



What's New in Version 7



eCommerce Industries, Inc.



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New Features in Version 7

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. To the left of each new feature is the version number in which it was released.

All of the features described in this handout are included in the Ensite 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/ver7doc.htm

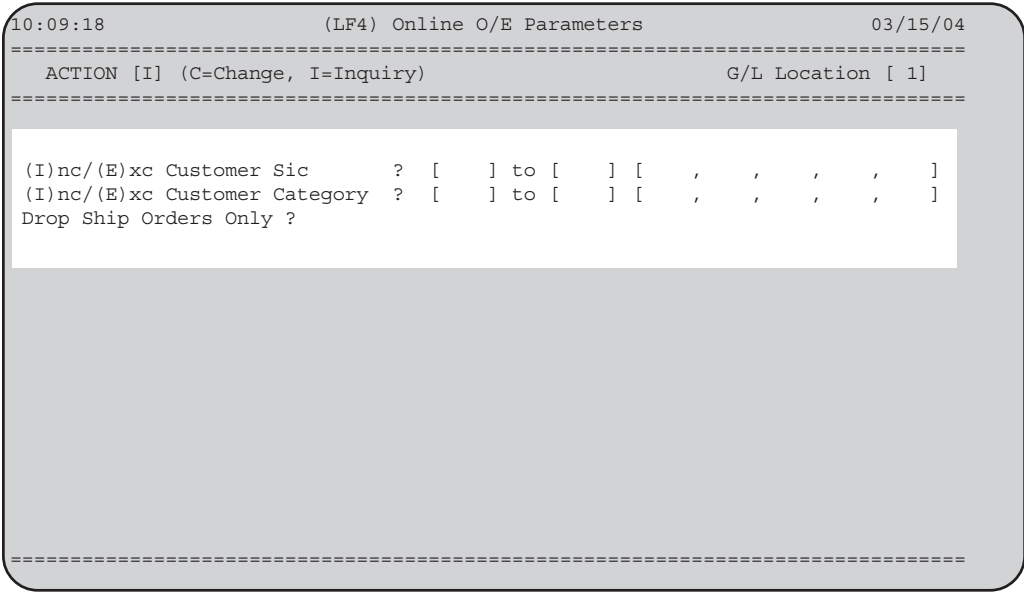
General Ledger and Serialized (Machines) are now available in Ensite Pro. An overview of these features are included in this handout.

Note: Before installing version 7, make sure any journal files that you want accessed are set up in Accounts Receivable (A/R), Accounts Payable (A/P), and Purchase Order Entry (P/O). If you do not set up these journal files, they will not be converted and will no longer be accessible after the installation.

Text-Based Changes

The following is a list of features added to text-based Version 7 software.

Figure 1:
The new (LF4)
Screen



Accounts Receivable

- 7.9.x Assigning Groups:** We've added a new 10 character Group field in the (AQ) screen and the Customer Master tab. This user-defined field works with the new customer contracts feature, described later in this handout. This field lets you assign customers to a specific group. Using this group code, you can run reports and post accounts receivable payments by group. The reports information is stored in the C-INFO file.

In accounts receivable, you can post a check to all accounts in a group. You access the the account by group and all invoices for all accounts in that group are available for posting. You can also use this group code when searching for a customer by alias. The Group box in the Accounts Receivable Posting Payments tab allows you to retrieve customers assigned to a specific group. Enter the group code in the Group box. You can also post payments by group in the (BQ) Quick Pay screens. Begin posting as you normally would. When Pay Method appears, select the Multiple Accounts per Check option.

Communications

- 7.2.x Private Supply Network (PSN):** You set PSN parameters in the new (LF4) Online O/E Parameters screen. This screen allows you to limit purchase orders through order entry. You can also limit purchase orders by customer category, SIC code, and drop ship orders only. See Figure 1.
- 7.4.1 Emco Communications:** You can now print the customer address information on Emco acknowledgments. To do this, set the Print Address Info on Acknowledgments field in the (L6J) Emco Communications screen to Y.
- 7.4.1 New PSN Trading Partners:** In addition to the PSN trading partners released in previous versions, you can now send purchase orders electronically to Lagasse and Synnex. Enhancements include new communications parameters screens for Lagasse and Synnex. These screens are (L6O) and (L6R), respectively. For more information, PSN handouts are available on our web site at www.ddms.com/support/doc/psn.htm and all parameters are included in our Ensite Pro online help.
- 7.4.1 S.P. Richards PSN Enhancements:** Using Source Complete, you can avoid backorders. Source Complete lets SP Richards drop ship your order from the nearest warehouse with the quantity to fill it. Set up Source Complete in the (L6C) screen. You must set up the Allow, Method, UPSable Only, and X UPS Zones fields. For more informa-

tion on these fields, refer to the *DDMS Parameters Manual or Phase II: Setting Up & Using SP Richards' PSN* handout at www.ddms.com/support/doc/psn.htm

- 7.5.0 S.P. Richards Electronic Invoicing:** Previously, S.P Richards customers could only download electronic invoices via conventional dial-up communications, which posed a number of programming limitations and could be time-consuming. With electronic invoicing through PSN, customers can download electronic invoices much more quickly. Customers can also download electronic invoices for a specified date range or a specified invoice number. Additionally, customers can download invoices from multiple Distribution Centers within a single request. Enhancements to the (L6C) Sparco Communications Parameters screen allow you to use electronic invoicing via PSN. First, set the SPR Direct P/O field to Y for PSN. Then, set the new Inv field to Y to use the new electronic invoicing feature.
- 7.9.10 EDI Communications:** We have added the ability to display the purchase order number in the EDI Transaction Monitor when EDI transmissions are purchase orders. In this (SG) screen, select the [T] Transaction Monitor function. To use this feature, type **A** for Actions, and then type **N**. The system displays the purchase order numbers in a column.
- 7.9.x OPUS PSN Control:** Office products manufacturers and wholesalers typically provide pricing information in numerous paper-based flyers, programs, and catalogs. Manually keeping up with this pricing information for each inventory item from multiple vendors can be very labor-intensive.

Therefore, Office Products Update Service (O/PUS®) created a service, the Business Products Information Resources™. The O/PUS BPIR allows dealers to download and process inventory pricing information in electronic format, eliminating data entry errors in manual procedures, and saving valuable employee time.

Vendors provide an ever-expanding list of pricing information files for general distribution to all O/PUS customers, as well as confidential pricing files for individual dealers.

Originally, the BPIR's sole distribution channel was the BPIR bulletin board system (BBS), a pre-Internet message center technology. A BBS allows members to dial-up via modem to a computer that stores downloadable files or broadcast messages.

Now, using the O/PUS PSNControl software, you are able to obtain all your quarterly OPdb O/PUS Multi-Vendor Updates by simply downloading them via the Internet, rather than waiting for a CD-ROM shipment. Effective for the first quarter of 2005, O/PUS will distribute the OPdb Multi-Vendor Update file via the O/PUS PSN service. In addition, you can download BPIR pricing files over your broadband Internet connection. Using the O/PUS PSN, BPIR transmissions are dramatically simpler, faster, and more reliable.

- 7.10 **Arlington PSN:** Arlington offers PSN services, including purchase order transmission, acknowledgements, and stock and price checks. For instructions, see www.ddms.com/support/doc/psn.htm.
- 7.10 **Allsteel PSN:** Allsteel offers PSN services, including SIF importation and purchase order uploading. For instructions, see www.ddms.com/support/doc/psn.htm.
- 7.11.30 **S.P. Richards' 2PL Network:** This new feature lets independent dealers provide local delivery to customers who have branch offices nationwide. The 2PL program works with national drop shipping (NDS) flow.

Using 2PL, you can flag a customer account or an individual order while in Order Entry to be drop shipped. The order is processed as a normal drop ship order. There is no need to change customer routes or any ASB parameters, etc. The order is transmitted to SPR as part of a P/O with no special handling.

If the customer is set up as a 2PL account and the order is a dropship, SPR routes the order to the distribution center nearest the delivery destination, based on the customer's zip code. The order is then filled and delivered the next day directly to the customer by a local dealer.

Note: This feature works with both text-based and graphical software.

- 7.11.30 **Eastern PSN:** Eastern Distributing offers PSN services, including purchase order transmission, acknowledgements, and stock and price checks. For instructions, see www.ddms.com/support/doc/psn.htm.
- 7.11 **Tri-Mega Purchasing Association (TPA) PSN enhancements:** Instead of the original functional acknowledgement ("Your order was received on this date"), TriMega PSN provides a full, detailed acknowledgement from manufacturers (including line item details and quantities to be shipped), which greatly improves the order flow and auto short-buy capabilities for TriMega customers. Addi-

tionally, new (CP) Electronic Invoicing parameters for the Match on P/O Nbr field let you match on the manufacturer invoice number or packing slip number. This reduces the number of exceptions that occur when posting A/P invoices from TPA. You can also send up to two bin numbers per item on purchase orders. When the manufacturer processes your order, the bin number prints on the label for the warehouse. For instructions, see www.ddms.com/support/doc/psn.htm.

- 7.11 TechData PSN Enhancements:** Tech Data lets you change your shipping method for each purchase order, order, or line item. The shipping method value was previously hardcoded as "23" Fedex Ground. You can now set the shipping method for each carrier. The Ensite Pro Order Entry application has also been enhanced to let you use Tech Data's blind drop ship. You select drop ship in Order Entry, and Tech Data drop ships the merchandise to the customer. The package has your dealership's address in the "From" portion on the package label. For instructions, see www.ddms.com/support/doc/psn.htm.

Customer

- 7.9.x Customer Parameters:** Several new parameters have been added to the (LA) Customer and A/R Parameters screen. See Figure 2. Use the Advanced Customer Queries field to enable advanced customer queries. Enabling this feature lets you search master accounts by the Name box in the Billing Address or the name box in the Additional Name and Contact boxes.

**Figure 2:
The (LA) Screen**

```

09:36:43                (LA) Customer And A/R Parameters                10/04/05
=====
Action [I] (C=Chg,I=Inq,1=Sales,2=A/R,3=Statement,4=Jour,5=Deposit) G/L Loc [ 1]
=====
Next Customer #          Allow Manual Input ?N Save Changes ?N Swap Name ?Y
Inc/Exc In (B) ?I From ? To ? From ? To ? Add In (B) Y/N ?N Status ?A
Inc/Exc In (G) ?I From ? To ? From ? To ? Add In (G) Y/N ?N Status ?A
Passwords: Reindex ?DDMS Release ?DDMS Purge ?DDMS EOM ?DDMS
           Delete ?DDMS Credit Card ? Mask Inquiry ?N EOY ?DDMS
Monthly Usage From ?M To ?M Quarterly Usage From ?Q To ?Q
Print Copies With Original Invoice Y/N ?Y National Drop Ship Route [NDS ]
In O/E on Customer Query, Display Shipto Address instead of Billto Y/N ?Y
In Gateway Set Shipto Name to ? (A=Add. Name, C=Add. Contact, S=Shipto Contact)
Set Dept Name to ? (B=Billto Name, A=Add. Name, C=Add. Cont., S=Ship Cont.)
Keep Service Quality Statistics for Customer Status : [A] to [Z] + [ , , , , ]
Locs.to Exclude from Service Quality Statistics [ ] to [ ] + [ , , , , ]
Auto-Bill Invoices: Print, Fax, Neither P/F/N ?N Formats: Invoice : Fax :
Sort Order ?N (#=Customer Nbr, N=Customer Name, R=Route, Z=Zip Code)
Only Bill Auto-Bill records that have a Quantity greater than Zero Y/N ?
Create Line Item Special from Auto-Bill Remarks Y/N ?
Advanced Customer Queries Y/N ? Suite instead of Street on Queries Y/N ?
Show Master Shipto's if none on Dept. Y/N ?
    
```

The Suite Instead of Street on Queries field lets you choose whether to search by suite number instead of street address when using customer queries.

The Show Master Shipto's if None on Dept field lets you determine whether to display the master shipto address instead of the department address, when there is none.

7.9.x Assigning Customer Groups: We've added a new 10 character Group field in the (AQ) screen and the Customer Master tab. This user-defined field works with the new customer contracts feature, described later in this handout. This field lets you assign customers to a specific group. Using this group code, you can run reports and post accounts receivable payments by group. The reports information is stored in the C-INFO file.

In accounts receivable, you can post a check to all accounts in a group. You access the the account by group and all invoices for all accounts in that group are available for posting. You can also use this group code when searching for a customer by alias.

Previously, you could view up to 10 departments in the (LA1) screen. Now, you can view up to 70 departments in the (AS) Customer Sales History screen.

Suppose you have several accounts and departmental accounts for a large customer. By assigning the master account and departmental account the same group code, you can ensure that the contracts used for the master account and all departmental accounts are the same. Once you have assigned group codes to your customer accounts and departmental accounts, you can go to the (ET) screen and use the new customer contract features to assign customers as many contracts as necessary. This contract information is stored in the C-DISC file.

You can also view your customers' history information by group in Customer History. In the Customer History Total Sales and Group Sales tabs, check the Sales Rollup by Customer Group box.

7.x Tiered Taxing: There is a new option in the (AT) screen. You specify that you are setting up a tiered tax district by entering the new [T] option in the LU field. (The LU field defines the tax type, combined or applied, for example.) The [T] option lets the system know that the previous tax district in the combined list is the lower range of the tax cap.

In the (AT) screen, you can set up the following tax districts: state tax districts, lower level cap (\$1600 and below), upper level cap (\$1600 to \$3200), and nested combined tax.

Nested combined tax districts allow you to create a combined tax district, comprised of more than three tax districts. For example, if you have a state tax, county tax, city tax, and an additional tax district, you can set up nested combined tax districts to allow for the fourth tax district. Another example would be if you had a tiered tax structure with more than two levels. In either case, you would first set up the individual tax districts, assigning the last two to a combined tax district. Then you would assign the first two tax districts and the combined tax district to another combined tax district that is assigned to the customer.

Note: Before making changes to the (AT) screen, DDMS recommends that you print a hard copy of your current tax districts.

- 7.x **Shipto Based Taxing:** Multi-location customers can complicate sales tax collection. Shipto Based Taxing enables you to link tax districts with customer shipping addresses. Sales taxes are calculated based on the shipping address for each order (rather than the billto address), ensuring accurate tax calculations. You set this up in the (AX) Customer Attentions screen.

- 7.11.10 **Order Entry Minimum Order Charge:** You have long had the ability to specify a minimum dollar amount for an order. You used this feature by setting the Minimum Order Amount and Add on Dollar Amount fields in the (LG3) Order Entry Pricing Parameters screen. We have recently enhanced this feature to allow you to exclude specific customers from the minimum order charge fee. We have also added the ability for you to customize the text that appears on the customer's ticket whenever the fee is applied. Two new parameters have been added to the (LG3) screen: Charge Description and Auto Apply. In the Charge Description field, you can enter up to 30 alphanumeric characters of descriptive text. You might enter the text Below Minimum Order Fee, for example. The text you enter prints on the customer's ticket, explaining the line item charge. When the customer's order falls below the specified amount, the order-taker is prompted and the customer is charged the fee or has the option of placing additional items on the order. If the charge is later deleted in the Item Detail tab, the system writes a line to the EXCEPTIONS file. You use the Auto Apply field to specify that the system automatically apply minimum charges to all customer's orders when the total falls below the minimum amount. If you want to exclude specific customers, you can use the Exempt From Min Order Charges box in

the Customer Order Entry tab. This customer is then exempt from minimum order charges and the order-taker is not prompted when the order is ended. This information is stored in the C-SUPP file. You can also print this information using Report Writer.

Item

7.4.x

Vendor Information: Several new boxes have been added to the Item screens. The Ven Stocking and Ignore Cost in O/E fields are available in the (E) Item Detail screen, the Multiple Vendor screen, and the (+E) Special Item Selector screen. You use the Ven Stocking field to specify whether the item's vendor is stocking or non-stocking. This information may be loaded from the O/PUS file or you can enter it manually. Type N if this item is a non-stocking item. Type S if this item is a stocking item. Type D if this item is a direct buy item.

You use the Ignore Cost in O/E field to specify whether to ignore the I-MFG (direct buy) cost in Order Entry and when creating contracts. You can also set this field when loading the O/PUS file. To ignore the I-MFG cost in Order Entry and when creating contracts, set this field to Y. When you ignore the I-MFG cost, the O/E and contract cost defaults to the next cost to use. The next cost is controlled by the Default To P Ven Cost If No MFG Cost field in the (LG3) Order Entry Pricing Parameters screen. If this field is set to Y, the cost defaults to the purchasing vendor. If this field is set to N or is blank, the cost defaults to the primary wholesaler.

**Figure 3:
The Item Detail
Screen**

```

Item Detail Screen (05/20/04)
----- MASTER RECORD ----- COLUMNS RECORD -----
Item #123          Co:GPT          Col. Type G/D : Assort :      Col #
Desc. :ELEMENT,TYP,PRST PICA,10      Qty 1 :      %      $
Extended #123          Unit :EA      Loc. Qty 2 :      %      $
Kit :   Lead :   Hr. :   Ser. :   [ ] Qty 3 :      %      $
Weight :          UPC #024222000709      Qty 4 :      %      $
Category 1:  2:  3:  4:          Qty 5 :      %      $
                                   Col. Cost $      .000      Avg
----- DIRECT BUY ----- PRIMARY WHOLESALER [ 1 ] -----
Vendor ID :          Taker :          Program :          Taker :
Who Chg   :E-CHG     Created :          Changed :OPUS      Created :OPUS
L.Change  :05/20/04  L.Update : / /      L.Change: / /      L.Update :03/27/00
Weight   :          UPSable :          Eff. On : / /      Ending On : / /
Cost $   :          Cost $ 20.390  Wt. :          UPS :Y
Ven. Stocking :S Ignore Cost in O/E ?Y  Recycle :  Minority :  Prod. Type :
----- PRICING RECORD [ 1 ] ----- UNITS OF MEASURE -----
Net :N Up Cost  % Max 12% Con  %      Unit      Qty      EDI Use Only  M/D
Cost $      .000 List $ 34.750 100.0%  [...] [.....] [...] [.....] [...]
Don't Mark as National Drop Ship ?  [...] [.....] [...] [.....] [...]
----- Hazard Forms -----
OSHA Y/N ?[...] Form # [.....]  [...] [.....] [...] [.....] [...]
DOT Y/N ?[...] Form # [.....]  Multiple or Information M/I :.
    
```

These fields can be changed in the Item Detail Screen, shown in Figure 3, and the (+E) screen. They are for display only in the Multiple Vendor screen.

- 7.4.x Pricing Matrix Changes:** In the (ET) Inventory Contract Price screen, you can now differentiate between items on a contract and items on a special price list. A new prompt allows you to assign items to a matrix pricing plan instead of a contract. At the Matrix Price Plan prompt, type Y to assign items to a matrix pricing plan. When placing an order for this item in graphical or text-based order entry, an M displays to specify that this item is part of a matrix pricing plan. (If an item is assigned to a contract, a C displays when placing an order for the item in order entry.)

Miscellaneous

- 7.4.x Printer Parameters Changed:** A change was made to the Compress Print field in the (L1L) Laser Printer Parameters screen to allow landscape printing. You use this field to determine whether to compress classic reports to 17 CPI (characters per inch). If you type Y in this field and are using 15-digit G/L account numbers, your report will automatically print in landscape format.
- 7.10.20 Calculate to Three Decimal Places:** Previously, when you set the Calculate Tax by Line field in the (LØ) screen to Y, the system calculated the tax for each line item on the order up to two decimal places. Now if this field is set to Y, the system calculates the tax for line items up to three decimal places. When rounding up to two decimal places, a large order containing up to 32 different line items, for example, could result in a 16 cent total tax difference. This enhancement was made to ensure that the tax being charged to the customer was as accurate as possible.
- 7.x Change to (LG4) Screen:** The Prompt For Updating Mfg Cost When Cost Is Changed lets you specify whether the system prompts you to update the manufacturer's cost when cost in the drop ship order entry application changes. The manufacturer's cost is set in the Direct Buy Record of the (E) Inventory Master screen. Now, you can also set this field to a P and the system will keep (not clear) the purchase order number for backordered lines when creating a -1 ticket.

Order Entry

- 7.4.x Using Matrix Pricing in Order Entry:** You can now use matrix pricing in Order Entry. To do so, begin by setting up matrix items in the (ET) Inventory Contract Price screen. When you do, you can differentiate between items on a contract and items on a special price list.

A new prompt allows you to assign items to a matrix pricing plan instead of a contract. At the Matrix Price Plan prompt, type Y to assign items to a matrix pricing plan. When you place an item on the order in text-based order entry, an M displays to specify that this item is part of a matrix pricing plan. If an item is assigned to a contract, a C displays when placing an order for the item in order entry. In the graphical Order Entry Item Detail tab, this information appears in the Disc Type box. The system displays the text Matrix in this box.

- 7.9.x Viewing All Departments When Viewing O/E History:** When you view item history in Order Entry, you can also view information for the customer's master account, as well as any customer departments. You can view item history using the HISTORY special. This special lets you view items that were sold to the customer or customer's department by specifying the item's manufacturer and/or description. This special also lets you view specific information about the sale of each item.

You can also view history when retrieving an item in Order Entry. Using this method, you can see as many as 10 invoices on which this item was sold. (Only status B invoices are displayed.) You can view invoice details for any one of the past invoices.

- 7.9.X Process Monitor:** Previously, you could only monitor batch tickets, batch invoices, and flushes from a DDMS server. Now, you can easily check the status of today's reports from a server or workstation. From the Master Menu, type TT. In the Batch Ticket/Invoice Print Status screen, you can see the detail of a print job or check the current status of a report. To see basic status information, in the Action Code field, type F. You can also set limits for viewing. To do this, type L.

- 7.9.x Expanded Printers in Order Entry:** The new (L1P) Order Entry Printers by Location screen lets you utilize more printers in order entry. Previously, when printing from order entry, you were limited by the (L1) screen automatically assigning a "P" as the first character. Enhancements to the (L1) screen let you set up as many as 88 printers. You can set up printers using Ø-9, A-Z, a-z, and ASCII characters as the second letter. For example, you can set up a printer as PA or Pa. Or you could set a printer to P! or P\$, and so on. For more information on setting up additional printers in the (L1) screen, see the handout *Setting Up Multiple Printers* at www.ddms.com/support/doc/ver5doc.htm

Note: You cannot use an uppercase T when setting up printers. PT is reserved as a slave printer.

You use the (L1P) screen to assign locations for printers using 5, 6, or 7 as the first character. This new feature lets you assign up to 360 unique printers for Order Entry and the (TR) screen. In the From and To fields, enter the locations to use for printers with the first character 5, 6, or 7. You can use the + (plus) fields to enter up to five additional locations. When printing from location 2, you can use printers with the first character of 5, when printing from location 3, you can use printers with the first character of 6, and so on. (All other locations will use printers with the first character of P.)

7.9.x New Special in Order Entry: We've added a BILLONLY line item special. Using this special indicates that the line items entered on the order should not affect inventory and default to shipped. To use the BILLONLY special, you must specify the order as bill only before entering items. Type BILLONLY in the Item field. The prompt Make Order a BILL ONLY Order appears, as shown in Figure 4. Type Y. Continue with the order as you normally would.

7.9.x Time Stamp in Order Entry: When creating an order in Order Entry, the order's creation time is saved in the P-GLOBAL file. This new feature works in conjunction with the Today's Cutoff Time field in the (TM-A) screen. The order creation time displays in the (G) screen when inquiring on an order. This feature works in both text-based and graphical.

**Figure 4:
The Make Order
a BILL ONLY
Order Prompt**

```

10:52:47                (G) Order Entry (01/25/05)                03/31/05
-----
Order Writer :CIND          G/L Loc # 1  Inv Loc # 1      Transaction # 10088-0
Order                               Charge          File :P-MASTER Vol :SR??
Name :3 I CORPORATION          Account #      70198
      SUITE 3320                S 10.0 Slsm : 372 Status :G  P/O #
      ONE POST OFFICE SQUARE    Route :G              Lines #      %
      BOSTON                    TX 02109              617 542 8560 Sub-Total $
-----
#  Item          Mfg          Description          UM C Order  Ship  Price
-----
      BILLONLY
-----
Make Order a "BILL ONLY" Order Y/N?N
    
```

- 7.9.x Duplicate Purchase Order Numbers Allowed:** The Check Customer P/O In Order Entry in the (LGA) Parameters Screen lets you specify how you want the system to search the file P-CPOINDEX by customer purchase order number. This field works in conjunction with the Create Customer P/O Index File field. (You must specify Y in the Create Customer P/O Index File field for this field to work.) An S response in this field lets the system search the P-CPOINDEX file by the short purchase order number. If you enter a duplicate purchase order number when entering an order in Order Entry, you can type a Y at the Duplicate P/O Found prompt and continue with your order. Previously, if the system found a duplicate P/O number, you could not continue with the order.
- 7.10.x Additional Volume Discounts:** This feature lets you offer discounts and item gift rewards to customers that place orders within a certain dollar amount. It gives you two options: You can reduce the customer's order by a discount percentage whenever the order falls within a set dollar amount, \$100 to \$200, for example. If you use this option, the discount applies to the entire order total and is based on the subtotal amount, before tax is added. The discount is given in addition to the customer's regular pricing. Or, you can give the customer a gift item when placing an order within a specific dollar amount. In this case, a gift item is added to the order at no charge. Before you can use this feature, you must set up the Additional Volume Discount Plans window in the Order Entry parameters. You use this window to set up plan codes, dollar amount ranges, and discount and gift items.

Note: This new feature works in both text-based and graphical order entry. You must setup graphical Order Entry parameters and graphical Customers. After setup is completed, you can use this feature in text-based order entry. This feature also requires authorization. For more information, please contact ECI² sales.

When you set up discount percentages in the Additional Volume Discount Plans window in the Order Entry parameters, the system links the discount percentage you specify to an existing inventory item. Linking the discount to an item is useful for tracking and reporting purposes. Unless you have items in your inventory that can be used as discount items, you must add new items for use with this feature in the Item window. Not only does this help the order-taker distinguish between discount plans and regular items while placing an order, you need the ability to track and report on these discount plans when printing reports. Therefore, you should carefully consider how you want to report these discounts. If you want to report

the various discount amounts given for specific code plans and dollar range tiers, you should create several different unique items for each level and for each table you set up. If you only need to view one total amount of volume discounts across all your sales, you only have to set up one unique item, volume discount, for example.

After you set up your items in the Item window and your plan discounts in the Order Entry parameters, you must assign the discount plan to a customer. Use the Additional Volume Discount Plan box in the Customer Order Entry tab to do this. In Order Entry, anytime the customer's order falls within the specified dollar range, the system adds the discount amount to the entire order as a credit, reducing the amount of the entire order. If the specified dollar range is set up as a gift item, it is added at no charge. A message displays in Order Entry, notifying the order-taker that the item or discount was added. In addition, if the customer's order falls within 30% of the next dollar range, the system prompts the order-taker, so the customer can consider adding more items to the order to reach the next dollar range and corresponding gift item or discount percentage. Whenever a volume discount line is added to an order in Order Entry, the system updates the P-GLOBAL file.

Note: If the order has a negative shipped total, the system prevents invoicing the order with the additional discount line items. Instead, the system holds the order at a status 6. The system also prints a message on the ticket indicating that the order cannot be invoiced. The system holds a negative shipped total order with additional discount items to a status 6 or 7 when using the (TR)[G] or (TR)[V] functions. An AAAA special line is added with the text Negative Total – Invoicing Not Allowed and an exception is created. When final-verifying a ticket, if the order has a negative total, the system holds the order at a status 6 or 7 and creates an exception. In addition, additional volume discount items cannot be placed on a picking manifest. These factors only apply to discounted items, not gift items placed on the order.

7.10.20 Calculate to Three Decimal Places: Previously, when you set the Calculate Tax by Line field in the (LØ) screen to Y, the system calculated the tax for each line item on the order up to two decimal places. Now if this field is set to Y, the system calculates the tax for line items up to three decimal places. When rounding up to two decimal places, a large order containing up to 32 different line items, for example, could result in a 16 cent total tax difference. This enhancement was made to ensure that the tax being charged to the customer was as accurate as possible.

- 7.9.x Third Party Carrier:** DDMS' third party carrier (3PC™) feature acts as an interface between the shipping manifest program and a third party shipping service. It allows you to streamline your 3PC™ billings and enables you to better track your customers' packages.

You begin by creating your orders in the (G) Order Entry screen. Then you 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 3PC™ pick ticket onto the manifest. Once the pick tickets are listed on the manifest, you export the pick ticket information to the shipping service using the third party carrier's software. After the information has been exported, the third party carrier processes the information and determines the package's weight, the method by which you want the package shipped, any insurance information, and any 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 the necessity of printing the labels yourself.

After the labels print, you import the third party information 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 will print on the invoice. Since you have the tracking number readily available and attached to the invoice, tracking your packages is easier than ever.

Purchase Order Entry

- 7.2.x Auto Flush:** Completed purchase orders flush automatically as part of your automated short-buy (ASB) flow. For example, you can auto flush a P/O after transmitting it to a certain vendor. Previously, you could pre-receive a P/O or final-receive a P/O. In addition to these two options, now you can use Final Receive & Available for Auto Flush to make a P/O eligible for auto flushing. You specify the calls to flush in the new (LFA4) Auto Flush Call List screen.

You can use auto flush with these trading partners:

- Sparco
- United

- Emco
- Azerty
- Horizon

Set these parameters:

- Set up the auto flush in the (LFA) Automated Short-Buy Menu screen. For more information on the (LFA4) screen, see your online help.
- To auto-flush P/Os by vendor (rather than by call code), set the Pre-Receive Purchase Order field in the vendor's (LFA) secondary screen to [G] Final Receive & Available for Auto Flush.
- Use the Prompt to Flush & Release to On-Hand, Auto Flush Items Separately field in the (LF1) screen to specify whether to include auto flush items when printing a report. This field applies to two functions in the (TR) Order Entry Reports screen: the [G] Flush Backorders function and the [H] Stock Receipts Reports / Release to On-Hand function. If you turn this option on, when you select one of the above functions in the (TR) screen, you can include auto flush items in the RECEIPTS file, exclude them, or include only auto flush items.

This feature is not included in all software packages and requires authorization. Auto flush is available on Packages B, C, and D. For more information, contact ECI² sales.

7.2.x Auto Receive: Auto receive lets you skip the pre-receiving process and automatically final receive purchase orders using wholesaler acknowledgments. Auto receiving:

- Saves time during the purchasing process.
- Helps eliminate flushing errors.

This feature works with automated short-buy (ASB) as well as manual purchasing. If you have this feature set up, manual and automated short-buy transmissions only final receive items with a shipped quantity. This lets you transfer any outstanding items so that they can be filled by another wholesaler either manually or using ASB.

You can use this feature with S.P. Richards and United Stationers. To do this, enter an F in the Pre-Receive fields in the (L6C) and (L6F) screens, respectively.

This feature is not included in all software packages and requires authorization. Auto receive is available on Packages B, C, and D. For more information, contact ECI² sales.

7.4.x Automated Short-Buy Exceptions File: You can transfer call exceptions to a file separate from the usual SHORT-AUTO file. This new exceptions file has a prefix of TF. Call exceptions are items that the vendor cannot fill or does not stock.

The exceptions file performs the same function as the SHORT-AUTO file. (This applies to both text-based and graphical software.) However, it lets you transmit exceptions to another wholesaler without checking the pick file for other items that could be purchased. You can process this file against a specific call vendor or call group.

An action code in the [LFA1] screen lets you reset all or some TF files so they revert to the normal Short-Buy process. You can reset the status on pick tickets for calls if there is no P/O and if the item is still backordered. The status is reset to 6. The file is picked up at the next transmit slot.

The exceptions file, which is date and time specific, has a prefix of TF. The file contains the date and time stamp as part of the file name. For example, an exceptions file for a call launched through the (LFA2) screen on January 4 at 9:10 a.m. would be TF040910.

**Figure 5:
The (LF1)
Screen**

```

09:44:01          (LF1)  Purchase Order Flushing Parameters          10/04/05
=====
ACTION [I] (C=Change, I=Inquiry)  G/L Location [ 1]
=====
Flush Pick Tickets in a Batch or Printer B/P ?B
Skip Printing of Tickets when Flushing Y/N ?      (Premium)

Last Working Day of Week for Flushing Old Shipped Orders 5=Fri,6=Sat,7=Sun ?

When Flushing Pick Tickets, Hold Transfers at Status 7 Y/N ?N

When Flushing Cash Backorders From P.O.S., Hold at Status 7 Y/N ?Y

On Flushes, Only Print All Shipped Y/N/S=Serial B/O W/O Only ?N or
Minimum Dollar Shipped $

Allow Zero Cost/Price Items to Flush Orders Normally for
Item Class Range : [ ] To [ ] + [ , , , , ]
When Flushing, Reset Price on Cost Plus Line Items with P/O Cost for
Customer OE Status Range : [G] To [G] + [ , , , , ]
When Flushing, If Item Cannot be Filled From Receipts, Fill From O/H Y/N ?N
On Flushes, Print Ship Complete Orders when 100% of Line Items Filled
Prompt to Flush & Release to On-Hand, Auto Flush Items Separately Y/N ?
    
```

- 7.8.x **Updated W-2 Format:** The W-2 report format meets the 2004 IRS requirements. On the carbonless, continuous-feed dot-matrix form, the IRS modified the boxes for retirement plan and 401(k).
- 7.8.x **Flush No Cost Items:** The (LF1) Purchase Order Flushing Parameters screen includes a new stock class range parameter, as shown in Figure 5. It lets you automatically move orders with zero price/cost items from a specified range of stock classes to a final verified status 8 or B during a (TR)[G] Order Entry Backorder Flush. In the Allow Zero Cost/Price Items to Flush Orders Normally for Item Class Range/To/+ fields, enter the stock class range that you want to use to limit.
- 7.9.x **Skip Printing:** The Skip Printing of Tickets When Flushing field in the (LF1) screen lets you specify whether to print tickets when flushing. If you do not print the tickets, the ticket is still updated and verified. Type **Y** to skip printing when flushing unless the ticket is going to a Status B. Type **N** to print tickets when flushing.
- 7.11 **Automated Short-Buy Limit by Contract:** You can include or exclude contracts from the ASB process. By setting a parameter in the (LFA1) Vendor Call Number screen, you can, for example, exclude a contract from your main account with the wholesaler, and process the contract's items on another call.

Use the (I)nc/(E)xc Contracts/To fields to select a range of contracts to include or exclude.

- To include them, type **I**.
- To exclude them, type **E**.

In the To fields, specify the range of contract codes to include or exclude. In the first field, enter the first two-digit contract code in the range. In the To field, enter the last code in the range. In the five fields to the right of the To field, you can specify five additional, non-sequential contract codes to include or exclude.

Report Writer

- 7.4.x **Report Limits:** You can limit reports by indicating whether the item is on a matrix pricing plan. For more information on matrix pricing plans, refer back to **Items**.
- 7.8.x **New Fields in PO-MASTER:** Two new fields were added to PO-MASTER in Report Writer. The Resp Center and Order Taker fields allow you to limit by responsibility center and order taker number.

What's New in Version 7

- 7.9.x **Limiting by Tax Code:** A new Tax Code field has been added to I-MASTER. You can use this code for limiting in reports.
- 7.10.x **Limiting by Drop Ship Orders:** A new Report Writer field lets you include drop-ship purchase order information on reports. You can also use the field to set limits. The field, DropShip Order, is stored in the PO-GLOBAL file.
- 7.11.x **Hedberg Cross-Reference Accounts:** Customer and Vendor Cross Reference fields have been added to report writer.
- 7.10.20 **Print by Order Totals:** When creating a report, you can now change the format to print by order total instead of ship totals. When using P-MASTER as the master file, type Y at the Change Fonts for This Line prompt. The prompt Use Order Totals Instead of Ship Totals appears.
- 7.11.x **Credit Card Reference ID Number:** A new feature allows you to reference the purchase order number to credit card purchases. This information is stored in C-MANIFEST and has been added to Report Writer.
- 7.11.10 **Minimum Order Charges:** A new feature allows you to exclude specific customers from the minimum order charge fee. For more information, refer back to the **Customer** heading. This information is stored in the C-SUPP file and has been added to Report Writer.

Serialized

- 7.2.x **New Tracking Parameters:** The new (EZ1T) Serialized Parameters screen lets you enter the general ledger accounts you want to use for your serialized information. By specifying accounts, you can easily track your service department's performance. This information was previously entered in the (EZ1S) Serial System Parameters screen. The new (EZ1T) screen also allows you to enter trade-in information such as an authorization password and the salesperson number for that trade-in authorization.

Note: Be sure to set up the parameters in the (EZ1T) Serialized Parameters screen. Until you do, you cannot access the (EZU) Serial Contract Maintenance screen.

- 7.2.x **Deleting Calls in the Graphical Machine Monitor:** Since the Z-C-INDEX, Z-R-INDEX, and Z-T-INDEX files are only used in text-based and not graphical systems, these files are only updated when you delete the call in the (EZP) Call Monitor screen. When the call is

deleted in the graphical Monitor, these files are not updated. If you want these files to be updated, you must delete the call using the (EZP) screen.

- 7.x New Parameters in the (LG6) Screen:** There are two new parameters in the (LG6) screen. The Skip No Cost Check For Serialized Contract & Meter Billings field gives you the option of suppressing the No Cost And/Or No Price message for billings with a zero cost. The Skip No Cost Check For Serialized Contract & Meter Billings parameter does not affect billings with a zero price. If a line item on a billing has no price, the No Cost And/Or No Price message appears, even if the parameter is set to Y.

The Skip No Price Check For Serialized Lines When All Correct field lets you suppress the No Cost And/Or No Price message when verifying serialized tickets that include line items without prices. However, this parameter only lets you suppress the No Cost And/Or No Price message if you indicate that the entire ticket is correct. (You do this by specifying Y at the prompt Entire Ticket Correct.)

Warehouse

- 7.9.x Printer ID:** You can enter lower case letters for the Printer ID in the Picking Manifest and Shipping Manifest screens.

- 7.12 Picking Manifest Enhancements:** We've added the ability to create multiple non-bulk and bulk picking manifests in the (TM)[N] screen. You do this by specifying Y at the Assign Bulk Items to Separate Manifest prompt. The system uses the number of lines or number of orders per manifest you specify to know how many manifests to create. For example, if you create 20 orders containing both bulk and non-bulk items and specify that each manifest contain 4 orders each, the system creates 5 different manifests at once. This eliminates the necessity of accessing the screen to create 5 separate manifests.

While creating manifests in the (TM)[A] screen, the system prompts you to include items pulled from bulk items so you can specify to create picking manifests that contain only bulk items. In this case, two separate manifests print: one containing bulk items, and one containing only non-bulk items. Later when you specify to add to an existing bulk bin only manifest, the system prompts you to append to the order.

When adding, changing, deleting, or final-verifying, the system displays the Include, Exclude or Only Bulk Manifests prompt as well as the Include, Exclude, or Only Incomplete Manifests prompt. These

prompts let you limit the display to include only bulk manifests and/or incomplete manifests. This makes it easier to view only those manifests that contain bulk items or are not yet completed.

When you are ready to complete the manifest, the system lets you change the order puller number, as well as the start and end times. In addition we've improved the picking manifest program to recognize a bulk item with a quantity that differs from the sell quantity. Therefore, if you sell boxes of paper in a quantity of one and the selling unit is one, the system prints the bulk manifest with the bulk label.

To use this feature, do the following:

- Set Up Your Bulk Items in (EK) Bulk Item Update screen.
- Set Parameters in the (L8P) Picking Manifest Parameters screen: You use this screen to specify if you want to limit the number of line items or the number of orders per manifest. For example, you can specify that the system limit the number of orders included on each manifest to 10 or the number of line items per manifest to 100 and so on.
- Set Parameters in the (L8P1) Additional Manifest Parameters screen: You use this screen to enter a beginning bulk manifest number. If you want to create multiple manifests when limiting by the number of orders or line items, set the Create Multiple Manifests if Limiting to # of Orders or Lines field to Y. You can also enter categories you want to exclude from the manifest as well as exclude uncataloged items. This screen also lets you enter the bulk manifest selector and printer you want to use.

Graphical Changes

The following is a list of features added to the Graphical Version 7 software.

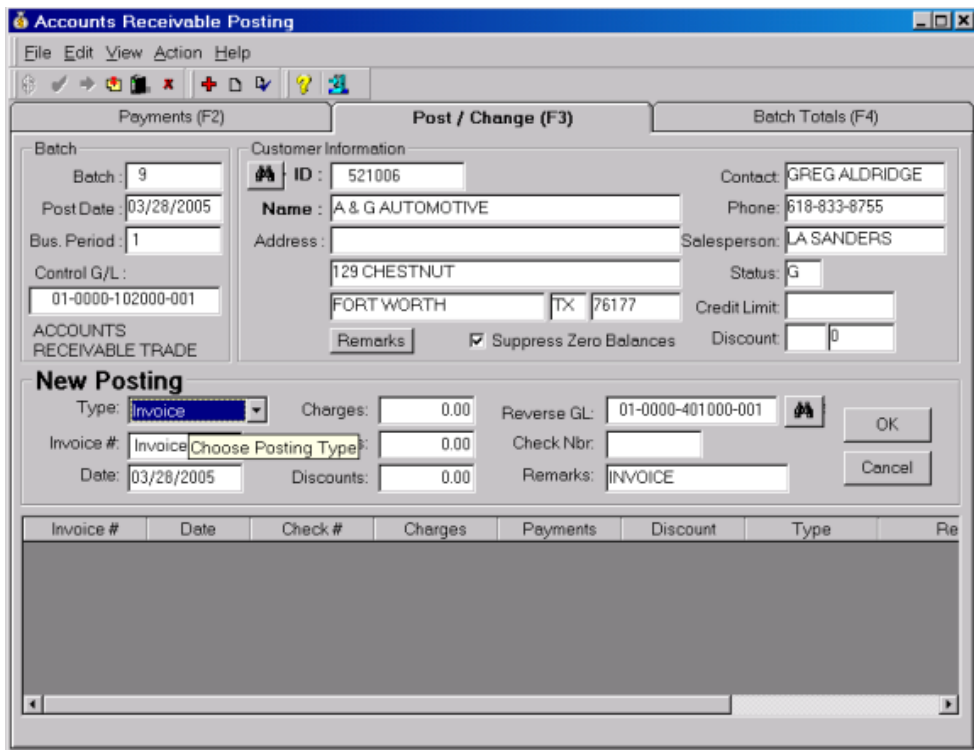
Accounts Receivable

- 7.2.x **Batch Selection:** In the Batch Information dialog box in A/R, you can now query the general ledger account number. Previously, you could enter the G/L number but not search.
- 7.2.x **Automatically Apply Project Deposits:** When posting deposits in A/R, the system now defaults to auto post. When you open the A/R Deposits dialog box, the system displays the Create tab. The Auto Apply Project Deposit box is automatically checked. This indicates that the deposit amount will be applied as a payment to the ticket

when it is invoiced. If you do not want to automatically apply the deposit amount as a payment to the ticket when it is invoiced, uncheck the Auto Apply Project Deposit check box.

- 7.2.x **Viewing the Customer O/E Status and Summary Invoice Number in A/R History:** You can view the customer's order entry status in the A/R History Summary tab. The status appears in the new O/E Exempt box in the A/R History Summary tab and comes from the O/E Exempt box in the Customer Order Entry tab. This box is for display purposes only. To change the customer's order entry status, you must do so using the O/E Exempt box in the Customer Order Entry tab. If the invoice you select is part of a summary invoice, the summary invoice number also appears in the new Summary Invoice box in the A/R History Summary tab. This lets you easily view the summary invoice number.
- 7.2.x **Updated Icons in A/R:** New icons in the Accounts Receivable window help you more quickly identify the action to perform.

**Figure 6:
Selecting
Invoice in the
Type Box**



- 7.2.x Viewing A/R History from Accounts Receivable:** From within the Accounts Receivable window, you can access the A/R History window to view the customer's A/R history information. To do so, type **Ctrl + H** or click the View menu and choose A/R History. If a specific invoice is selected in Accounts Receivable, the system opens the A/R History Detail tab for the invoice you highlighted. If a specific invoice is not selected, the A/R History Summary tab opens, listing all the invoices for the customer's account.
- 7.2.x A/R Post/Change Tab:** When creating a new invoice in the A/R Post/Change tab, the system defaults to Adjustment in the Type box. To create a new invoice, click the down arrow in the Type box and select Invoice, shown in Figure 6.
- 7.2.x Entering A/R Invoices and Adjustments:** When posting an adjustment in the Accounts Receivable Post/Change tab, you must enter an invoice number. After you do, if you press Enter, the cursor automatically moves to the Payments box. When posting a new invoice and entering the invoice number, if you press Enter, the cursor now automatically moves to the Charges box.
- 7.2.x Post Remaining Funds in A/R:** You can post funds to two or more accounts. This is common for agencies such as school boards and the government. After you select the invoices for the first customer, if you have funds remaining after indicating that you want to post the invoice payments, the You Have Not Applied All of the Available Funds, Do You Still Want to Post message appears. At this message, click the Post/New button. At this point, you can select the next customer for which you want to post the remaining funds and select the invoices to be paid.
- 7.9.x Assigning Groups:** We've added a new 10 character Group field in the (AQ) screen and the Customer Master tab. This user-defined field works with the new customer contracts feature, described later in this handout. This field lets you assign customers to a specific group. Using this group code, you can run reports and post A/R payments by group. The reports information is stored in the C-INFO file.

In A/R, you can post a check to all accounts in a group. You access the the account by group and all invoices for all accounts in that group are available for posting. You can also use this group code when searching for a customer by alias. The Group box in the Accounts Receivable Posting Payments tab lets you retrieve customers assigned to a specific group. Enter the group code in the Group box. You can also post payments by group in the (BQ) Quick Pay screens. Begin posting as you normally would. When Pay Method appears, select the Multiple Accounts per Check option.

- 7.10.0 Accounts Receivable Deposits:** We have enhanced A/R deposits when using the Purge feature in the (OR) screen. The sequence numbers 1 through 999 are used for customer deposits. When sequence number 999 is reached, the user cannot enter another deposit for the customer's account until deposits are purged. Now, after purging, the sequence number is reset to 1 for the customer's account. This ensures that customer deposits are properly renumbered.
- 7.11.10 Enhanced Accounts Receivable P/O Lookup:** To retrieve variations of purchase order numbers, you can now combine part of the purchase order number with an asterisk (*). The asterisk serves as a wildcard; it represents any character. You can use this feature when searching for P/Os in either the Short PO or Long PO boxes in the following: the Accounts Receivable Payments tab, the Accounts Receivable Post/Change tab and the AR History Detail tab. Suppose you enter *123 as the purchase order number. The system would display all P/Os ending in 123 — 4123, 56123, a123. Or suppose you specify 123*. The system would then include all purchase orders numbers beginning with 123 — 123456, 1239, 123a. Likewise, if you specify *123*, the numbers could appear anywhere in the sequence — 123456, 4123, 51234, a123, and so forth. If only one purchase order number is found, the system retrieves the customer with the open invoice from the AR-MASTER file with the associated P/O number. When searching in the Accounts Receivable Posting window, the system searches for the P/O in the AR-MASTER file. When searching in the A/R History window, the system searches for the P/O in the journal set in the Journal box, JNL-AR, for example.

Communications

- 7.11.30 S.P. Richards' 2PL Network:** This new features lets independent dealers provide local delivery to customers who have branch offices nationwide. The 2PL program works with national drop shipping (NDS) flow.

Using 2PL, you can flag a customer account or an individual order while in Order Entry to be drop shipped and the order is processed as a normal drop ship order. There is no need to change customer routes or any ASB parameters, etc. The order is transmitted to SPR as part of a P/O with no special handling.

If the customer is set up as a 2PL account and the order is a dropship, then SPR routes the order to the distribution center nearest the delivery destination, based on the customer's zip code. The order is then filled and delivered the next day directly to the customer by a local dealer.

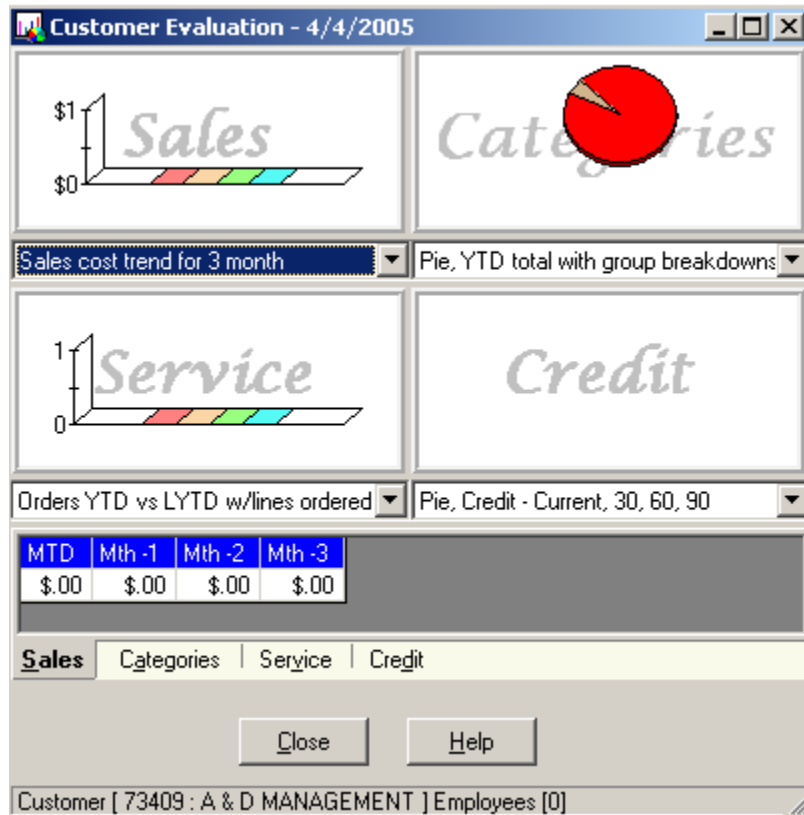
Note: This feature works with both text-based and graphical software.

Customer

7.0.x Customer Evaluation: The Customer Evaluation dialog box allows you to view the customer's complete buying history quickly and easily. Viewing this screen allows you to evaluate your customer in every aspect of their buying history from sales to delivery. You can view pie charts and graphs by customer sales, categories, service, or credit. See Figure 7. You can also view this window from Order Entry.

This feature is not included in all software packages and requires authorization. Customer Evaluation is available in the Platinum package and packages B, C, and D. For more information, contact ECP² sales.

**Figure 7:
The Customer
Evaluation
Dialog Box**



- 7.0.x Notes Everywhere:** You can use notes throughout Ensite Pro to provide important information. This feature keeps details directly at your fingertips. Notes Everywhere allows you to create customer notes and vendor notes. Customer notes are associated with the Customer database; Order Entry application; Accounts Receivable application and A/R invoices; Serialized machines and contracts; and existing project notes. Vendor notes are associated with the Vendor database; purchase order numbers, Accounts Payable application and A/P invoices.

Note: This feature is not included in all software packages and requires authorization. Notes Everywhere is in the Platinum package and packages C and D. For more information, contact ECI² sales.

You begin using notes by setting up parameters. You can set parameters so that the Notes Everywhere dialog box automatically opens each time you open Ensite Pro. This dialog box remains on top of other windows, so you can easily view notes for the selected customer, vendor, or invoice. What's more, the selected customer or vendor is automatically recognized when you retrieve the record and the notes display for you. The Notes dialog box blinks, notifying you that the selected customer has notes. You can also set passwords and set up parameters for Campaign Manager.

Next, you set up the codes and descriptions to use in the Note Setup dialog box. You can set up notes for email. Using Notes Everywhere parameters, you can also password-protect this feature. Give the password to only those people with access to the Notes Setup dialog box.

After you enter the codes and descriptions, you can begin setting up notes for Customers, Vendors, Order Entry, Purchase Order Entry, Accounts Receivable, Accounts Payable, Serialized, Furniture, and so on. You do this using the Notes Monitor. For more information, see the **Setting Up & Using Notes Everywhere** handout at <http://www.ddms.com/support/doc/ver7doc.htm>.

- 7.11 Campaign Manager:** Campaign Manager lets you create automated marketing tasks based on a customer's status, such as new customers or growth customers. You can send emails to both internal and external customers. For example, if a customer hasn't made any purchases recently, you might email their salesperson internally to notify them. You could also email marketing flyers or perhaps a discount offer. Campaign Manager lets you automatically recognize and react to customers who haven't purchased recently. You simply set up the campaign and limit to the customers that fit your criteria.

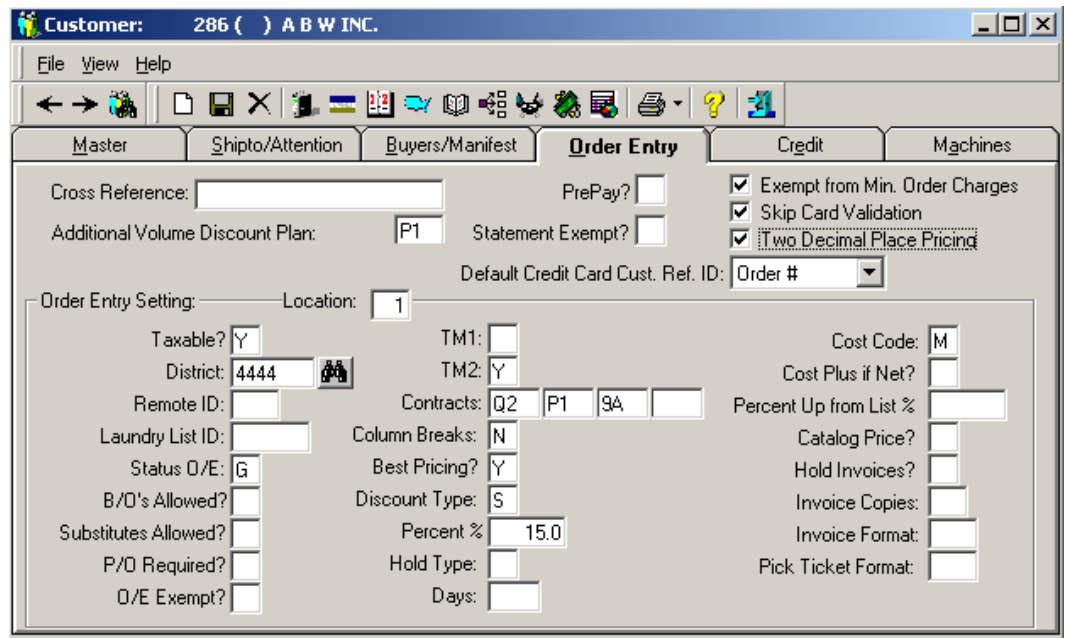
Using Campaign Manager, you can apply the campaigns in any order simply by moving them up or down. You can create new campaigns or modify and delete campaigns. Campaign Manager allows you to run campaigns manually or automatically. Campaign descriptions are also shown in the Campaign Manager window.

Campaign Manager works with Notes Everywhere. Before using Campaign Manager, you must first set up Notes Everywhere. You must set up parameters in the Notes Everywhere Parameters and set up note codes in the Note Setup dialog box.

Note: This feature is not included in all software packages and requires authorization. Campaign Manager is in the Platinum package and packages C and D. For more information, contact ECI² sales. To use Campaign Manager, you must also be authorized for Notes Everywhere.

Two boxes in the Customer History Total Sales tab contain the last two active campaigns for this customer. The campaign code and the last activity date for these campaigns are displayed in the Campaign 1 and Campaign 2 boxes. This information is for display only and is stored in the C-SUPP file. You can also use these boxes for reporting purposes. For more information, see the **Campaign Manager** hand-out at <http://www.ddms.com/support/doc/ver7doc.htm>.

Figure 8:
New Boxes in
the Customer
Order Entry Tab



Note: Some anti-virus software programs will prevent emails from being sent. You may have to disable your anti-virus software to use Campaign Manager.

7.5.x Credit Card Validation: You can now skip credit card validation for a customer. Use the Skip Card Validation box in the Customer Order Entry tab to skip credit card validation for this customer, shown in Figure 8. If you set the Pre-Authorize Credit Cards through the Gateway when Zero Amount is Due field in the (LA2) A/R Parameters Screen to Y, check this box to specify not to pre-authorize for this customer.

7.8.x Use Two Digit Pricing: Some credit card companies require pricing be extended to two digits instead of three. To use this feature, check the Two Decimal Place Pricing check box in the Customer Order Entry tab, shown in Figure 8. This rounds the unit's sell price and list price to two decimal places in Order Entry. You can report on this information by using the C-MANIFEST file through Report Writer.

7.9.x Assigning Customer Groups: We've added a new 10 character Group field in the (AQ) screen and the Customer Master tab. This user-defined field works with the new customer contracts feature, described later in this handout. This field lets you assign customers to a specific group. Using this group code, you can run reports and post accounts receivable payments by group. The reports information is stored in the C-INFO file.

In accounts receivable, you can post a check to all accounts in a group. You access the the account by group and all invoices for all accounts in that group are available for posting. You can also use this group code when searching for a customer by alias.


Previously, you could view up to 10 departments in the (LA1) screen. Now, you can view up to 70 departments in the (AS) Customer Sales History screen.

Suppose you have several accounts and departmental accounts for a large customer. By assigning the master account and departmental account the same group code, you can ensure that the contracts used for the master account and all departmental accounts are the same. Once you have assigned group codes to your customer accounts and departmental accounts, you can go to the (ET) screen and use the new customer contract features to assign customers as many contracts as necessary. This contract information is stored in the C-DISC file.

You can also view your customers' history information by group in Customer History. In the Customer History Total Sales and Group Sales tabs, check the Sales Rollup by Customer Group box.

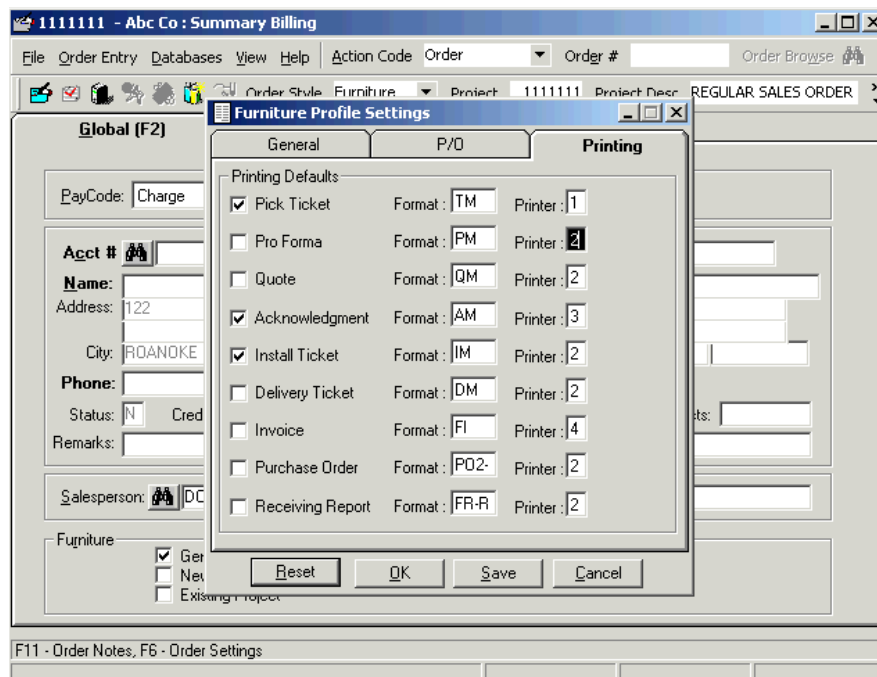
- 7.9.x **Additional Volume Discount Pricing:** You can set up additional volume discounts in the new Order Entry parameters. Setting up these parameters allows you to offer selected customers an additional discount based on the dollar volume of an order. This discount percentage will be offered in addition to normal pricing. You can set up 4 tiers of dollar volume. After you create the additional volume discount pricing plans, you assign them to the customer in the Customer Order Entry Tab using the Additional Volume Discount Plan box. For more information on these parameters, see **Keyop Menu**. For more information on using these plans in Order Entry, see **Order Entry**.
- 7.10.5 **Auto Billing:** Changes have been made to the Group box in the Auto Bill Detail dialog box. You can now enter upper or lower case letters or characters in this box.
- 7.11.x **Hedberg Cross Reference Accounts:** Use the Cross Reference box in the Customer Order Entry tab to interface with Hedberg software. When importing a Hedberg order, the system checks this box. To import Hedberg orders successfully, this box must contain the account number. If this box is blank, the dealer will see an exception message. Hedberg is used by Steelcase dealers. This information is stored in the C-SUPP file.
- 7.11.x **Credit Card Customer Reference ID:** A new feature allows you to reference the purchase order number to credit card purchases. Use the Default Credit Card Cust Ref ID box in the Customer Order Entry tab to specify whether to use the order number, short P/O number, or long P/O number. Previously, you could only reference the DDMS invoice number. You must have the Prompt for Cust ID field in the (LG7) screen set to Y or R for this feature to work. This feature also requires authorization. This information can be used for reporting purposes.
- 8.0.50 **Minimum Order Charges:** In the Customer Order Entry tab, check the Exempt from Min Order Charges box to exempt this customer from minimum order charges in order entry. When placing an order for this customer in Order Entry, you are prompted to charge this customer for an order that doesn't meet the minimum amount. (This box works with two new fields in the (LG3) screen. These fields are described earlier in this handout.)

Furniture

- 7.1.x **Limiting by SIF File:** In a furniture order, you can limit by SIF files. When placing an order in Furniture Order Entry, click . Select the SIF file from the appropriate folder. The Process Sif File message box opens. Click Yes. Only items containing in this SIF file display. SIF files are created when a SIF file is released.
- 7.2.x **Delivery and Install Marking:** You can mark and unmark furniture items for delivery and installation. Using this feature, the system opens new dialog boxes that let you change the delivery and install dates as well as mark all the items as shipped on an order. You can also individually mark items. You can easily view additional order information, including add and change Start of Order (AAAA) and End of Order (ZZZZ) notes as well as change the shipping address for the pick ticket or the purchase order.

To use this feature, from the Master Menu, double-click the Furniture icon. When the Furniture Menu opens, double-click the Project Management icon. When the Project Management window opens, click the Action menu and click Delivery/Install. At this point, you can change the delivery and install dates by checking the Delivery Date and/or Install Date boxes. To mark all the items on the order as shipped, click the Mark All Shipped option. This lets you verify that items already shipped are marked by default. You can then easily

**Figure 9:
The Furniture
Profile Settings
Printing Tab**




mark the items that are not going now. Using the Mark column, you can mark and unmark items for delivery. If you clicked the Mark All Shipped option, all shipped items have been marked. Notice also that backordered items are indicated with a check mark in the Backorders column.

You can also use this dialog box to view item specials as well as view information in the Item window, the Customer window, or O/E History window. Right-mouse-click an item, and select the option you want to view. To add or change the shipping address for the pick ticket or the P/O, right-mouse-click an item and select View Detail/Statistics.

You can also use this option to enter or change order notes. When you're ready to update the delivery installation ticket, click Update Delivery/Install. You can change the customer account, order number, status, copies and printer.


- 7.2.x Furniture Profile Settings Print Options:** The Furniture Profile Settings Printing tab has been redesigned to let you specify a format and printer for each format you want to print. See Figure 9. For example, if you specify to print an acknowledgment, pick ticket, and install ticket when the order is ended, simply check the Acknowledgment, Pick Ticket, and Install Ticket boxes. Then click the new Format and Printer boxes to enter the form and the logical name of the printer to use to print, P1, P2, or P3, for example. In addition, by clicking the Reset button, you can view the default formats and printers you have set up in the (LGC) Furniture Order Entry Parameters screen. To change the settings, click each box and enter the new information over the existing information. To save the changes you made to the print formats, click Save. The information you specify becomes the default print settings for the Furniture Order Entry tab. However, you can always change them when the order is ended.
- 7.2.x Exclude the text "Option" on Furniture Orders:** When you create a furniture order and release a SIF file, you can use the new Exclude "Option =" On Option Items check box in the Furniture Profile Settings dialog box to specify that the system exclude the word Option. This word previously appeared in front of all special lines on the order. If you check this box, the word Option will not appear on these specials. To use this feature, in Furniture Order Entry, click the Furniture Profile Settings button. When the Furniture Profile Settings dialog box opens, under the SIF Options heading, check the Exclude "Option =" On Option Items check box to exclude the word Option. To include the word Option, leave this box blank.

- 7.2.x **Importing SIF Files:** When creating a purchase order, you can limit the P/O by SIF file. Use the new Sif Limit box in the Items to be Purchased dialog box to select the SIF file from the drop down list. Only items contained in this SIF file appear on the purchase order.
- 7.2.x **Changing Furniture Orders:** When changing furniture orders, you have the ability to import SIF files. You can also add SIF file items to existing orders.
- 7.2.x **Staging Bins:** You can assign uncataloged items to staging bins in Furniture Order Entry. You can specify staging bins when verifying a furniture order.
- 7.2.x **Furniture Bid Number:** A new box in the Order Settings dialog box lets you view the furniture bid number for a specific line item. This box applies to the AllSteel project. The bid number set in this box is used in the .txt file that gets built by the vendor. This bid number also prints on the P/O as a line item special when you build the P/O in the Order Totals tab.
- 7.2.x **New Furniture Project Parameters:** Two new fields were added to the (LGC1) Furniture Add On Item Parameters screen. Use the Close Project field to set a password for the system to prompt you before you can close a project in the Furniture Project Overview window. In the Del Project field, set a password for the system to prompt you before you can delete a project in the Furniture Project Overview window.
- 7.2.x **Furniture Contracts:** You can set up vendor contracts in the new Furniture Contracts dialog box. From the Vendor Master tab, click . In the Furniture Contracts dialog box, you can create furniture contracts, delete, and query contracts.

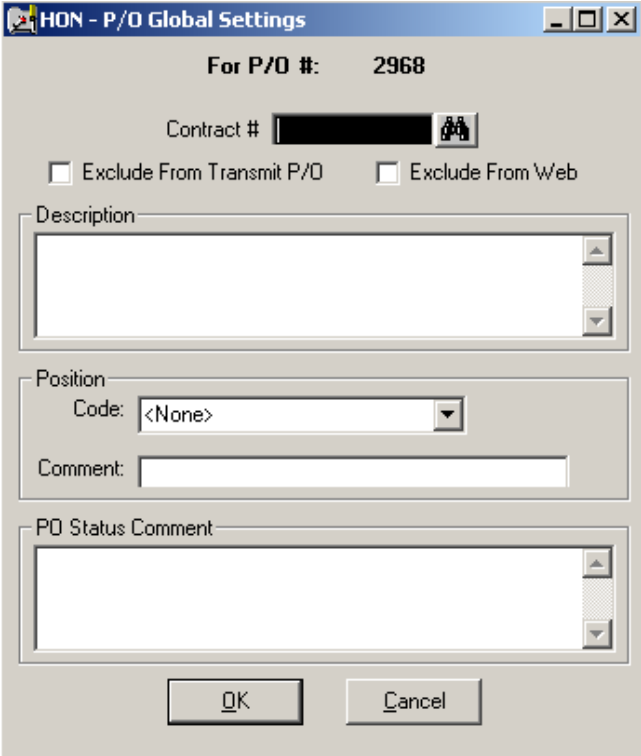
You can also access this dialog box when you specify to automatically build the purchase order in the Furniture O/E Order Totals tab. The system displays the Furniture Purchase Order Information dialog box. A new feature in this dialog box, the Global Info button, lets you open the Global Settings dialog box. You can use this dialog box to choose the vendor contract you want to use for this purchase order. To do so, click the Contract # box and enter the contract number. If you cannot remember the contract number, you can view all the contracts you have set up in the Furniture Contracts dialog box. In addition, you can also open the Global Settings dialog box in the Purchase Order Entry window. To do so, click the Purchasing menu, select Global, and click the Global Information option.


- 7.3.9 Logging Furniture Calls:** You use the Furniture Work Orders window to log furniture calls. This window provides a number of features to help you identify call and item information. For example, when you log calls, you can enter codes. Codes automatically enter text for common problems and solutions, reducing the amount of typing you must do. They also give you a management tool because you can run reports on these codes to see how often different problems occur. To set up codes, you use the Furniture Tools window, described below.
- 7.3.9 Furniture Tools:** You use furniture tools to enter call codes, service types, qualification codes and territory codes. Call codes are one or two digit user-defined codes that you can use to separate and track inventory history. You enter call codes when you log and complete furniture calls. When you log furniture calls, it is important that you code the call to distinguish its priority, the time frame in which it must be accomplished, or to indicate how the call was resolved. This code will be displayed as part of the call information in the Furniture Monitor. You can use service types to classify your service calls. Service types are user-defined codes that help you organize your calls by the type of service involved. For example, you might set up one service type for warranty work and another for non-warranty work, and so forth. You can use the Furniture Tools Territories tab to divide the geographical regions into smaller areas called territories. Once you set up territory codes, you can group your customers by codes. For example, you might have one group of customers assigned to the southwest and another to the northeast. You use qualification codes to identify the different types of service that your customers require. Once your qualification codes are set up, you assign the codes to your technicians, according to their expertise. This helps you quickly identify their skill levels and their experience working with particular types of equipment.
- 7.3.9 Furniture Monitor:** You can view your calls in the Furniture Monitor. The window is updated every two minutes, by adding and deleting calls and responses as they are logged, dispatched, and completed. This window lets you monitor the status of all your calls and lets you easily dispatch them. You can also view your technicians' schedules and assign a technician to a call, set call limits, print calls, and also fax and email calls.
- 7.3.9 Furniture Tech:** This window is divided into several tabs that let you monitor your technician performance. You can change and delete information about your technicians' calls in the Tech Recap tab. At times, you make changes to time, travel, and miles on a completed work order. When you complete a work order, the system

records time, travel, and mileage information. However, if you re-open a call later and change this information, the system does not update it in the file. To maintain accurate records, you need to update time and travel information through the Tech Recap tab. You can change information about your technicians' monthly work performance and calls in the Tech Recap Totals tab. In this tab, technician performance is shown by item number. The system shows the amount of time and mileage, and the number of calls and callbacks that this technician spent on each item during the specified month(s). You can change and delete the technician performance information for each individual item.

7.3.9 View Vendor Contract Information When Building a P/O: When building a purchase order in Furniture Order Entry, the Purchase Order Info dialog box opens. If you click the Global Info button, the system opens the Global Settings dialog box. See Figure 10. This dialog box includes the Contract # box. Using this box, you can enter the vendor contract number you want to use for this purchase order. In addition, if you don't know the contract number, click  to view the vendor contract information.

**Figure 10:
The Global
Settings Dialog
Box**



- 7.3.9 Change the Furniture Project Description:** While changing furniture orders, you also have the ability to change the description for the project. If there are multiple tickets associated with the project, the project's description on all the tickets is updated. In addition, you can change the project description for new projects as well as general projects. (To determine the general project description, the system uses the description set in the General Project Default Name field in the (LGC) Furniture Order Entry Parameters screen.) In the Furniture Order Entry Change tab, click one of the displayed line items to highlight it. Once an item is highlighted, right-mouse-click. A context menu opens. Click the Change Project Description option. When the Change Project Description box opens, click the box and enter the new project description. When you finish, click OK. The cursor returns to the Change tab.
- 7.10.x Printing Furniture Project Information:** You use the Furniture Project Management feature to view virtually every level of detail concerning your furniture projects. Once you have drilled down to the desired level of detail in the Furniture Project Management window, you can now also preview and print the project information. When you do, the system presents the information in a concise format which includes company information, project headings, dates and so forth. In addition, when using the Print Preview window, you have the added benefit of exporting the project information to a file.
- 7.11.x Importing and Releasing Hedberg Orders to Existing Projects:** You can create furniture orders by importing and releasing Hedberg files into Ensite Pro. When you do, the system defaults to release the order to a new project. However, you also have the option of importing and releasing the Hedberg order to an existing project. In the Furniture Order Entry window, click the Order Entry menu and select Hedberg Orders. The Furniture Hedberg Orders dialog box opens. The system displays the orders in the upper section of the dialog box. Click the Mark box for each order you want to import. To select a specific project to release the Hedberg order to, click the Project Number box. When the  button appears, click it to open the Project Query dialog box and select the project you want to release the Hedberg order to.
- 7.11.x Respecify Items from Furniture CAP SIF Files:** You now have the ability to respecify items on a CAP SIF order after you've created it in DDMS Order Entry. To do so, go to the Furniture Order Entry window and select the Change action code. Select the order that contains the CAP SIF items you want to change. Click the item you

want to re-specify on the order to highlight it and right-mouse-click. Select the Respecify Item option. After you do, the system re-opens the specifier program so you can make any necessary changes. When you finish, the items are automatically imported back to the DDMS order, including the changes you made. (If the item is on a purchase order, the system displays a corresponding message and automatically moves the item to a status 6.)

- 7.12 Modifying Furniture Orders:** You can modify furniture orders in Furniture Order Entry. This feature gives you the ability to fully view item information and is similar to viewing information through specifier software. You can easily see all the selling prices, costs, and list prices for the items on the order. You can verify that the quantities, costs and extended costs are accurate. This feature lets you perform different pricing scenarios in that it allows you to mass change the cost, the selling price, and the list price for all items on the order. Mass changing lets you quickly change all or several line items on the order without the necessity of changing each line item at a time. You do this by increasing or decreasing the cost by a dollar amount or percentage. You can also change the sell price by a dollar amount, percentage or by the gross profit percentage. This lets you change the pricing that comes from the specifier to the actual pricing you want to use. You can also specify that the system recalculate the actual/average cost on the manufacturer's discount for all line items on the order. You can easily view specials for each line item and you can select Print Preview to save the information to a file.

General Ledger

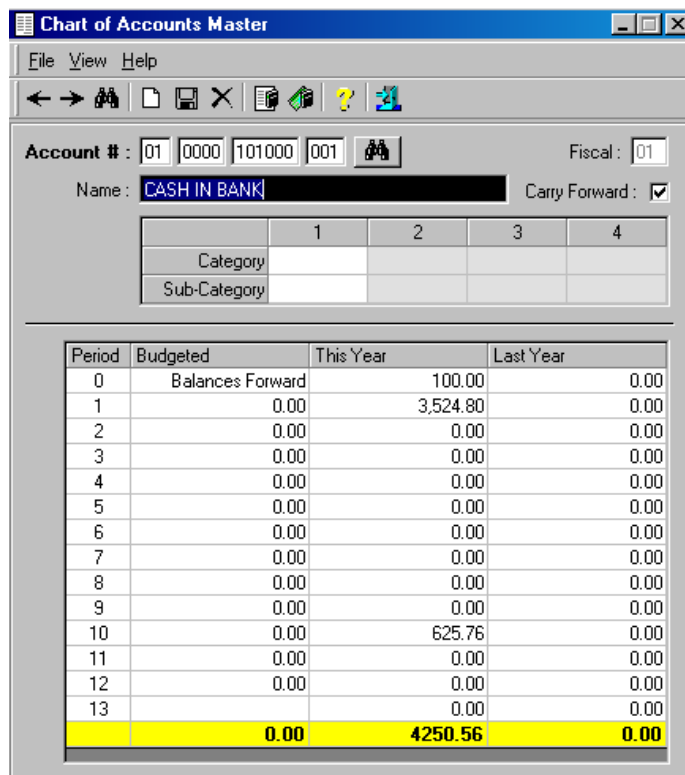
General Ledger is now fully integrated into our Graphical software. All of the features that were previously text-based are now graphical! After loading Version 7 software, you need to set up general ledger categories. You must set up categories if you use general ledger graphical or text-based. The following is a brief list of the graphical General Ledger features. G/L handouts are available at <http://www.ddms.com/support/doc/ver7doc.htm>.

- 7.2.x Chart of Accounts:** In the Chart of Accounts master window, shown in Figure 11, you can set up your general ledger chart of accounts or make changes to the current chart of accounts. When using Chart of Accounts, you can select an account in two ways. You can enter the general ledger account number or you can search for the number by using the GL Account Query dialog box. You set up categories in the Chart of Accounts window. Categories and sub-categories are a new feature for chart of accounts. If you are a previous DDMS text-based user, you will need to assign categories to all of your accounts.

A category must be assigned for your account to print. These categories are pre-defined in your system. You can also assign sub-categories to your chart of accounts. These sub-categories are pre-defined in your system and are based on the category that you selected. For example, if we selected Current Assets as the category, only subcategories of Current Assets are listed. After you select your account, use the drop down arrow in the category box to assign a pre-defined category.

- 7.2.x **Journal Allocations:** You can view journal allocations from the Chart of Accounts Master window. From the Chart of Accounts Master window, click View then select Allocations. You can use the Journal Allocations dialog box to view or create journal allocations.
- 7.2.x **Chart of Accounts History:** You can easily view history for the Chart of Accounts. The Chart of Accounts History window allows you to view detailed posting information. You can easily access the Chart of Accounts History window from the General Ledger Menu, from the Chart of Accounts Master window or from the General Ledger History window.

**Figure 11:
The New Chart
of Accounts
Window Re-
places the Text-
Based (J) Screen**



- 7.2.x **Chart of Accounts Specials:** In the Chart of Accounts master window, you can also view Specials. In the Chart of Accounts Special dialog box, you can select accounts to change, copy, delete, reset totals, transfer, or clear balances. (These functions were previously performed in the (+J) Special Chart of Accounts screen.)
- 7.2.x **G/L Posting:** You use the GL Posting window to enter your general ledger posting information. In this window, you can preview your postings, post to batch, enter batch total information, reverse a permanent batch, or export your postings to a file. You can specify which information to display by selecting grid options. In the GL Batch Totals tab, you can review batch entries without printing a report. You can limit your view to specific postings, and you can resort the information by clicking the headings. When making postings or reviewing batches, you can view an account's master history or posting history simply by right-clicking an entry. You can add special lines to a posting by pressing F11 or right-click a line and select GL Specials.
- 7.2.x **G/L Posting History:** You can easily view G/L posting history. The General Ledger Posting window allows you to view detailed posting information. You can access the General Ledger History window from the General Ledger Menu, from the Chart of Accounts Master window or from the General Ledger History window.
- 7.2.x **G/L Financial Reports:** Creating custom financial reports is easier and faster than ever. You can create Financial Reports simply by categorizing general ledger account numbers. You access Financial Reports from the General Ledger menu. In the Financial Reports window, there are two tabs. Use the Report Options tab to specify the report and what information should appear on the report. Use the Limits tab to set limits. You can view the reports on screen before printing or you can export the reports to an excel spreadsheet or text file. You can also save your custom reports and they are automatically added to your list of reports.
- 7.2.x **Exporting G/L Information to a File:** You can now export financial data to a Microsoft Excel spreadsheet or to a text file with a single click.
- 7.2.x **Trial Balance Reports:** The G/L Trial Balance Report shows all posting details and totals for each general ledger account. This report is part of your permanent audit trail. You should print this report for all profit centers and request full detail. You can access the Trial Balance Reports dialog box from the General Ledger Master Menu. In the Trial Balance Reports dialog box, you can select the report level

by clicking the drop down arrow. Then you can set limits and options. For example, you can save unnecessary detail and printing time by checking the Suppress Zero Accounts box so that accounts with zero balances are not printed. When you finish setting limits and options, click Build Report.

- 7.2.x **G/L Drill Down:** Ensite Pro contains complete general ledger history files. The G/L Drill Down feature allows you to access even more detailed G/L history information.

You can use the General Ledger History window to search for and view detailed G/L postings. No more digging through Batch Reports. The new drill-down option makes it easy to access any posting detail. The system stores your posting details in a new file, and the General Ledger History window gives you fast, flexible access to all of it. Start at the broadest levels, and drill down in seconds to the smallest detail on an individual invoice. Suppose your advertising account is over budget for the last period, and you need to find out why. You can retrieve a list of the invoices posted to that account with a few clicks. If you find an unusual invoice, double-click it to see the complete details for that invoice in A/P.

From the General Ledger History window, select the level of search that you want to use. Then, you can set limits to find the specific postings that you want to view. You can also limit by sources: A/R, A/P, journal entry, machines, and payroll.


In this window, you can preview this information before printing, change the grid settings, save the limits that you set, and load saved limits.

This feature is not included in all software packages and requires authorization. G/L Drill Down is in the Platinum package as well as packages B, C, and D. For more information, contact ECI² sales.

- 7.10.x **Financial Report Changes:** A new dialog box allows you to change header and footer information on financial reports. You can also modify margins and fonts. You can access the Page Setup dialog box after you create a report and select Print Preview. This new dialog box is available for both financial reports and trial balance reports.
- 7.10.x **Editing Categories and Sub-Categories:** Now you have the ability to edit categories and sub-categories. From the Chart of Accounts Master window, click View then select Category. The Category/Sub Category dialog box opens. You can edit category and sub-category descriptions in this dialog box. You can search by category, sub-cat-

egory, or by description. Once you select the category or sub-category to edit, highlight the description you want to change and type over the text.

Item

7.2.x Item Aliases: You can now add, copy, substitute, and delete item aliases in the Item database. You can access the Item Alias dialog box from the Master Menu or in the Item database. Select Databases from the Ensite Pro Master Menu then select Item Alias. In the Item database, click View then select Item Alias or click  .

In the Item Alias dialog box, click the alias type under the heading Alias Types. The alias types that you selected appear at the bottom of the screen. You can select Customer, Common, UPC, and Print. You can also create EDI aliases using the Customer Alias functions.

7.4.x Vendor Information: Several new boxes have been added to the Item Vendor Information dialog boxes. The Vendor Stock and Ignore Cost in O/E boxes are available in the Item View Vendor Information, Item Add Wholesaler Vendor, and the Item Add Manufacturer dialog boxes. You use the Vendor Stocking box to specify whether the item's vendor is stocking or non-stocking. This information may be loaded from the O/PUS file or you can enter it manually. Type N if this item is a non-stocking item. Type S if this item is a stocking item. Type D if this item is a direct buy item.

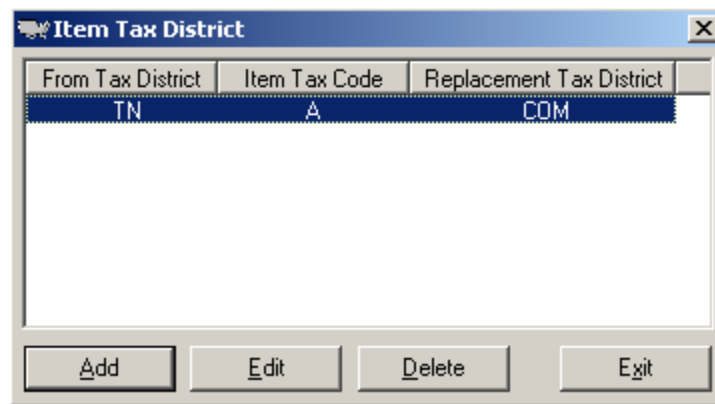
Figure 12: The Item Add Manufacturer Dialog Box

You use the Ignore Cost in O/E box to specify whether to ignore the I-MFG (direct buy) cost in Order Entry and when creating contracts. You can also set this box when loading the O/PUS file. To ignore the I-MFG cost in Order Entry and when creating contracts, set this box to Y. When you ignore the I-MFG cost, the O/E and contract cost defaults to the next cost to use. The next cost is controlled by the Default To P Ven Cost If No MFG Cost field in the (LG3) Order Entry Pricing Parameters screen. If this field is set to Y, the cost defaults to the purchasing vendor. If this field is set to N or is blank, the cost defaults to the primary wholesaler.

These boxes can only be changed in the Item Add Manufacturer dialog box. See Figure 12. They are for display only in the other dialog boxes.

- 7.x **Item Tax Districts:** You can use the Item Tax Districts window to set up tax districts that work in conjunction with item departments. To access the new feature, from the Ensite Pro Master Menu, click Databases, then Item Tax Districts. See Figure 13. This is a helpful feature for Furniture dealers who have taxable and non-taxable locations. Suppose you have two separate locations - Phoenix and Albuquerque. While Albuquerque is taxable, Phoenix is not. When you place an order for Phoenix, it is important that the system recognize the non-taxable status of items on the order. The Item Tax Districts window lets you specify a From tax district to a Replacement tax district that is tied to the item's department. When items with this department are placed on the order, the system automatically switches the

Figure 13: The Item Tax Districts Dialog Box



tax district to use the replacement district you specified, from taxable to non-taxable, for example. This feature also works in conjunction with the Use Department As Item Tax Code for Uncataloged field in the (LGC) screen. If you set this field to Y, the system automatically matches the uncataloged item's department to the correct tax code.

Keyop Menu

7.9.x Keyop Menu Changes: There's exciting changes made to the Keyop Menu. You can now access all parameters from one window. In addition to being able to access the text-based parameters, we have added some graphical parameter screens. See Figure 14. Some of these parameters may not be visible on your screen because they require authorization. For more information, contact ECI² sales.

7.9.x Customer Parameters: Customer Parameters include General Configuration parameters and Terms and Conditions parameters. In the Customer General Configuration parameters, you can set up the Additional Name Mode Search box. Use this box to enable the Additional Name Mode Search feature in Customer Query. The Addi-

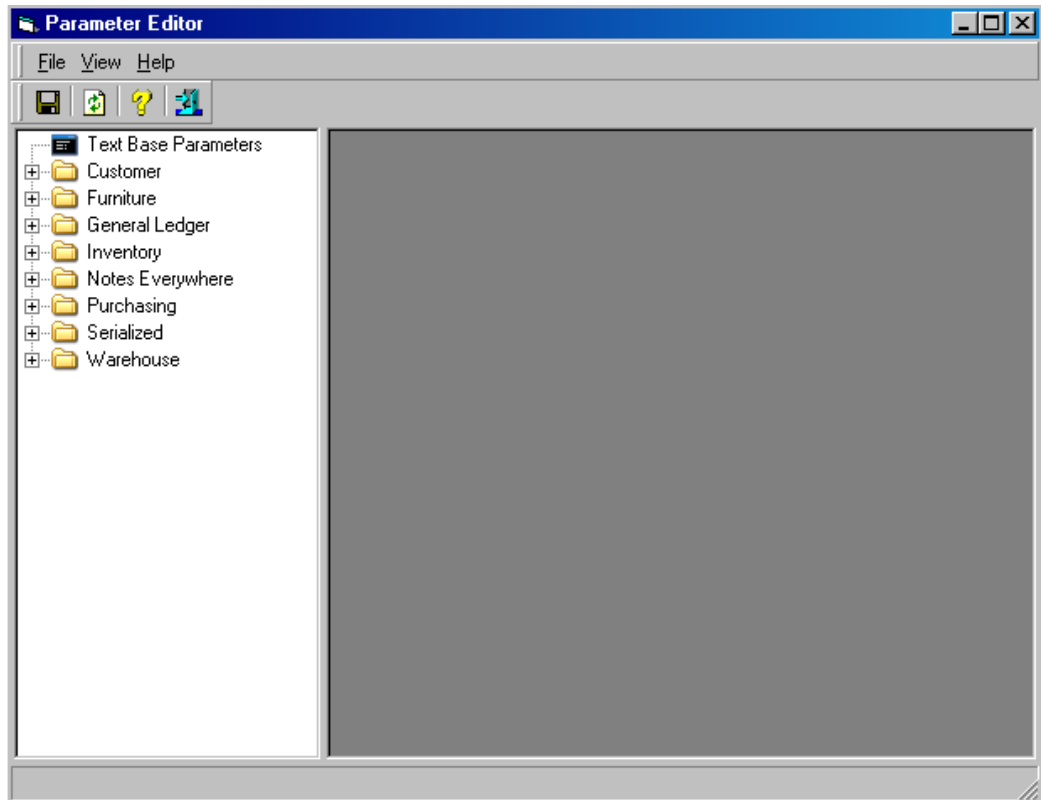


Figure 14:
The Parameter
Editor Window

tional Name Mode Search feature lets you search master accounts by the Name box in the Billing Address or the name box in the Additional Name and Contact boxes. You can also set up the For Dept, Also Check O/E Exclusion Status on Master Acct box. Use this box to place the customer's departments on credit hold when the customer's master account is on credit hold. In the Terms and Conditions parameters, enter paths for all of your documents that you will need to access in order entry.

- 7.9.x **Furniture Parameters:** You can set three types of parameters in the new Furniture Parameters: Check List, Job Cost Types, and General Configuration parameters. Use the Furniture Check List dialog box to create a descriptive list of furniture items that appear in the Furniture Project Overview window. You can create ten checklists. Use the Job Cost Types dialog box to setup job cost types such as billing intervals, departments, and item information. The Show One Cost box in the General Configuration parameters lets you specify you can specify whether to show either A Cost or P Cost only in Furniture Order Entry.
- 7.9.x **General Ledger Parameters:** The new General Ledger Parameters let you set up department parameters, general configuration parameters, and master number parameters. You can set up to 70 item departments per general ledger number for Salesperson, Credits and Costs in the G/L Departments dialog box. The General Ledger General Configuration parameters let you set up responsibility center parameters. Use the G/L Master Numbers text boxes to enter general ledger master numbers for A/P, A/R, Cash, Cost, Deposit, Payroll, Sales, and Taxes.
- 7.9.x **Inventory Parameters:** The new Inventory Parameters include the No Auto Query on Super Index Exact Match text box. Use this box to specify whether to automatically query items if an exact match is found in the super index.
- 7.9.x **Notes Everywhere Parameters:** You use the Notes Everywhere parameters to set up general configuration and passwords parameters. In the Notes Everywhere General Configuration parameters, you set up parameters for emailing notes and/or campaigns. In the Notes Everywhere Passwords parameters, you set up passwords for setting up, deleting, viewing, and restricting access to notes.
- 7.9.x **Order Entry Parameters:** You can set up additional volume discount plans using the Additional Volume Discount Plans window. Setting up these parameters allows you to offer selected customers an additional discount based on the dollar volume of an order. This dis-

count percentage will be offered in addition to normal pricing. You can set up 4 tiers of dollar volume. Suppose you assign a plan code of D1 for the first discount. Within that code, you could set up a range of dollar amounts for \$50 to \$100; \$101 to \$200; \$201 to 300; and \$301 to \$5000. You can set up as many codes and corresponding dollar amounts as necessary, D2, D3, and so on. Within the specific dollar range of \$50 to \$100, you could specify that the customer receive a gift item, a free box of pens, for example. The second dollar range of \$101 to \$200 could have a 2% discount given for the entire order, and so forth. See Figure 15. After you create the additional volume discount pricing plans, you assign them to the customer in the Customer Order Entry Tab using the Additional Volume Discount Plan box.

You can also set up the Backorder All or By Stock Class parameters. You can specify whether to backorder all items, not backorder items, or backorder by a range of stock classes. If you want to backorder by a range of stock classes, you set up the range plus five additional stock classes.

- 7.9.x **Serialized Parameters:** You set up parameters for the new demo picker feature in the Serialized Parameters. Demo picker allows you to track machines given out to customers without putting the machine on an invoice. After the trial period, the machine will either

Plan	Description	SubTotal From	SubTotal To	Item Key	Volume Discount
P1	Discount Plan P1	100	200	00021 FEL	0.00
		201	300	VOLUME DISC 1	5.00
		301	400	VOLUME DISC 2	10.00
		401	500	VOLUME DISC 3	15.00

**Figure 15:
The Additional
Volume
Discount Plans
Window**

change ownership to the customer or return to inventory. You can set up call codes and technician codes in the Serialized Demo Picker Parameters. You can also set up 15 different return reasons in the Return Reasons text boxes.

- 7.9.x **Warehouse Parameters:** You use the Warehouse Parameters to set up the new Advanced Manifest features. You can set up inventory location printers and route location printers. Use the general configuration parameters to set up the Activate Advanced Manifest text box. To use the advanced manifest options, type Y in this text box. You must be authorized to use these features.

Miscellaneous

- 7.2.43 **Logging Errors:** The `ensite.elf` file has always saved error information. Now, to save space on your computer, you can specify just how much information to log to this file. You can log errors, warnings, or all messages. You can set different logging options for the server and the client. First, create a new text document in the `C:/DDMS/CLIENT/SYSTEM` folder and name it `loggingoptions.ini`.

Next, in the text document, type **Errorlevel=** and enter one of the following options:

- 0 Do not log any messages.
- 1 Log errors only.
- 2 Log errors and warnings.
- 4 **(default)** Log all messages.

For example, to log all messages, type **Errorlevel=4**. Save and close the `loggingoptions.ini` document.

The `elfview.exe` file is located in the `C:/DDMS/CLIENT` folder. To view the log file, double-click `elfview.exe` to open the Elf File Viewer window.

- 7.9.x **Credit Card Enhancements:** Processing credit cards through your DDMS system is easier and more flexible than ever. Recent enhancements give you:
- Level 3 line item detail
 - Bill-complete flow and credit card authorization flow merge
 - Control of approval numbers and dollars
 - Greater prepay transaction flexibility.

To process credit cards electronically at Level 1 or Level 2, you need:

- Automated authorization and capture software, such as POS-partner. POS-partner lets you receive authorizations, store transactions, settle transactions with your clearing house, report on your transaction dollars by type of card and communicate electronically using Internet TCP/IP.
- Approval Link™ 2.0 is the interface between your DDMS system and POS-partner.

To process payments with Level 3 item detail, you need Approval Link + and POS-partner. (Approval Link + is only available with Ensite Pro Version 7.6 software.)

Together, Approval Link 2.0 and POS-partner cut costs for processing credit card transactions. Approval Link 2.0 and POS-partner let you:

- Be compatible with all major credit card services
- Accept procurement, corporate, major and private label credit cards
- Accept multiple merchant IDs
- Approve Level 1 and Level 2 transactions
- Change prepay orders
- Make fast, reliable TCP/IP connections from your server to POS-partner
- Use approved DDMS point-of-sale equipment
- Authorize credit card orders placed through Dealer Station.

This feature is not included in all software packages and requires authorization. Approval Link is available in the Xtended & Platinum packages as well as packages A, B, C, and D. For more information, contact ECI² sales.

- 7.9.x AutoComm:** AutoComm makes faxing and emailing fast and easy. AutoComm (previously AutoFax), is the interface between your DDMS system and the Symantec™ WinFax™ PRO software. You can communicate directly from your system to any fax machine or computer. Simply connect your DDMS system to a PC running AutoComm and WinFax PRO software. Choose the information to fax or email and let AutoComm do the rest.

What's New in Version 7

As with the previous versions of AutoFax, you can fax invoices, pick tickets, purchase orders, statements, and word processing files. Now you can email them as well. You can accurately transmit large volumes of information from your DDMS system. AutoComm passes faxes to WinFax PRO for faxing and sends email through your 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 and emailing functions you can easily perform from the DDMS system.

This feature is not included in all software packages and requires authorization. AutoComm is available in packages A, B, C, and D. For more information, contact ECI² sales.

7.x O/PUS Tools: O/PUS offers several utilities for importing special pricing files into your DDMS system.


- **O/PUS FileMapper™:** With the O/PUS FileMapper, you can quickly convert inventory file information from manufacturers or other sources into a format which can be read by the DDMS system. You can even bring special pricing or other data in from a file you built yourself.
- **O/PUS PT Updater™:** Supplement your OPdb wholesaler information with pricing for your favorite direct buy vendors. PT Updater imports manufacturer pricing directly from Moore's Power Tools program and loads it into your DDMS inventory database. PT Updater can also load i2's competitor cross-reference table, a listing of superstore product numbers.
- **O/PUS TechMapper™:** Convert TechData item files into a format which can be read by the DDMS system. This Microsoft® Windows®-based program will convert the TechData file and transfer it to your DDMS server.

These tools are is not included in all software packages and requires authorization. These tools are is available in the Xtended and Platinum packages as well as packages A, B, and C. For more information, contact ECI² sales.

Order Entry

7.0.x Customer Evaluation: A new feature in Order Entry allows you to view your customer sales and credit history quickly and easily. You can view pie charts and graphs by customer sales, categories, service, or credit in the Customer Evaluation window. In the Order Entry window, click the Order Entry menu, then select Customer Evaluation.

This feature is not included in all software packages and requires authorization. Customer Evaluation is in the Platinum package. For more information, contact ECI² sales.

7.2.x Limiting by SIF File: In order entry, you can limit an order by SIF files. When placing an order, click . Select the SIF file from the appropriate folder. The Process Sif File message box opens. Click Yes. Only items contained in this SIF file display.

7.2.x Viewing Summary Invoice Number in O/E History: You can now view the summary invoice number in O/E History. If the selected invoice is part of a summary invoice, the summary invoice number appears in the new Summary # box in the O/E History Line Item Detail (Secondary Fields) tab. This lets you easily view the summary invoice number for a specific invoice.

7.2.x View Entire Item Numbers: When you look up items using the Item Query dialog box in the Order Entry Item Detail tab, the system displays the entire item number, up to 15 characters. Previously, the system displayed approximately 12 characters of the item number. In addition, if you move the mouse over the Description box, the system displays the entire item description as a tool tip.

7.2.65 Add Items to an Order Using the Customer Order History Dialog Box: While placing orders, you can view the Customer Order History dialog box. This dialog box lets you view items the customer has previously ordered. You can also add an item to the order using this dialog box. To do so, retrieve an item in the Item Detail tab. When the cursor moves to the Order box, type **Ctrl +S**. The Customer Order History dialog box opens. Click the item you want to add to the current order and right-mouse-click. Click the Add Item to Order option. When the Addon Item Quantity dialog box opens, enter the item quantity, and click OK. The cursor returns to the Item Detail tab, displaying information for the item you selected. You can also double-click the item in the Customer Order History dialog box. The system adds the item to the order with a quantity of one; however, you can always change the item quantity.

- 7.4.x **Viewing Pricing Matrix Items:** In the (ET) screen, items can be set up on a contract or a matrix pricing plan. When placing items on an order in order entry, the Disc Type box displays either Contract or Matrix.
- 7.4.x **Prepay Orders:** Previously, once a prepay order was placed and the order accepted, you could not change the prices or order quantities on the order if it would affect the order total. This has been changed. You now have the ability to change a prepay order so the order total is affected as long as no amount has been prepaid on the order.
- 7.8.x **Use Two Digit Pricing:** Some credit card companies require pricing be extended to two digits instead of three. To use this feature, check the Two Decimal Place Pricing check box in the Customer Order Entry tab. This rounds the unit's sell price and list price to two decimal places in Order Entry. You can report on this information by using the C-MANIFEST file through Report Writer.
- 7.9.x **Time Stamp in Order Entry:** When creating an order in Order Entry, the order's creation time is saved in the P-GLOBAL file. This new feature works in conjunction with the Today's Cutoff Time field in the (TM-A) screen. The order creation time displays when inquiring on an order and in O/E History. This feature works in both text-based and graphical.
- 7.10.x **Additional Volume Discounts:** This feature lets you offer discounts and item gift rewards to customers that place orders within a certain dollar amount. It gives you two options: You can reduce the customer's order by a discount percentage whenever the order falls within a set dollar amount, \$100 to \$200, for example. If you use this option, the discount applies to the entire order total and is based on the subtotal amount, before tax is added. The discount is given in addition to the customer's regular pricing. Or, you can give the customer a gift item when placing an order within a specific dollar amount. In this case, a gift item is added to the order at no charge. Before you can use this feature, you must set up the Additional Volume Discount Plans window in the Order Entry parameters. You use this window to set up plan codes, dollar amount ranges, and discount and gift items.

Note: This new feature works in both text-based and graphical order entry. You must setup graphical Order Entry parameters and graphical Customers. After setup is completed, you can use this feature in text-based order entry. This feature also requires authorization. For more information, please contact ECI² sales.

When you set up discount percentages in the Additional Volume Discount Plans window in the Order Entry parameters, the system links the discount percentage you specify to an existing inventory item. Linking the discount to an item is useful for tracking and reporting purposes. Unless you have items in your inventory that can be used as discount items, you must add new items for use with this feature in the Item window. Not only does this help the order-taker distinguish between discount plans and regular items while placing an order, you need the ability to track and report on these discount plans when printing reports. Therefore, you should carefully consider how you want to report these discounts. If you want to report the various discount amounts given for specific code plans and dollar range tiers, you should create several different unique items for each level and for each table you set up. If you only need to view one total amount of volume discounts across all your sales, you only have to set up one unique item, volume discount, for example.

After you set up your items in the Item window and your plan discounts in the Order Entry parameters, you must assign the discount plan to a customer. Use the Additional Volume Discount Plan box in the Customer Order Entry tab to do this. In Order Entry, anytime the customer's order falls within the specified dollar range, the system adds the discount amount to the entire order as a credit, reducing the amount of the entire order. If the specified dollar range is set up as a gift item, it is added at no charge. A message displays in Order Entry, notifying the order-taker that the item or discount was added. In addition, if the customer's order falls within 30% of the next dollar range, the system prompts the order-taker, so the customer can consider adding more items to the order to reach the next dollar range and corresponding gift item or discount percentage. Whenever a volume discount line is added to an order in Order Entry, the system updates the P-GLOBAL file.

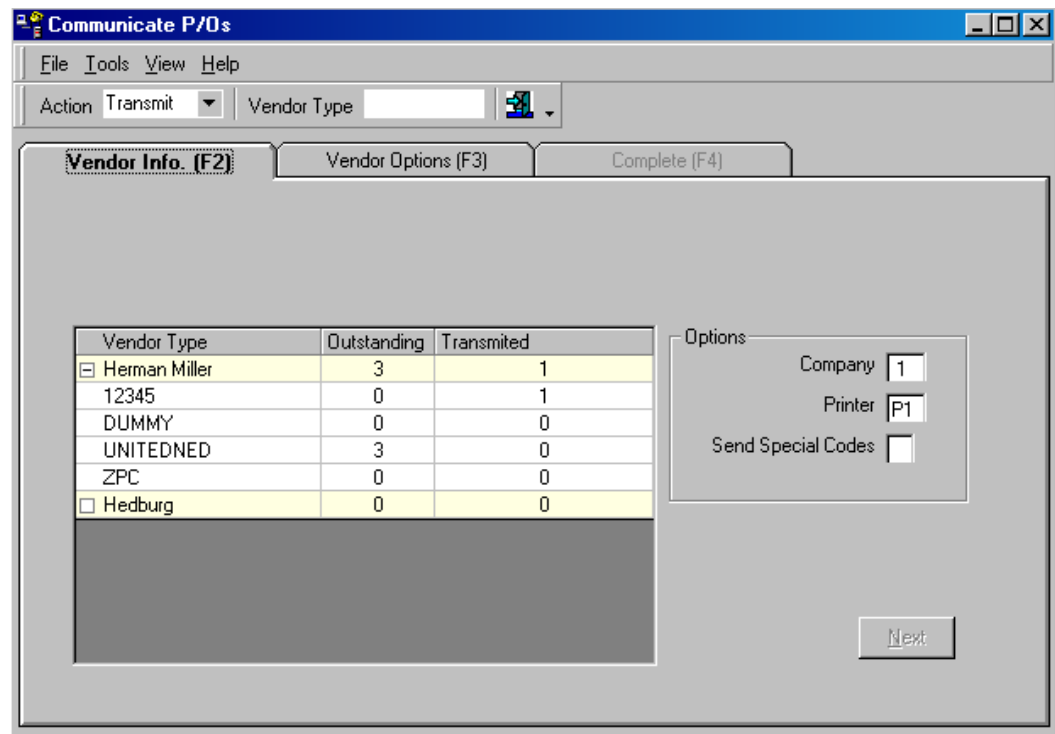
Note: If the order has a negative shipped total, the system prevents invoicing the order with the additional discount line items. Instead, the system holds the order at a status 6. The system also prints a message on the ticket indicating that the order cannot be invoiced. The system holds a negative shipped total order with additional discount items to a status 6 or 7 when using the (TR)[G] or (TR)[V] functions. An AAAA special line is added with the text Negative Total – Invoicing Not Allowed and an exception is created. When final-verifying a ticket, if the order has a negative total, the system holds the order at a status 6 or 7 and creates an exception. In addition, additional volume discount items cannot be placed on a picking manifest. These factors only apply to discounted items, not gift items placed on the order.

7.10.10 Calculate to Three Decimal Places: Previously, when you set the Calculate Tax by Line field in the (LØ) screen to Y, the system calculated the tax for each line item on the order up to two decimal places. Now if this field is set to Y, the system calculates the tax for line items up to three decimal places. When rounding up to two decimal places, a large order containing up to 32 different line items, for example, could result in a 16 cent total tax difference. This enhancement was made to ensure that the tax being charged to the customer was as accurate as possible.

Purchase Order Entry

7.2.x Communications: You now have the ability to perform Communications procedures in graphical Purchase Order Entry. In Purchase Order Entry, select the Communicate action code. Use the Communicate P/Os dialog box, shown in Figure 16, to easily transmit and receive purchase orders. Ensite Pro divides the Communications window into several tabs based on the action you are performing. If you are Transmitting you have three tabs: Vendor Info, Vendor Options and Complete. If you are receiving purchase orders you have three more tabs: Vendor Info, Receive, Acknowledge.

Figure 16:
The
Communicate
P/Os Dialog Box



- 7.2.x. Low-Stock:** All the low-stock functions available in the text-based software are now available in graphical. You can generate low-stock purchase orders without having to print the Low-Stock Report first. You can specify settings and set limits for the purchase order in the Low-Stock Limits dialog box. For example, you can set limits by entering a range of item numbers, departments and locations, plus many more. The low-stock purchase order is created by the click of a button. Once it is created, you can set up additional options such as choosing whether to use a vendor contract range or setting item class or bin locations. You can even add additional items to the purchase order before completion.
- 7.2.x Purchasing with Serialized Items:** You can now create purchase orders and short-buy purchase orders with serialized items. You can also receive serialized items. The procedures for this are similar to those of creating regular purchase orders and short-buy orders. The new Assign System and Serial Numbers dialog box allows you to select machines to receive, assign system and subsystem numbers, or allow the system to assign the number for you.
- 7.4.x Item Detail Tab:** When building a P/O manually, you can check the Manufacturer's record in the Item Detail tab. It shows page, prefix, and vendor information. Scroll right to view vendor stock information. Click a vendor on the list to open the P/O Entry Details dialog box. Scroll right to view the Ven Stock and Ignore Cost boxes. The Ven Stock box displays whether this item is a stocking item. The Ignore Cost in O/E box displays whether the system not use the manufacturer's cost in order entry. (For more information, refer back to the **Item** heading.)
- As you add items to the P/O, you can check the Manufacturer's record to be sure you meet your minimum order requirements.
- 7.4.x Low-Stock Limits:** The Low-Stock Limits dialog box lets you limit the items that appear in the Low-Stock Items dialog box. Use the Vendor Stock/To boxes to limit by vendor stocking information.
- To limit the P/O to stocking items, type **S** in the Vendor Stock and To boxes.
 - To limit the P/O to non-stocking items, type **N** in the Vendor Stock and To boxes.
- 7.4.x Low-Stock Items:** You can add a vendor stocking information column to the Low-Stock Items dialog box. Simply change the grid information then drag the column to where you it to display.

- 7.4.x Automated Short-Buy Exceptions File:** You can transfer call exceptions to a file separate from the usual SHORT-AUTO file. This new exceptions file has a prefix of TF. Call exceptions are items that the vendor cannot fill or does not stock.

The exceptions file performs the same function as the SHORT-AUTO file. (This applies to both text-based and graphical software.) However, it lets you transmit exceptions to another wholesaler without checking the pick file for other items that could be purchased. You can process this file against a specific call vendor or call group.

An action code in the [LFA1] screen lets you reset all or some TF files so they revert to the normal Short-Buy process. You can reset the status on pick tickets for calls if there is no P/O and if the item is still backordered. The status is reset to 6. The file will be picked up at the next transmit slot.

The exceptions file, which is date and time specific, has a prefix of TF. The file contains the date and time stamp as part of the file name. For example, an exceptions file for a call launched through the (LFA2) screen on January 4 at 9:10 a.m. would be TF040910.

- 7.10.x New Route in Short-Buy:** A new column in the Short-Buy Items dialog box lets you view the route assigned to a ticket. You can sort by this column, move the column and save your settings, just as you can with the other columns in this dialog box.

Serialized

Serialized is now integrated into our Graphical software. Many of the features that were previously text-based are now graphical! The following is a brief list of the graphical Serialized features.

- 7.2.x Serialized Order Entry:** The Serialized application provides a special version of the Order Entry window. The Serialized Order Entry window was specifically designed to help you easily sell serialized merchandise and contracts. You can also use this window to accept trade-ins, sell lease, rental, and umbrella contracts. You can also view the list of serialized options available. After you retrieve the customer, click the Item Detail tab. Click the Item Number box and right-mouse-click. A context-sensitive menu appears, as shown in Figure 17.
- 7.2.x Item Transfer:** You can manually transfer items from one inventory location to another in the Item Transfer dialog box. You can assign an inventory location to each technician's van, for example, and use

this dialog box to track transfers from your warehouse to each van.

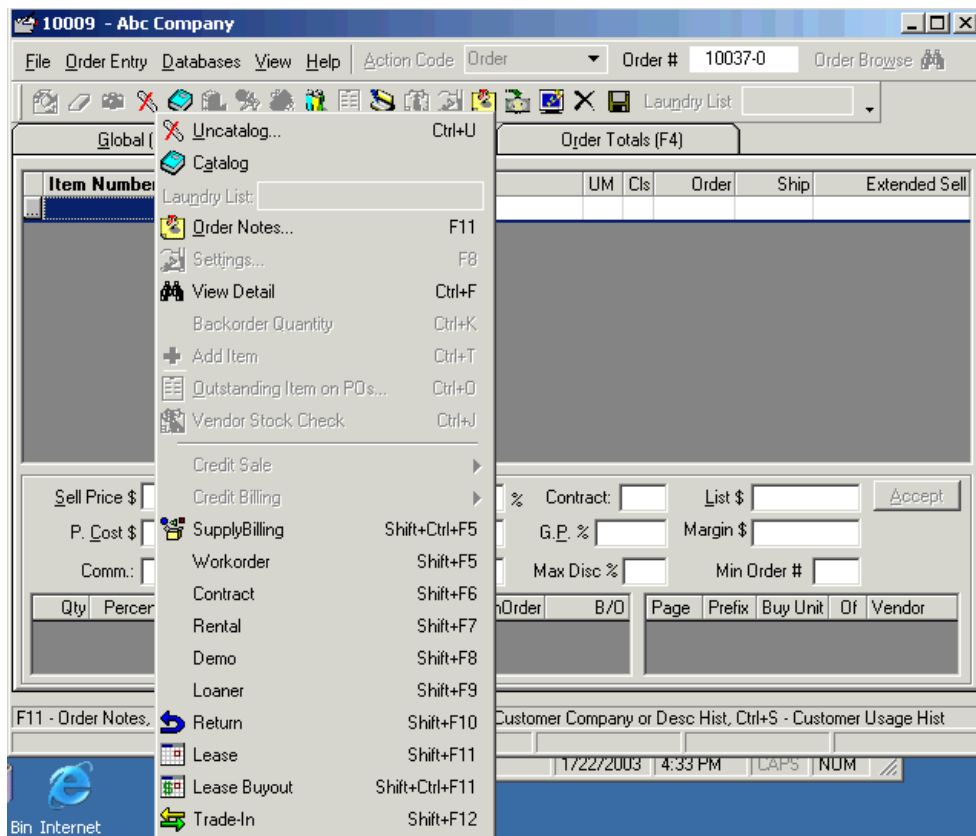
From the Item Master tab, click .

You can also view information about the transfers. You can look at all of the items on a particular transfer, or look at all of the transfers that include a particular item.

When you transfer inventory, you can print a copy of the Item Transfer Report. However, you can return to the Item Transfer dialog box at a later date and print additional copies. This report lets you print information from the current transfer file, from transfer journal files, and from the transfer exception file. If you print transfer exceptions, you have the option of deleting the exception file after printing it.

You can also release (delete) and save completed transfers. You should delete transfers from the system periodically to free disk space. The number of transfers you make determines how often you

Figure 17:
Using
Serialized
Order Entry



should do this. By releasing the Z-TRANSFER file, you ensure that this file contains only current information, which helps improve the speed and efficiency of your system.

In the Item Transfer Transfer tab, you can use the drop down arrow in the Action box to select one of the following options: Add, Inquire, Print, or Release.

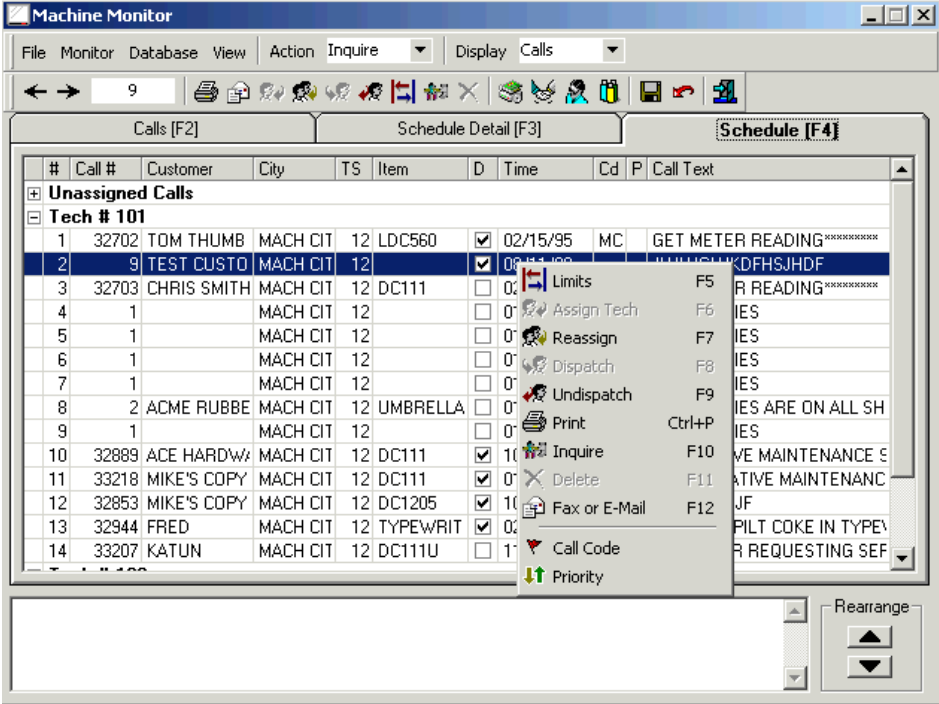
- Select Add to create new item transfers. These records are stored in the Z-TRANSFER file.
- Select Inquire to view information about the transfers you have made. You can look at all of the items on a particular transfer, or look at all of the transfers that include a particular item.
- Select Print to print a copy of the transfer transaction.
- Select Release to release (delete) and save completed transfers.

You can use the Item Transfer Release/Print tab to release completed transfers or to print the Item Transfer Report.

- 7.2.x **Maintain Machine Databases:** Your machine data is stored in numerous databases designed to organize your serialized information. For example, you set up and store your contract, meter, lease and department information in the Contract Types tab. The system uses this information as the default data when selling machines and service contracts. However, you can always change it in order entry. The Contract Detail tab stores information for the customer's contracts, including history, renewal history and deferred income data. Similarly, the Machine Detail tab stores information for machines, including any critical parts and depreciation information. To set up call codes, service types, territory codes, and qualification codes, you use the Machine Tools window.
- 7.2.x **Logging Calls:** To log a call, you'll use the Machine Work Orders window. This window provides a number of features to help you identify call and item information. For example, when you log calls, you can enter codes. Codes automatically enter text for common service problems and solutions, greatly reducing the amount of typing you must do. They also give you a management tool, because you can run reports on these codes to see how often different service problems occur.
- 7.2.x **Using the Machine Monitor:** You can easily dispatch calls in the Machine Monitor. You can also view technician's schedules, assign and reassign technicians to calls, set call limits, print, and fax or e-mail calls using the Monitor. See Figure 18.

- 7.2.x **Use Machine Accessories:** You can use the machine accessory feature with any machine whether it's covered by a contract or not. When you sell a contract, the customer may also want to purchase accessories from you. For example, customers who use copiers may choose to include feeders and sorters. They may also decide they want non-serialized items, including stands and cabinets. When they do, you place the additional items on the order, along with the machine. After you end the order, the system automatically creates a record for the machine in the Machines Accessories dialog box. However, you may also need to manually add additional items if the customer decides to add them later. You can easily do this in the Machine Accessories dialog box. This dialog box lets you easily add and remove accessory items.
- 7.2.x **Meter Overage Amounts:** We've made a minor change to the number of characters that display in the meter overage amount boxes. Instead of displaying two characters to the left of the decimal and four to the right, the system now displays two characters to the left and six to the right. For example, 12.3456 is now 12.345678.

Figure 18:
Viewing the
Machine
Monitor



- 7.2.x Tracking Technician Performance:** You can easily monitor a technician's performance. The Tech Recap window lets you see at a glance how many billable hours each technician has been working. You can also see how much time they spend traveling, and how their actual travel time compares to the travel time you bill for. The Tech Recap Totals tab lets you analyze your technicians' long-term performance. It also shows the number of callbacks for each tech, and the number of copies between service calls. The system also tracks the number of clicks between repair calls for each machine in the Tech Recap Clicks Per Fix tab. The information is listed by technician number, using the technician who last fixed the machine.
- 7.2.x Umbrella Contract Enhancements:** Two enhancements affect umbrella contracts. The first lets you combine all service contracts for a customer into a single umbrella contract. Each service contract covered by the umbrella contract can have different terms and billing cycles. To make this change, groups are used within the umbrella contract. All the service contracts covered by the group share the following terms: the number of allowed clicks per billing period (Over # box); the amount charged for each click that exceeds this amount (At \$ box); and the billing cycle (Freq box). An umbrella sub-system number identifies the groups. For example, if an account has 50 machines with service contracts, they are assigned an umbrella system number applying to all 50 machines. If the 50 machines are divided into five separate groups, each is assigned a sub-system number.
- The second umbrella contract enhancement lets you specify how many machines a contract covers. You specify the number in the Order box in the Item Detail tab. For example, if the umbrella contract covers three machines, type **3** in the Order box. In this case, the Umbrella Sub # prompt redisplay for each machine the contract covers. You can also change contract terms, meters, and departments for each machine.
- 7.2.x Machine Security:** You can use the (EZX) Serialized Program Security screen to set screen passwords to provide serialized security. All passwords you set in the (EZX) screen now also apply to graphical windows. For example, if you set an update or inquiry password for the (EZP) Call Monitor screen, this password applies to the Machine Monitor window. If you set a password for the (EZO) Log in Calls screen, it also applies to the Work Orders window. For more information on serialized security, see the topic **About Serialized Security** in your online documentation.

- 7.2.x Update Using the Contract's Anniversary Date:** You can use the Update "Next Bill Date" with Contract Anniversary Day of Month field in the (EZ1B) Serial Contract/Meter Billing Parameters screen to specify that the system set the next billing date for both contracts and meters to the same day of the month that the contract began. This helps ensure that you consistently bill the meter. Suppose the meter is due to be read and billed by 6/15/03 but you don't receive the meter reading until 6/20/03. If you bill the meter after entering the customer's reading in the (EZY) screen, the Last Meter Billing Date box in the Contract Detail Meter Master tab will be set to 6/20/03. In this case, the machine is not due to be read and billed until 7/20/03. You want to bill the meter consistently on the 15th of each month. If you set this field to Y, the system automatically sets the reading and billing for the 15th or the date set in the Next Meter Billing Date box.
- 7.2.x Demo Picker:** Demo picker allows you to track machines given out to customers without putting the machine on an invoice. After the trial period, the machine will either change ownership to the customer or return to inventory. You can create demo pick tickets in order entry. When you do, the system holds the ticket at less than a status B (invoice). By creating a demo pick ticket, you can let your customers demo an item without actually purchasing it. Items you add to the ticket remain in an allocated position and update the demo field in the I-AUX file. In addition, until they are invoiced, demo pick tickets do not affect accounts receivable or sales. When the demo period is over, you can release the pick ticket to an invoice. If the customer decides not to keep the item, you can delete or void the pick ticket.
- You set up demo picker parameters in the Serialized Demo Picker Parameters. These text boxes let you set up default call codes for demo picker parameters. You can also set up fifteen different Return Reasons in the Serialized Return Reasons Parameters to use when returning an item in order entry.
- This feature is not included in all software packages and requires authorization. For more information, contact ECP² sales.
- 7.2.x Machine Work Order Billing:** The Machine Work Order Billing dialog box displays when you complete calls. The boxes in this dialog box calculate labor and travel charges for the work order, as well as the miles billed for the service. This information also determines what prints on the service work order invoice. In addition, this information provides a valuable tool for measuring a technician's performance in the Machine Tech Recap window. It can indicate how

much of a tech's day is spent on billable work, how many billable miles he travels, and so on. However, for this information to be helpful, it must be accurate. Since the information is automatically calculated, you can usually accept it. You can also easily change it when completing the call, if necessary.

- 7.2.x **Deleting Calls in the Graphical Machine Monitor:** Since the Z-C-INDEX, Z-R-INDEX, and Z-T-INDEX files are only used in text-based and not graphical systems, these files are only updated when you delete the call in the (EZP) Call Monitor screen. When the call is deleted in the graphical Monitor, these files are not updated. If you want these files to be updated, you must delete the call using the (EZP) screen.
- 7.2.x **Trade-In Enhancements:** Several enhancements have been made that affect the serialized trade-in feature. You now have the ability to indicate whether the trade-in is a customer machine. You can create database records for non-customer trade-ins. You can also place trade-in orders on hold until the trade-in manager specifies a trade-in amount, and you can calculate the approved trade-in amount into the sale (or rental) as an additional discount.
- 7.7.0 **View Last 10 Meter Readings:** We have added the ability to view a machine's last 10 meter readings to the Machine Contract Detail Meter tab. To do so, retrieve the machine containing the meter readings you want to view and click the Meter tab in the Contract Detail window. Then click the forward arrow (>) to the right of the Clicks and Date boxes. The system displays the last 10 meter readings.
- 7.3.9 **View P/O Required Box:** We have added the PO Rqd box to the Work Orders Global tab. This allows you to see at a glance whether a purchase order number is required for this customer before logging a service call and before the service is billed.
- 7.3.9 **Color Coded Machine Monitor:** We have enhanced the Machine Monitor by adding colors to indicate the status of the call, reopened, rescheduled, transferred, and so forth. The color coding replaces the old text-based system's use of an !, *, and +.
- 7.10.x **Improved Service Call Completion:** We've improved the cursor movement when you complete and bill a call in the Machine Work Orders window. Changing the cursor flow lets you quickly move to the boxes that you need to complete in a more efficient manner. We've also added the ability to enter more than one solution code to a service call. When you do, a new dialog box opens that lets you enter additional solution codes. However, since only one call can dis-

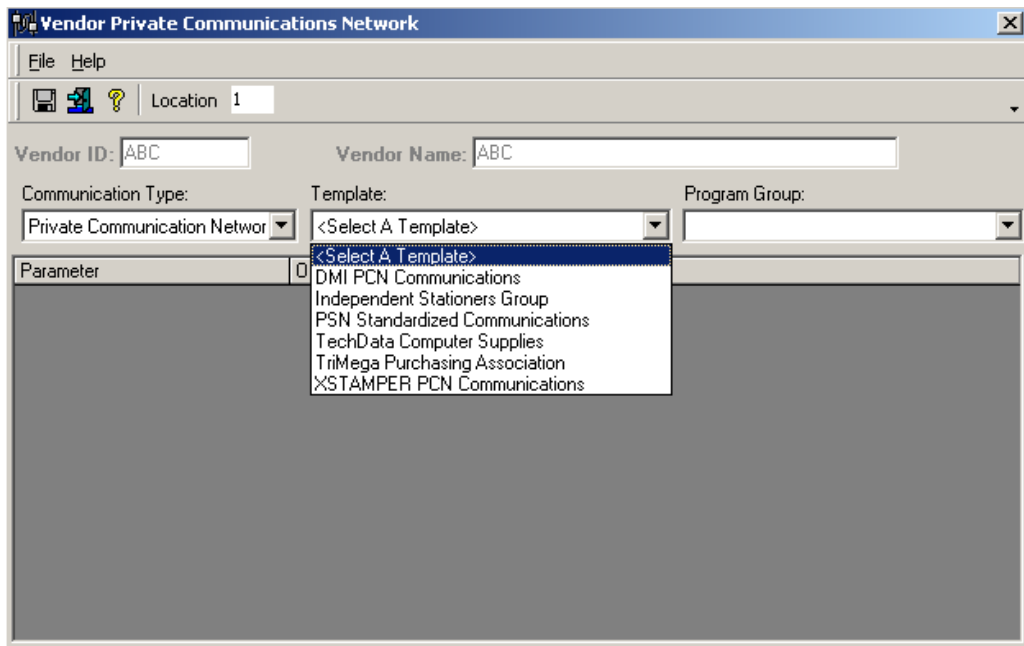
play in the Work Orders window, a Display check box lets you indicate the solution code you want to appear. We've combined the Edit Call Dates and Times dialog box with the Meter Readings dialog box. This lets you enter dates and meter readings in one place. This dialog box also lets you enter mileage information. Entering the mileage data here saves you time when the Recap dialog box opens, thereby speeding up the flow and process time. In addition, this dialog box includes a checkbox to indicate that preventive maintenance was performed. If you check this box, the system updates the related preventive maintenance date and meter boxes in the Machine Contract Detail window.

- 7.x **Additional Shortcut Keys:** In the Machine Work Orders window, you can specify that the system display additional shortcut keys on the toolbar. To do so, click your cursor to the right of the Location or Taker box in the toolbar and right-mouse-click. A context menu appears. Click the Shortcuts option. The system displays the Notepad, Call Detail, and Contract Detail options.

Vendor

- 7.2.79 **Lead Days:** The new Lead Days box in the Vendor Account Status tab allows you to enter the average number of days between the purchase order date and the date you receive your first shipment.

Figure 19:
The Vendor
Private
Communications
Network Dialog
Box



7.2.79 New boxes in Vendor Master tab: Several new boxes have been added to the Vendor Master tab. Use the Mach Dlr box to indicate a third-party vendor is involved with a machine trade-in. For example, one machine dealer is delivering a copier for another machine dealer (the third-party vendor), and the customer is trading in a copier as part of the deal. Type **Y** in this box to include the dealer in the list of possible vendors available when processing the trade-in.

Use the Net Terms box to determine when the full invoice amount is due. If a vendor has terms that are set in the (LC) Vendor and A/P Parameters screen, enter the code that specifies the net terms in this box.

The Sales/Purchases Major box displays the sales or inventory purchasing General Ledger (G/L) major account number for this vendor. If you enter a number in this box, it is used as the reverse general ledger major account when posting invoices in the Accounts Payable Post P/O tab. Unless you change it, this box defaults to the major displayed in the Expense G/L # box.

7.4.1 New PSN Trading Partners: You can now send purchase orders electronically to Xstamper, TechData, Lagasse, Express Computer Supply, TPA (TriMega), and Synnex. You set these parameters in the Vendor Private Communications Network dialog box, as shown in Figure 19. For more information, PSN handouts are available on our web site at www.ddms.com/support/doc/psn.htm

7.11.x Hedberg Cross Reference Accounts: You can enter your Hedberg vendor number in the Cross Reference box in the Vendor RemitTo/Settings tab. This number lets your DDMS system interface with Hedberg software. When importing a Hedberg order, the system checks this box. To import Hedberg orders successfully, this box must contain the account number. If this box is blank, the dealer will see an exception message. Hedberg is used by Steelcase dealers. This information is stored in the V-SUPP file.