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# THE JUST-IN-TIMES NEWSLETTER

MID-LEVEL CUSTOMIZABLE ACCOUNTING SOFTWARE BASED MICROSOFT ACCESS

## CUSTOMER PROFILE **A&M Appel Distributing**

Mmmmm...the smell of bakery products combined with the easy-to-use and customizable Access Your Biz™ *Standard Edition!*

A & M Appel Distributing sells bakery products wholesale. Their business involves two delivery routes to customers that order the same items each day of the week. However, depending on their business climate, customers may call to change a day's order or to make an additional order.

Before using Access Your Biz™, A & M Appel was using an old DOS based system that was limited in features and offered little flexibility. This time-consuming process required each order to be entered individually since the old system did not have a recurring sales order feature. In addition, the orders had to be manually organized by route and stop number each day. A & M Appel wanted to expand their business to include an additional route. However, the Dos based system was not efficient enough to support two routes.

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### TECH TIPS

When you want to expand the Access Your Biz™ program from a single computer to a network with multiple users, you can use the Change Data Location feature to do this. You can also use this feature if your files become too large and the need to be split up or relocated. When data files are relocated, they lose their connection to the program. This means that Access Your Biz™ will not work properly unless the connection is re-established. This feature allows you to re-establish the connection quickly and easily. The Change Data Location feature also allows you to



relocate all your files at one time, instead of having to move each file individually. Not only does this make the process more efficient, but it also reduces the room for error.

For example, if you had originally installed Access Your Biz™ on the C drive, you can now transfer the program to the network drive,

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### THE NEW FEATURES

## SPOTLIGHT

With the Reorder Point Update feature, Access Your Biz™ makes it easy to keep the right amount of inventory on hand at all times.

Since demand for a product can be inconsistent, you need a simple and efficient way to keep your inventory at optimum levels to increase sales and profit.

The Reorder Point Update feature is unique because it allows you to update the reorder point for any product based on past sales.

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THE NEW FEATURES SPOTLIGHT

To do this, Access Your Biz™ will calculate the average sales per month for the item.

Then, dependent on how many months' worth of inventory you wish to keep on hand, the program will create a new reorder point that will keep your inventory within target range.

You can use this feature in conjunction with the Inventory Analysis feature, which allows you to print a report highlighting problem areas in your inventory levels.

Once you have identified reorder points that need to be modified, you can use the Reorder Point Update feature to correct it.

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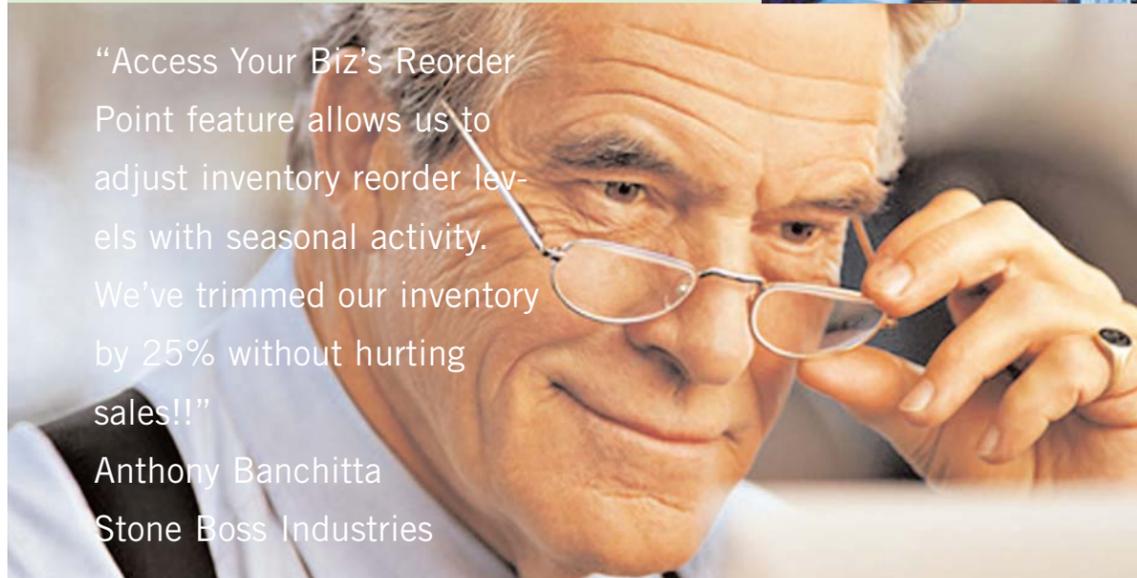
# TECH TIPS

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which will allow multiple users to gain access to it. To do this, select the Change Data Location menu option, which is located on the Utilities menu. Now open the folder that contains the files for the network drive and locate the (Company name)DataSM.mdb file. Open this file. When you do this, you are establishing a connection with the system setup files so you can tell the computer where the new location of the files will

be. On this screen, you will see the old file path for each data file. Click the button to the right of the first file path (General Ledger file path). In the network drive folder, select the file (Company Name) DataGL.mdb as the new location. A message will appear asking if you want to change the file paths of all the modules as well. Click Yes. When you have done this, click the Update Links button, located on

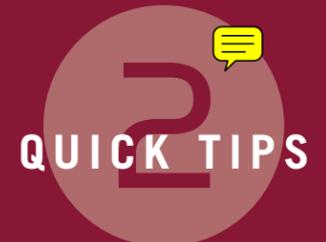
the bottom of the screen. Now the files are connected to the network and multiple users will be able to access them simultaneously.



“Access Your Biz’s Reorder Point feature allows us to adjust inventory reorder levels with seasonal activity. We’ve trimmed our inventory by 25% without hurting sales!!”

Anthony Banchitta  
Stone Boss Industries

“Access Your Biz™ allowed me to process more information in less time so I can grow my business.”  
Mike Appel



## A&M Appel Distributing

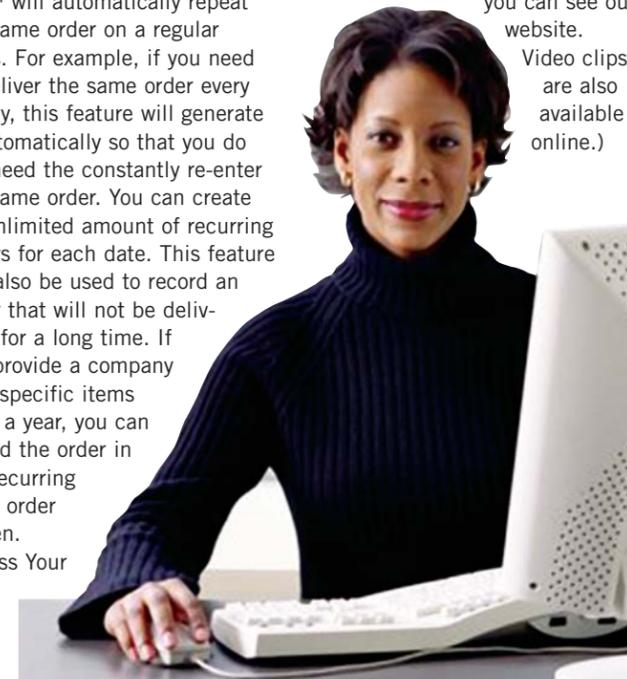
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A & M Appel was able to use the Recurring Sales Order feature within Access Your Biz™ to make their business more manageable. This feature allows them to customize a separate list of recurring sales for each day of the week. Each day a summarized list of recurring orders could be print-ed to keep the order quantities accurate and easy to read. If they no longer need to generate an order on a regular basis, the recurring sales order can be deactivated and saved in the Access Your Biz™ system. It can then be reactivated and updated at any time. If A & M Appel needed to order additional products for a customer on one specific day, a separate sales order could be entered. For any date, they can view the total quantity of any one item that is needed to fulfill all orders for that day.

them to print the sales orders in the sequence that they would be delivered. This decreased the amount of time spent each day organizing the route.

A Recurring Sales Order is very similar to any other sales order, except that the Access Your Biz™ will automatically repeat the same order on a regular basis. For example, if you need to deliver the same order every Friday, this feature will generate it automatically so that you do not need the constantly re-enter the same order. You can create an unlimited amount of recurring orders for each date. This feature can also be used to record an order that will not be delivered for a long time. If you provide a company with specific items once a year, you can record the order in the recurring sales order screen. Access Your

Biz™ will remember the date for you, and will automatically generate the order along with all your regular orders when the time is appropriate. (You can view step-by-step instructions on how to use the Recurring Sales Order feature in the Access Your Biz™ manual, or you can see our website. Video clips are also available online.)



Within the Recurring Sales Order feature, the option to group by Route and Stop Number enabled



## SOURCE CODE SOLUTIONS

In this edition of Source Code Solutions, we will show you how to modify the sorting and grouping options of an existing report. To demonstrate this, we will focus on the Recurring Payable Invoice report, which is located under the Accounts Payable module. Originally, this report automatically sorted recurring payable invoices by vendor code - there was no other sorting option. Here we will show you how to make this report, as well as any other, more dynamic for the user by creating additional sorting options. To get started, load Access Your Biz™ while holding down the shift button on your keyboard. This will allow you to view the database container for the program. Before you make any changes to the report, run the current version of the report and decide upon the changes that you would like to make to its sorting features. Minimize this report when you are finished - you will need to return to it later. To begin redeveloping the report, access the View toolbar menu and select the Design View option. Once you are in design view, you need to create a new option group. To do this, select the option group icon from the toolbox and then click on an area of empty space on the report. Once you have done this, the Option Group Wizard will launch, and you will be asked to enter the Label Names for each new option. Once you have done this, click the Next button. Now you need to indicate which option will be the default setting. The wizard will automatically designate the first option entered in the label names screen as the default, but you can either select a differ-

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## STORIES OF SUCCESS

“Access Your Biz™ has helped me accurately track our profitability and spot the areas we have weakness in!”

Kevin Theofield  
Akemi North America



LOOKING FOR A  
SPECIFIC FEATURE?  
TELL US,  
IF WE DON'T HAVE IT,  
WE MIGHT

DO IT FOR  
FREE!!!



THE  
NEW  
FEATURES

## SPOTLIGHT

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### SOURCE COD SOLUTIONS

ent option or select the option for no default setting before clicking Next. The subsequent screen shows the values assigned to each option in order to evaluate the users choice. For example, the value for the first option would be one, the value for the second option would be two, etc. Click Next to accept these values. The next screen allows you to adjust the cosmetic features of the option group by indicating either option buttons, check boxes or toggle buttons as the method of user selection. In this screen, you can also choose a style for the box or button display option that you have selected. After you have done this, click the Next button. Now the wizard will ask you to create a caption label for the new option group. Once you have done this, click the Finish button. This will cause the wizard to close and the new option group to appear on the screen. In the window labeled Option Group: Frame 90, enter a name for the option group, such as Sort By or Group By, in the field labeled Name.

To complete this step of the report redevelopment, click on the new option group and drag it to the location where you want it to appear on the print screen. Now that you have created this new option, you must modify the report to make the new sorting option applicable. To do this, first return to the original displayed report that you had viewed earlier. Now select the Design View from the View menu. Once you have done this, access the View menu again and select Sorting and Grouping. In the Sorting and Grouping window, enter a name for the new sorting option in the column labeled Field/Expression. To make this the primary sort, double-click it and drag it to the top of the list. In the Report window click on the "build" button, next to the On Open field, to access Visual Basic. Here you will see the current Visual Basic code for the report. After the If statement that determines if there is any data for the report, enter the code for the new sorting option, which is shown below.

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This code is telling the program that if the value of the new option group is equal to one then the Me .Group level (0), or rather the first sorting criteria, should be based on vendor code. The Else statement provides the program with directions to follow if the first statement is not true, (i.e. it does not equal one). These directions provide the alternate criteria of next date as the first sort order. After you have entered the Visual Basic code, save the changes to the report and close it. A message box will appear asking if you would like to save the changes to the following objects as well. Click Yes. Now you can rerun the report to check for errors. You should see the new option group on the report's print screen. Select one of the sorting options from the new option group, fill in the remaining criteria and click Print. If you encounter an error, review the above directions and check for mistakes, before rerunning the report.

For example, if you have three warehouses and only one location is having a problem with inventory levels, you can perform this process exclusive for that warehouse.

This enables you to fix one problem without creating another. The same flexibility is available with the product range as well. If you are only having trouble with a specific product, you can



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