ECi Regional Users Meeting

ECi DDMS® ECi TeamDesign™ ECi OMD® ECi La Crosse™

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Why Not Graphical?

ECi

ECi DDMS®

September 2009 Rev.

Contents

Introduction

This handout covers some of the new and cool features available in DDMS software. All of the features described in this handout are included in the DDMS 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/ver8doc.htm

In talking with customers using text-based versions of the DDMS software about our graphical product, we've heard some interesting things. It seems there are a lot of misconceptions about the software and its capabilities. We'd like to set the record straight and offer some good reasons why, if you aren't already using the graphical software, you should be.

This handout covers the benefits of graphical as well as cool features available throughout the system.

Text AND Graphical

The choice of text or graphical has as much to do with personal preference as actual software performance. That's why the graphical software gives you both. Almost every graphical application gives you the option of using the text screens if you prefer while still having the convenience and ease-of-use offered by the Windows® environment. Why go graphical? There are definite advantages to graphical, and we believe the increased efficiency more than offsets the transition costs over the long term. Here are a few of them.

Legibility

With the graphical software, data is contained in defined boxes. It's easier and faster to find and read information.

Training

The graphical software reduces training time. You can get new employees up and running much more quickly in the Windows environment.

Online Help

Did you know that DDMS has comprehensive online help? Help is always at your fingertips. The Help file contains three tabs: Contents, Index, and Search. You can use the Contents tab to quickly drill down to the subject for which to view information. You can click the Index tab to quickly and easily look up a box by name. Each and every box in the DDMS system is indexed individually. For example, if you need more information about the Hold Type box in the Customer Order Entry tab, you simply type Hold Type and the indexed information comes right up. Double-click the index entry and the indexed topics can be viewed.

Use the Search tab to quickly search for a term when you are not sure of where to look for it. Searching is as easy as typing a generic term like order entry. Every topic that has the words order and entry are returned in your search. For a more specific search, type order entry in quotes: “order entry”. Then only topics that have that exact phrase are returned in your search.

Another way that allows you to quickly view information is to use F1. Click the Help button at the top of each window or press F1 at any time. Pressing F1 also brings up help specific to where your cursor is on the window. (This is context-sensitive help, shown in Figure 1.) Using our earlier example, you might click the Hold Type box in the Customer Order Entry tab then press F1. The help topic for the Hold Type box immediately displays. For more information on navigating DDMS, read the online help topics called Introduction to DDMS.

Using Keyboard or Mouse, It’s Your Choice

Many users told us they didn’t want to use a mouse to move around the window; a keyboard is faster, they said. Again, this is a matter of preference. For an experienced user, a keyboard can be faster. That’s why our graphical windows support keyboard shortcuts for navigation and most system functions. For example, you can complete an entire order in order entry without ever using the mouse! However, if you prefer to use the mouse, it’s your choice. You can use your mouse to move around in any of the windows.

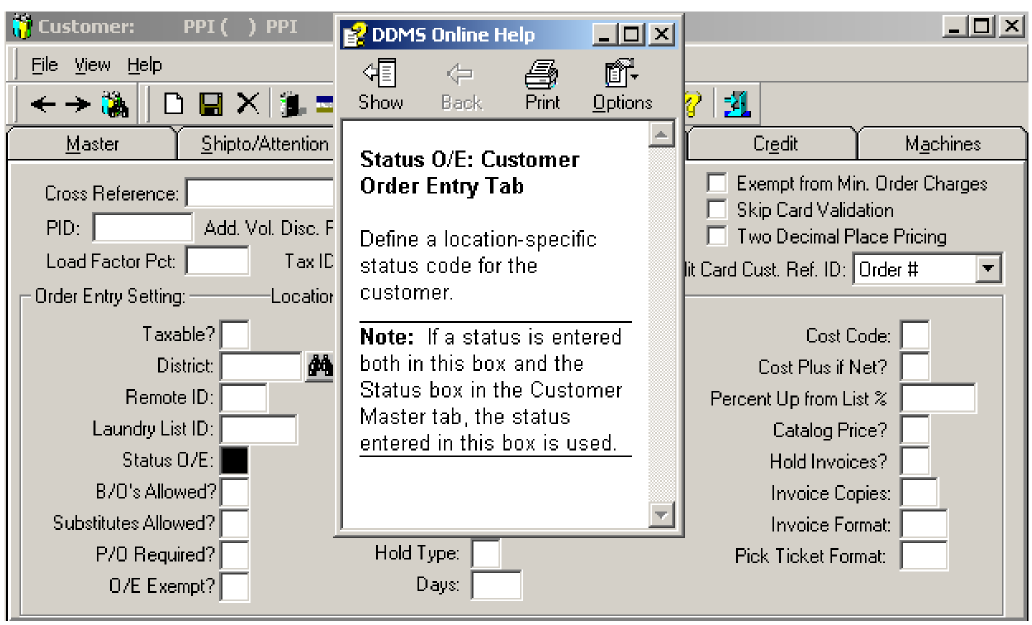


Figure 1: Context Sensitive Help for the Status OE Box

Shortcut and Access Keys

Shortcut keys are either function keys, like F9, or a combination of the Control key and a letter, such as **Ctrl + R**. For example, to view outstanding items on a purchase order, type **Ctrl + O**.

Access keys are keys corresponding to the underlined letter in a menu or tab name. To open a menu or move to a tab, hold down the Alt key and press the access key. For example, to open the P/O Browse dialog box, type **Alt + B**.

You can select multiple line items in many applications just like you do in other Windows programs. To select several different lines, press the Ctrl key and click individual lines. You can also select several lines in a row by clicking the first line, holding the Shift key and clicking the last line.

One User—Multiple Sessions

The graphical software allows you to work in multiple applications at the same time. You can review a customer's A/R history in one window while entering a new order in another, for example. While our text-based software for the Microsoft® Windows and UNIX platforms allow this type of multi-tasking, each open program (session) requires one user license. With graphical, you only need one license per user, regardless of the number of applications.

Cutting and Pasting

The Windows environment lets you cut, copy and paste data from one box to another. This saves time in creating records. For example, when creating a customer ship-to record, you can copy relevant information like city or state from the billing record instead of re-keying it.

Smart Windows

When using multiple applications, changes in one window can affect related information displayed in another. For example, suppose you open a customer's master record in one window and the account history in another. Change to a different customer record, and the history window automatically displays the new customer's account.

User Preferences

Each graphical user can set his/her own preferences. If you have a furniture operation and an office products operation, your order entry personnel can view furniture order entry information or hide it from view.

You can add and remove buttons from the toolbars in the databases and applications.

You can also customize grids in almost every database or application. For example, in A/R History in the A/R Detail tab, click the Set Grid Options button. You customize your grid by simply clicking the options to set.

Look-ups

Many of your operators probably have keystrokes and other information memorized. But imagine the ease of looking up a salesperson's number or a tax district, without having to remember it or look it up on a list that may or may not be handy.

You can look up information using almost any box in the system. You can view history data and other detailed data from all the databases at the same time. You can re-sort information as needed. Just click on the button by which you want to sort.

Drill-down menus are available throughout the system. For example, in order entry, you select the action from a drill-down menu.

Searching/Sorting Using a Search Box

Most windows have search boxes. Any box that is **bold** can be used for searching. Tab to or click the box by which to search or sort. This highlights the information currently in the box.

Type the information over the highlighted information. (This does not destroy the current information.)

Press Enter to find the first instance of the information you typed or sort the information beginning with the information you typed. When searching, if the first instance is not correct, scroll until the requested information appears, or search again using a different search box.

Scrollable Data Windows

Scrollable data windows means fewer errors and less to memorize.

You can scroll forwards and backwards and use the up and down arrow key to easily navigate through information.

Pop-up Windows

Pop-up windows display available choices for things like salesperson numbers, customer information, item information, and almost any other type of data.

Ease-of-Use

Ease-of-use was a major factor in developing the graphical software. It offers a simpler, more consistent interface. The Order Entry window is a perfect example. Changing a setting in the Global tab always affects the entire order, while changes in the Item Detail tab affect only the selected line item.

Database Management

Creating and maintaining database records — customers, vendors, inventory, etc. — is simply faster and easier in the graphical software. There's no more switching screens and tabbing through fields. Just click the box to change, enter the data, and click Save.

New Technology

ECi recently introduced a new generation of business system technology. These applications incorporate smart-client architecture, SQL databases, the Microsoft® .NET programming framework, and a completely redesigned user interface. These changes provide very real benefits to you:

- Improved performance and reliability
- Ability to accomodate future growth
- Simpler customization
- Better security.

Ensite EBS (Enterprise Business System) is Windows-based with new GUI (graphical user interface) and .NET platform. Programming is done in Microsoft Visual C#. Ensite EBS allows us to completely detach from TBL — all business logic will be rewritten. Utilizing this new technology makes one major difference: standard coding practices. This makes the system easier to enhance and maintain.

Cross Reference of Text-Based Screens to Windows

You may find that older documentation refers to text-based screens, such as the (E) screen, for example, which performs the same function as its graphical counterpart, the Item window. Or, you may find that you're referenced to the (AT) Tax Districts Tables screen,which in graphical software is located in the View menu of the Customer window. The reference list at the end of this document is designed to help you find the right graphical software window when all you have is a set of keystrokes for a text-based screen name. For each text-based screen name, we list the screen title, and the directions to the equivalent graphical software window. While there may be more than one way to get to a screen, this table details the most common method.

What's an Icon?

In graphical user interfaces, an icon is a small picture with a label. In these instructions, an icon is in the master menu or application menus of your DDMS software.

When you double-click an icon, it launches a program. For instance, when you are in the DDMS Master Menu, and double-click the Reports Menu icon, the Reports Menu appears. (See Figure 2.) When you then click the Standard Customer Reports icon, a new window opens with a selection of standard customer reports.

What's a Tab?

A tab may be a keystroke to take you to the next data field. However, in these instructions, a tab is a clickable region of the window that contains data fields or reports. It's a way to conserve space within an application, or to indicate the next stage in a task. For example, in Order Entry, there are tabs for Global, Item Detail, and Order Totals, in the exact sequence you must follow to complete an order.

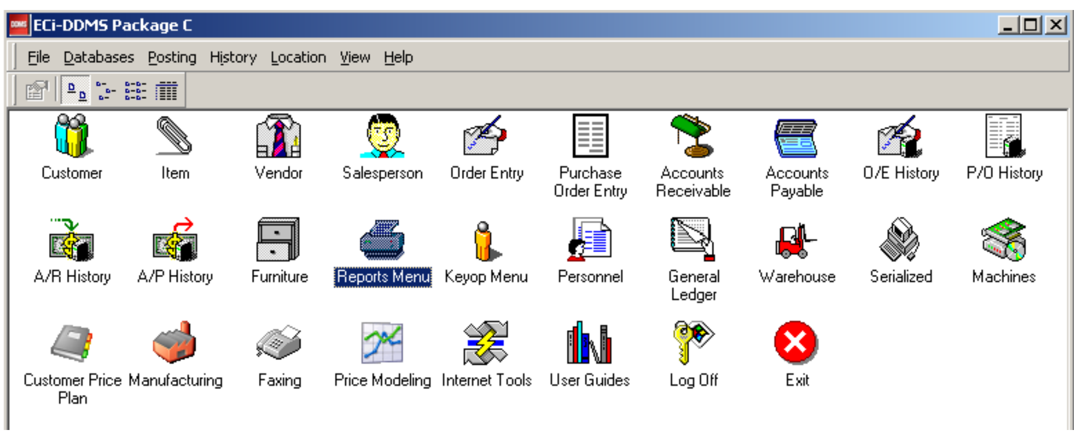
Where is View?

Menu bars are found along the top of DDMS windows, between the title bar and the toolbar row of buttons. When you click the menu name, a list of options opens. Click the option you want and the appropriate action takes place.

View is the title of one of these menus. For example, when you are in the Item database, and click View on the menu bar, then select Item Bins, the Multiple Bins window appears.

File and Action are other examples of menu titles.

Figure 2: The Reports Menu Icon



Accounts Receivable

The Accounts Receivable (A/R) application lets you monitor and update your customers accounts. Each accounts receivable account represents the amount owed by a customer for purchases (orders) or services. Through the Accounts Receivable application, you can build and maintain a complete and accurate history for all your customer's accounts receivable activity.

Disputed Invoices

A new feature lets you mark invoices that have been disputed. This allows your A/R clerk to be aware of any invoices that are being disputed before ever making a collection call.

Pay by Groups

If you have a customer that pays multiple accounts with one check, this feature is what you need. You can assign customers a group code in the Customer database then use that group code to retrieve the customers in the Accounts Receivable Payments Tab. If you retrieve using this method, you can post payments to customers with a specific group code.

As with paying multiple accounts with one check, as long as you check the Update Customer History box, each customer's account is updated with the payment date, amount, and check number.

Quick Pay Posting

Quick pay posting is the DDMS equivalent of the text-based Multiple Accounts Per Check method in the (BQ) Accounts Receivable Check Posting screen. You can apply a payment to multiple accounts at once, applying a particular check amount to more than one account.

When you post payments, Quick Pay posts the check number, date, and last payment information to all accounts. The program also updates the 90 $, 60 $, and 30 $ boxes in the Customer Credit tab for every account for which you paid invoices. In addition, the Check # field in the C-AUX file is updated for all posted accounts.

A/R Query

The A/R History Invoice Query dialog box lets you locate and select an invoice from a list of invoices. You can search by the following: invoice number, purchase order number, check number, date, payments, and charges.

In the A/R History Detail Tab, you can use the Long PO # box to select the invoice to view. Enter the long purchase order number in the Long PO # box, and press Enter. You can enter up to 30 characters in this box. The invoice that most closely matches the one you specified appears.

You can also use the Long PO # box to retrieve variations of long purchase order numbers. To do so, combine part of the purchase order number with an asterisk (*). The asterisk serves as a wildcard; it represents any character. (The wildcard feature works with short P/O numbers, as well.) 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 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. The system searches for the purchase order in the journal set in the Journal box, JNL-AR, for example.

Printing Statements in A/R History

In A/R History, printing a statement is easier than ever! To print a statement in the A/R History window, select the customer, then click the drop down arrow next to the Print button to select Print Statement. And even better, no more finance charges! In text-based software, you might accidentally add on finance charges to a statement. In graphical, this is no longer an issue!

Accounts Payable

Since you can mark and unmark invoices for payment, accounts payable postings are easier than ever before. Previously, you ran the To-Be-Paid Report and reviewed it before applying changes. Now changes are made before the checks are released.

In the Accounts Payable Posting window, you can set limits for the vendors whose invoices you need to pay. When you do, you can append and update the AP-PAY file directly through the A/P window. You can even delete it, if necessary.

Through the AP Payment Limits dialog box, you can limit by vendor account number, name, code, location, and date. After the invoices are displayed, you simply click the invoices to pay. You can also click Recap by Vendor to verify the invoices you've marked.

Paying invoices by hand-written check is also much easier. You simply click the Hand Check button and enter the vendor information, including the check number. Then mark the invoices to pay. Postings are not made to accounts payable until you are ready. If you change your mind, you can cancel the transaction without posting anything.

Posting purchase orders has been made easier then ever by the addition of the A/P Post P/O tab. You can use this tab to see every line item that has been purchased but not posted against. You can also change the purchase order and the invoice cost without leaving the A/P window.

While in the A/P window, you can also view additional vendor information, purchase order entry history, and accounts payable history. Once you access the P/O History window, you can view order entry history.

Viewing A/P History

The Accounts Payable window lets you easily view A/P history information. You can see at a glance the vendor's invoices; payments and charges; invoice, voucher, and net dates; check numbers; purchase order numbers; and much more. Since the information is shown in columns, you can click the column heading to re-sort the data, allowing you to easily find the information you need. For example, if you click the Invoice # column, you can sort the displayed invoices by invoice number, from highest to lowest. Likewise, by clicking the Charges column, you can sort the data by charge amount. You can also exclude zero balance invoices with a single click.

From A/P history, you can enter a check number to see what purchase orders were paid or vice versa; you can enter the purchase order number to see what check was used to pay the P/O.

You can also access Purchase Order Entry History to view P/O information. To do so, click the View menu and select P/O History.

Order Entry

Order entry allows you to find information without ever leaving the application. You can make changes while online. You can quickly scan back and forth during an order by simply clicking the tabs. When entering an order, you can easily change the salesperson or even the customer. Even if you've entered several items on an order, you can still make global or line item changes, such as changing the tax, for the entire order or for a line that has been previously entered.

When you retrieve a customer in order entry, settings for that customer display at the top of the window. In the example shown in Figure 3, this customer is set up for summary billing. You can access item detail or order totals at any time while placing an order.

You can quickly look up customer item history without ever leaving your order; just right-click on an item and view history for this customer.

You can enter order notes and change order settings by simply pressing a function key. Also, when changing or verifying items on an order, you can re-sort the information as needed. You can sort by item description or company name, for example.

You can release a quote in one easy step. You have the ability to view all orders or quotes without having to know which number to query.

There are several ways you can move through the order entry boxes. Pressing Enter, Tab, or using your mouse moves you through the order entry windows and dialog boxes. Function keys and access keys are also available. For example, in the Order Entry Global tab, type Alt + M to move the cursor directly to the Dept Name box.

There are several ways to access O/E History. You can view customer order history without ever leaving order entry by pressing F5. You can view order entry history by clicking the button at the top of the order entry tab or by using access keys.

Change, Verify, Delete Orders

In the Order Entry window, you can change, verify, and delete orders.

You can click the Order Browse button to access all tickets that are available to be verified, changed, or deleted. Or you can perform a query. Press the F11 key to display the Order Notes dialog box as you browse through the tickets.

Order Changes

Our graphical software lets you easily change almost any component of an order, including things that are impossible in text-based. Suppose you are ready to end the order and realize you retrieved the wrong departmental account.

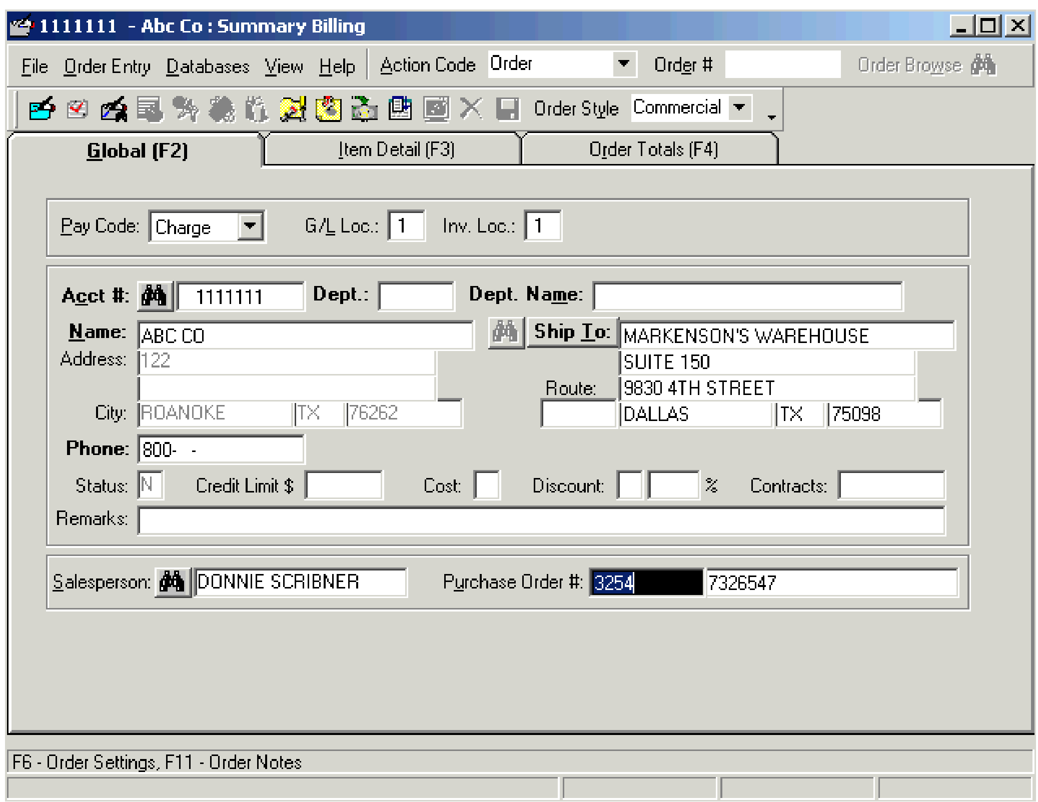


Figure 3: Customer Settings

With graphical, you simply retrieve the correct department record, then continue with the order. You can change line items by double-clicking or by highlighting the item and pressing Enter. You can also scroll up or down by clicking the up or down arrow keys to access a line. Once the item is highlighted, press Enter to change the item.

The Change tab is used for quick changes. This means changes you commonly make such as changing the shipped quantity; the item's selling price, list price, and cost; changing the gross profit percentage of an item; or the purchase order number.

In addition to making these quick changes, you also have the ability to change all of the information for an individual line item or you can change an entire order.

You can also add an item or substitute one item for another. Adding an item is similar to placing an item on the original pick ticket. When you substitute one item for another, the application checks stock levels for the new item and places information such as the item's stock class, inventory department, unit of measure, and cost on the pick ticket.

Order Settings Dialog Box

This dialog box is easy to use and easy to understand. Simply press F6 and the Order Settings dialog box opens. In this dialog box, you can enter discount types, who called, price breaks, price plans, and much more.

Order Notes Dialog Box/Entering Specials

Order entry specials have never been easier. With the graphical software, all you have to do is press the F11 key to display the Order Notes dialog box. Separate boxes let you enter text for beginning, ending, and line item specials. No more special commands to remember and type. You can even select whether the special text displays on the ticket, short-buy, backorder, or purchase order.

Ship-to Lookup

Looking up multiple shipto addresses and attentions is easier than ever. In order entry, select the query button to display the complete list of shipto addresses. For a list of attentions for this customer, press Ctrl + A.

Searching in Order Entry

You can also select customers using the word search feature. You do this using two \\ (back slashes) and specific text. For example, to retrieve all customer accounts containing the word office, click the Name box and type \\OFFICE.

The system automatically opens the Query dialog box displaying a list where the word office appears in the customer's name, for example, Office Warehouse Supply, Warehouse Office Supply, or Supply Warehouse Office. To retrieve a customer using more than one word, you could type OFFICE AND LAW. The system retrieves each instance where the words office and law appear in a customer's name.

While using word search, you can also use a boolean variable to retrieve customers using more than one word. The words "or" and "and" are key words that let you search for multiple words in the customer's name. The word "or" means that only one of the words has to exist in the description. The word "and" means that both words must exist in the description.

Faxing and E-mailing

One button faxing and e-mailing is available from Order Entry and O/E History.

Catalog Explorer

The Catalog Explorer lets you select an item from the contents of various wholesaler catalogs including S.P. Richards, United Stationers, and Tech Data. You can use the Catalog Explorer to select an item in the Order Entry Item Detail tab, in the Item window (through the Item Query dialog box), and in the Purchase Order Entry Item Detail tab. Catalog Explorer lets you find an item without knowing the item number. You can view wholesaler catalogs by different levels: multi-level, single-level, and page or vendor.

Viewing Item Customer Sales History

You can easily view information on an item previously sold to the customer. When you do, all the invoices on which this item was sold appear. This feature also allows you to view line item detail for any one of the past invoices. In the Item Detail tab, click the item on the order for which to view sales history. Then just press F7 and the Customer Item History dialog box opens listing the customer's account number and the information for the item you selected. The invoices on which this item appears are also shown. The invoice number, invoice date, order quantity, cost, selling price, and gross profit percentage appear.

You can also quickly view manufacturer history in order entry. You can view items that were sold to the customer by specifying the item's manufacturer and/or description. This feature also lets you view specific information about the sale of each item even if you don't know the item number. In the Item Detail tab, press F10. You can enter the manufacturer name or search for the information.

Changing Item Settings

Other former specials are also stored in two settings dialog boxes: the Order Settings dialog box and the Item Settings dialog box, respectively. These dialog boxes display several former specials used in the text-based system. In the Order Settings dialog box, you can make changes that affect the entire order. However, these changes are in effect for this order only. Instead of using the CONTRACTS, CTAX, DROPSHIP, WHOCALLED specials, boxes in the Order Settings dialog box let you easily flag the order as a drop ship order, specify who called to place the order, set the taxable status for the entire order, specify contracts, and specify a secondary salesperson for commission purposes.

In the Item Settings dialog box, you can specify settings for specific line items. To do this, the item must be shown in the first line on the order. If it appears on a different line, double-click it to move it up to the first position. You can specify a particular item as non-taxable, or change its tax district. You can change the item's commission code, and specify that the item not be included when you run the automated short-buy.

Viewing O/E History & Reprinting

An advantage to using a graphical interface is the ease with which you can access history information. You can view order and item sales history while:

- Placing Your Order
- Verifying Orders
- Changing Orders
- Creating Credit Returns.

This feature lets you access the O/E History window to view past orders. This includes entries that are stored in the current sales journal, JOUR-S; the active order entry file, P-MASTER; or renamed sales journals.

Another new feature is that you can print as many times as needed!

Purchasing

In Purchase Order Entry, you can now run the short-buy report on screen. Creating a short-buy in graphical is easy and can be done in a minimal number of windows with just a couple clicks of your mouse. See Figure 4. You can create multiple short-buys quickly and save them for future use. Complete the information then click the Save button. The short-buy is saved and can be retrieved in a couple of clicks!

You can view a list of items by vendor or change the vendor with one simple click. You can change cost on-line and use all the purchasing functions from one window. You can modify the purchase orders both before and after you send them to the vendor or wholesaler. First you set your limits, then view the items this search retrieves and finally build the purchase order. You no longer have to print the short-buy report to create a short-buy purchase order. Creating the short-buys in the appropriate window automatically builds the files.

Using the short-buy procedure, you can put items directly on a purchase order from the file. This speeds up the process since you don't have to create a purchase order by entering each item individually.

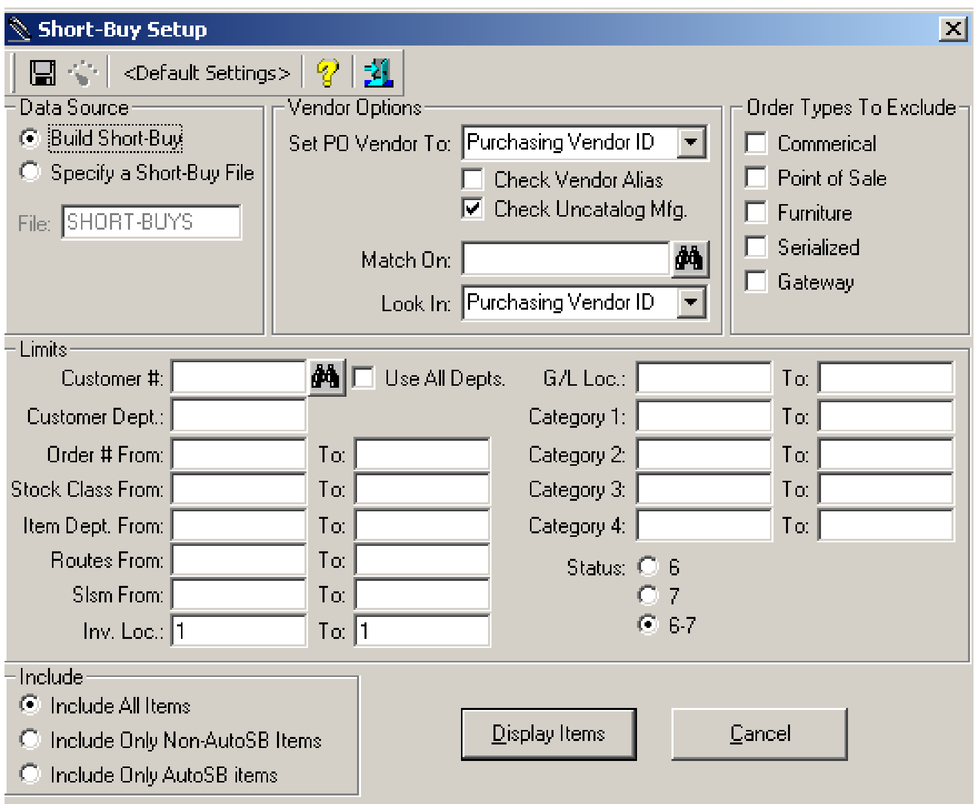


Figure 4: The Short-Buy Setup Window

Changing Purchase Orders

There are several ways to change a purchase order. You can change:

- Received quantity
- Acknowledgement number (you can also mass change)
- Due date (you can also mass change)
- Cost and prices
- Item quanities and information.

You can easily change purchase orders in the Receive/Change tab. It's easier than ever to receive items and un-receive items. You can right-click the line item and receive each line separately or you can unreceive the item by clicking the red arrow or typing Ctrl + I.

Salespersons

There are new functions available in the Salesperson database. In the Salesperson Master tab, you can limit salespersons to only view their customers. Use the drop down arrow in the User Type box to select Salesperson. When querying customers, this salesperson only sees the customers assigned to his or her salesperson number or salesperson alias.

Maintaining your salesperson database is now much easier. With one click, you can limit your salesperson to only have access to view database screens or to only have the ability to process orders in order entry.

Note: To restrict this salesperson to only viewing his or her customers, you must also set the Restrict Salesperson Access to their Customers Only parameter in the (LHY) Salesperson Parameters screen to Y. After setting this parameter, ECi recommends that you rebuild the customer index files.

Customer Price Plans

Customer Price Plans allows you to set up price plans for customers. After you add your items, you can place special pricing, or a discount, on an item or group of items. You can assign price plans to customers or customers to price plans.

Note: Assigning customers to price plans is an authorized feature. It may not be included in your software package. For more information, contact ECi sales.

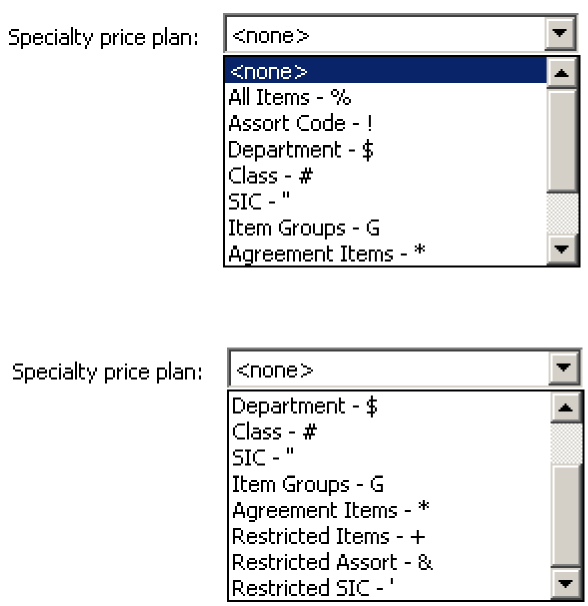
Item Groups price plan is a new price plan that lets you add special groups to a specialty price plan. You can place special pricing on an item or group of items. You can specify a gross profit percentage or discount percentage for the groups of items. Setting this up does not set the price, just the percentage. Item Groups price plan saves only the items and the percent on the price plan. This means no refiguring if the item's price changes — the system automatically uses the current cost or price from the item database.

Specialty contracts begin with one of five symbols (%, !, $, #, or " followed by a number or a letter), for example, %1. The symbol is the first character in the contract number and determines which items are included in the contract, as follows:

- % = Special pricing on every item
- ! = Special pricing on all items with specified assortment codes
- $ = Special pricing on all items within specified departments
- # = Special pricing on all items with specified stock classes
- " = Special pricing on all items with specified SIC codes.

When creating a price plan, selecting a specialty price plan just takes one click on the arrow in the Specialty Price Plan box. The different types of specialty price plans are shown in Figure 5.

Figure 5: Specialty Price Plans



General Ledger

Creating custom financial reports is easier and faster than ever. Previously, in text-based software, you had to build financial tables before you could run reports. No more! You can create financial reports without building financial tables! The Financial Reports window lets you create customized financial statements simply by categorizing general ledger account numbers. 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.

In the Financial Reports window, there are currently two reports available: Balance Sheet and Profit and Loss. See Figure 6. A balance sheet shows your net worth at a glance, including what you have and what you owe. Periodically running a balance sheet lets you see how your business is doing. The profit and loss statement provides a snapshot of how your business is doing for the specified period. The profit and loss statement includes sales, cost of goods, and expenses.

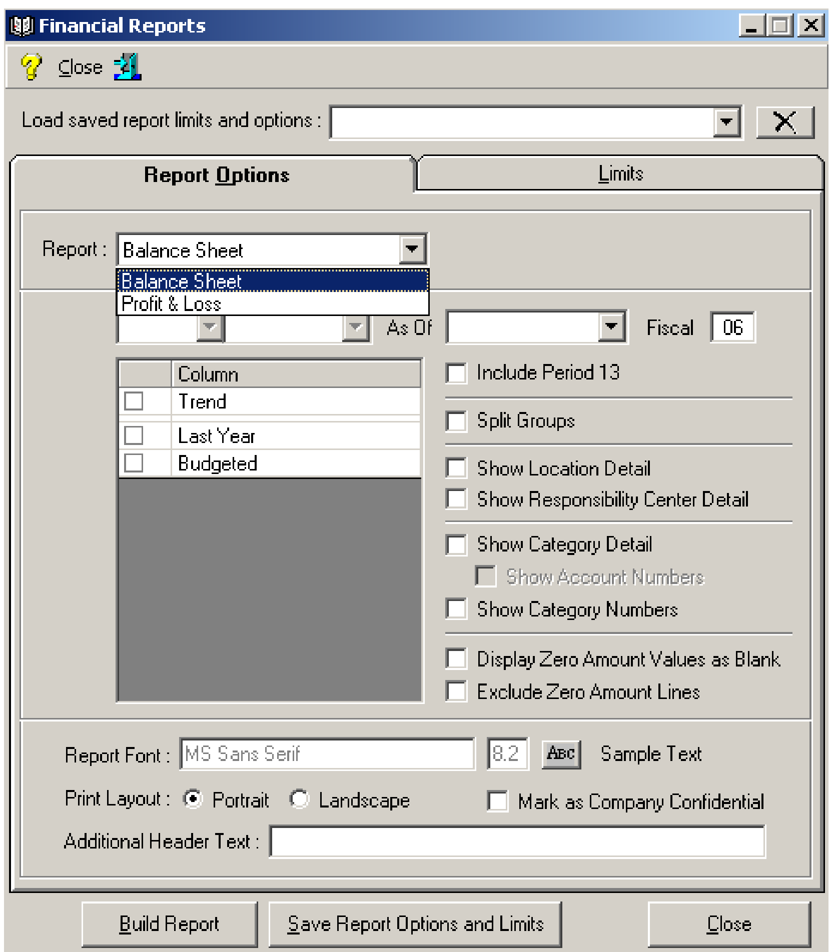


Figure 6: The Financial Reports Window

Code	Text Screen Title	Accessing the Graphical Equivalent
*	Editor	Text Based Only
!	Word Processor	Text Based Only
+	Specials	Keyop Menu Icon > Specials icon (text based)
?	Planner	Text Based Only
@	Printer Setup	Text Based Only
&	Faxing Program	Faxing Icon
"	Contact Fax & E-Mail	Customer Icon > View Menu > (Customers)
"	Contact Fax & E-Mail	Salesperson Icon > View Menu > (Salesperson)
"	Contact Fax & E-Mail	Vendor Icon > View Menu > (Vendors)
A	Customer Master (main)	Customer Icon > Master Tab
A	Customer Master (credit limit & start limit)	Customer Icon > Credit Tab
A	Customer Master (shipping address)	Customer Icon > Shipto/Attention Tab
AB	Customer Monthly Budgets	Customer Icon > View Menu > History > Monthly Budgets Tab
AF	Customer Credit Cards	Customer Icon > View Menu > Credit Card
AG	Customer Auto Billing	Customer Icon > View Menu > Auto Bill
AH	Customer History (A/R Information)	Customer Icon > Credit Tab
AH	Customer History (MTD & YTD Sales)	Customer Icon > View > History > Total Sales Tab
AL	Customer Buyers List	Customer Icon > Buyers/Manifest Tab
AQ	Customer Service Quality	Customer Icon > View Menu > History> Service Quality Tab
AQ	Shipping Manifest	Customer Icon > Buyers/Manifest Tab
AQ	Summary Billing	Customer Icon > Credit Tab
AQ	E-Mail Category, Region, & Area	Customer Icon > Master Tab
AQ	Exp. Sales $, of Emp. #, Exp. Margin $, Exp. G.P.%	Customer Icon > View Menu> History > Total Sales Tab
AR	Customer Master Reindex	Text Based Only
AS	Customer Sales History	Customer Icon > View Menu > History > Group Sales Tab
AT	Tax Districts Tables	Customer Icon > View Menu > Tax District
AX	Customer Attentions Cross Reference (Attention & Shipto)	Customer Icon > Shipto/Attention Tab
AX	Customer Attentions Cross Reference (Credit Cards)	Customer Icon > View Menu > Credit Cards
B	Accounts Receivable Posting	Accounts Receivable Icon
BA	Bad Account Number File	Text Based Only
BB	Batch	Accounts Receivable Icon > Batch Totals
BC	A/R Posting Change	Accounts Receivable Icon > Post/Change Tab

Code	Text Screen Title	Accessing the Graphical Equivalent
BE	A/R E-Mail Statements	A/R History Icon > Retrieve Customer > File > EMail
BF	A/R Fax Statements	A/R History Icon > Retrieve Customer > File > Fax
BI	A/R Inquiry	A/R History Icon
BO	A/R Inquiry by PO #	Accounts Receivable Icon > Post Change Tab
BP	A/R Posting	Accounts Receivable Icon > Post Change Tab
BQ	A/R Check Posting	Accounts Recievable Icon > Payments Tab
C	Vendor Master	Vendor Icon > Master/RemitTo/Account Status Tabs
CE	Vendor EDI Parameters	Text Based Only
CP	Vendor Electronic Invoicing	Vendor Icon > View Menu > Electronic Invoicing
CR	Vendor Re-Indexing	Text Based Only
CS	Vendor PSN	Vendor Icon > View Menu > Supply Options
CV	Vendor Alias	Vendor Icon > View Menu > Vendor Alias
CX	Vendor Private Comm-unication Network	Vendor Icon > View Menu > PCN
DA	Accounts Payable	Accounts Payable Icon > AP Invoice Tab
DB	A/P Auto Pay	Text Based Only
DD	A/P Discount	Accounts Payable Icon > AP Invoice Tab > Retrieve Invoice and Change Disc % > Post
DE	Checks File	Accounts Payable Icon > Action Menu > Post to Check File
DI	Accounts Payable Inquiry	Accounts Payable History Icon
DM	Accounts Payable Mark Invoices to Be Paid	Accounts Payable Icon > Payments Tab > Setting Limits
DO	Accounts Payable Post P/O	Accounts Payable Icon > Post P/O Tab
DP	Accounts Payable Pay (Handcheck)	Accounts Payable Icon > Payments Tab > Handcheck
DT	A/P Batch Totals	Accounts Payable Icon > Batch Totals Tab
DV	A/P Void Check	Accounts Payable Icon > Action Menu > Void
E	Inventory Master (Master Record & Pricing Record Fields)	Item Icon > Master or Settings Tabs
E	Inventory Master (Direct Buy, Primary Wholesaler, Purchasing Vendor)	Item Icon > Vendors or Master Tab
E	Inventory Master (Usage Record)	Item Icon > View Menu > History > Inventory Tab
E	Inventory Master (Mult Units of Measure)	Item Icon > Settings Tab
EB	Bill of Materials Link	Item Icon > View Menu > Bill of Materials (text based)
EG	Multiple Bins	Item Icon > View Menu > Item Bins
EH	Inventory History	Item Icon > View Menu > History > History Tab
EK	Bulk Item Update Screen	Text Based Only
EL	Customer Item Price Check	Text Based Only
EN	Inventory Remarks	Item Icon > Remarks Tab
ER	Inventory Re-Index	Text Based Only

Code	Text Screen Title	Accessing the Graphical Equivalent
ES	Inventory Alias Item	Databases > Item Alias
ET	Inventory Contract Price	Item Icon > View Menu > Inventory Contract (text based)
EV	Vendor Contracts	Item Icon > View Menu > Vendor Contracts (text based)
EX	Item SIC Extended Desc	Text Based Only
EZ	Serialized Inventory	Serialized Icon (text based)
E+/SPE	Special Item Screen	Keyop Menu Icon > Specials Icon > E (text based)
FC	Purchase Order Change	Purchase Order Entry Icon > Change Action Code
FD	Purchase Order Delete	Purchase Order Entry Icon > Delete Action Code
FE	E-Mail Purchase Order	P/O History Icon > Email P/O Icon
FF	Fax Purchase Order	P/O History Icon > Fax P/O Icon
FI	P/O Inquiry	P/O History Icon
FM	Debit Memo	Text Based Only
FO	Purchase Order Entry	Purchase Order Entry Icon > Order Action Code
FP	Print Purchase Order	P/O History Icon > Print Icon
FR	Receive P/O (Pre-Receive & Final)	Purchase Order Entry Icon > Pre-Receive or Final Receive Action Code
FS	Purchase Order Short Buy	Purchase Order Entry Icon > Short-Buy Action Code
FT	Purchase Order Transfer	Purchase Order Entry Icon > Transfer Action Code
GA	Order Entry (Auto Bill)	Order Entry Icon > Auto Bill Action Code
GC	Order Entry Change	Order Entry Icon > Change Action Code
GD	Order Entry Delete	Order Entry Icon > Delete Action Code
GE	EDI Release	Text Based Only
GF	Order Entry Fax	O/E History Icon > Retrieve Invoice > File > Fax
GG	Order Entry E-Mail	O/E History Icon > Retrieve Invoice > File > Email
GI	Order Entry Inquire	O/E History Icon
GJ	Journal Functions	Text Based Only
GL	Customer Price Check	Text Based Only
GM	Modify Quotes	Order Entry Icon > Change Action Code
GO	Order Entry (commercial)	Order Entry Icon
GP	Order Entry (retail)	Order Entry Icon > Order Style > Retail
GQ	Quotes	Order Entry Icon > Pay Code > Quote
GR	Order Entry Release	Order Entry Icon > Release Action Code
GS	Drop Ship Order Entry	Text Based Only
GU	Furniture Order Entry	Order Entry Icon > Order Style > Furniture
GUT	Furniture Project Management	Furniture Project Management Icon
GV	Order Entry Verification	Order Entry Icon > Initial or Final Verify Action Code
GX	Credit Returns	Order Entry Icon > Credit Action Code
HY	Salesperson Master	Salesperson Icon
HYF	Salesperson Allowable Functions	Salesperson Icon > View Menu > Functions
HYL	Salesperson Price Check Parameters	Salesperson Icon > Price Check Tab
HYP	Remote Order Entry Parameters	Salesperson Icon > Remote Order Tab

Code	Text Screen Title	Accessing the Graphical Equivalent
HYP1	Remote Order Entry Parameters	Salesperson Icon > Addl./WinOrder Tab
HYR	Salesperson Re-Index	Text Based Only
HN	Personnel Master	Personnel Icon (text based)
I	Payroll Update	Personnel Icon (text based)
J	Chart of Accounts Master	General Ledger Icon > Chart of Accounts Icon
K	General Ledger Posting	General Ledger Icon > GL Posting Icon
L	Parameters	Keyop Menu Icon > Parameters Icon (text based)
M	Operational Procedures	Keyop Menu Icon > Operational Procedures Icon (text based)
N	Custom Customer Reports	Reports Menu Icon > Custom Customer (text based)
NR	Standard Customer Reports	Reports Menu Icon > Standard Customer (text based)
O	Custom A/R Reports	Reports Menu Icon > Custom A/R (text based)
OR	Standard A/R Reports	Reports Menu Icon > Standard A/R (text based)
P	Custom Vendor Reports	Reports Menu Icon > Custom Vendor (text based)
PR	Standard Vendor Reports	Reports Menu Icon > Standard Vendor (text based)
PD	President's Screen	General Ledger Icon > President's Screen Icon (text based)
Q	Custom A/P Reports	Reports Menu Icon > Custom A/P (text based)
QR	Standard A/P Reports	Reports Menu Icon > Standard A/P (text based)
R	Custom Inventory Reports	Reports Menu Icon > Custom Inventory (text based)
RR	Standard Inventory Reports	Reports Menu Icon > Standard Inventory (text based)
S	Custom P/O Reports	Reports Menu Icon > Custom P/O (text based)
SG	EDI Communication	Text Based Only
SM	Distribution Specialist Custom Platform	Text Based Only
SR	Standard P/O Reports	Reports Menu Icon > Standard P/O (text based)
T	Custom O/E Reports	Reports Menu Icon > Custom O/E (text based)
TD	Print Shipping Labels	Text Based Only
TM	Picking Manifest	Warehouse Icon > Picking Manifest Icon (text based)
TR	Standard O/E Reports	Reports Menu Icon > Standard O/E (text based)
TS	Shiping Manifest	Warehouse Icon > Shipping Manifest Icon (text based)
U	Custom Sales Reports	Reports Menu Icon > Custom Sales (text based)
UR	Standard Sales Reports	Reports Menu Icon > Stadard Sales (text based)
V	Personnel/Payroll	Reports Menu Icon > Personnel Reports (text based)
W	General Ledger Reports	Reports Menu Icon > G/L Reports (text based)
X	Program Security	Keyop Menu Icon > Program Security Icon (text based)
Z	System Utilities	Keyop Menu Icon > System Utilities Icon (text based)