



*Implementing  
eNsite Pro:  
Are You Ready?*



## Implementing eNsite Pro: Are You Ready?

### Contents

<b>Welcome to eNsite Pro</b> .....	<b>3</b>
Detailed Tutorial .....	3
Live Human Contact .....	3
Convenient Training.....	3
Practice .....	3
<b>Checklist</b> .....	<b>4</b>
Customer Database .....	4
Inventory Database .....	5
Vendor Database .....	6
Salesperson and Order-Writer Database .....	7
Order Entry (O/E) Application .....	8
Order Entry Change and Delete Application .....	9
Order Entry Verification Application .....	9
Purchase Order Entry (P/O) Application .....	10
Order Flow .....	10
Accounts Receivable (A/R) Application .....	11
General System Preparation .....	11
Optional Applications .....	12



## Welcome to eNsite Pro

Congratulations! Your investment in the DDMS eNsite Pro system gives you the powerful, leading-edge tool you need to run your business more efficiently. To help you make the most of your investment, DDMS provides a number of learning tools.

### Detailed Tutorial

The **Let's Get Started** (LGS) program is a self-paced tutorial that covers everything you need to know, including setting up your hardware, choosing business forms, setting up databases and learning to use the applications. The LGS program is available via the Internet at [www.ddms.com/lgs](http://www.ddms.com/lgs).

### Live Human Contact

Within two days of shipping a new system, the Training department contacts you to schedule this appointment. When your **New Customer Coordinator** calls, she helps you plan and prioritize each step of your implementation process. This is a good time to ask questions about the process, if you have any.

In addition, your New Customer Coordinator contacts you weekly. She monitors your progress and makes sure your training needs are met as quickly as possible. For additional help during implementation, please contact the DDMS Training Department at 1-800-959-3367. Or you can contact us via e-mail at [training@ddms.com](mailto:training@ddms.com).

### Convenient Training

An integral part of learning to use your eNsite Pro system is **Virtual Classroom Training**. Virtual Classroom Training is live, online software training. You can attend a variety of scheduled classes via telephone and Internet. These classes are designed to reinforce the information you learn from the tutorial and to answer any questions that arise. As part of the LGS program, new customers can attend any Virtual Classroom Training for 180 days from the date of purchase. For more information, go to [www.ddms.com](http://www.ddms.com). Click **Training** and **Virtual Classes**.

### Practice

The goal of all this training is to "go live": to use your DDMS eNsite Pro system for daily business transactions. Practice is the key to quickly implementing the system. The eNsite Pro database and transaction files are designed to allow you to easily delete all practice data and transactions, while leaving your primary databases and important settings intact.





## Checklist

To go live successfully, there are certain major tasks and skills you must accomplish. As you complete each, check the corresponding box. When you finish a section, sign it and fax it to your New Customer Coordinator.

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*For more information on any of these procedures, see your eNsite Pro online help or the LGS program.*

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This checklist covers the things *most* people need to know to go live. However, your business may have unique requirements. To make sure you've accounted for every task and skill you need, continue your current processes. As you do each, duplicate it on your eNsite Pro system.

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*If the files have been converted, you must do any necessary modifications manually.*

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### Customer Database

- Send customer database information to O/PUS to be converted. Or you can manually load all customers into the database. *Print a full customer master listing report to verify that your customer database is complete.*
- Add, change, delete customer records. Inquire on customer database by name and by customer account number.
- Add, change, delete and view multiple shipping addresses.
- Assign customers to the appropriate taxing districts. Add, change, delete and view tax districts. Do test orders on various customers to check tax districts.
- Set pricing options for all customers and assign order entry status codes. Test discounts, cost type and contract pricing in order entry with customers who have various pricing structures.
- Set up customer credit limits. Test some large orders to become familiar with the prompts that appear when a customer goes over the credit limit.
- Be sure to assign the correct salesperson number or in-house salesperson number to each customer's account.
- Be familiar with the customer reports available through the standard customer reports menu. *The best way to learn about the reports is to print them. Note the reports you print frequently.*
- Review customer history. Do some test orders to see how the boxes are updated.
- Add a departmentalized customer.
- Add a Cash (specialty) customer.

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*Be sure you can retrieve customers by name or account number.*

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*By setting limits, you can reduce the number of records each report includes.*

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I have completed the Customer Database section of the LGS program.

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## Inventory Database

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*If you load the O/PUS inventory file, be sure to read the O/PUS documentation that comes with the O/PUS CD, or print the documentation from the [www.ddms.com](http://www.ddms.com) web site.*

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- Load inventory database. *Spot check commonly sold items to make sure your database is complete and correct.*
- Add unique items.
- Set up alternate items and alias items.
- Divide inventory database into stock classes for purchasing.
- Divide inventory database into G/L departments for proper posting.
- Check the list price and selling unit of measure to be sure they are correct.
- Attach vendor records to inventory items. Add, change, delete and view multiple vendor records for an item.
- Understand multiple costs for items: Wholesaler, Manufacturer, Average.
- Understand the purchasing vendor concept. Set the purchasing vendor for an item. O/PUS users mass change the purchasing vendor flag for inventory items.
- Add, change, delete and view inventory contracts. Understand fixed, flexible and sale flyer contracts.
- Assign inventory bin locations and min/max quantities. *These boxes are in the Item History window.*
- Load initial inventory counts from a purchase order. Manually change on-hand quantities from the Item History window.
- Review other data stored in the Item History window. Understand how and when the history boxes are updated.
- Understand allocate, backorder, and on order. Understand how those inventory boxes are updated.
- Assign any column pricing.
- Create a bill of materials list and/or a laundry list.
- Complete training and entering of multiple unit of measure items.
- Be familiar with the various inventory reports available: Inventory Catalog, Inventory Extended Dollars, Lowstock and Usage.
- Understand sort and limit options on reports. Print reports with different sorts and limits. *Reports show data; they do not change it.*

I have completed the Inventory Database section of the LGS program.

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*By grouping vendors according to the kind of merchandise they sell or by the service they provide, you can use them to sort or limit reports or to exclude vendors from the Purchase Order Entry or Accounts Payable applications.*

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### Vendor Database

- Load vendor database. *All vendors you purchase from or write A/P checks to need to be in your vendor database. Print a vendor master listing report to verify that your vendor database is complete.*
- Add, change, delete and view vendors in the Vendor window.
- Make sure the Vendor ID # for vendors you manually add match the Vendor ID # used in the Item window for items this vendor carries.
- Add specialty vendors: Dummy, Inventory, and so on.
- Group your vendors by vendor code.
- Assign terms for each vendor, including any discounts allowed.
- Assign special G/L accounts to vendors who do not use the default A/P reverse G/L number. Utility companies, for example, may use a unique number.
- Understand the Remit To and Account Status tabs in the Vendor window and how the boxes are updated.
- Be familiar with the various vendor reports available. Print reports with different sorts and limits.

I have completed the Vendor Database section of the LGS program.

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## Salesperson and Order-Writer Database

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*Salesperson and order-writer numbers are stored in the same database. Depending on the application, the system determines if the number is a salesperson or order-writer number.*

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- Load salesperson database. *All personnel must be assigned an order-writer or salesperson number. Print a salesperson master listing report to verify that your salesperson database is complete.*
- Add, change, delete and view salespersons in the Salesperson window.
- Add specialty salespersons.
- Add all employees as salespersons.
- Understand the Salesperson window and how information is updated.
- Understand the Allowable Functions in the Salesperson window.
- Be familiar with the various salesperson reports available.

I have completed the Salesperson Database section of the LGS program.

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Company



## Order Entry (O/E) Application

- Retrieve customers by customer name and account number. Be familiar with retrieving customers using the query feature.
- Change and view multiple shipping addresses, and assign a unique shipping address for a single order.
- Change the salesperson for an order using the salesperson query feature.
- Understand the difference between long and short P/O numbers.
- Press F6 to view the Order Settings dialog box. Be familiar with the changes you can make to an order using this feature.
- Retrieve items in the Item Detail tab using the item number and the item query feature.
- Understand the item pricing information in Order Entry and where this information comes from.
- Understand how cost flows to order entry.
- Change the item's quantity, price, and cost by clicking and by using the function keys.
- Change and delete items that have been placed on the order.
- Add, change, and view order and item notes.
- Click an item and right-click to view the options available.
- Place an order on-hold. Later, retrieve and complete the on-hold order.
- In the Order Totals tab (F4), understand the difference between ordered and shipped totals.
- View and change (if necessary) the format and printer.
- Understand the order status code, including initial and final verify, as well as invoiced. *The order's status determines how and when other files on your system are updated.*
- Make note of the special function and hotkeys used in order entry. *They can greatly streamline your order process.*
- Load forms and formats. Be sure they are operational.

I have completed the Order Entry section of the LGS program.

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Date

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Company



## Order Entry Change and Delete Application

*Changing an order does not alter its order status.*

*Always note the status of line items before changing the item. If the item is at a status 7 or has a vendor P/O # attached, the item may already be on a P/O.*

- Understand the information that can be changed.
- Retrieve an order to change or delete using the Order Browse Query feature and understand the information displayed in this dialog box.
- Add new items and substitute items on an existing order.
- Delete an item from an existing order.
- Delete an entire order.
- Print the Order Entry Exceptions Report (a day-end report) to view the order entry changes and deletions. This provides an audit trail.

I have completed the Order Entry Change and Delete section of the LGS program.

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Date

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## Order Entry Verification Application

*Your order flow determines how and when you Final Verify your orders.*

- Understand the difference between Initial and Final Verifying.
- Understand when to use the Final Verify feature and on which tickets.
- Retrieve an order to verify using the Order Browse Query feature and understand the information displayed in this dialog box.
- Change the shipped quantity and the price of an item when Final Verifying.
- Add freight to an order when Final Verifying.

I have completed the Order Entry Verification section of the LGS program.

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*Be sure to set up your communication modems.*

### Purchase Order Entry (P/O) Application

- Print the Short-Buy Report from the list of Standard Purchase Order Reports and understand the information shown on this report.
- Understand how to place items from the Short-Buy Report onto a P/O.
- Be familiar with the method by which you plan to send your purchase orders to your vendors: transmit, fax, or phone.
- Set up your communication modems and test P/O transmissions to all vendors.
- Understand electronic transmission acknowledgments.
- Receive a Purchase Order in the Purchase Order Entry window.
- Understand the difference between Pre-Receive and Final-Receive.
- Transfer items not received from one vendor to another P/O.
- Practice flushing backorders.

*Be aware of the status you are flushing your backorders to: Status B or Status 8.*

I have completed the Purchase Order Entry section of the LGS program.

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### Order Flow

*If you plan to print in a batch, practice printing batch tickets from the list of Standard Order Entry Reports.*

- Be familiar with the difference between printing orders as they are entered and printing them in a batch.
- Be familiar with how often you plan to pull items: as tickets print or when the backorders come in.
- Be familiar with how often you plan to print the Short-Buy Report and create purchase orders: once a day, twice, or more.
- Be familiar with when you plan to send your purchase orders to your vendors.
- Be familiar with when you plan to receive P/Os and flush backorders.
- Be familiar with when you plan to Final Verify orders.
- Be familiar with when you plan to print invoices: in a batch, or from the backorder flush and Final-Verify procedure.

*Consider all vendors, not just primary vendors.*

*Orders pulled completely from stock need to be Final Verified.*

I have completed the Order Flow section of the LGS program.

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### Optional Applications

- If you plan to be live on General Ledger, set up the general ledger database and understand the flow of general ledger. Also, modify the general ledger chart of accounts, if necessary.
- If you plan to use Accounts Payable, practice posting and paying invoices in the Accounts Payable Posting window.
- If you plan to use the Personnel database and Payroll application, set up the Personnel database and practice entering payroll information.
- If you plan to use the Retail module, practice placing retail orders in the Retail Order Entry window.
- If you plan to use the Furniture module, be sure you receive authorization. Practice placing furniture orders in the Furniture Order Entry window.
- If you plan to use the Serialized module, be sure you receive authorization. Practice placing serialized orders in the Serialized Order Entry window.

I have completed the Optional Applications section of the LGS program.

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