What's New in Version 5

eCommerce Industries, Inc.

ddms distribution software

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Contents

New Features in Version 5

Each new software release has upgraded features. Some affect text-based software only; others, graphical. Each feature is briefly described below, according to the platform and application it affects.

All of the features described in this handout are included in the *e*Nsite Pro online help. Some of these features also have complete handouts. All of the handouts are available on our web site at www.ddms.com/support/doc/ver5doc.htm

Text-Based Changes

The following is a list of features added to text-based Version 5 software.

Accounting

- **Calculate Salesperson Commissions Using Level Compensation:** The (L7L) Level Compensation Table Parameters screen offers you another way to calculate your salesperson commissions. See Figure 1. This screen uses a scale range to calculate compensation and is based on gross profit percentages. Not only can you split commissions among salespeople, you can specify whether a salesperson's compensation is based on a percentage of the margin (the difference between the selling price and the cost) or a percentage of the entire sale.

Figure 1: Specifying Compensation Levels in the (L7L) Screen

```
17:24:01          (L7L) Level Compensation Table Parameters           08/31/99
================================================================================
  Action [C] (A=Add,C=Chg,D=Delete,I=Inq,N=Insert,X=Copy,B=Back)  G/L Loc.[ 1]
================================================================================
      Slsm [ 101] to [ 101]    Negative Compensation Y/N [X]
Split Comp Y/N [N]  #      %    #      %    #      %    #      %    #      %



         By Gross %     % of          Scale Dollars
        From      To    Comp   S/M     From      To     S/M  Comp%
      -------  ------    ---    -     -------  -------   -    ----
1       0.00    15.00           M              9999999   M    25.00
2      15.01999999.99           M           0     8000   M    28.00
3      15.01999999.99           M        8001    11200   M    32.50
4      15.01999999.99           M       11201    14400   M    35.00
5      15.01999999.99           M       14401    17600   M    38.00
6      15.01999999.99           M       17601  9999999   M    40.00
```

Calculating compensation on a scale range means that you calculate compensation on specified ranges of dollar amounts. These dollar amounts can vary based on the amount of the customer's invoice. Within each dollar range, the percentage of compensation can also vary, depending on the gross profit percentage of that invoice. While the (L7) Compensation Table Parameters screen and (L7L) screen are similar, the (L7L) screen gives you an additional advantage. Instead of using one line on the table to calculate compensation for each invoice, the (L7L) screen has the ability to add several different lines of compensation together. For more information, see the handout *Compensation Tables* at www.ddms.com/support/doc/ver5doc.htm

Note: You cannot have a compensation table set up in both the (L7) and (L7L) screens. If you previously set up a compensation table in the (L7) screen and want to begin using the (L7L) screen instead or if you want to practice using the (L7L) screen tables, you must first rename your compensation parameters file. To do this, go to the (Z) System Utilities screen and select the [F7] Rename A File function. At the prompt Enter File Name, rename the PAR-COMP file. The system will create a new PAR-COMP file when you set up a compensation table.

- **Use Alphanumeric Locations:** Managing multiple locations or customer stockroom locations is easier than ever before. You now have the ability to use alphanumeric characters in all the location fields throughout the DDMS system. Therefore, in addition to using numerical locations such as Ø1, Ø2, Ø3, and so on, you can also use easier to remember alphanumeric locations, such as AA, BB, A1, A2, B1, B2, and so forth.

- **A/R:** An enhancement to the (BQ) A/R Check Posting screen transmits address verification information when a customer pays with a credit card. You must set up the Prompt for Address Verification on Credit Card Payments field in the (LA2) A/R Parameters screen.

- **New A/R & A/P Parameter Screens Added:** Two new parameter screens have been added: the (LA4) A/R Journals Parameters screen and the (LC1) A/P Journals Parameters screen.

  The (LA4) screen lets you specify the names and locations of your journalized accounts receivable files. When you add new journals in these screens, the journal in the 1) field of the Journal Name column moves to the 2) field, the journal in the 2) field moves to the 3) field, and so on. If you add a thirteenth journal, the bottom journal name (in the 12) field) is removed from the list.

The (LC1) screen lets you specify the names and locations of your journalized accounts payable files. It works much the same way as the (LA4) screen. However, the (LC1) screen also allows you to specify whether to allow paying a different vendor than what is on a purchase order. And you can specify whether to allow changing quantities when posting purchase orders.

- **Laser Check Format for A/P:** To print laser checks, enter M in the Check Type field in the (LC) Vendor and A/P Parameters Screen. This feature is at no extra cost but does require authorization.

Communications

- **Third Party Carrier Feature:** The new third party carrier program is the interface between the shipping manifest program and a third party shipping service, such as the UPS On-Line program. It allows you to streamline your TPC billings and helps you track your customers' packages. Once you create your orders in the (G) Order Entry screen, build your shipping manifest in the usual manner in the (TS) Shipping Manifest screen. You can also use the (TR) Order Entry Reports screen to manually add or scan each TPC pick ticket to the manifest. Once the pick tickets are listed on the manifest, export the pick ticket information to the shipping service using the third party carrier's software. The third party carrier processes the information and determines the package's weight, shipping method, insurance information, and freight charges. While you may have several pick tickets listed on each manifest, the freight shown by the third party carrier represents the total amount for the package being shipped. After the information is processed, the third party carrier also creates and prints your shipping labels, using your on-site label printer. This saves you from printing the labels yourself.

  After the labels print, you import the third party information from your Windows PC back to your DDMS system. At this time, all the delivery information is attached to the invoice and can be viewed in the (G) screen. The system also lists the third party carrier information, including the tracking number as a special MMMM line on the ticket. This line includes the freight charges for the ticket, which print on the invoice. Since you have the tracking number readily available and attached to the invoice, tracking your packages is easier than ever. The TPC feature allows you the flexibility to decide if you want to charge the customer for freight, and whether you want the order shipped overnight, ground, etc. You can set separate default shipping methods and freight settings for each customer in the (A) Customer Master screen. Since these settings are only defaults, you can easily change them when you actually place the customer's order. You do this using the new TPC special. For more information, see the handout *Third Party Carrier Manifests* at www.ddms.com/support/doc/ver5doc.htm

- **Emco Communication Enhancements:** The Multiple Drop Ships field has been added to the (L6J) Emco Sales and Service screen. This field lets you transmit multiple drop ship orders. For more information, see the handout *Using Wholesaler Communications with Emco* at www.ddms.com/support/doc/ver5doc.htm

Customers

- **Minimum Margin By Order:** You have long been able to ensure your margins by setting up margin protection in the customer discount file. This helped control your line item margin amount when placing items on an order. The new Minimum Margin by Order feature goes one step further. It lets you check for minimum margins for the entire order. If the total pricing of an order is below the minimum margin amount, the order-taker is prompted to place the order on hold or modify the pricing before the order can be completed. To use this new feature, type O in the Hold Type field in the (A) Customer Master screen. In the # field, enter the margin percentage.

  A password can also be set to allow overriding this feature, when necessary. You set your password in the Under Min Gross Profit % Password field in the (LG3) Order Entry Pricing Parameters screen.

  This new feature is also available in graphical. See the Customer heading under Graphical Changes for instructions on how to set up this feature in *e*Nsite Pro.

- **Tax Districts:** There are three new taxing features. These include the tiered sale price taxing district, nesting combined taxing districts, and taxing single items at different percentage rates based on categories. These features are a result of changes to the Tennessee tax code. However, these work for anyone who needs combined tax districts.

  Tiered taxing districts let you tax a different tax percent on an item based on sell price.

  With these new features, you can set up a combined tax district with unlimited tax districts. Previously, you could only set up a combined tax district with not more than three tax districts. Nesting combined taxing districts lets you assign one combined tax district to another combined tax district. For more information, see the handout *Version 5 Taxing Enhancements* at www.ddms.com/support/doc/ver5doc.htm

EDI

- **New Importer Program:** You can import EDI files into the DDMS system. You can process the invoices and post them to the appropriate vendor in the A/P file. You can also match items on the P/O and invoice that could not be matched when the order was processed.

Inventory

- **Display Gross Profit Percentage Instead of Discount:** You can now display the gross profit percentage instead of the discount amount on column break pricing. To do so, set the new Display GP % On $ Type Col field in the (LPE1) Inventory Parameters screen to Y. In the (E) screen, after you input the column break price, the gross profit percentage is calculated, rather than the discount.

- **Refigure Contracts on a Negative Gross Profit:** You can now refigure contracts using a negative gross profit percent. This feature applies to all contracts except specialty contracts. If the Gross % or Disc % field in the (ET) Inventory Contract Price screen is under .01, the G-% or D-% field now displays a minus sign (-) and the percent amount, instead of "NEG". (If the Gross % or Disc % field in the (ET) screen is over .99, the G-% or D-% field now displays a plus sign (+) and the percent amount.) When you select the [F] Figure action code in the (ET) screen, contracts with a minus sign in the (ET) screen are refigured based on the negative gross profit percent. This feature is reflected in contract reports and is also available with RoadRunner contracts.

Figure 2: Setting the Contracts Default Category in the (LE1) Screen

```
09:40:48              (LE1) Inventory Parameters  (Con't.)            03/08/02
================================================================================
              Action [I] (C=Change, I=Inquiry)   G/L Location [ 1]
================================================================================
Update Manual "E" Screen Item # Changes to Other Files during "MA" Y/N/X ?X
Which Aliases to Check in Order Entry ? [123] (1=Customer, 2=Common, 3=Print)
Class Range to Build History From [1] To [Z] + Additional Classes [         ]
Class Range to Force Ship (O/E) From [ ] To [ ] + Additional Classes [         ]
    Force Ship on Ned Y/N ?               Inventory Pulling Location ?
Companion Locations From ? 2 To ?99       Companion Locations ? [  ,  ,  ,  ]
Default to Loc 1 For "I-COLUMNS" Y/N ?    Default to Loc 1 For "I-PRICE" Y/N ?
Update "I-AUX" Sales For Inventory Location (Not G/L Location) Y/N ?
Multiple Bin Pulling Codes:  First [A] to [H], Last [I] to [Z], Never [ ] to [ ]
Amount to Increment Bom Sequence Number by [ 1] (1 - 99, Blank = 10)
Cost for Col. Price Disp. ?M (A=Avg,M=Mfg,L=Mfg Lst,W=Whl,X=Whl Lst,P=Purch Ven)
Display GP% on $ Type Col. Y/N ?Y         Track Drop Ship Sold Quantities Y/N ?
CONTRACTS:  Default Category I/L/N ?  (I=Fixed, L=Flexible, N=Sale Flyer Range)
Apply Weight Rate to Cost When Using WHL, MFG or FUTURE Y/N ?
Apply Up Cost % to Cost Y/N ?             Apply Con % to List Y/N ?
Prompt to Save Price Changes Y/N/X ?      Cost To Use W/M/F/L/A/P/2-9 ?
Display Cost Window Y/N ?Y                Lower Price when Refiguring Y/N/P ?
Allow Contract Dates by Line Y/N ?Y       Other Lists to Discount Price Y/N ?Y
Default List W/M/L/2-9 ?W     "ET" Passwords: Update ?DDMS  Set Cost/List ?DDMS
```

- **Assigning Fixed/Flexible Contracts:** Now you can choose whether any contract number is used for a fixed or a flexible contract. The new Fixed/ Flexible field in the (ET) Inventory Contract Price screen lets you enter **I** for fixed or **L** for flexible when adding a contract. This means contract numbers either above or below the sales contract range can now be used for fixed or flexible contracts. The default for this field is set in the Contracts Default Category field of the (LE1) screen, as shown in Figure 2. The new Default Category I/L/N field lets you specify that the system default to add a fixed or flexible contract in the (ET) screen. If you set the Category I/L/N field to I, it defaults to add a fixed contract. If you set this field to L, it defaults to add a flexible contract. If you leave this field blank or set it to N, it defaults to the previous method of adding new contracts (by using the sales flyer range set in the (LG3) Order Entry Pricing Parameters screen). This feature works when setting up new contracts only. Existing contracts in the (ET) Inventory Contract Price screen do not change.

- **Special Item Screen:** When changing costs in the (+EA) screen, there are two new prompts that offer you even more flexibility. The new Select Percent to Increase or Decrease prompt allows you to enter a percent to increase or decrease the selected cost. For example, to decrease the percentage, you would type -34.5. If you wanted to increase the percentage of the selected cost, you would type 34.5. There is also a new Multiplier prompt that makes currency conversions easy. It multiplies a figure you enter by the value in a selected field. If you want to multiply the value, type **Y** in the Multiplier field.

- **New Fields in the (LE) Screen:** There are two new fields in the (LE) Inventory Parameters Screen. The Like Item Sub field allows you to link together items that are alike. When you order the original item in order entry, the system displyas a list of all the alternates in the chain, and prompts the order-writer to choose one of the alternates or return back to the original item. If you link the last item in the series of alternates back to the first item, all items in the chain will be displayed, no matter which item is originally ordered.

  Another new field is the Preferred Sub field. Use this field to enter a code to designate that there is a different item that you would prefer to sell. You can only specify one preferred item for the original. When the original item is ordered, the system automatically replaces the original item with the alternate (preferred) item. The original item number is displayed in a window, along with the following information: company, description, contract, discount information, selling price, list price, unit of measure, on-hand quantities, pricing cost, average cost, and gross profit percentage. The order-writer can accept the replacement or return to the original item with just one keystroke.

Miscellaneous

- **New Contact Fax and Email Screen:** This new screen lets you maintain a list of contact information. To access the Contact Fax & E-Mail screen in the text-based system, type " (quotation marks) from the DDMS Master Menu. See Figure 3. To use this new feature, you must be set up with the AutoComm module.

  By adding, changing, and deleting information, you can easily manage multiple contacts for your customer, vendor, salesperson, and serialized databases. You can now have multiple contact types. For example, when using the Serialized module, you can email a meter reading to one contact, while emailing another contact a contract renewal. You can also set up contacts within departments: one for each sales, accounting, and human resources departments, for example. This new feature also lets you mass add contacts from your customer files. The Delete and Mass Add functions require a password before you can continue. The Delete password is set in the Delete field in the (LA) Customer and A/R Parameters screen. The Mass Add password is set in the Reindex field in the (LA) screen.

  Once you set up the contact's fax and email information, you can easily choose the best way to electronically transfer documents throughout the system. For example, you can now fax or email meter readings, contract renewals, purchase orders, invoices, and statements to multiple contacts from within the Serialized application, the (F) Purchase Order Entry screen, the (G) Order Entry screen, and the (B) Accounts Receivable Posting screen, as well as their graphical versions. You can also easily fax or email forms from the P/O History, A/R History, O/E History graphical windows.

Figure 3: The New Contact Fax and E-Mail Screen

```
11:16:02                CONTACT FAX & E-MAIL   Rev. (03/29/01)           09/04/01
================================================================================
Action Code [I] (A=Add, C=Change, D=Delete, I=Inquiry, M=Mass Add)
================================================================================
Area (_)  (1=Customer, 2=Machine, 3=Salesperson/Tech, 4=Vendor)

Name    :______________________________

System  :__________  Sub  :____             Type  :__________

Serial  :_______________  Item #_______________  Co:________

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

Contact :______________________________

E-Mail  :__________________________________________________
        :__________________________________________________

Fax     #___-___-___  Phone #___-___-____ Ext. #____  F=Fax, E=E-Mail (F/E) :_

URL     :__________________________________________________
===============================================================================
```

- **New Parameter Screen Added:** A new parameters screen has been added: the (L1L) Laser Printer Parameters Screen. The (L1L) screen allows you to print some classic standard reports to laser printers. In this screen, you can set up each of your laser printers to compress reports to 17 CPI (characters per inch) then automatically reset back to 10 CPI. You can set up as many as 32 laser printers. The laser printers must be setup using the HP4 printer emulation. When setting up laser printers in TBLServer, you must set the printers up as LP.

  The following reports can be printed using this new feature: United PSN Acknowledgment; United, SP Richards, & Daisytek acknowledgments; Automated Short-Buy Exceptions report, ASB P/O report, & ASB Call Code Test; (TR) [E] Pick File Report; (TR) [I] Exception Report; (TR) [H] Stock Receipts Report; (TR) [F] Daily Invoice Register; (TR) [K] Gateway Credit Cards Report; (W) [B] Select G/L Levels and or Detail Reports; (OR) [B] Accounts Receivable Trial Balance Report; (QR) [A] Print A/P Batch Report; (QR) [B] Accounts Payable Trial Balance Report; (QR) [C] Print A/P Reports; (QR) [F] Print Check File Report; (QR) [Z] Print A/P G/L Summary Report.

- **Set Up User-Defined Printer Emulations:** You can now add printer emulations that you can use with TBL/NT systems. Using the new Printer Emulation Workshop dialog box, you can easily customize and manage these printer emulations to work with virtually any Windows compatible printer. To do so, double-click the TBLConfig icon on your desktop. Click the plus (+) icon to the left of the Advanced icon and click Printer Emulations to highlight it. Right-mouse click and select Add New. When the Printer Emulation Definition window opens, click Emulation Workshop. At this point, you can add the new printer emulation. To do so, you specify the emulation code, A1, for example, and the hexidecimal printer control strings (AKA printer control codes). When you finish specifying printer settings, click Save. Now you can assign the new custom emulation to your printer. For more information, see the handout *Printer Emulations* at www.ddms.com/support/doc/ver5doc.htm

- **Setting Up Multiple Printers:** You can now set up as many as 352 printers on your DDMS system. The (L1) Terminal/Ticket/Printer Parameters screen has been enhanced to allow you to assign printer names and terminal names by upper or lower case letters, numbers, and some ASCII characters. An example of this new setup is shown in Figure 4. Another enhancement allows you to set up more modems than before. You can also use ASCII characters when setting up modems. For more information, see the handout *Setting Up Multiple Printers* at www.ddms.com/support/doc/ver5doc.htm

- **O/PUS Toolbox:** This builds item indexes that can cross-reference or link different item information to the item number and company (the item key) in the Master Record. Each index provides an additional way to view and retrieve items in order entry and purchasing. For example, you can build an index that links the prefix and item number to the item key. Or you can build the index to link the I-WHL, I-MFG, and I-CAT item numbers to the item key. In this case, the item number and company are cross-referenced to the item key in the Master Record. So even if the item number or company in the I-WHL, I-MFG, or I-CAT file is different from the item key in the Master Record, you can still view and retrieve these items in order entry.
- **New Bulk Bin Feature:** Warehouse efficiency is a vital part of your business. To help you manage your warehouse items more effectively, we've added the (EK) Bulk Item Update screen. Items that are set up in the (EK) screen are flagged as bulk items when a picking manifest is created. This screen lets you assign bulk (or larger) items to a specific bin. You can assign bulk items to two bins using these screens, including the bulk number, the unit of measure, and the selling unit for the item. After you set up bulk bins, you can use the picking manifest program to run a separate manifest — one that contains only bulk items. Information in the (EK) screen is stored in I-BULK file created on the Item Aux volume serial. For more information, see the handout *Bulk Bin Items* at www.ddms.com/support/doc/ver5doc.htm

Figure 4: Setting Up a Printer in the (L1) Screen

```
14:36:25            (L1)  TERMINAL/TICKET/PRINTER PARAMETERS           11/21/02
================================================================================
     ACTION [C] (C=CHANGE, I=INQUIRY, H=HELP, W=WINDOWS, L=LASER PRINTERS)
================================================================================
              Starting Terminal to have Order Entry as Master [TZ]
        KEY:  AHD=Ahead, ST.=Status, ONL=Print online, P=Printer number
   LOG.       KEY  O/E   T-I-C-K-E-T-S      SLIP      LABELS     INVOICES
   TER.  LOC. AHD  TYPE  ST.  ONL  FORM P    FORM P    FORM P   ONL  FORM P  OPTION
 1 [T0] [ 1] [ ]  [ ]   [6] [Y] [4T   0]  [      ]  [      ]  [Y] [8I   0]  [B  ]
 2 [T1] [ 2] [ ]  [ ]   [6] [Y] [4T   0]  [      ]  [      ]  [Y] [8I   0]  [B  ]
 3 [T3] [ 2] [ ]  [ ]   [6] [Y] [4T   a]  [     _]  [____ _]  [_] [____ _]  [___]
 4 [1A] [_3] [_]  [_]   [6] [Y] [4T   b]  [____ _]  [____ _]  [_] [____ _]  [___]
 5 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
 6 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
 7 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
 8 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
 9 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
10 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
11 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
12 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
13 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
14 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
15 [__] [__] [_]  [_]   [_] [_] [____ _]  [____ _]  [____ _]  [_] [____ _]  [___]
```

Order Entry

- **Print Invoice Items in Item Company Order:** You can print items on the invoice in item company order. If similar products are grouped together, receiving and processing your invoices is easier for your customers. This feature only affects the way an invoice prints. You can still print pick tickets in bin order. You can override the feature with the SEQUENCE special. To use this feature, go to the (+Z) Setup Formats for Reports screen. Select the invoice format that you want to change and specify the library where the invoice format is stored. When the Change Fonts For This Line prompt appears, type **Y**. The system displays the Combine Lines for Ticket Printing prompt. Type **Y**. At the Special Item Print Order prompt, type **C** to print the invoices in item company order. This feature only works with formats in which P-MASTER is the master file.

- **New Drop Ship Features:** You can track drop ship item quantities separately from regular item quantities. You do this by setting the new Track Drop Ship Sold Quantities field in the (LE1) Inventory Parameters screen to Y. If this field is set to Y, the system updates the I-AUXSUP and I-HISTSUP files with drop ship quantities. The I-AUXSUP file allows you to track the month-to-date quantity of drop ship items sold when the I-AUX month-to-date quantity is updated. The I-HISTSUP file updates the monthly quantity of drop ship items sold when the I-HISTORY sold quantity is updated. When you print Low Stock Reports, you can subtract drop ship quantities from the low stock calculation. Likewise, when you print Cycle Low Stock reports, the Include Drop Ship in Calculation prompt appears. For more information, see the handout *Line Item Drop Ship* at www.ddms.com/support/doc/ver5doc.htm

- **Approval Link:** A new feature cuts your cost for processing credit cards. Connect your DDMS system to PC Authorize software and process credit card and procurement card transactions. This Windows-based interface program connects your DDMS server to a PC equipped with PC Authorize software. Customer information is pulled directly from your DDMS server, eliminating the need to re-enter the information. Approval Link can also handle additional sales information that might be needed to process an order, such as item description, invoice number, and customer number.

  Approval Link handles all major credit card servers, and procurement cards or private label credit cards. It simplifies the process with an easy-to-use Windows application and provides network and TCP/IP capabilities. There is no need to add another modem. It also handles separate merchant IDs, handles multiple hubs, and works with all approved DDMS point-of-sale equipment.

- **Allow Check Approval:** This field in the (+VI) Approval Link Id Setup screen allows check approval through a credit card processing service. You set this parameter by merchant.

- **New Picking Manifest Parameters:** Several new parameters have been added to the (L8P) screen:

  - **Reset:** If you specify a password in this field, the password must be entered in the (TM) screen before you can change the order-puller number.

  - **TM-P Menu:** If you specify a password in this field, the password must be entered before you can access the (TMP) Manifest Build Configuration Menu.

- **(TMQ) Maintain Build Configurations:** You can create up to 26 (A-Z) configurations for building manifests. You can set limits and printing options for each configuration. This information is stored in the MP-CONFIG file. You can add, change, delete and inquire on configurations.

- **(TMP) Manifest Build Configuration Menu:** In the (TMP) screen, select one of the configurations you set in the (TMQ) screen to build a manifest. In addition to the 26 configurations, you can type **0** to access the existing (TMB) Complete Manifest action code. Type **!** to return to the (TM) screen.

- **Shipping Manifest:** You can input pick numbers when manually adding to a manifest in the (TMH) screen.

  You can add a carton count to shipping labels, for example, 1 of 3. In the (TS) screen, select the [U] Update Ctns & Print Lables action code. To use this feature, you must create the format using the (+Z) screen and Report Writer.

- **Order Validation:** The latest version of DDMS software includes the new order validation features that are part of our ongoing data protection initiative. The software may not process any order generated from other than an ECI^2 Approved Vendor Product. These orders may not be verified, invoiced, or picked up by the short-buys process nor the automated short-buy. You can still print and view these orders.

  Your DDMS system identifies valid orders via an encrypted index, P-VALID. The index is built the first time you install a version containing the order validate logic. Version 5.10.82 is the first released version with this enhancement. Orders not in the P-VALID file will not be recognized by the system. These orders cannot be verified, invoiced or released to valid orders. In addition, their status does not advance when flushed (by TR-G) or batch verified (by TR-V). When an unrecognizable order is final verified, flushed or batch verified, it will not move beyond a status 6 or 7. A special line will be added to the order and an exception is written to the verification exceptions file, VER-EXCEPT. The special line will read "Order Requires Review-Please Verify." In addition, unrecognizable orders moved into the system at a status 8 from other than an ECI[2] Approved Vendor product cannot be invoiced using the TR-B function. The order does not advance beyond a status A and no files are updated.

Processing backorders for orders not in the P-VALID file has been restricted. If you run a short-buy report (T-10), items from invalid orders show up on the report. However, you cannot add them to a P/O using the [S] Short-Buy function in the (F) screen. In addition, the automated short-buy ignores items from orders not in the P-VALID file. If your P-VALID file is deleted or becomes corrupted, you can rebuild it using the ;SPCVNDX program. It requires authorization each time you use it. Contact DDMS Support for authorization.

To remove unrecognizable orders from your system, use the [D] Delete action code in order entry. You usually can identify the unrecognizable tickets by order-writer number. You can print the report from the (T) or (TR) screens.

Point-of-Sale

- **New IBM Point-of-Sale Option:** As the industry changes, DDMS is always at work to keep your software compatible with the latest technological advances. In keeping with this, DDMS recently modified the point-of-sale application to work with IBM's point-of-sale system.

Purchasing

- **Auto Short Buy Enhancement:** You can now group multiple vendor call codes together for transmission scheduling. If you need to initiate more individual vendor calls at once than the current screen allows, the new group feature simplifies your automated short-buy setup.

  You can use the (LFA3) Vendor Call Groups screen to add vendor call codes. This screen gives you more in-depth control of purchasing on one launcher. You can take information that is spread on several short-buy launchers and maintain it on one launcher. This feature allows you to create vendor call codes in the (LFA1) Vendor screen, and then group these codes in the new (LFA3) screen. You can set up to 100 codes in each group, which means you can have up to 1,000 codes in a time slot. The system checks the (LFA2) Short-Buy Launcher screen to view the order of the call codes or groups. Not all call codes must be put in a group. A single code can still be used in a time slot. You can enter a single group code in the (LFA2) Short-Buy Launcher screen to represent multiple calls to be activated at a specific time.

To create these call codes in the (LFA3) screen, an @ symbol followed by a single alpha or numeric character denotes a call group. For example, @1 means Call Group 1.

- **Check for Wholesaler Cost:** When placing or changing purchase orders, you can automatically update the wholesaler's cost. To use this feature, you must set the Allow Updating Wholesaler Cost If Vendor Matches field in the (LF) Purchase Order Parameters screen to **Y**. When you place or change an order, the Reset Mfg Cost field appears as Reset Mfg/Whl Cost. By typing **Y** in this field, you can use the P/O cost to update the wholesaler cost.

- **Improved Item Matching for Electronic Invoicing:** DDMS has completed several new features that improve item number matching on received electronic 810 invoices. After processing the 810 in the usual manner, you may find item exceptions that could not be matched to an item on the purchase order. A new screen in the (DO) Accounts Payable Purchase Orders screen displays all the items. This screen lets you manually match any unmatched items from the invoice to an item on your P/O. This information is stored in the I-ALIAS file as an EDI 810 alias. The next time one of these items appears on an EDI 810 invoice, the system finds the match in the alias file, and processes the item automatically. See Figure 5.

- **Wholesaler Communications:** Mid Continent Office Distributors has been added to the available wholesalers. In the (L6E) Wholesaler Group Communications screen, type **H** to select Mid Continent.

Figure 5: The (DO) Invoice P/O Item Match Screen

```
                  (DO) Invoice P/O Item Match (XX/XX/XX)
================================================================================
<#>=Select Item, N=Next Page, P=Previous Page, T=Toggle Between Invoice & P/O
================================================================================
[__]-- Selected [__] ------ --- Purchase Order ------------- -- ----- ----------
  1  1234           TST      TEST ITEM DESCRIPTION      EA       1.000  25
  2  54321          TST      TEST ITEM NUMBER 2         BX      25.000  10




[__]-- Selected [__] ------ Invoice --------------------------------------------
  1  UNV35411                                           EA     3.400     10
  2  ACC25075                                           BX     1.520     12
  3  UNV27410                                           DZ     3.760     25
  4  72220          UPR      CLIP,JUMBO,SMOOTH,1C/BX    BX      .270     10


================================================================================
```

- **Daisytek Weight Restriction:** You can also set a P/O weight restriction. If you have a weight limit set with Daisytek, you can use this feature to insure your P/Os don't exceed it. When a P/O exceeds the limit, it is split for transmission then reunited later. This happens behind the scenes — you only see one P/O number, one shipment and one acknowledgement. To use this feature, go to the (LFA1) Vendor Call Number Master screen and select the [C] Chg Action Code. Tab to the Split P/O When Maximum Weight Is Exceeded field, as shown in Figure 6. Type **Y** and press Enter. To save your changes, press Enter in the second and third subscreens.

- **Vendor Comparison Report:** A new report compares the cost of items purchased from a vendor to those purchased from a wholesaler. The report includes the vendor, P/O number, invoice number, item number, company and description, shipped quantity, the extended cost for the P/O and the extended cost if purchased from a wholesaler. It shows the cost difference between the two and the percentage. To print the report, in the (SR) Purchase Order Reports screen, select the [S] Compare Vendor Purchases option. You can limit by vendor number, P/O number, P/O date, item class and item department. Use the National Drop Ship Orders Only field to only compare items sold as a national drop ship order in O/E.

Figure 6: The First (LFA1) Subscreen

```
11:49:26               (LFA1) Vendor Call Number                    10/14/02
--------------------------------------------------------------------------------
                          Call Number [3 ]
--------------------------------------------------------------------------------
  Parameter Screen :L6D     P/O Vendor # :DAISYTEK    Desc: [DAISYTEK       ]
  Match On Vendor Y/N ?   Add. Ways To Match on Vendor [          ] [          ]
  Match on ?  W=Primary Vendor Id, P=Pur. Vendor Program, V=Pur. Vendor Id
  Transmit P/O ?Y (Y=Yes,N=No,F=Fax,E=Email)   End P/O's Created Y/N ?

  How to Create P/O Number ?5 (Last P/O Number Used :D03173)
     (1=MMDD##,2=V.DOY##,3=V.MM##,4=YYMM##,5=V.MMDD#,N=Next P/O Number)

  If P/O Exists Use Next P/O Number Y/N/X ?X (Y=LF P/O #,N=Same,X=Next Seq.#)

  How to Sort P/O (1)  (2)  (3)   Create NEW P/O When Sort ONE Changes Y/N ?
     (I=Inv.,C=Customer,R=Route,S=Slsm,#=Item #,D=Dept,V=Ven.,X=Class)

  P/O Minimum Amount $
     Combine P/O if Under Minimum Y/N ?N  Transmit P/O if Under Minimum Y/N ?N
  Split P/O when Maximum Weight is Exceeded Y/N ?
  Cutoff Time : 22:00      Cutoff Day of Week :
     Combine P/O if Under Minimum Y/N ?N  Transmit P/O if Under Minimum Y/N ?N
--------------------------------------------------------------------------------
PRESS ANY KEY TO CONTINUE (P=PREVIOUS SCREEN)
```

- **PSN:** PSN opens a new world of interactive possibilities. It connects dealers to wholesalers via the Internet, eliminating the speed limitations, problems, and expense of dial-up modem connections.

  You can use PSN to batch transmit purchase orders and receive acknowledgments from vendors. The always-on connection (TCP/IP) is both faster and more reliable than dial-up modem transmissions. PSN is also free. There are no setup fees or transaction charges.

  P/Os are transmitted from your DDMS system over the Internet to ECI²'s private communication network (PCN). The PCN acts a translator and traffic cop. It converts the order to the right file format, and then sends it to the vendor. Whether your vendor uses XML, EDI, flat-file, or something else, they receive your order in their preferred format, ensuring seamless and speedy transactions.

  Wholesalers and manufacturers can also use PSN and the PCN to create their own private supply networks (PSNs). A PSN allows a vendor to offer customized, value-added services to DDMS customers. The features available through a PSN are determined solely by the sponsoring vendor and programmed to its specifications.

  For more information, go to *www.ddms.com/support/faq/purch-comm.htm*

Figure 7: The AR-MASTER Selection Fields

```
========= AR-MASTER SELECTION ========= |REPORT NAME - [!RPT   ON SR??] [!USR]
CUST #..........   INVOICE #..........  |              SEND TOF? [Y] LINES [66]
DATE :../../..     CHECK   #........    |TITLE -       RPT [ ] WIDTH [__]
DEBITS $.......... CREDITS $..........  |[                                  ]
   TAX $..........   DISCOUNT $.......  |MASTER FILE >> 1 AR-MASTER  <<
LOC. :..       REMARKS :..............  |
P/O  #..........   TYPE :.   DISC. :.   |PAGE BREAKS IN FILE Y/N ?
POS  :.    POST TYPE :.    DEPT :....   |PRINTER SETUP FILE-[__________  ____]
COMM. FLAG :. SUB :.   SALESMAN :....   |
FINANCE FLAG :. TERMINAL :..            |
DISCOUNT DATE  :../../.. DISPUTED :.    |
USER SEL. DATE :../../..                |HEADINGS (1-20)   BREAKS    (21-25)
BATCH REL DATE :../../..                |DETAIL   (26-35)  SUBTOTALS (36-40)
STATEMENT DATE :../../..                |TOTALS   (41-55)  TRAILERS  (56-65)
L.P/O #.............................    |LINE  [ 1] BOILERPLATE [  ]
                                        |FONTS [  ] [  ] [  ] [  ] [  ] [  ]
                                        |SKIPS BEFORE [  ] AFTER [ 1] LAST [  ]
                                        |FILE TO SELECT FROM [ 1]
                                                  ** ENTER 99 FOR TEXT ONLY **

--------------------------------------------------------------------------------
```

Report Writer

- **New Accounts Receivable Fields:** There are several new fields available when printing accounts receivable reports. For example, you can print or sort on the net and discount date, long purchase order number, and the disputed fields. You use the AR-MASTER file as the master file for the report, as shown in Figure 7.

- **New Laser Printer Options:** In the (+Z) screen, you can now select Landscape and Portrait printing options.

- **Print Vendor Bin Locations in Report Writer:** A new field has been added to the P-LINE Report Writer Selector screen. See Figure 8. You can use the Flush Vend/Bin field to print information from tickets and invoices. It will print the item's bin location, or if the item was filled from a vendor P/O during a (TR-G) flush, the Flush Vend/Bin field will let you print the first four characters of the vendor's number from the flushed P/O. The system prints the line item's flushed vendor number during the flush and also when you reprint the ticket or invoice.

Sales

- **New Sales Report:** The (UR-F) Sales Analysis (Full) Report is expanded into three reports. The Monthly Usage Report shows customers by department. It produces sales totals for each department for the select period, and totals for all departments with the customer's account. The second report shows item usage for each department for the selected accounts. The third report shows the same item usage at the customer master account level.

Figure 8: The Flush Vend/Bin Field

```
========== P-LINE SELECTION  =========== |REPORT NAME - [!RPT   ON SR??] [!USR]
PICK #........-.  SORT :...  GROUP :.... |              SEND TOF? [Y] LINES [66]
ITEM #.............. CO:........         |TITLE -       RPT [ ] WIDTH [__]
ORIG PICK #.......... FURN. CO:...       |[                                   ]
ORIG OT:....  VERIFIER:....  PULLER:.... |MASTER FILE >> 1 P-LINE     <<
CREDIT REASON :...............           |
RESTOCK FEE :.........  TAG#:.......     |PAGE BREAKS IN FILE Y/N ?
NATIONAL DROP SHIP ORDER :.  LINE D/S :. |PRINTER SETUP FILE-[__________  ____]
TRACKING UNIT :..    FACTOR :......      |
QUANTITY SOLD               :......      |
BUY UNIT :..        EXCLUDE AUTOSB :.    |
DELIVERY EST :../../.. ACTUAL :../../..  |HEADINGS (1-20)   BREAKS    (21-25)
DELIVERY TIME :..... TO :.....           |DETAIL   (26-35)  SUBTOTALS (36-40)
INSTALL  EST :../../.. ACTUAL :../../..  |TOTALS   (41-55)  TRAILERS  (56-65)
TAG DESC :.........................      |LINE  [ 1] BOILERPLATE [  ]
PICK MANIFEST #.......... PULLER :....   |FONTS [  ] [  ] [  ] [  ] [  ] [  ]
ADDITIONAL SALESPERSON :....             |SKIPS BEFORE [  ] AFTER [ 1] LAST [  ]
FLUSH VEND/BIN :.... MULTI BIN :....     |FILE TO SELECT FROM [ 1]  TYPE F/T [F]
QUERY ITEM #......................                  ** ENTER 99 FOR TEXT ONLY **

--------------------------------------------------------------------------------


FILL THE FIELDS WITH CHARACTERS TO SELECT
```

Serialized

- **Use Uncataloged Items in Serialized:** You can sell machines and contracts using uncataloged items. When you place an uncataloged item on an order or a contract, you are prompted to enter the system and serial numbers. Once you do, the uncataloged item description, department, stock class, and unit of measure are saved in the Z-ITEM file. By saving the information, serialized history for the uncataloged item is tracked just like any other cataloged serialized item. This feature is controlled by the Prompt Serial Number For Uncataloged Items field in the (LGF) General Parameters screen.

  You are also prompted to set up item defaults for the uncataloged item in the (EZC) Item Defaults for Serial Records screen. If you set up item defaults, you can return to the (EZC) screen later to view and change information for the uncataloged item. Not only can you create critical parts, warranties, and contract defaults for regular serialized items, but you also can when using uncataloged items.

Note: If you want to view and change information for the uncataloged item in the (EZC) screen, you must specify item defaults when prompted by the system. If you specify not to set up item defaults, you cannot access the uncataloged item in the (EZC) screen. Therefore, youcannot set up a critical parts list or warranty information for the uncataloged item. Once you set up an (EZC) record for the item, you can return to the (EZC) at a later date to view or change your settings.

- **New Fax and E-mail Capabilities:** Previously, you used a batch method to fax meter reading requests to a range of customers. A new enhancement lets you fax and e-mail not only meter readings, but contract renewals, and service workorders. You can set up contact information using the graphical Contacts window or the new text-based Contact Fax & E-Mail screen. This new screen lets you maintain a list of contact information. Once you have your contacts set up, you can enter the default formats you want to use for faxing and e-mailing. You do this in the (L6T) Fax Parameters screen. After you set up the contact's fax and e-mail formats, you can easily fax and e-mail serialized information from various screens, including the (EZO), (EZP), and (EZV) screens. You can fax and e-mail multiple meter reading requests through the (EZV) screen. However, if you want to fax and e-mail individual meter reading requests, you can do so using the (EZI) screen. You can also fax or e-mail requests using the new [F] Fax/E-Mail Renewals action code in the (EZU) screen. When you do, the system uses the records already in the Z-RENEWALS file to know what to fax or e-mail. You can also set limits for the records you want to include. For more details concerning this feature, see the *Serialized Faxing and E-mailing* handout available at www.ddms.com/support/doc/ver5doc.htm

- **Tech Recap Screen:** (EZWA) Tech Recap Selection Reports now accurately reflect a technician's time and mileage for subsequent occurences of a call.

Utilities

- **Telnet Licensing:** Since the Telnet user is no longer used by *e*Nsite Pro and *e*Nsite software, an additional TBL license is not required. Instead, the *e*Nsite user is automatically added to your system when the server installs. In addition, the TBL Interpreter changes the password for the new *e*Nsite user each time someone logs into the system.

- **Printer Setup:** In the (@) Printer Setup Program screen, you can now select Landscape and Portrait printing options.

Windows Software

- **AutoComm:** Faxing and e-mailing is now easier than ever. The new interface, AutoComm (previously AutoFax), lets your software work with the WinFax 10.0 software package. You can communicate directly from your system to any fax machine or computer. Simply connect your DDMS system to a PC with WinFax 10.0 software. Choose the information that you want to fax or e-mail, and let AutoComm do the rest.

  As with the previous versions of AutoFax, AutoComm allows you to fax information from your system to a fax machine. You can fax invoices, pick tickets, purchase orders, statements, and word processing files. Now you can e-mail these documents as well. AutoComm is easy to use and

Figure 9: The Fax and E-Mail Action Codes in the (B) Screen

```
16:13:14        (B) Accounts Receivable Posting rev. (06/21/00)        08/15/00
=============================================== $_______.__ ====================
Action [_]   File [AR-MASTER ]  Vol. [V5  ]   Batch #____ Control G/L __-___-__
================================================================================
Name   :______________________________   Number:__________ Last Payment MM/DD/YY
Suite  :_________________________   Discount ?_ %__._   #________ of $_______.__
Street :_________________________  Slsm :____   Limit $______    Avg Days #___
City   :____________________  St :__ Zip #_____ ____ Status :_ Prev $_______.__
Phone  #___-___-____      Contact :____________________           Curr $_______.__
     Check #________ Of $_______.__  Up TO Date ?MM/DD/YY       Total$_______.__
 INVOICE #   DATE    CHECK #    CHARGES    PAYMENTS   DISC. T REMARKS     REVERSE
---------- -------- -------- ---------- ---------- ------- - ----------- -------

-- Action Codes --
P = Post
I = Inquire
C = Change
B = Batch
Q = Quick Pay
A = Bad Accounts
F = Fax Statements
E = E-Mail Statements
O = Inquire by P/O #
```

allows you to accurately transmit large volumes of information to AutoComm from your DDMS system. AutoComm passes faxes to WinFax for faxing and sends e-mail through a mail server.

Using either the (&) DDMS Faxing screen or the appropriate application screen (see Figure 9), you can send invoices, account statements, and files to your customers. You can also fax purchase orders to your vendors. There are several faxing functions that you can easily perform from the DDMS system. With the added e-mailing feature, you can quickly send customer documents using your DDMS system, as well as Word and graphic documents from your PC.

There is also a new screen that allows you to monitor your faxes and emails. In the (&7) AutoComm Monitoring screen, you can inquire, delete, purge or resend faxes and emails.

- **Transferring Purchase Orders to Manufacturers:** This new feature works in conjunction with the DDMS DataPipe II module. It allows you to quickly transfer purchase orders to your manufacturers, without manually re-entering the information on your PC. The system will now transfer the information in just a few easy steps. Once you create a purchase order on the DDMS system, you use the DataPipe II module to build the purchase order in a format which your manufacturer can read. After the P/O is built, you can download the file using DataPipe II to your PC where it can be quickly transferred to the manufacturer. For more information, see the handout *Transferring P/Os to Manufacturers* at www.ddms.com/support/doc/ver5doc.htm

Graphical Changes

The following is a list of features added to *e*Nsite Pro Version 5 software.

Accounting

- **Accounts Payable:** You can now post and pay accounts payable invoices using the Accounts Payable Posting window, as shown in Figure 10. This graphical software version lets you perform all your normal A/P functions, including using the To Be Paid Report to pay invoices or manually marking the invoices you want to pay. In addition to manually paying invoices, the new *e*Nsite Pro edition of the A/P software also lets you post payables from purchase orders. This graphical version of the (DO) Accounts Payable Purchase Orders screen can streamline your accounts payable process. It allows you to easily make changes to your invoices and automatically posts information to your AP-MASTER file in a few easy steps.

- **Use Alphanumeric Locations:** Managing multiple locations or customer stockroom locations is easier than ever before. You now have the ability to use alphanumeric characters in all the location fields throughout the DDMS system. Therefore, in addition to using numerical locations such as Ø1, Ø2, Ø3, and so on, you can also use easier to remember alphanumeric locations, such as AA, BB, A1, A2, B1, B2, and so forth.

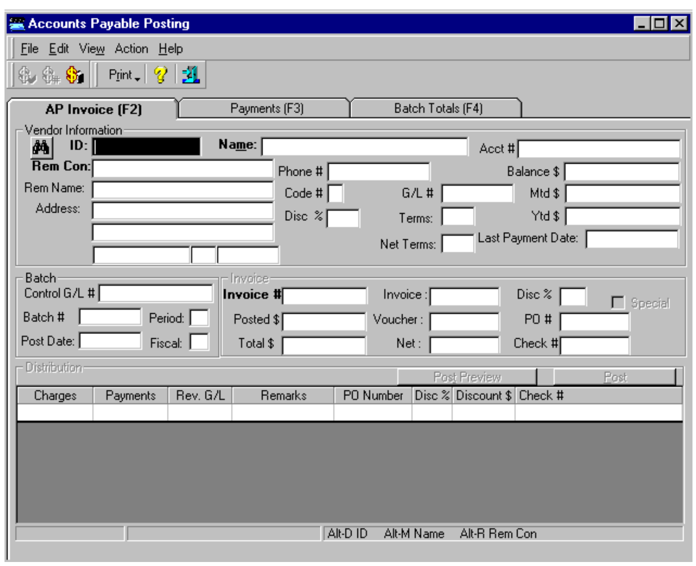
- **Post Deposits to Alternate Credit Cards:** You can post a deposit to any credit card set up for a customer.

Customers

- **Minimum Margin By Order:** You have long been able to ensure your margins by setting up margin protection in the customer discount file. This helped control your line item margin amount when placing items on an order. The new Minimum Margin by Order feature goes one step further. It lets you check for minimum margins for the entire order. If the total pricing of an order is below the minimum margin amount, the order-taker is prompted to place the order on hold or modify the pricing before the order can be completed. You set up this feature in the Customer Order Entry tab. Type O in the Hold Type box. In the Days box, enter the margin percentage.

  A password can also be set to allow overriding this feature, when necessary. You set your password in the Under Min Gross Profit % Password field in the (LG3) Order Entry Pricing Parameters screen.

Figure 10: The Graphical Accounts Payable Posting Window



- **New Salesperson boxes:** The Salesperson 1 box in the Customer Master tab allows you to enter the number or the name of the salesperson assigned to this account. Click the Salesperson 1 box on the right hand side of the Customer Master tab. If a salesperson is not assigned to the customer, assign the account the in-house salesperson number. If you do not know a salespersons number use the salesperson query button to search for a salesman. Click the query button next to the Salesperson 1 box and choose the salesperson you want from the list. See Figure 11.

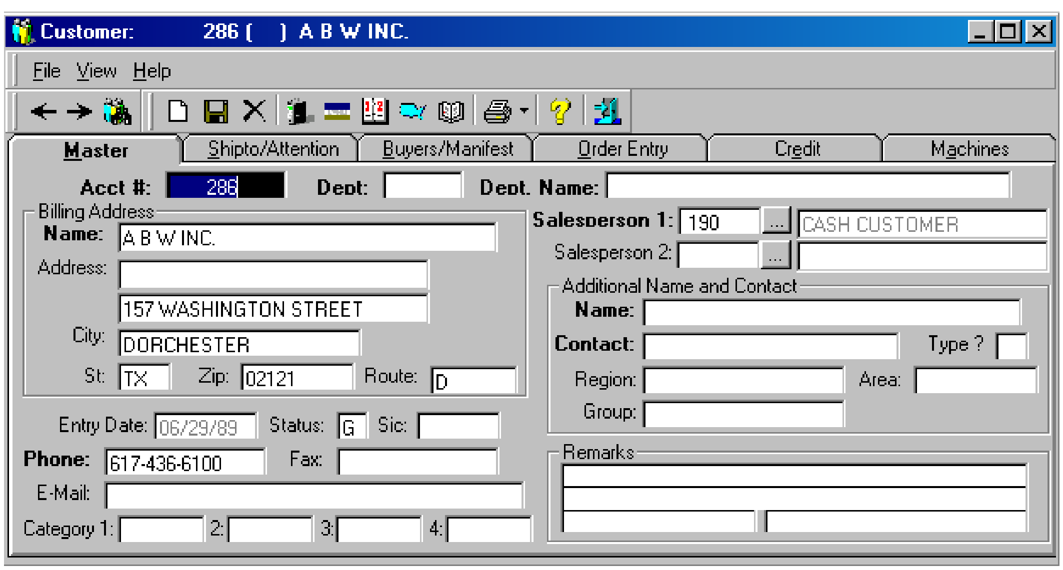
- **Tax Districts:** There are three new taxing features. These include the tiered sale price taxing district, nesting combined taxing districts, and taxing single items at different percentage rates based on categories. These features are a result of changes to the Tennessee tax code. However, these work for anyone who needs combined tax districts.

  Tiered taxing districts let you tax a different tax percent on an item based on sell price.

  With these new features, you can set up a combined tax district with unlimited tax districts. Previously, you could only set up a combined tax district with not more than three tax districts. Nesting combined taxing districts lets you assign one combined tax district to another combined tax district.

  In addition, you can now assign tax categories by item. For example, you can tax non-processed food items at a different rate than processed food items. This is only set up in graphical. For more information, see the handout *Version 5 Taxing Enhancements* at www.ddms.com/support/doc/ver5doc.htm

Figure 11: The Salesperson 1 and Salesperson 2 boxes



EDI

- **New Importer Program:** You can import EDI files. You can process the invoices and post them to the appropriate vendor in the A/P file. You can also match items on the P/O and invoice that could not be matched when the order was processed.

Furniture

- **Furniture Profiles:** Furniture profiles let you control a number of features for a furniture order: project type, due dates, whether to automatically creat a P/O for the order and more. Saving the profile prevents you from having to complete these fields for every order. Instead, you can set them once to suit most orders, and then change them only when an individual order requires it. Each order writer can save profile settings to suit his or her way of working.

- **Deposit Collection:**

  - You can display the Deposit window in Order Entry.

  - You can void deposits, returning the money to the customer, as long as the deposit has not yet been applied to an invoice.

  - When voiding a deposit, you can choose to retain a portion of the deposit that the customer has forfeited.

  - You can browse for the correct customer in the Deposit window.

- **Electronic Communication:** Use the Comm box in the Vendor window to transmit purchase orders to Herman Miller and receive acknowledgements.

- **Quote Release:** When you release a quote, the customer you created the account for, along with the project number, is retreived. You can select a different customer and project number, too.

- **Print Orders:** You can print orders in Change mode in Order Entry so you can review the changes you made.

Inventory

- **View Outstanding Purchase Orders:** In the Item window, you can see open purchase orders that include the item you're viewing. From the Item window, click . Outstanding purchase orders for the current item appear.

Miscellaneous

- **New Contact Fax and Email Screen:** This screen lets you maintain contact information. To access the Contact window in *e*Nsite or *e*Nsite Pro, click the File menu and select Contacts or type **Ctrl + N**. (To use this new feature, you must be set up with the AutoComm module.)

  By adding, changing, and deleting information, you can easily manage multiple contacts for your customer, vendor, salesperson, and serialized databases. You can have multiple contact types. For example, when using the Serialized module, you can email a meter reading to one contact, while emailing another contact a contract renewal. You can also set up contacts within departments: one for sales, accounting, and human resources departments, for example. You can mass add contacts from your customer files. The Delete and Mass Add functions require a password before you can continue. The Delete password is set in the Delete field in the (LA) Customer and A/R Parameters screen. The Mass Add password is set in the Reindex field in the (LA) screen.

  Once you set up the contact’s fax and email information, you can easily choose the best way to electronically transfer documents. For example, you can fax or email meter readings, contract renewals, purchase orders, invoices, and statements to multiple contacts from within the Serialized application, the (F) Purchase Order Entry screen, the (G) Order Entry screen, and the (B) Accounts Receivable Posting screen, as well as their graphical versions. You can also easily fax or email forms from the P/O History, A/R History, O/E History graphical windows.

- **Retrieve Using Word Search:** You now have an additional way to retrieve using specific words and the symbols \\ (two back slashes). You can use this new method in many databases and applications across the system, including the Customer, Vendor, Item, and Salesperson databases and the Order Entry, Accounts Receivable, Accounts Payable, and Purchasing applications. Here's how it works.

  Suppose you want to retrieve all customer accounts which contain the word "office". In this case, click the binocular icon in the toolbar to open the Customer Query dialog box. Once the dialog box opens, click the Name box and type \\OFFICE. Press Enter. The system retrieves each instance where the word office appears in the customer's name: Office Warehouse Supply, Warehouse Office Supply, or Supply Warehouse Office, for example.

  Likewise, to retrieve an item in Order Entry containing the word folder, you would click the Description box and type \\FOLDER. To retrieve items that contain the words red and blue, pens, for example, you could type \\RED

AND BLUE PEN. The words “or” and “and” are key words that let you search for multiple words in the item’s description. The word “or” means that only one of the words has to exist in the description. The word “and” means that both words must exist in the description. The word "not" excludes description with the word you specify.

You can also search using abbreviations. For example, if the abbreviation for blue is BE and you want the search to include all blue pens, type \\BE OR BLUE AND PEN. You can further limit the search by specifying the item’s manufacturer code in the Company box. For example, to search for all Sanford red pen refills, you would type SAN in the Company box and type \\RED AND PEN AND REFILLS in the Description box.

Order Entry

- **Print Invoice Items in Item Company Order:** You can print items on the invoice in item company order. If similar products are grouped together, receiving and processing your invoices is easier for your customers. This feature only affects the way an invoice prints. You can still print pick tickets in bin order. You can override the feature with the SEQUENCE special.

- **Auto Display Customer/Item History in Graphical O/E:** Use this field in the (LGF) General Parameters screen to automatically display Customer and Item History in Graphical Order Entry.

- **New Approval Link Feature:** This feature cuts your cost for processing credit cards. Connect your DDMS system to PC Authorize software and process credit card and procurement card transactions. This Windows-based interface program connects your DDMS server to a PC equipped with PC Authorize software. Customer information is pulled directly from your DDMS server, eliminating the need to re-enter the information. Approval Link can also handle additional sales information needed to process an order, such as item description, invoice number, and customer number.

  Approval Link handles all major credit card servers, and procurement cards or private label credit cards. It simplifies the process with an easy-to-use Windows application and provides network and TCP/IP capabilities. There is no need to add another modem. It also handles separate merchant IDs, handles multiple hubs, and works with all approved DDMS point-of-sale equipment.

- **Order Entry Freight Tables:** An enhancement lets you easily add freight charges in order entry for all available freight vendors. You can set up freight charges that can be passed along to the customer, based on specific rates. For example, suppose you have several couriers that charge different delivery charges. In this case, you set up separate tables for each. When your ordertakers final-verify orders and add freight, a new dialog box automatically opens. This dialog box displays the list of available freight vendors and lets them quickly select the one they want to use for the order. For more information on setting up and using this feature, see the handout *Order Entry Freight Tables* at www.ddms.com/support/doc/ver5doc.htm.

- **Order Validation:** The latest version of DDMS software includes the new order validation features that are part of our ongoing data protection initiative. The software may not process any order generated from other than an ECI^2 Approved Vendor Product. These orders may not be verified, invoiced, or picked up by the short-buys process nor the automated short-buy. You can still print and view these orders.

- **Set Up User-Defined Printer Emulations:** You can now add printer emulations that you can use with TBL/NT systems. Using the new Printer Emulation Workshop dialog box, you can easily customize and manage these printer emulations to work with virtually any Windows compatible printer. To do so, double-click the TBLConfig icon on your desktop. Click the plus (+) icon to the left of the Advanced icon and click Printer Emulations to highlight it. Right-mouse click and select Add New. When the Printer Emulation Definition window opens, click Emulation Workshop. To add the new printer emulation, you specify the emulation code, A1, for example, and the hexidecimal printer control strings (AKA printer control codes). When you finish specifying printer settings, click Save. Now you can assign the new custom emulation to your printer. For more information, see the handout *Printer Emulations* at www.ddms.com/support/doc/ver5doc.htm

- **Hot Keys:** In the Item Detail tab, you can access item usage at any time by pressing Ctrl + S. To access customer history by company or description, press F10.

Point-of-Sale

- **New IBM Point-of-Sale Option:** As the industry changes, DDMS is always at work to keep your software compatible with the latest technological advances. In keeping with this, DDMS recently modified the point-of-sale application to work with IBM's point-of-sale system.

Salesperson

- **Use Text Base O/E:** You can specify which type of Order Entry screen you access from the *e*Nsite Pro Main Menu. You can access either the text-based (G) Order Entry screen, or the *e*Nsite Pro graphical Order Entry window.

- **Use Text Base P/O:** You can specify which type of Purchase Order Entry screen you access from the *e*Nsite Pro Main Menu. You can access either the text-based (F) Purchase Order Entry screen, or the eNsite Pro graphical Purchase Order Entry window.

- **Use Text Base A/R:** You specify which type of Accounts Receivable Posting screen you access from the *e*Nsite Pro Main Menu. You can access either the text-based (B) Accounts Receivable Posting screen, or the *e*Nsite Pro graphical Accounts Receivable Posting window.

- **Use Text Base A/P:** You can specify which type of Accounts Payable Posting screen you access from the *e*Nsite Pro Main Menu. You can access either the text-based (D) Accounts Payable Posting screen, or the *e*Nsite Pro graphical Accounts Payable Posting window.

Serialized

- **New Fax and E-mail Capabilities:** Previously, you used a batch method to fax meter reading requests to a range of customers. A new enhancement lets you fax and e-mail not only meter readings, but contract renewals, and service workorders. You can set up contact information using the graphical Contacts window or the new text-based Contact Fax & E-Mail screen. This new screen lets you maintain a list of contact information. Once you have your contacts set up, you can enter the default formats you want to use for faxing and e-mailing. You do this in the (L6T) Fax Parameters screen. After you set up the contact's fax and e-mail formats, you can easily fax and e-mail serialized information from various screens, including the (EZO), (EZP), and (EZV) screens. You can fax and e-mail multiple meter reading requests through the (EZV) screen. However, if you want to fax and e-mail individual meter reading requests, you can do so using the (EZI) screen. You can also fax or e-mail requests using the new [F] Fax/E-Mail Renewals action code in the (EZU) screen. When you do, the system uses the records already in the Z-RENEWALS file to know what to fax or e-mail. You can also set limits for the records you want to include. For more details concerning this feature, see the *Serialized Faxing and E-mailing* handout available at www.ddms.com/support/doc/ver5doc.htm

Utilities

- **Windows 2000 Service Pack 2:** In order to run *e*Nsite and *e*Nsite Pro graphical software, you must be using Windows 2000 Service Pack 2. When you install the software, it checks to be sure you are using the correct service pack.

- **Telnet Licensing:** Since the Telnet user is no longer used by *e*Nsite Pro and *e*Nsite software, an additional TBL license is not required. Instead, the *e*Nsite user is automatically added to your system when the server installs. In addition, the TBL Interpreter changes the password for the new *e*Nsite user each time someone logs into the system.

Vendors

- **Auto-Pay:** The Auto Pay section in the Vendor Account Status tab has three G/L # boxes. You can select the G/L number from a drop down list.

- **Communication Link:** Use the Comm box in the Vendor Master Tab to specify the communication link between the vendor and the wholesaler or manufacturer. If you select Herman Miller, for example, the parameters for this vendor are automatically set to communicate with Herman Miller, according to their file transmission preference.

Windows Software

- **AutoComm:** Faxing and e-mailing is now easier than ever. The new interface, AutoComm (previously AutoFax), lets your software work with the WinFax 10.0 software package. You can communicate directly from your system to any fax machine or computer. Simply connect your DDMS system to a PC with WinFax 10.0 software. Choose the information that you want to fax or e-mail, and let AutoComm do the rest.

  As with the previous versions of AutoFax, AutoComm allows you to fax information from your system to a fax machine. You can fax invoices, pick tickets, purchase orders, statements, and word processing files. Now you can e-mail these documents as well. AutoComm is easy to use and allows you to accurately transmit large volumes of information to AutoComm from your DDMS system. AutoComm passes faxes to WinFax for faxing and sends e-mail through a mail server.

  Using either the (&) DDMS Faxing screen or the appropriate application screen, you can send invoices, account statements, and files to your customers. You can also fax purchase orders to your vendors. There are several faxing functions that you can easily perform from the DDMS system. With the added e-mailing feature, you can quickly send customer documents using your DDMS system, as well as Word and graphic documents from your PC.

Wholesaler Communications

- **Daisytek's Private Supply Network**

  - You can have P/Os split automatically after a P/O reaches a certain weight limit. Because orders that exceed the weight limit are shipped by slower methods, this feature can help ensure that your orders are shipped by the fastest means.

    - The Price Comparison Report compares your actual purchasing cost on previous orders to the current Daisytek cost in your inventory file. This helps you make informed decisions on future purchases. The report can be limited in a variety of ways, letting you compare pricing on specific types of purchases, such as national drop ship orders.

- **United's Unilink:** If you have split lines on a P/O, the acknowledgement number prints on each line.
- **SP Richards:** Transmissions include space for 9-digit zip/postal codes.