



**2009 REGIONAL
USERS MEETINGS**

Accessory Management



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Machine Accessories

This feature helps you manage accessories. You can access Machine Accessories from the Machine Detail database and from Order Entry.

This feature is not included in all software packages and may require authorization. For more information, contact ECi sales.

The Machine Accessories window makes it easy to sell or lease machines with the accessories the customer needs. Suppose you're selling a copier with a document feeder, a cabinet, and a finisher. You specify the base model number for the copier and the three accessories and let the system search. Exact matches list first (any copiers with all three accessories that are on-hand). It also lists copiers that have some but not all of the accessories you specified, and lists the individual accessories available. You can drag and drop machines and accessories to assemble the copier you need.

When you end the Serialized order, the system automatically creates a record for the machine in the Machines Accessories window. However, you can also manually add additional items if the customer decides to add them later. You can easily do this in the Machine Accessories window. This window lets you add and remove accessory items.

In addition, you can also create a setup or delivery work order without leaving the Machine Accessories window. A setup work order indicates that a machine needs to be built with the accessories specified in the Machine Accessories window. A delivery work order indicates that a machine needs to be delivered with the accessories specified in the Machine Accessories window.

What's more, you can view the history of any accessory part at a glance; this feature makes it easy to quickly spot defective parts.

Before you use the accessory feature:

- Set up serialized item accessories in the Item window. (If the accessory is a serialized item, set the Serial box in the Item Settings tab to Y for serialized item or P for accessory item.)
- Set the password in the Accessories field in the (EZ1S) Serial System Parameters screen.
- Execute the program that takes all the sub-system numbers for a machine and adds them to the Z-ACCESS file.

Note: When selling a machine and ending the order at a status 6 or less, you have the ability to use the Accessories Management feature without assigning the serial number for a model and its accessories at that time. This allows you to build the machine without actually assigning serial numbers. Instead, you can assign the serial numbers when you verify the pick ticket in the usual manner.

Adding Machine Accessories

You can add new accessories (items) to machines using the Machine Accessories window. See Figure 1. The item you add can be a serialized item, a non-serialized item, or an accessory.

- 1 Double-click



- 2 From the Machines Menu, double-click



- 3 Select the machine to add accessories.

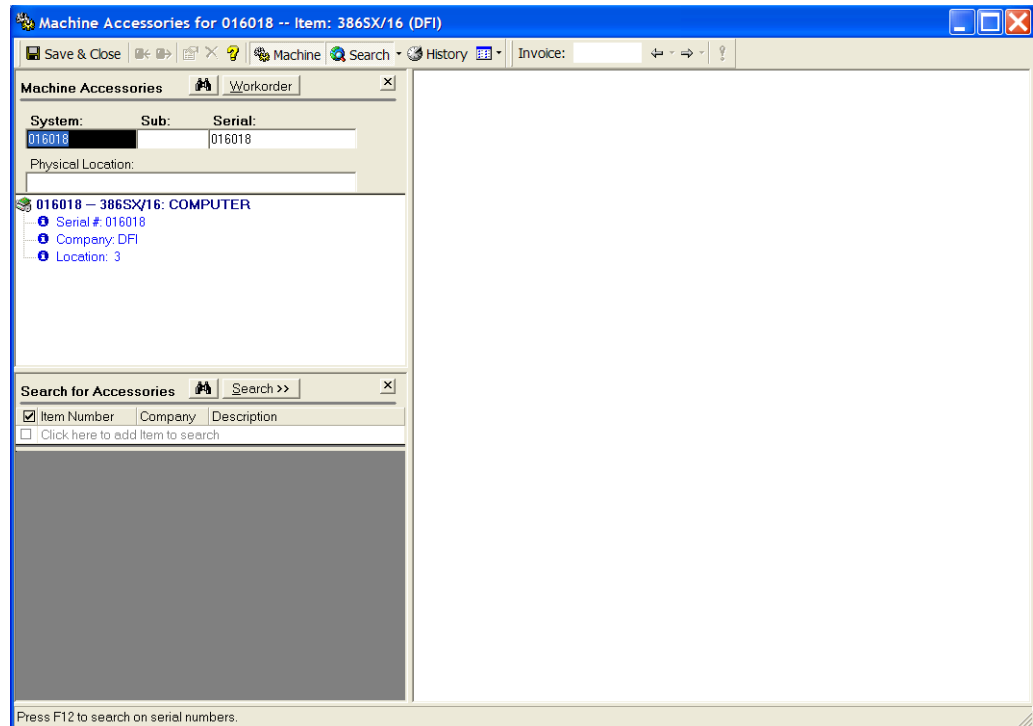
- 4 Click





- 5 At the Enter Password prompt, enter the password set in the Accessories field in the (EZ1S) screen. Click OK.



- 6 The Machine Accessories window opens, displaying the last machine used.


Figure 1: The Machine Accessories Window



Note: If necessary, you can retrieve a different machine using the System, Sub, and Serial boxes, or you can retrieve the invoice that contains the machine information. If you don't know the system, sub-system, or serial number, you can click  to the right of the Machine Accessories text to open the Serial Query dialog box. Double-click the machine for which to add accessories. To retrieve the machine by invoice number, click the Invoice box and enter the number. Press Enter. You can also scroll through the invoices, by clicking the next and back buttons to the right of the Invoice box.


- 7 After you retrieve the machine, to add an accessory to the displayed machine, you use the Item Number, Company, and Description boxes at the bottom of the tab. To search using a department limit, type **Ctrl + F2**. To search using the system and serial numbers, press F12, or click the Search menu and select the Serial Search option.
 - 8 Click the box by which to limit your item search and enter the information. If you don't know the item number, you can click  to the right of the Search for Accessories text to open the Item Query dialog box. You can also click the down arrow in the Dept Limit box to select the department by which to limit.
 - 9 When you finish entering the limits, press Enter. The system displays the items that meet the limits you set.
 - 10 The system moves the item down one line and returns the cursor to the Item Number box. You can continue to retrieve as many item accessories as necessary.
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Note: If you make a mistake, to change an accessory, click the item to change, and click . The system returns to the Item Number box so you can retrieve a different item. To remove an item, click the item to remove and click .



- 11 When you finish retrieving items, click .
- 12 The system displays the list of accessories you selected in the upper right-hand side of the window. At this point, you can select the type of accessory to add.
 - If you don't know the exact system and serial number to assign this machine, you can add a generic item. The text Generic Equipment displays the generic information for the item.
 - If you know the item is not in stock and must be backordered, you can assign this machine the backordered item. The text Backorder Equipment displays the backorder information for the item.

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- If you know the system and serial number to assign this machine, you can add the item containing the correct system and serial numbers to this machine.

- 13 To add an accessory to the machine you retrieved earlier during this procedure, click the accessory to highlight it and click  or press F5. You can also right-click the item and select Install.

Note: To add an accessory to a machine, the accessory you select must be set up with on-hand quantities in the Item window. In addition, if the machine or accessory has been suggested for another order, a red icon appears under the machine or accessory item, indicating it has been suggested for another order. Since it has been selected for another order, you cannot add this accessory.

- 14 The system displays a list of options. In the Quantity box, enter the number of this accessory to add to the machine, 1, 2, or 3, for example.
- 15 To make this a permanent accessory for this machine, click the Make Non-Removable option. If this option is selected, this accessory cannot be removed from the displayed machine.
- 16 Click the New Sub box and enter the sub-system number to assign this accessory. Or click the Generate New Sub option to let the system assign the next sequential sub-system number for this machine.
- 17 The system adds the accessory to the machine and displays it on the left-hand side of the window. You can continue to install as many accessories as needed for this machine.
- 18 When the list of machine accessories appears on the left-hand side of the window, you can click the Plus sign to the left of the system number to view item accessory information. This includes the item company (manufacturer); the serial number, if any; and the quantity of this accessory added to the machine.
- 19 If there are additional machines on this order, click  to view the next serialized item on the order. To view previous items on the order, click . When the item opens, you can add accessories to the displayed serialized item just as you did for the first.
- 20 When you finish adding machine accessories, click Save and Close to save the changes you made and close the Machine Accessories window.

Remove Accessories

To remove an accessory, click the accessory to delete. Then, click  or press F6. A new dialog box opens and the cursor moves to the New System box. You can use this dialog box to specify information concerning the item you are removing.


Open Accessories from the Work Orders Window

From the Work Orders window, click the Databases Menu and select Accessories.

Add Accessories to Items Through Order Entry

When selling a machine, the system prompts you to add accessories after you select the system or serial number of the item you are selling the customer.

Verifying Orders with Accessory Items

- 1 Double-click . The Order Entry window opens, displaying the Global tab.
- 2 If the Order Style list box does not default to Serialized, click the down arrow and click Serialized.
- 3 Click the down arrow in the Action Code list box and choose Final Verify.
- 4 When the Order Packer window opens, you can enter the name of the person packing the order for shipment, Bob Smith, for example, or you can leave this box blank. Click OK.

Note: The order packer number does not automatically print on the pick ticket. It is saved, however, in the P-MASTER file. You can use Report Writer to print the order-packer on custom pick tickets.

- 5 Retrieve the order to final verify.
- 6 When the order opens in the Verify tab, double-click the first item on the order.
- 7 The Machine Accessories window opens. At this point, you can select the serial and system numbers for the machine you are final verifying. For instructions on using the Machine Accessories window, see the previous heading **Adding Machine Accessories**.

Serialized Demo Picker


You can create demo pick tickets in order entry. When you do, the system holds the ticket at a status 6. 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 or rejects it, you can delete or void the pick ticket.

Note: Before you can use this feature, you must set the serialized demo pick ticket parameters in the Keyop Menu. You can use this screen to set up your demo picker default call codes and technicians.

Entering Serialized Demo Picker Orders

When creating demo picker orders, you enter the machines, accessories and demo picker contract for the order. You can also enter a demo picker estimated installation date. The estimated date sets the beginning date for the delivery date. (The demo date is set by the contract.) At a later date, you can invoice the demo pick ticket, or void it, depending on whether the customer keeps or returns the item(s).

Note: Be sure you have the proper default demo picker parameters set in the Parameter Editor window before using this feature.

- 1 From the DDMS Main menu, double-click  .
- 2 The Action Code list box defaults to Order. If not, click the Action Code list box and click Order.
- 3 If the Order Style list box does not default to Serialized, click the down arrow and click Serialized.
- 4 Click the View menu, and select the Demo Picker option. The Demo Picker menu appears, as shown in Figure 2.
- 5 Click the Enter option from the Demo Picker menu. The Demo Picker options, the setup, delivery, and network boxes appear at the bottom of the window.
- 6 You can use these Demo Picker options to specify whether to create a setup work order, delivery work order, or network work order when the order is ended. To create any of these work orders, check the appropriate option.

- 7 Select the customer for which you are creating a demo pick ticket.
- 8 At this point, you can change information for this order, including the pay code, the general ledger location, the shipping address, and so on.
- 9 To begin placing items on the order, click the Item Detail tab.
- 10 When the cursor moves to the Item Number box, you can place items (models) on the ticket. You can select an item using the Item Number, Company, or Description boxes, or you can use the Item Query dialog box.
- 11 The cursor moves to the Order box. Enter the quantity to place on this order or press Tab to accept the default quantity of one item.
- 12 When the cursor moves to the Sell Price box, you can change the pricing, cost, discount, or gross profit for this item. Press Tab to move from box to box, or click the box to highlight it and enter the new information over the existing information.
- 13 To add this item to the order, click Accept.

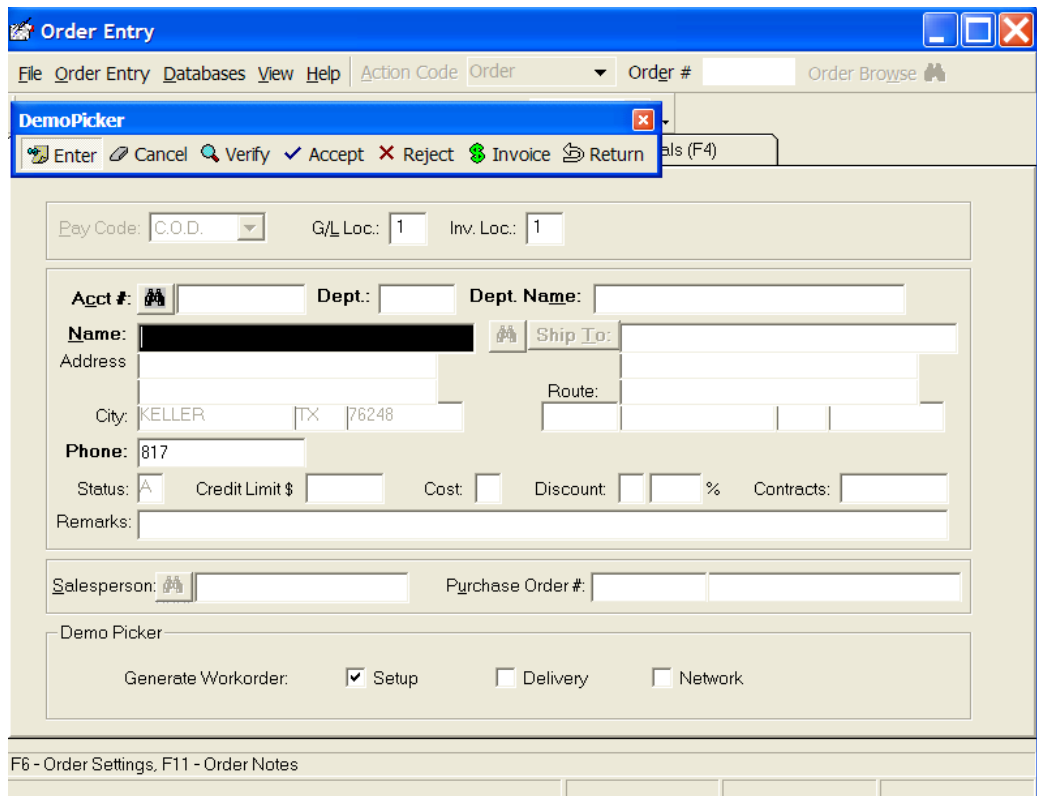



Figure 2: The Demo Picker Menu

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- 14 The Install Accessories for Item message appears. At this message, you can build the accessories for this machine. To do so, click Yes. The Machine Accessories window opens. The system displays the list of machine you selected in the upper right-hand side of the window. At this point, you can select the type of machine to build.
- If you don't know the exact system and serial number to assign this machine, you can add a generic item. The text Generic Equipment displays the generic information for the item.
 - If you know the item is not in stock and must be backordered, you can assign this machine the backordered item. The text Backorder Equipment displays the backorder information for the item.
 - If you know the system and serial number to assign this machine, you can add the item containing the correct system and serial numbers to this machine.
- 15 To add an machine, click the machine to highlight it (either generic, backorder, or the system number) and click  or press F5. You can also right-click the item and select the Install option.

Note: To add an accessory to a machine, the accessory you select must be set up with on-hand quantities in the Item window. In addition, if the machine or accessory has been suggested for another order, a red icon appears under the machine or accessory item, indicating it has been suggested for another order. Since it has been selected for another order, you cannot add this accessory.

- 16 The system displays the Machine Accessory New Sub dialog box. In the Quantity box, enter the number of this accessory to add to the machine, 1, 2, or 3, for example.
- 17 To make this a permanent accessory for this machine, click the Make Non-Removable option. If this option is selected, this accessory cannot be removed from the displayed machine.
- 18 Click the New Sub box and enter the sub-system number to assign this accessory. Or click the Generate New Sub option to let the system assign the next sequential sub-system number for this machine.

Note: To not add this item as an accessory, click Cancel.

- 19 The system adds the accessory to the machine and displays it on the left-hand side of the window.
- 20 You can continue to install as many accessories as needed for this machine.

- 21 When the list of machine accessories appears on the left-hand side of the window, you can click the Plus sign to the left of the system number to view item accessory information. This includes the item company (manufacturer); the serial number, if any; and the quantity of this accessory added to the machine.
- 22 If there are additional machines on this order, click  to build the next machine on the to view the next serialized item on the order. To view previous items on the order, click . When the item opens, you can add accessories to the displayed serialized item just as you did for the first.
- 23 When you finish adding machine accessories, click Save & Close to save the changes you made and close the Machine Accessories window.
- 24 The Demo Picker Contract Profile dialog box opens. If you link serialized items to your contract types, they automatically display in the bottom portion of this dialog box.
 - To not create a service contract, click Cancel. The cursor returns to the Item Detail tab.
 - To add a service contract to the order along with the item, in the Contract Type box, enter the contract type to assign this serial item. Press Tab.
- 25 After you enter the contract type, click the remaining boxes to specify additional contract type information. For example, enter the beginning and ending contract dates using the Contract From and Contract To boxes. When you finish entering information, click OK.
- 26 The system adds the text DEMO-UC as the first line item on this order. The contract item moves down one line, indicating it has been added to the order. You can continue to add as many items and contracts as necessary. When you finish adding items and contracts, click the Order Totals tab or press F4.
- 27 Click the DP Options button. The Demo Picker Work Orders dialog box opens. The system defaults to generate the workorders you specified in the Global tab: setup, delivery, and network. Click each box and enter the information for the workorders to create.
- 28 To open the Contacts dialog box, click Contact. You can use this dialog box to enter contact information. When you finish, close the dialog box to return to the Demo Picker Workorders dialog box.
- 29 When you finish entering information in the Demo Picker Workorders dialog box, click OK. The cursor returns to the Order Totals tab. Make sure the Ending Order Status option is set to end the ticket at a status 6.

- 30 At this point, you can enter an end line special and change the printing information. When you are ready to end the ticket, click Accept Order. The cursor returns to the Global tab.

Canceling Serialized Demo Picker Orders

If you have only entered a demo picker order, you can use the Cancel function to delete the order. However you must cancel the order before you have verified it.

Note: Be sure you have the proper default demo picker parameters set in the Parameter Editor window before using this feature.

- 1 Click the Cancel option from the Demo Picker menu. The Order Browse dialog box automatically opens so you can choose the demo picker order to delete. Click the order to highlight it and click OK.
- 2 The Are You Sure You Want to Cancel the Current Order message appears. Click Yes to delete the selected demo picker order.

Verifying Serialized Demo Picker Orders

Since the system ends demo picker orders at a status 6, you must verify demo pick tickets in order entry. When you do, the system prompts you for the system and serialized number for the item(s) on the order.

- 1 Click the Verify option from the Demo Picker menu. The Order Browse dialog box opens, listing the orders. Click the order to verify and click OK.
- 2 The Verify tab opens, displaying the items on the demo picker order. In this tab, you can change the costs and pricing for items on the pick ticket, view and change order settings, view and change notes for the order, and add freight to the order.
- 3 To open the Machine Accessories window to build the machine, double-click the first item on the order. The Machine Accessories window opens. Select the system and serial numbers for the machine you are verifying. If you need details, see Step 14 through Step 23 in the heading **Entering Serialized Demo Picker Orders**.
- 4 When you finish viewing and changing information for the pick ticket, click Accept.
- 5 The Order Totals tab opens and the system displays the Processing Machines/Accessories message. When the process is complete, the Serialized Contract dialog box opens and the cursor moves to the From box. At this point, you can specify the terms for this contract. Certain boxes in this dialog box default to the terms for the contract type you selected

and come from the Contract Types tab. Additional information comes from the Contract Detail Contract tab. When you complete the line entry for this contract, the system creates contract records in these tabs for the contract you sold. You can accept or change the default terms. To change the terms, click each box and enter the new information over the existing information.

- 6 If the contract type you selected is not linked to meters, go to **Step 8**. If the contract type you selected is linked to meters, the system displays the meters in the bottom section of the Contract dialog box. To change the meter terms, double-click the # column corresponding to the meter to change.
- 7 The Meter dialog box opens and the cursor moves to the Contract Length # box. This dialog box lets you specify meter terms. Press Tab to move the cursor to the boxes to change and enter the new information over the existing information. When you finish entering information for this meter, click OK. The cursor returns to the Contract dialog box.
- 8 When you finish specifying contract information, click OK.
- 9 The Order Totals tab reopens. Click the DP Options button. The Demo Picker Workorders dialog box opens. The system defaults to generate the work orders you specified in the Global tab: setup, delivery, and network. Click each box and enter the information for the work orders to create.
- 10 To enter contact information, click the Contacts button. When the Contacts window opens, you can specify contact information. When you finish, close the Contacts window to return to the Demo Picker Workorders dialog box.
- 11 When you finish entering demo picker options, click OK. The cursor returns to the Order Totals tab. Make sure the Ending Order Status option is set to end the ticket at a status 8.
- 12 At this point, you can enter an end line special and change the printing information. When you are ready to end the ticket, click Accept Order. The cursor returns to the Global tab.

Accepting Serialized Demo Picker Orders

If the customer decides to keep or accept the serialized item, you can perform this step before invoicing the demo pick ticket.

- 1 Click the Accept option from the Demo Picker menu.
- 2 The Order Browse dialog box opens. Click the order to accept and click OK.

- 3 The Item Detail tab opens and the Are You Sure You Want to Accept the Current Order message appears. Click Yes. The cursor returns to the Global tab.

Rejecting Serialized Demo Picker Orders

You perform this step when the customer decides not to keep or rejects, the serialized item.

- 1 Click the Reject option from the Demo Picker menu.
- 2 The Order Browse dialog box opens. Click the order to accept and click OK.
- 3 The Item Detail tab opens and the Demo Picker Workorders dialog box opens so you can specify information for picking up the item.
- 4 Enter any additional text, if necessary, and click Reject. The cursor returns to the Global tab.

Invoicing Serialized Demo Picker Orders

You must invoice demo pick tickets in order entry. This moves the demo pick ticket to a status B.

- 1 Click the Invoice option from the Demo Picker menu.
- 2 The Order Browse dialog box opens. Click the order and click OK.
- 3 The system displays the Invoice Demo Picker dialog box, so you can select the invoice type. You can specify the Sell, Lease, Rental, or Contract options. If you are billing a third party for this contract, click the Bill Third Party option. When you finish, click OK.

Note: If you specify to bill a third party, the system displays the Third Party Billing dialog box so you can retrieve the third party billing customer. You can retrieve the customer by Acct #, Dept, Dept Name, Name, and Phone. Click the box by which to retrieve the customer and enter the appropriate information. When you have the correct customer selected, click OK.

- 4 The Serialized Contract Profile dialog box opens and the cursor moves to the Number box. To change the displayed terms, click each box and enter the new information over the existing information.
- 5 At the Install/Remove accessories message, click Yes to open the Machine Accessories window to add or remove existing accessories for this serialized item. When you finish, click OK.
- 6 The serialized item moves down one line and the DEMO-UC item appears as the next item on the order. To accept the displayed contract, click Accept.

- 7 The Serialized Contract dialog box opens and the cursor moves to the From box. To change the displayed terms, click each box and enter the new information over the existing information.
- 8 If the contract type you selected is linked to meters, the system displays the meters in the bottom section of the Contract dialog box. To change the meter terms, double-click the # column corresponding to the meter to change.
- 9 The Meter dialog box opens, and the cursor moves to the Contract Length # box. This dialog box lets you specify meter terms. Press Tab to move the cursor to the boxes to change and enter the new information over the existing information. When you finish entering information for this meter, click OK.
- 10 The cursor returns to the Contract dialog box. When you finish specifying contract information, click OK.
- 11 The cursor returns to the Item Detail tab and the Contract-UC item moves down one line, indicating that it has been added to the order. At this point, you can add additional line items to the order. When you finish, click the Order Totals tab.
- 12 The Ending Order Status options default to end the order at a Status B invoiced). You can enter an end line special and change the printing information. When you are ready to end the ticket, click Invoice Order. The cursor returns to the Global tab.

Returning Serialized Demo Picker Orders

This option allows you to delete or void the demo pick order.

- 1 Click Return in the Demo Picker menu.
- 2 The Order Browse dialog box opens. Click the order and click OK.
- 3 The Item Detail tab opens and the Are You Sure You Want to Void/Delete the Current Order message appears. Click Yes. The cursor returns to the Global tab.