Webinar - Order Time Version 1.0.28 + B2B Portal 1.1 - What's New?

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Webinar Notes:

Order Time - New Version of Order Time + B2B Portal

- **New Version Release Notes: https://help.ordertime.com/help/version-1028**
- **New B2B Version Release Notes: https://help.ordertime.com/help/b2b-version-11**
- **Docusign Integration is in beta, and allows you to get signatures.**
- **More information on the integration with FreightPrint: https://info.ordertime.com/freightprint**
  - **Shipping integration for truck loads and freight shipping**
- **Email Templates**
  - **You can toggle between HTML and Text**
  - **It gives you a Rich Text Editor with Tokens for custom marketing emails**
  - **Can add a default BCC to all emails as well**
- **Custom Reporting**
  - **The Matrix Reports can be customized with dates as your pivot**
  - **Inventory Ledger Report, new type: Ledger**

- - - **Customer Ledger**
    - **Inventory Movement with Bins**
    - **Inventory Movement by Location**
    - **Has a starting and running balance**
- **Batch Actions on Customer Returns are in**
- **Changing the Statuses on Activities using Batch Actions from the Activity List**
- **A total of all Records is now on the bottom of all Lists**
- **The Sales Charts are now more detailed and load faster**
- **If you go to the Page Layouts for Sales Orders - Details Page**
    - **Total Margin**
    - **Total Margin Percentage**
    - **Total Markup**
    - **and more have been added, you can drag and drop them into the layout of your Sales Orders**
- **Most of the errors and bugs that were fixed were hotfixed at different times during the production cycle, but they were just notated during this patch release.**
- **B2B Portal**
    - **Under Customer Types you can define the Price Level, Terms, and Categories**
    - **If you have it set to allow the Customer to Self-Register, you can change which Customer Type these Customers will end up as under the B2B Portal - General Settings.**
    - **You can turn off ordering so that they can just use it as basically a catalog.**
    - **There are new fields to allow a Customer to enter a Memo**
    - **There are new fields to allow a Customer to enter a Promise Date**
    - **Under the Sales Tab, you can view all Carts in B2B by going to the bottom-right in the Quick Links and clicking on the link that says Carts**
    - **You can now filter what the Customers can see by the Customer Categories or the Customer Price Level.**
- **In the newest version of our iPhone app, you can check out a Purchase Order, check out the products, scan them in, and it creates the Purchase Order.**
- **If you have any questions about today's webinar, send us an email at support@ordertime.com**

- **Past Webinars**
    - **Head here to see all Past Webinars: https://help.ordertime.com/help/past-webinars**
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