is.group Dealer Data Collection Program

eCommerce Industries, Inc.

ddms distribution software

September 2007 Item # H-ISDATA

Contents

About is.group Dealer Data Collection

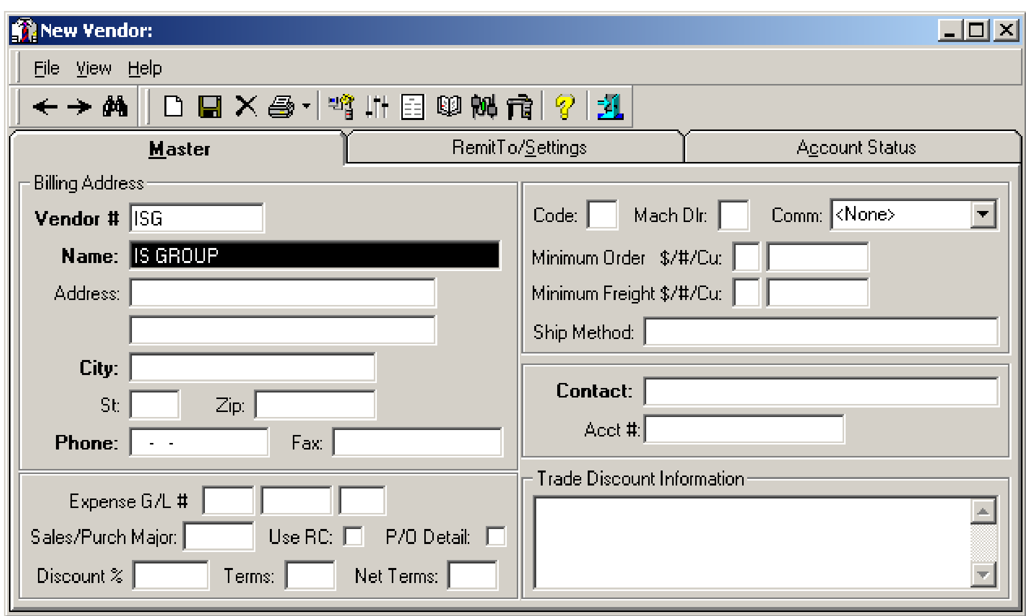
The Data Collection program collects purchasing history information by item within a specific date range or quarter. It uses the journals listed in the (LF2) P/O Journals Parameters screen. By tracking this information, is.group can determine what to stock in their regional distribution centers (RDCs).

Requirements

There are several prerequisites to using this program:

- You must be on a Windows® platform.
- You must be an authorized PSN user. See *Phase I: Setting Up PSN* and *Phase II: Setting Up and Using the is.group PSN*.
- You must have Ensite Pro™ Version 7.7.100 or greater installed.
- You must install the is.group Dealer Data Collection software on your Ensite Pro server.
- You must also have set up the new fields in the I-MFG file that let you create purchase orders limited by vendor stocking information. For more information, see the handout *Loading & Purchasing is.group Items.*
- You must compress the P/O journals in the (LF2) screen.

Figure 1: Setting Up the ISG Vendor in the Vendor Master Record



Setting Up the Vendor Record

You can set up the vendor record using either Ensite Pro's Vendor Supply Options dialog box, or the text-based (CS) Vendor Private Supply Network screen.

1 Create a vendor with the name IS Group and vendor number ISG, as shown in Figure 1. For instructions, see your online help.

2 In the Vendor # box in the Vendor Master tab, type **ISG**

3 Click Save.

4 From the View menu, click Supply Options.

5 The Supply Options window opens, as shown in Figure 2. In the Location box, enter a G/L location, or accept the default of 1.

Note: If you use is.group as a vendor, go to **Step 8.**

6 In the Destination ID box, enter your is.group ID exactly as follows: **ISG**

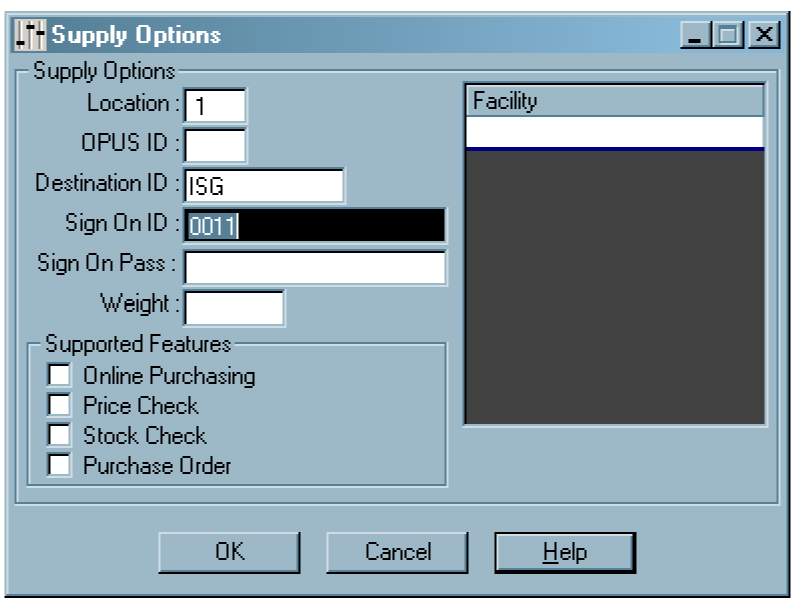
7 In the Sign On ID box, enter the four-digit is.group member ID provided by your is.group sales representative. (If your ID has fewer than four digits, add leading Øs. For example, if your ID is 11, you would enter ØØ11.)

Note: If you use is.group as a vendor, no password is required.

8 When you finish, click OK.

9 Click Save.

Figure 2: The Vendor Supply Options Dialog Box



Installing the IS Dealer Data Collection Program From the Ensite Pro Update CD

Installation of this program requires that you read and accept the authorization. You must install this software on your Ensite Pro server.

A warning messages signals a problem with your Data Collection program. See ***Troubleshooting*** *for solutions.*

1 Insert the Ensite Pro update CD into your CDROM drive.

2 When the AutoRun menu opens, click Install Other Software.

3 Click ISG Data Collection and follow the prompts on your screen.

4 When the program is finished installing, click Finish.

5 Reboot your system as you normally would.

Using the IS Dealer Data Collection Wizard

Before you can use the IS Dealer Data CollectionProgram, you must accept the license agreement. When you open the IS Dealer Data Collection Program, you must log in. If you decide not to send the data, click the Cancel button at any time.

Note: You must have journals set up in the (LF2) P/O Journal Parameters screen. You must also have TBL Server open.

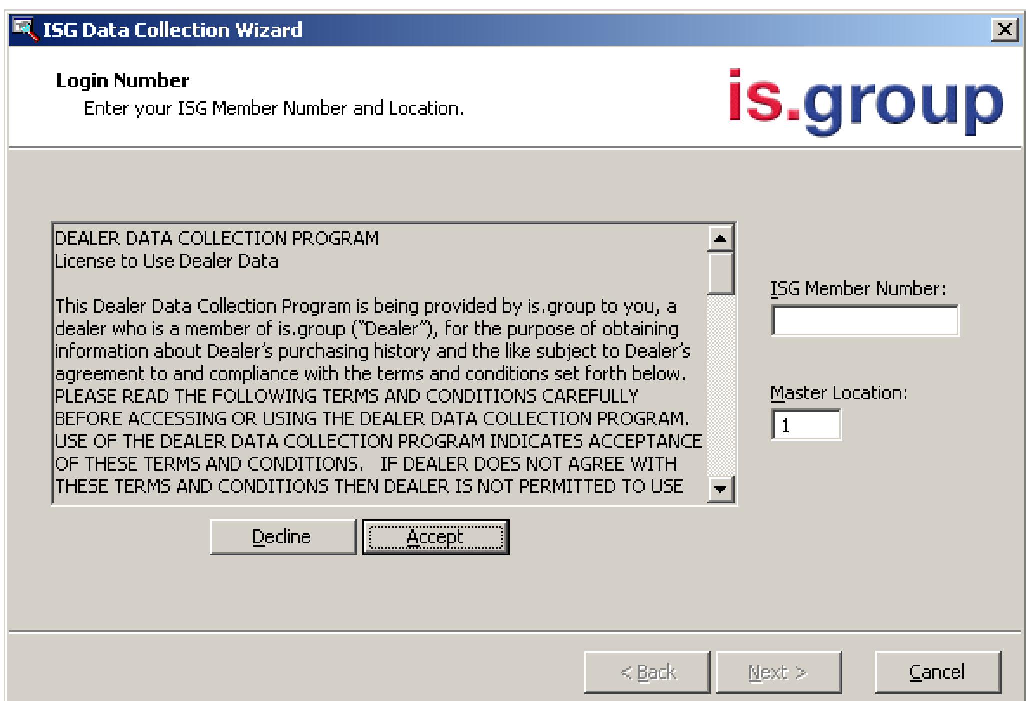


Figure 3: The IS Dealer Data CollectionProgram License Agreement

1 After installing the program, double-click .

A warning messages signals a problem with your Data Collection program. See ***Troubleshooting*** *for solutions.*

2 In the ISG Data Collection Wizard dialog box, you must read and accept the license agreement. See Figure 3. After you read the license information, click Accept.

3 In the ISG Member Number box, enter your ISG Member Number.

Note: This number is provided to you by is.group.

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4 In the Master Location box, enter the general ledger location for the purchasing information to retrieve.

5 Click Next.

6 In this dialog box, enter any limits to apply to this data. See Figure 4.

Step 1: You can limit by all items, by RDC items or by manufacturer.

To limit by all items, click All Items.

To limit by RDC items only, click RDC Items. (You must have entered N or S in the Ven Stocking field in the Item Detail Screen.)

Figure 4: Setting Limits for Data Collection

To limit the collection to a single manufacturer, click Single Company and enter the manufacturer's code in the corresponding box.

*A warning messages signals a problem with your Data Collection program. See **Troubleshooting** for solutions.*

Note: Only approved manufacturers' codes can be entered in this box. This list is updated quarterly.

Step 2: You can limit by received date range or by quarter. To limit by date range, click Date Range then enter the beginning of the range in the first box and the end of the range in the To box. You can select the date by using the drop down arrow.

To limit by quarter, click By Quarter. Then check 1st, 2nd, 3rd, or 4th quarter. (This only includes the current year.)

Step 3: Purchasing journal files are displayed on the right side of the dialog box. Click the journal files to include. (JOUR-PO is included by default. The journals that display are set in the (LF2) screen.)

Step 4: In the is.group PO Vendor box, enter the vendor number from the Vendor Master Record or the (CS) screen, ISG, for example.

7 When you finish setting limits in this box, click Finish to send the file. If you do not want to send the data, click Cancel.

8 The file goes to the is.group designated FTP site. Click OK.

Troubleshooting

A warning message may appear as you complete the wizard. Please cancel the Data Collection wizard and follow the steps listed here to resolve the issue. After the issue is resolved, restart the Data Collection wizard.

Situation 1:

The files listed do not have the proper field definitions to be read by the ISG Data Collection Wizard.

Before compressing files, be sure to back up your system.

Error: Cannot proceed; please apply field definitions to the following files: I-MFG, I-MASTER, I-PRICE. See Figure 5.

Solution: Compress the files listed.

Note: File compression is a dedicated function. Be sure all other users are logged out before proceeding.

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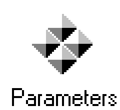
1 Find out where your inventory files are stored.

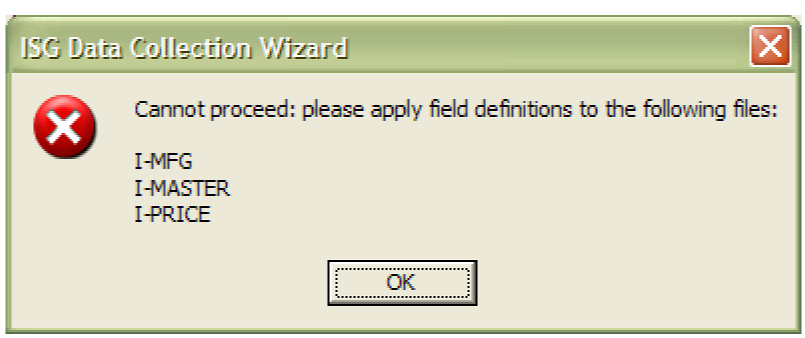
Step 1: From the Ensite Pro Master menu, double-click 

, then double-click 

.

Step 2: Double-click Text Base Parameters. The (L) Parameters screen opens.

Figure 5: Situation 1



Step 3: Type Ø in the Selection Code field. The (LØ) Global Master Parameters screen opens.

Step 4: In the (LØ) screen, note the volume where your inventory files are stored. See Figure 6. You will need this information later.

Step 5: Press Esc to return to the Parameter Editor window.

Step 6 Close the Parameter Editor window.

2 Clear the TBLserver.

Step 1: Close TBLserver.

Step 2: At the warning, Exiting the server will close all TBL clients. Continue,” click OK.

Step 3: Restart TBLserver.

Step 4: Click Utilities then click Stop. This closes all TBL clients. (File compression is a dedicated function.)

Figure 6: Note the Volume Where Your Inventory Files Are Stored

```
13:27:43                (L0)  Global Master Parameters                 04/11/05
================================================================================
ACTION [I] (C=Change, I=Inquiry)   G/L Location [ 1]
================================================================================
Name   :DOC TEST SYSTEM                      Save Parameter Changes Y/N ?Y
Suite  :11111                                Last Change 01/25/05
Street :P.O.BOX 507                          Using RoadRunner Y/N ?Y
City   :KELLER                               Locations to Exclude From #   To #
State  :TX   Zip #76248                      Stock Room Locations From #10 To #98
Phone Number #817-431-0668                   =========== VOLUME SERIALS ===========
                                             | Customer   =IN?? | Order Ent. =SR??
Federal   #12-12345678                       | A/R        =IN?? | P/O's      =W1
State Tax #12-123456-1                       | Vendor     =IN?? | G/L        =IN??
State Tax %             GST Y/N ?            | A/P        =IN?? | Salesman   =IN??
Round Tax up to Higher Cent Y/N ?Y           | Inventory  =IN?? | Personnel  =IN??
Use Only State Tax for P.O.S. Y/N ?N         | Inv. Hist  =IN?? | Payroll    =IN??
Calculate Tax by Line Y/N ?Y                 | Inv. Aux   =IN?? | Sales Jour =IN??
                                             | Inv. Whl   =W1?? | Sales Hist =IN??
Set Order Writer in Main Menu Y/N ?N         | Serial     =IN?? | Tele.Mark. =IN??
Using Multiple UOM's for an Item Y/N ?Y      | Contract   =IN?? | System     =SR??
Commissions/Taxes on Paid Invoices ?Z        | Rpt.Writer =SR?? | Work       =W2??
   (Y=Commissions, T=Taxes, Z=Both)          | Non. Mach. =SR   |
================================================================================
```

3 Compress files.

Step 1: Click Tools, then click TBL to open a DDMS client.

Step 2: In the DDMS Master menu, type **Z** in the Program Selection field. The (Z) Master Utilities screen opens.

Step 3: In the Enter Utility Type field, type **C**.

When working in text-based screens, remember to use your Caps Lock.

Step 4: In the Enter Subset Number field, type **7**.

Step 5: In the Enter the File to Compress field, enter the file name and press Tab. For example, to compress I-MFG, type **I-MFG**

Step 6: In the Unit # field, enter the number corresponding to the volume you noted earlier. Press Enter. For example, if your inventory files are stored in volume IN, you would enter the number corresponding to the IN volume, then press Enter. See Figure 7.

Step 7: The files compress.

Step 8: Repeat Steps 5 - 7 for I-MASTER and I-PRICE.

4 Close TBLserver.

5 Restart TBLserver.

Figure 7: Enter the Unit Number Corresponding to the Volume with Your Inventory Files.

```
                               15:22:32
                           C7. Compress single file|
          Unit        Label                          Unit        Label
            1         U1                               19        ........
            2         U2                               20        ........
            3         U3                               21        ........
            4         SR                               22        ........
            5         IN                               23        ........
            6         CU                               24        ........
            7         HI                               25        ........
            8         W1                               26        ........
            9         W2                               27        ........
           10         W3                               28        ........
           11         WP                               29        ........
           12         ........                         30        ........
           13         ........
           14         ........
           15         ........
           16         ........
           17         ........
           18         ........
COMPRESS FILE
Enter the File to Compress :I-MFG        Unit # 05   Volume :
```

Situation 2:

The I-MFG table does not have the Vendor Stocking flag defined. The field is populated; however, the flag is not defined in the table. The ISG Data Collection Wizard still runs; however, the Limit to RDC option is unavailable.

Error: The Vendor Stocking Flag in I-MFG is not defined. Limiting by RDC Items is not available. See Figure 8.

Solution: Compress the I-MFG file, using the latest data dictionary.

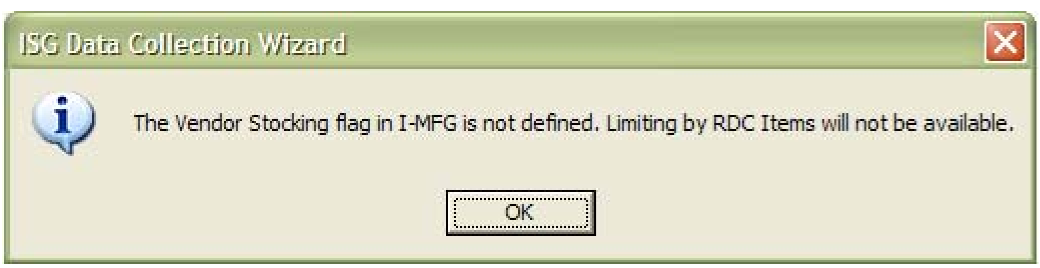


Figure 8: Situation 2

Situation 3:

There is no data in the (L6X) PSN Parameters screen.

Error: No Vendor PSN data was found. See Figure 9.

Solution: Enter valid vendor information into the (L6X) screen. See http://www.ddms.com/Resources/Doc/PSN/psn.pdf.

Figure 9: Situation 3

Situation 4:

The vendor ID entered does not match any vendors defined in the (CS) Vendor Private Supply Network screen or the Vendor Supply Options dialog box.

Error: Please enter a valid vendor ID. See Figure 10.

Solution: In the vendor ID box, type **ISG**.

Figure 10:
Situation 4