



*I Didn't Know It
Would Do That*

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Introduction

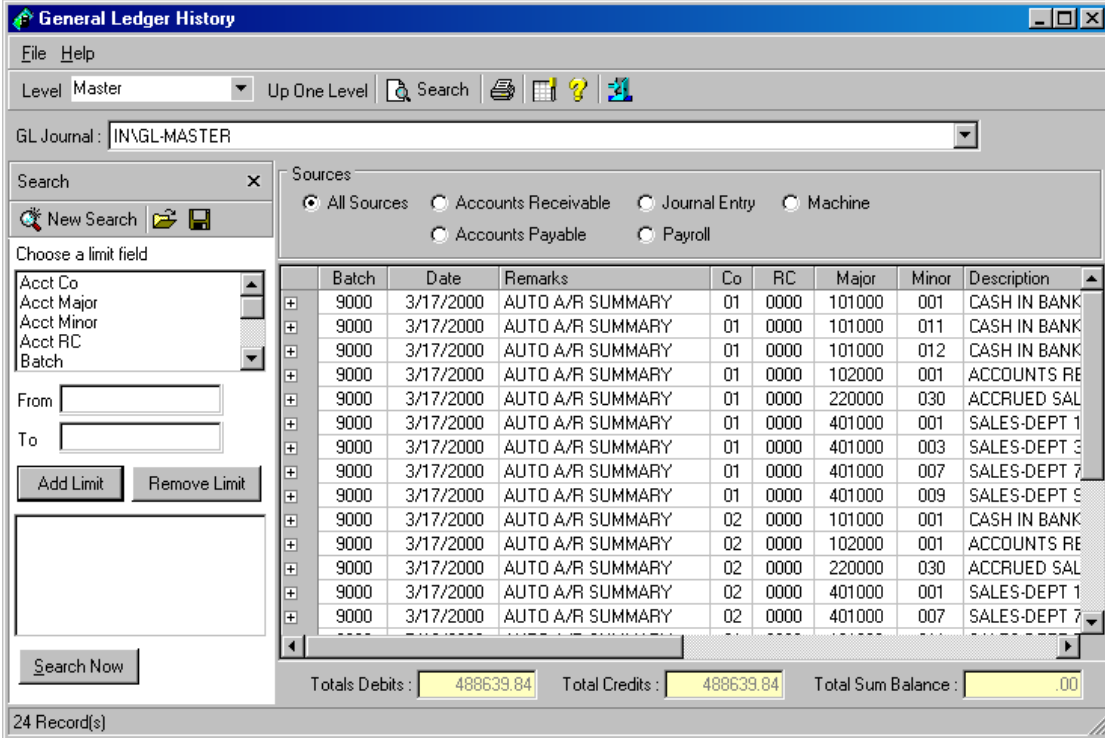
This session is an overview of features in your current software that you may not be aware of. As always, for complete documentation, see your Ensie Pro online help.

G/L Drilldown

Ensie 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.

Figure 1: G/L Drill Down General Ledger History Window



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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. See Figure 1.

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

Invoice Date Special

You can view and print invoice information for a particular date. To use this feature, you must know the date of the invoice you want to view or print. The system lets you view the following information for each invoice on the date you select:

- Customer account number
- Invoice number
- Invoice date
- Check number
- Charge amount (debit amount)
- Payment amount (credit amount).

In addition, the system displays the debit total (charge total), credit total (payment total), and the invoice total for all the invoices on the date you specify.


In order entry, press F6 to open the Order Settings dialog box. Click the Invoice Date box to assign a new invoice date to the order. Enter the date in the Invoice Date box using the mm/dd/yy format. The default invoice date is the date that the pick ticket moves to a status B. However, occasionally you might want to use a specific invoice date for A/R purposes.

In the (+B) screen, you can change the date for existing invoices. You may need to change an invoice date if the system date was wrong on a particular day. You can also use this feature to make an invoice date earlier, so that it will be included on a statement. When you change the invoice date, you can verify the change for each invoice, or you can mass change invoices.

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.

You can access the Customer Evaluation dialog box from the Customer database or Order Entry.

- From the Customer database menu, click . You can also click View then select Evaluation or type **Ctrl + F11**.
- In Order Entry, click Order Entry from the menu then select Customer Evaluation. You can also type **Ctrl + F11**.

In the Customer Evaluation dialog box, simply click the drop down arrow under each section and select the information that you want to view. You can also click the buttons at the bottom of the box to select Sales, Categories, Service, or Credit. See Figure 2.

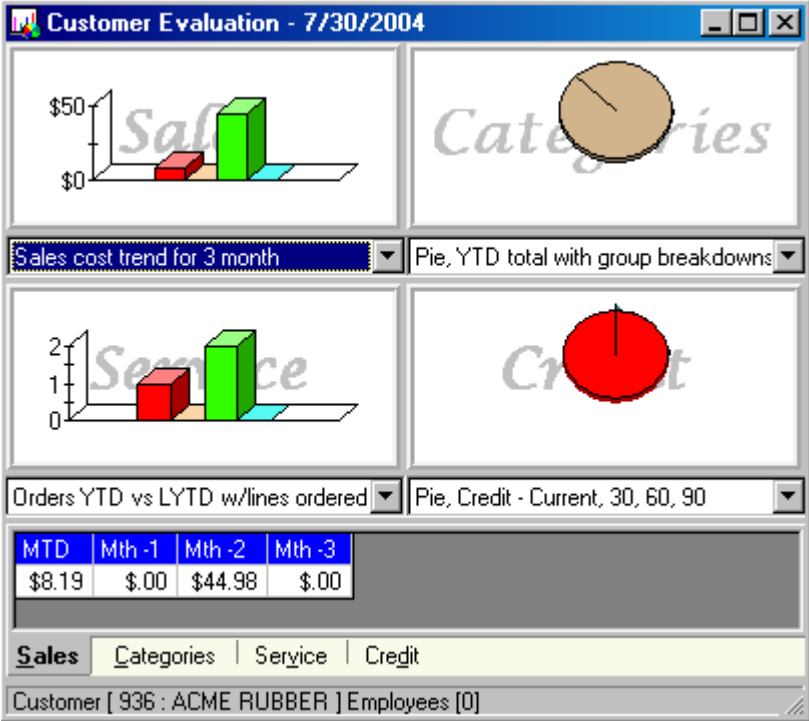


Figure 2: The Customer Evaluation Dialog Box

Converting Item Lists

The conversion option in the (+ES) Customer Item List Conversion screen lets you convert one type of item list to another type of item list. For example, you may have an existing quote and you want to create a contract with the same or many of the same items. This option lets you quickly convert the information from the existing quote into a contract with only a few keystrokes.

You can include all the items from the original list, or you can view and confirm the items before you convert them. See Figure 3. You can also create a quote, contract, or laundry list based on sales history. You can search the sales history of a particular customer, the sales history in a particular sales journal, or the sales history in all sales journals.

You can perform the following conversions:

- Converting a quote to a contract
- Converting a quote to a Laundry List
- Converting a contract to a quote
- Converting a contract to a Laundry List
- Converting a Laundry List to a quote
- Converting a Laundry List to a contract
- Converting an item's sales history to a quote
- Converting an item's sales history to a contract
- Converting an item's sales history to a Laundry List.

Figure 3: The (+ES) Screen

```
Customer Item List Conversion

Source          Destination
-----
1) Quote       1) Quote
2) Contract    2) Contract
3) Laundry List 3) Laundry List
4) Sales History

Source Number [ ]      Destination Number [ ]

By Item Y/N [ ]

Enter Number of Source
```

Only Show Zero Cost/Sell Once

You can use the Only Show Zero Cost/Sell Once field in the (LGC) to be prompted when a furniture order has no cost or sell price. See Figure 4. If you set this field to Y, the prompt displays when you final-verify a furniture order.

- To be prompted when final-verifying the order, type Y.
- To skip this prompt, leave this field blank or type N.

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.

Figure 4: The (LGC) Screen

```

16:04:55          (LGC)  FURNITURE ORDER ENTRY PARAMETERS          03/24/06
=====
ACTION [I] (C=Change, I=Inquiry, 1=Additional Parm)      G/L Location [ 1 ]
=====
Next Project #      1003          Create A/P when Final Receiving Y/N ?
On Simple Invoice, Sub-Total By (S)ort/Group or (T)ag ?
Display Only One Line Item at a Time Y/N ?      Only Show Zero Cost/Sell Once ?
Use Department as Item Tax Code For Uncatalogs Y/N ?
Default Furniture Order Department [ ] Allow Changing Y/N ?
Prompt to Flush and Batch Print Furniture Orders Separately Y/N ?Y
General Project Default Name [ ]
Automatically Sequence Y/N : Order:[ ] Quote:[ ]
Default Selector for P/O's : [ ] Printer: [ ]
Default Form Formats & Printers:  Default Form [ ]
0) No Print Out
1) Pick Ticket          Format [ ] Printer [ ]
2) Pro Forma           Format [ ] Printer [ ] -- Add. Invoice Formats --
3) Acknowledgment      Format [ ] Printer [ ] Description Format Ptr
4) Delivery Ticket     Format [ ] Printer [ ] [ ] [ ] [ ]
5) Install Work Order  Format [ ] Printer [ ] [ ] [ ] [ ]
6) Quote               Format [ ] Printer [ ] [ ] [ ] [ ]
7) Invoice              Format [ ] Printer [ ] [ ] [ ] [ ]
=====

```

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 can turn the auto flush on or off by individual call or by vendor. Only calls with final-received P/Os can be auto flushed.
 - You specify the calls to flush in the (LFA4) Auto Flush Call List screen.
 - Auto flush calls begin with an ampersand (&). For example, one auto flush call number might be &1.
 - The (LFA4) screen lets you set ticket limits; specify to include/exclude/only Furniture orders; specify sort order; specify inventory location; set ticket status; specify ticket printer and format; specify label printer and format; and specify terminal ticket print options.
- All eligible P/Os created since the last flush are available for auto flushing.
- You can have multiple flushes in a single time slot.
- The ASB status displays as Flushing while the pick is updated. The ASB status is cleared after all orders are updated with the ship quantities. It is not held while printing.
- Auto flush is available on Packages B, C, and D.
- You can use auto flush with these trading partners:
 - Sparco
 - United
 - Emco
 - Azerty
 - Horizon.

P/O Flushing Parameters in the (LF1) Screen

You can move orders with zero price/cost items automatically from a specified stock class range to a final verified status 8 or B during a (TR)[G] Order Entry Backorder Flush.

You can specify a range in the Allow Zero Cost/Price Items to Flush Orders Normally for Item Class Range/To/+ field in the (LF1) Purchase Order Flushing Parameters screen. See Figure 5. Set a range of stock classes to allow zero cost/price items to flush orders normally. It lets you automatically move these orders to a final verified status 8 or B during a (TR)[G] Order Entry Backorder Flush.

In the first field, enter the beginning of the range. In the To field, enter the end of the range. In the + fields, enter any non-sequential stock classes by which to limit.

Figure 5: The (LF1) Screen

```

10:46:34          (LF1) Purchase Order Flushing Parameters          03/24/06
=====
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 ?

```

Auto Verifying

When you use the [V] Auto Verify with Batch Printing function in the (TR) Order Entry Reports screen, you can specify whether all tickets that have a shipped line are verified regardless of their dash extension.

You set the All Shipped field in the (LGØ) Order Entry Parameters screen. This field works with the Allow Auto Verifying With Batch Printing field, shown in Figure 6.

- To verify all tickets with shipped line items, type **Y**
- If you are not verifying all tickets that have a shipped line, leave this field blank or type **N**.

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. This 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.
- You can give the customer a gift item when placing an order within a specific dollar amount, \$50 to \$100, for example. In this case, a gift item is added to the order at no charge.

Figure 6: The (LGØ) Screen

```

10:39:41                (LGØ) ORDER ENTRY PARAMETERS                03/24/06
=====
ACTION [I] (C=Change, I=Inquiry)  G/L Location [ 1]
=====
Invoice # 10117          Cash Receipt #          Quote # 100
Serial # 1000           Serial Prob. # 1000
Pricing Info ?Y  Shipto Info ?Y  A/R Info ?Y  Pay Code Msg ?Y  Pastdue Days #30
Set Commission Code Y/N ?N  Archive Specials Y/N ?Y  Freight Default Dept ?9
Use Billto as Shipto Y/N ?N  No Partial Ships Y/N ?  Only Print Assemblies ?
Have Page# & Vendor Display Match the Prefix & Carton Display Y/N ?Y
Allow Auto Verifying with Batch Printing ("TR-V") Y/N ?Y All Shipped Y/N ?N
Keep All PICK Fields in JOUR-S Y/N ?N  Build Sales Journal Item Index Y/N ?Y
Allow Sequence on "Pick Nbr" Orders Y/N ?  Build Debit Memo Data File Y/N ?Y
PASSWORDS:  Drawer ?OPEN  Delete ?DDMS  Reindex ?DDMS
            Pick Nbr ?DDMS  Change Loc ?LOC  Credits ?DDMS
UNCATALOGS :  Not allowed on remotes Y/N ?Y  Default Dept ?9  Add-on -UC Y/N ?Y
BACKORDER PRINT :  (All Items or Flushed)  Future Shipping Y/N/A ?N
            Print Code ?A (A=Ven,B=Bin,N=Ven,O=Bin) No Print From ?  To ?  Status 8 ?
            Split to a Separate Line Partial Backorders Y/N ?Y  Specials B/S/X ?X
            Always Print Pick Tickets in Bin Order Y/N/Z ?N  (Z=Invoices and Tickets)
TRANSFERS :  A/R Master Y/N ?N  A/R Batch Y/N ?Y  Sales Journal Y/N ?Y
            A/R Location same as Transfer From Location Y/N ?N
SHIPPING LABELS :  Print Company Logo Y/N ?Y  Customer Logo Y/N ?Y
    
```

Note: The additional volume discount feature is not included in all software packages and may require authorization. For more information, contact ECI² sales.

You use the Additional Volume Discount Plans window in the Order Entry parameters to set up plan codes, dollar amount ranges, and discount and gift items. For each code, you can set up to four different dollar amount tiers. 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. See Figure 7.

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.

When you set up discount percentages in the Additional Volume Discount Plans dialog box 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

Figure 7: The Additional Volume Discount Plans Window

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

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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. For details on setting up these parameters, see the heading **Setting Up Additional Volume Discount Plans**.

After you set up your items in the Item window and your plan discounts in the Additional Volume Discount Plans dialog box, you assign the customer a plan code in the Additional Volume Discount Plan box in the Customer Order Entry tab. Using the same example, you might assign customer ABC with plan code D1, and customer XYZ with plan code D2.

In Order Entry, when the customer's order falls within a specified dollar range, the system adds the discount amount to the entire order as a credit, reducing the amount of the entire order. See Figure 1.

If the specified dollar range is set up as a gift item, it is added at no charge to the order. A message displays in Order Entry, notifying the order-taker that the item or discount was added. See Figure 2.

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. See Figure 3.

Note: When a volume discount line is added to an order in Order Entry, the system updates the P-GLOBAL file. 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 also 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.

Minimum Order Charge (Fuel Surcharge)

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.

The Fuel Surcharge is part of the Minimum Order Charge feature. It lets you enter a description, such as Fuel Surcharge as a line item. Recent fuel rate hikes have hit everyone hard -- but especially dealers who deliver products. Fuel Surcharge lets you specify a minimum dollar amount for an order, so every order is worth the trip. You can exclude specific customers, and you can customize the text that prints on the customer's ticket whenever the fee is applied.

Assign & Allocate

You can allocate items from a purchase order placed for stock to an order that is picked by the short-buy to keep items from being purchased unnecessarily.

You may be creating two kinds of purchase orders: P/Os to replenish stock, which are frequently made to manufacturers, and P/Os to fill backorders, which you create through the short-buy process. Short-buy P/Os typically go to wholesalers. When you create them, each line entry on the purchase order is assigned to the pick ticket with the backorder it will fill. After you receive the P/O, you flush backorders. When you do this, the backorders on each ticket are filled, using the lines on the P/O that were assigned to that ticket.

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Now, when you're creating a P/O through the short-buy, the system can check for current P/Os that already contain these items. Each time you retrieve an item to put on the short-buy P/O, the system can automatically check for open P/Os that include this item. Open P/Os have not been final-received yet, and contain unallocated quantities of the item in question. (If a quantity is unallocated, it's not assigned to a pick ticket.)

Instead of purchasing more of an item to fill the backorder, you can assign the backorder to the open P/O. The appropriate quantity is allocated to the pick ticket containing the backorder. If the P/O you choose does not include enough of the item to completely fill the backorder, you can choose another P/O, and assign the remaining quantity to it. If several open P/Os exist for an item, you can choose which P/O to assign. Due dates are listed for each P/O, so you can see when the backordered item will be delivered.

Suppose that you created a P/O for a paper manufacturer, Acme Paper, that includes copy paper. Your short-buy also includes a backorder for the same copy paper. Instead of placing a small order for this copy paper on the P/O you're creating from the short-buy, you can assign the pick ticket with the copy paper backorder to Acme Paper's P/O. When you receive the P/O from Acme Paper, the customer's backorder is filled. This feature can help streamline your operation: you can fill orders faster by using open P/Os whenever possible, and you can avoid unnecessary purchasing.

Figure 8: The (TR) Screen

```

10:58:35                (TR) Order Entry Reports  rev. (03/06/06)                03/24/06
=====
A. Picking Tickets.                B. Invoices.                C. Quotes.
D. Shipping Labels/Manifest ..... Type ?. L/M/T
E. Pick File Report .. Reindex ?. Today's ?. Paycode ?. To ?. Status ?. To ?.
F. Daily Invoice Register                ** Must Be Done Before Backup (MA) **
G. Flush Backorders                ** Do Not Release Receipts Until Finished **
H. Stock Receipts Report ..... Release To On-Hand ?. Y/N
Labels ?. Y/N/B Alignment ?. Y/N Class ?. To ?.
I. Exception Report ..... Lost Sales ?. Y/N Delete ?. Y/N
J. Invoice Copies.                K. Gateway Credit Cards Report.
L. Scan Items to Check Against Pick Tickets.
M. Send Invoices Electronically.        N. Print Cycle Invoices from Journals
P. Credit Card Service Capture and Invoicing of Prepay Orders.        Modem ?2
V. Auto Verify with Batch Printing.
P/O #..... To #..... Vendor #..... To #.....
Pick #      -. To #..... Route :.... To :.... ?. R/M
Zip #.....-..... To #.....-..... Writer :.... To :....
Name :..... To :.....
Sort Order 1). 2). #=Pick Nbr, C=Cust Name, M=Shipping Route, R=Route,
D=Date, S=SlsM, T=Taker, Z=Zip
===== File ?P-MASTER Volume ?SR?? ===
Report [B] Loc [ 1] Printer [1] Format [....] Status [.] Copies [..] B.Comp [.]

```

Batch Reprint Invoices

You can reprint invoices in the (TR) screen by specifying a different sales journal, rather than P-MASTER.

- 1 In the (TR) screen, type **B** in the Report field.
- 2 When the cursor moves to the Pick # field, press Esc.
- 3 In the File field, enter a sales journal file, shown in Figure 8.
- 4 Complete the procedure as usual. You can limit by date or by customer.

Checking a Report's Print Status

You can check the status of some of today's reports. This applies to printing picking tickets (TR-A), invoices (TR-B), quotes (TR-C), invoice copies (TR-J). You can also check the status of flushing backorders (TR-G), invoices sent electronically (TR-M); and auto verifying with batch printing (TR-V). Go to the (TT) Batch Ticket/Invoice Print Status Screen screen, shown in Figure 9. You can access this screen in two ways. You can type TT from the DDMS Master Menu or execute the (ZB) [4] function. In the Enter File Name field, type ;NEW:TT. The Batch Ticket/Invoice Print Status screen opens. 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. To set limits, in the Action Code field, type L. To see detail, in the Detail field, type Y. You can limit by Who, Terminal, Printer and Request. The status updates every 30 seconds. Status information is stored in the RPT-TRACK file and is deleted during your day-end procedure.

Figure 9: The (TT) Batch Ticket/Invoice Print Status Screen

```

10:12:24                (TT) Batch Ticket/Invoice Print Status                05/12/03
Action [F] (F=First Page, N=Next Page, L=Limits) (Refreshes every 30 sec.)
Detail Y/N [N] Limits: Who [ ] Terminal [ ] Printer [ ] Request [ ]
Who Term Pr Req Time Date Loc Program Status
==== == == == ===== ===== == =====
T0 P0 TG 11:29:07 11/11/02 1 ;RPT:GTAP AUTOVERIFY COMPLETE
    
```

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To view the print status, enter the appropriate code in the Req field.

- To view (TR-A) pick tickets and (TR-M) invoices sent electronically, type **TA**.
- To view (TR-B) invoices, type **TB**.
- To view (TR-J) invoice copies, type **TJ**.
- To view (TR-G) flushing backorders and (TR-V) auto verifying with batch printing, type **TG**.

Enhanced A/R Customer P/O Lookup

To retrieve variations of purchase order numbers, you can combine part of the purchase order number with an asterisk (*) wildcard that represents any character. You can use this feature when searching for customer 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 (which looks in the AR-MASTER file) and the AR History Detail tab (which looks in the journal set in the Journal box, JNL-AR). If only one matching P/O number is found, the system retrieves the customer with the open invoice from the AR-MASTER file with the associated customer P/O number.

Pay Multiple Vendors with One Check

Using the A/P Multiple Vendors feature, you mark and pay multiple invoices for multiple vendors while issuing only a single check to a buying group for the total of the purchases. You must set up the vendor window for each vendor with whom you plan to use this feature. Invoices you create for any vendor having a vendor ID are stored with the vendor ID in the A/P invoice record. This affects invoices that you create using the AP Invoice tab in the Accounts Payable Posting window, as well as invoices you create using the A/P Post P/O tab. However, you can clear the vendor ID code on each posting. Leaving the code blank indicates that the posting is to be handled using the existing A/P flow and not paid or reported as part of a vendor group. As with all accounts payable postings, the new vendor ID code is written to the AP-MASTER, AP-BATCH, and GLD-MASTER files. This feature applies when creating hand checks or when creating system-generated checks.

Item Catalog Search

The Catalog Explorer lets you select an item from the contents of various wholesaler catalogs. You can view items by multiple category levels or by a single level.

Report Writer

You can print items on an invoice in item company order using the (+Z) Setup Report Formats screen. If similar products are grouped together, receiving and processing your invoices is easier for your customers. This feature only affects the way an invoice prints. You can still print pick tickets in bin order. You can override the feature with the SEQUENCE special.

Using Laser Printer Parameters

The (L1L) Laser Printer Parameters screen is used to set parameters for laser printers. You access the (L1L) screen from the (L1) Terminal/Ticket/Parameters screen. See Figure 10.

The (L1L) screen lets you print some classic standard reports to laser printers. In this screen, you can set up each of your laser printers to compress reports to 17 CPI (characters per inch) then automatically reset back to 10 CPI. You can set up as many as 32 laser printers. The laser printers must be set up using the HP4 printer emulation. When setting up laser printers in TBLServer, you must set the printers up as LP.

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

Salesperson Compensation Report

The Salesman Compensation Report shows salesperson compensation for the month-to-date. It can be sorted by salesperson number or salesperson name.

You can print the manufacturer's cost, the wholesaler's cost, the average or actual cost, or the pricing cost on the report. You can also enter a percentage by which to increase the costs on the report. Increasing the cost that appears on the report lowers the margin.

You can print the Salesperson Compensation Report using the (UR) Sales Report screen. In the Report field, type **A**.

To increase the cost by a percentage, in the Cost Type field, type %. At the Cost Type prompt, enter the cost type: M, W, A or P. In the Percent To Up Cost field, enter the percentage by which to increase the cost on the report.

Resetting Customer History

You can update customer history from a sales journal for a 12-month period (you cannot update customer history for months 13 through 24). Sales history is displayed in the Customer History window. See Figure 11.

Each time you update customer sales history, the Sales, Cost, and Hits boxes in the Customer History Total Sales tab are also updated.

In the (+A) Special Customer screen, select the [J] Reset Customer Sales History From Sales Journal action code.

Figure 11: The Customer History Window

