UPC number for a name, and a ".PDF" extension, Apex Build will pick it up as the cut sheet for that item.

For example, if you put a file named "07847778808.pdf" in your part images directory, that can be displayed as the cut sheet for a Leviton 5242.

This can help answer any questions they may have about the items without needing to involve purchasing.

Keywords safety switch										
	Source	Description	Order Quantity	Item Notes	Cost Code	Quick Code	Mfg#	Item#	History	Cut Sheet
	Job	ITE HF322NR 3P 240V 60A SFTY SW	0		6402		783643	15069	History	
	Catalog	ITE HF361 3P 600V 30A SFTY SW	0		6401; SWITCH GEAR	HF361	783643	15100	History	Cut Sheet

The cut sheet link will only appear on items that have a cut sheet.

Trade Service Online is a good resource for cut sheets. They can provide a spreadsheet with links to cut sheets from a list of items that you provide.


Please let Vulcan Software know if you obtain one of those

spreadsheets and want cut sheets.

There is a utility you can use to build your PDF library. Note that this is the same spreadsheet that provides thumbnail images for your items.

Alternatively, if you don't want to use Trade Service you can obtain cut sheets from other sources. Any PDF file will work.

Heavy Duty Safety Switches



Item#	Description	Order Qty	Item Notes	Cost Code	Quick Code	Mfg#	Item#	History	Cut Sheet
480 VOLT AC 100 VOLT AC 100 VOLT DC	480 VOLT AC 100 VOLT AC 100 VOLT DC								
480 VOLT AC 100 VOLT AC 100 VOLT DC	480 VOLT AC 100 VOLT AC 100 VOLT DC								
480 VOLT AC 100 VOLT AC 100 VOLT DC	480 VOLT AC 100 VOLT AC 100 VOLT DC								
480 VOLT AC 100 VOLT AC 100 VOLT DC	480 VOLT AC 100 VOLT AC 100 VOLT DC								

Errata

Other changes to Apex Build include:

- When creating a requisition, your Contacts now have access to your Apex Message Library.
- Pressing the Enter key in a text field will click the active button, like when you are entering a job for a requisition.
- Apex Build has been updated with the new “Description Synonym” programming discussed earlier in the Apex section. It is generally easier to maintain synonyms in Apex, but if you have an Apex Build administrator that does not have access to Apex they can also maintain them.
- When looking for a job’s release order, you can select to only show releases that have outstanding quantities.
- After searching for purchase orders, you can quickly print detailed bill-of-material forms from the search page.
- Traditionally, the requisition system’s *Company Catalog* menu has been built using your standard cost code table. This is a fast and straightforward way to organize your items, customized for your company’s items. However, if for some reason this isn’t an option (i.e. you don’t use cost codes), then you can choose to build your menu solely from your DB Item commodity codes.
- The quantity ordered and quantity previously received have been added to the Receiving Entry screen.
- Users can now choose to cc themselves when submitting a requisition to purchasing. This gives them a copy of the email that purchasing will get.
- When suggesting a future date required for a requisition, Apex Build will now only count business days.
- Item notes can be edited directly while you are entering a quantity on a requisition.
- There are new Apex Build specific fields in your Apex Contact Maintenance screen.
 - Approval Email:** This can be used to route approval emails for contacts that are not authorized to submit requisitions on their own.
 - View Pricing?** Can the contact see pricing?
 - Allow Admin?** Is this user an Apex Build administrator?
 - Access All Jobs?** Can this contact access all jobs, or do they need to be listed as a contact in Job Maintenance? This is the equivalent entering an asterisk (“*”) in the contact’s position in previous versions of Apex Web.
 - View Attachments?** Can this contact view attachments to purchase orders? Note that attachments can contain pricing, so you will want to consider the ramifications of this.
- Apex Build continues to maintain compatibility with Office 365 for sending emails.
- Some older things have been removed, and there are a number of cosmetic changes to make the web site match more modern designs. For example, you no longer have the unneeded choice to export to the 2003 “XLS” Excel format. Instead, you can now just export to “Excel”, using the .xlsx extension. As usual, there are other fun things for you to discover on your own.

The Apex Build Guide has been updated with the new version 5.0 options. Please download it from apexpurchasing.com or ask for a copy.

Final Thoughts...

Artificial intelligence is everywhere these days. Apex is no exception. For years people have told me that mobile devices are better for consuming information than they are at producing it. That’s why we first introduced Apex Build. Using a web site with a mouse and keyboard is a more productive environment.

However, the reality is that mobile devices are a way of life. I didn’t want to introduce a product that I felt would lead people down the wrong path.

A.I. to the rescue. I have two R&D projects that I think will enable a mobile platform to rival the productivity of Apex Build.

So, here is a brief announcement

of “Apex Connect”, coming soon to a phone or tablet near you...

Powering all this is the vast amount of data in the Apex community. Millions of P/O lines, items, and prices. Of course we will introduce this ethically, with customers buying in to anonymously participate, but imagine what we can do with all that data...

