

What's New in Version 10



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New Features in Version 10

Each new software release includes upgraded features. Some affect text-based software only; others, graphical. Each upgraded or new feature is briefly described below, organized by the module it affects. To the left of each is the version number in which it was released.

All features described in this handout are also included in the DDMS online help.

Text-Based Changes

The following is a list of features added to text-based Version 10 software.

Warehouse

- 10.3.0 **Batch Printing Packing Slips for Orders:** There are two new action codes in the (TS) Shipping Manifest screen that allow you more control over printing your invoices and pick tickets. You can select to batch print tickets or batch print invoices then further limit by dates, sort order, etc.
- 10.3.0 **Display Sales Orders in Delivery Manifest:** In the Delivery Manifest List window, you can now view sales orders for a manifest. You must first set the new parameter in the General Parameters window then simply click the manifest ticket to highlight and then click Display Sales Order(s) in the Current Options menu. The Sales Order window opens displaying sales order history for this ticket. You can also print, fax and email the displayed order from this window.

Graphical Changes

The following is a list of features added to the Graphical Version 10 software.

Accounts Receivable

- 10.3.0 **Change the Cash G/L Number in A/R:** When entering batch detail in the A/R Batch Information dialog box, a new option has been added, the Cash GL box. This box displays the general ledger cash account number. The ability to change the Cash G/L number depends on the Allow Changing the Default GL Cash Account parameter in the Keyop Accounts Receivable General Configuration window. If this parameter is set to Y, the number can be changed. If this parameter is left blank or set to N, the Cash G/L number box cannot be changed in the A/R Batch Information dialog box.
- 10.3.0 **Add Invoices to be Paid When Posting Payments in A/R:** When posting payments in A/R, if a customer's invoice you want to pay is not shown, this new enhancement lets you easily add it to the list. You can add a new invoice, if needed. The invoice is automatically checked for posting. Any credit (negative) postings appear in red. It is important to note that if you added a new invoice and later un-check the box for posting, the invoice is automatically removed from the list and is not posted.

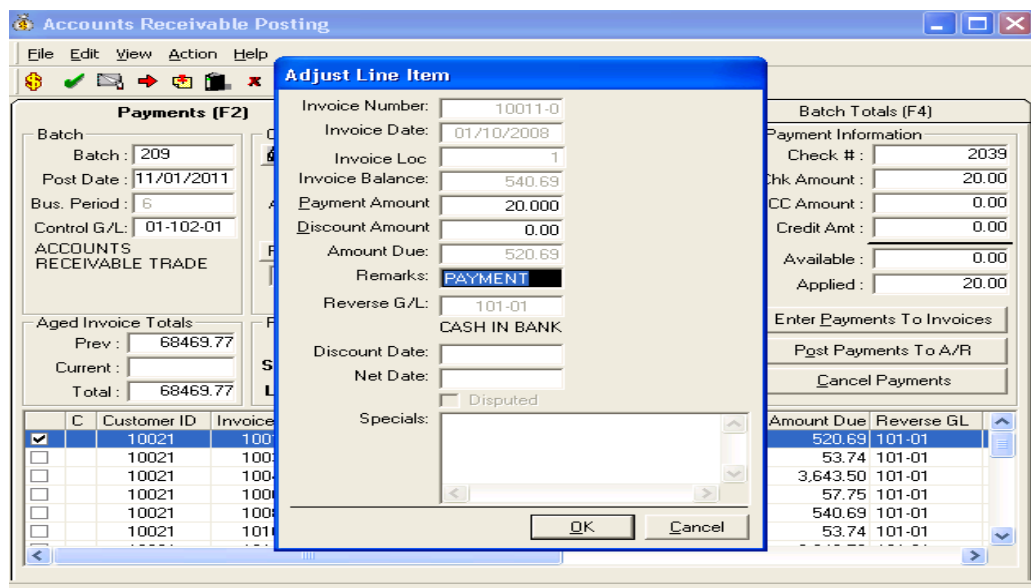
- 10.2.0 Edit Remarks in A/R Payments:** You now have the ability to edit item remarks when adjusting invoice payment detail. After posting a payment, in the bottom section of the Accounts Receivable Posting window, click the check box corresponding to the invoice to change. Click the Edit menu and click Adjust Payment Detail Line or type **Ctrl + P**. The Adjust Line Item dialog box opens. Click the Remarks box and enter the new remarks over the existing remarks. Press Enter. This box defaults to the type of change being made, Payment or Adjustment, for example. See Figure 1.

Customers

- 10.2.0 Multiple Merchant ID:** Previously, DDMS required a dealer to set up a new location to implement a new merchant ID. Now, the dealer can have the business system apply orders to different merchant IDs based on two different scenarios. First, orders can be applied by order type, as either web, commercial, or retail. This helps the dealer improve credit card rates. Second, you can set up a merchant ID for an individual customer account. This is especially helpful for GSA accounts.
- 10.2.0 Cost Center Codes:** This feature allows a customer account-specific code to be entered at the item level. You can enter the code in both commercial order entry and ECinteractive. You can use general ledger numbers as your codes. This allows the dealer to provide reporting back to the customer sorted and totaled by the general ledger code. Using this method, eases the process of posting to accounts payable.

Note: You must be authorized to use this feature. For more information, contact ECi Sales.

Figure 1: Editing Item Remarks in A/R Payments



- 10.1.0 Creating Price Plans in Excel:** You can now create a new price plan in an Excel spreadsheet, then import it into DDMS's Customer Price Plans module. Create the price plan in the Excel template provided in your v10.1 install. Once you've entered all the information in the spreadsheet, go to Price Plans, click Import Price Plans from Excel, and follow the prompts on your screen.
- 10.0.0 Order Codes:** This feature lets you set a default order code which can be used to filter backordered items to specific purchasing processes, including the automated short-buy process. Previously this code could only be used with graphical software. In this latest software enhancement, this code can be used with text-based systems as well as Dealer Station and ECinteractive. To get started, set a default in the Order Code box in the Customer Order Entry 2 tab. When you place an order, the system automatically uses the default for your orders. After the order is completed, to change the code, you must do so using the graphical Order Entry Change or Verify windows. When a quote is released to an order, the order code is assigned to the customer to whom the quote is being released. It does not use the order code assigned to the quote. In addition, the ability to change the Order Code box in graphical O/E can be restricted using the Allow Order Code box in the Salesperson Price Check tab. The salesperson for the order must have the Allow Order Code box set to Y before the code can be changed.

Furniture

- 10.3.0 View Sales Order Detail in Furniture Project Management:** You can view sales order detail from the Order Analysis window without leaving Project Management. After selecting the view and setting limits, click a displayed order. Under Current Options, click Display Sales Orders. You can also right-click an order and choose Display Sales Orders. The Sales Order dialog box opens, displaying sales order detail for the order you selected. You can click Print to print the data shown, show and hide order specials, and modify the grid.
- 10.3.0 View and Print Scheduled Event Detail in Project Management:** We have enhanced the Project Management window to include Event View. When you select Event View, you can set numerous limits to include only the necessary information from the Furniture Scheduler window. This view can be useful when you need to print scheduled tasks for your delivery and installation teams. For example, you can specify to show all the deliveries currently scheduled for next week. When you print, select Landscape view. You can also adjust the size of the columns so line information prints on a single page.

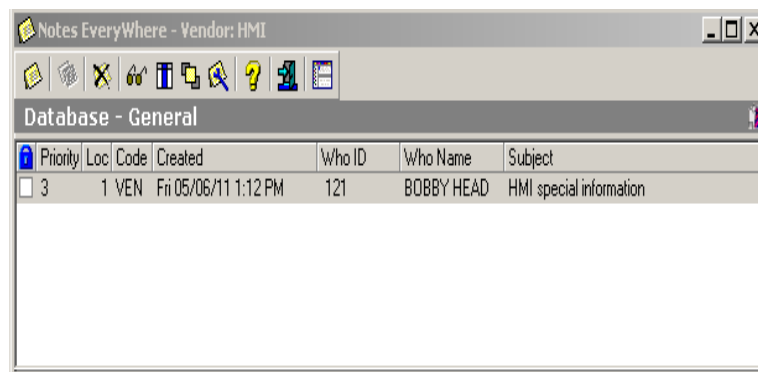
10.1.0 Furniture Scheduler: This feature was designed to help you better track your deliveries, installations, and other activities related to your contract furniture business. In the Scheduler window, you can easily add, change, and delete event information. You can use this window to manage your available resources and event lists. The Scheduler window can also be quickly accessed from Furniture Project Management and Furniture Order Entry Change and Verify modes. To prevent unauthorized access, you can also set a password restricting the ability to open the Scheduler window. For more details, see the handout *Setting Up & Using Furniture Scheduler* at www.ddms.com.

10.0.0 Viewing Notes Everywhere: Notes Everywhere is now available in Furniture Order Entry. When creating purchase orders in Furniture Order Entry, you can now view vendor notes. See Figure 2.

Item

10.1.0 Searching for Items by Category: In the Item database, you can create category keywords that allow you to categorize items by a keyword and search for items by keyword in Order Entry. In Order Entry, you open the Item Search dialog box in the Item Detail tab to search for an item by department and/or category. The system displays the items that match the search criteria and you can place them on the order. Before using this new feature, you must set up the GL Dept and Categories boxes for each item in the Item Master tab and set up the Category for Item Search box in the Order Entry General Configurations Parameters.

Figure 2:
Viewing Notes
Everywhere in
Furniture Order
Entry



The screenshot shows a window titled "Notes EveryWhere - Vendor: HMI". The window has a toolbar with various icons and a table titled "Database - General". The table has the following columns: Priority, Loc, Code, Created, Who ID, Who Name, and Subject. The table contains one row of data.

Priority	Loc	Code	Created	Who ID	Who Name	Subject
3	1	VEN	Fri 05/06/11 1:12 PM	121	BOBBY HEAD	HMI special information

Machines

- 10.3.0 Exporting Machine Renewals:** You now have the ability to export renewal information in the Machine application. To do so, go to the Machine Update Renewals window and set your sorts and limits. When the results display, click the Export Renewals link under Current Options. You can also right-click a contract and choose Export Renewals. The system prompts you to save the file to your hard drive. After the file is built, the spreadsheet detail can be used in a format of your choice that can be sent to your customers. There is also a new parameter for use with this feature. You can use the Renewal Contact Type box to set a default contact type, Renewals, for example. You set up contact type details using the Serial Contacts window. This includes the contact type, the contact's name, fax, and email address. If you leave the parameter blank and have a blank contact type set up for the contact, it uses that information instead. For more information, see the ECi DDMS online help topic *Using the Serialized Contact Window*.
- 10.2.0 Updating Machine Renewals:** In software version 10.0, the Machine Meter Readings feature was added to graphical software. In version 10.1, we added the ability to also generate machine billings for contracts, meters, and leases. This software version adds the final phase which allows you to update your machine renewals. To do so, click the Machine Billing icon in the Machines menu. Under Machine Tasks, click Update Renewals. Use the Renewal Date From and To boxes to enter the dates for which to update renewals. After you set limits, you can verify individual contract records or you can process them in a batch. When you are ready to update, click Save. For more information, see the handout *Machine Billing* on our website.
- 10.2.0 Email/Fax Machine Meter Reading Requests:** We added the Machine Meter Readings feature to software version 10.0.0. In software version 10.2.0, we added the ability to also email or fax the customer a meter reading request from within the Machine Billing window. This ensures that you have the most up-to-date meter readings before you actually bill. The system uses the default contract type for meter readings set in the Meter Readings Contract Type box in the Serialized General Configuration parameters. Formats for meter reading requests are set in the Meters Fax and Meters Email fields in the text-based (L6T) Fax Parameters screen. (To use the email/fax feature, you must be set up and using AutoCommII.) Next, you can enter meter readings, search for meters, add meters not shown, or delete meter readings without leaving the Machine Billing window. The Z-M-BILL file is updated with the meter readings you specified. The Current Reading Clicks and Date boxes in the Contract Detail Meter tab are also updated.

- 10.1.0 Generating Machine Billings:** In software version 10.0, the Machine Meter Readings feature was added to graphical software. This function allowed you to enter meter readings before actually billing them. In software version 10.1, we added the ability to generate your machine billings. Once you enter meter readings and are ready to bill, the Machine Billings function lets you bill contracts, meters, and leases all at once. When you do, you can set numerous limits. The more limits you set, the more you can narrow to include just those contracts you are prepared to bill. After the limits are set, all the contracts based on your criteria are shown. Simply click the Update box beside the contracts to bill and click Process. Billing has never been easier!
- 10.0.0 Machine Meter Readings:** We added the Machine Billing feature to graphical software. Divided into different phases, this beginning phase lets you enter meter readings in the new Machine Billing window. Before you can generate machine billings for contracts containing meters, you must enter meter readings. This ensures that your meter readings are up-to-date before you actually bill them. Using the Machine Billing window, you can specify dates and a wide array of limits for the meters to include. This makes billing your meters very flexible and convenient.
- 10.0.0 Assign a Default Call Priority to a Machine:** Previously, you had the ability to assign a call priority to a customer. This new enhancement lets you assign a call priority to a specific machine. This is useful for customers who have multiple machines. For existing machines, you can manually assign a default call priority in this box, as shown in Figure 3. After you do, when creating a call in the Work Orders window, the system checks to see if the machine is assigned a default call priority. If assigned, the system uses the default priority as specified, but you can always change it. You can also set the call priority for a machine when selling a contract using the new Call Priority box in the Serialized Contract dialog box. Call Priority information is stored in the Z-SUPP file and can also be used in Report Writer.

Figure 3:
Assigning Default
Call Priority

The screenshot shows a software window titled "System: () - Item: ()" with a menu bar (File, View, Help) and a toolbar. Below the toolbar are several tabs: Master, Other, Depreciation, Consumables, Order Entry, and Meters. The "Other" tab is active. The form contains the following fields and values:

- Calls # 313
- Rent/Loan/Demo/Ease D
- Application A
- Qualification
- Tech #
- Equip Type
- Call Priority 1 (highlighted with a red box)
- Territory
- Recall # 46
- Date 05/05/201
- Umbrella System #
- Leasing Acct # 3000
- Do Billings To Leasing Acct # Y
- Customer Ship-To Address
- Customer Address
- City FORT WORTH
- St TX
- Zip 76177

Order Entry

- 10.3.0 Additional Information Added to the Order Analysis Window:** This window has been enhanced to include many new customer, project, and sale order limits. For example, under Sales Order Detail Limits, you can now limit using the secondary salesperson and the order's status. Under Project limits, we have added the ability to limit using the project's name, and so on. Additional detail has also been added to the Quick Order Lookup view. Columns of information have been added to the Analyze Orders and Analyze Line Items window. You can also view new data groupings when using the Analyze Order Groups and Analyze Item Groups feature.
- 10.1.0 Searching for Items by Category:** In the Item database, you can create category keywords that allow you to categorize items by a keyword and search for an item by keyword in Order Entry. In Order Entry, you open the Item Search dialog box in the Item Detail tab to search for an item by department and/or category. The system displays the items that match the search criteria and you can place them on the order. Before using this new feature, you must set up the GL Dept and Categories boxes for each item in the Item Master tab and set up the Category for Item Search box in the Order Entry General Configurations Parameters.
- 10.1.0 Coupons and Promotions:** This enhancement lets you add promotions such as free goods, samples, and gifts to a customer's order, based on different qualifying amounts. For example, you could send a free coffee mug to any customer whose order totals \$100 or more. You can also set up one-time or reusable coupons as well as discounts to apply to orders. In the Promotion window, the Promotions Order Requirement Type box and Promotions Benefit Type box work together to determine the promotion being offered. You can use promotions with commercial and retail order entry as well as Web storefront orders. For details, see the handout *Setting Up & Using Promotions* at www.ddms.com.
- 10.0.0 Analyzing Sales Order Data:** To help you more easily view and track your order history information, we have added the new Sales Order History and Analysis window. This window combines all the benefits of the O/E History window, along with order analysis and reporting features. It provides an easy, streamlined method by which you can set limits and report on data as well as print analysis results. Once your limits are set, you can easily create a template for quick launch the next time the window is opened. Grid options let you further customize how the data is grouped and displayed. The Sales Order History and Analysis window also provides several different security options that can help you restrict individuals from viewing confidential security information. You can provide minimal security or a high level of security, depending on your business needs.

- 10.0.0 Order Codes:** This feature lets you set a default order code which can be used to filter backordered items to specific purchasing processes, including the automated short-buy process. Previously this code could only be used with graphical software. In this latest software enhancement, this code can be used with text-based systems as well as Dealer Station and ECinteractive. To get started, set a default in the Order Code box in the Customer Order Entry 2 tab. When you place an order, the system automatically uses the default for your orders. After the order is completed, to change the code, you must do so using the graphical Order Entry Change or Verify windows. When a quote is released to an order, the order code is assigned to the customer to whom the quote is being released. It does not use the order code assigned to the quote. In addition, the ability to change the Order Code box in graphical O/E can be restricted using the Allow Order Code box in the Salesperson Price Check tab. The salesperson for the order must have the Allow Order Code box set to Y before the code can be changed.
- 10.0.0 View and Retrieve Customer Orders by Route:** The new Route column has been added to the Order Entry Order Browse dialog box. This column lets you view and search for orders using route information. You can search for orders in Order, Change, and Verify modes. This column only appears if the Add Order Route to Order Browse box in the Order Entry General Configuration Parameters is set to Y.

Purchase Order Entry

- 10.2.20 New PSN Vendor:** Printer Essentials was added as a new PSN vendor with this release. For more information, see the handouts at www.ddms.com.
- 10.2.20 Display Your On Hand Quantities On Your eCommerce Website:** When your customers shop your eCommerce website, they want to know whether an item is in stock and ready to be shipped. Knowing an item is out of stock could affect shopping decisions. This enhancement lets you display your on hand quantities to your online shoppers. To do so, there are certain steps you must first complete. Have your network administrator open firewall ports 9965 and 9966 to use the new ECi EBS SQL pipeline, required for these vendor communications features. Import your data through the EBS SQL Import Panel. You must import your file information and then set up a schedule for importing future data. There are two ECi DDMS parameters you must consider and you must also set up the Vendor Supply Options dialog box for use with this feature. Once your back office system is configured, use your Administrative web site, to set up on hand quantity preferences for the entire site using the Site Preferences page. Use the Quantity On Hand Management page to customize preferences for individual accounts which can then be applied to all customers within the account or to specific customers. For more information, see the *ECinteractive® & is.D-Force2® Administrative Site: Quantity On Hand* handout at www.ddms.com.

- 10.2.0 **New PSN Vendors:** New PSN vendors available with this release include EDR and Katun. For more information, see the handouts at www.ddms.com.
- 10.1.0 **New PSN Vendors:** New PSN vendor available with this release is TOPS. For more information, see the handouts at www.ddms.com.
- 10.0.0 **New PSN Vendors:** New PSN vendors available with this release include HON Daily and Trodat. For more information, see the handouts at www.ddms.com.
- 10.0.0 **Order Codes:** This feature lets you set a default order code which can be used to filter backordered items to specific purchasing processes, including the automated short-buy process. Previously this code could only be used with graphical software. In this latest software enhancement, this code can be used with text-based systems as well as Dealer Station and ECinteractive. To get started, set a default in the Order Code box in the Customer Order Entry 2 tab. When you place an order, the system automatically uses the default for your orders. After the order is completed, to change the code, you must do so using the graphical Order Entry Change or Verify windows. When a quote is released to an order, the order code is assigned to the customer to whom the quote is being released. It does not use the order code assigned to the quote.

In addition, the ability to change the Order Code box in graphical O/E can be restricted using the Allow Order Code box in the Salesperson Price Check tab. The salesperson for the order must have the Allow Order Code box set to Y before the code can be changed.

Reports

- 10.3.0 **New Furniture Scheduler Reports:** There are four new reports for Furniture Scheduler. You must add the reports from the project.xml file. The reports include: Scheduled Delivery Report, Scheduled Install Report, Scheduled Events and Scheduled Events w/Shipto.
- 10.0.0 **New SQL Reports:** Several new reports were added in version 10. These include: Customer Group Sales Analysis, Customer Aging Totals, Customer Usage by Date, Third Party Billing Invoice Register, and Vendor Alias.
- 10.0.0 **New Furniture Reports:** Two new furniture reports are available. There is also a new uncataloged report for Furniture: the WIP Uncataloged Posted Monthend Report.

Vendors

- 10.0.0 **Kimball Office and National Dealers:** When using PSN to transmit purchase orders, Kimball Office and National Dealers can set the Distribution Channel box to Direct in the Purchase Order Communications Vendor Options tab. If using the direct ship option, be sure to specify a ship to address with one exception: you do not have to enter the suite. In addition, the customer identification number shown in the St Cust ID box is not required and can be left blank.
- 10.0.0 **HON DSR:** New parameters in the Vendor Private Communications Network window let you set up a Dealer Sales Representative (DSR) email. See Figure 4.

Figure 4:
Setting up DSR
Emails in the
Vendor Private
Communication
Network Window

