



# *Workflow Xtensions*



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## About Ensite Xtensions

Ensite Xtensions are features to enhance your Ensite Pro system. These features are not included in all software packages. They may require authorization, either individually or as a group.

There are Xtensions available for Customers, General Ledger, Distribution, Workflow, E-commerce, Line of Business, Contract Office Furniture, and Office Machines and Equipment.

This document details Workflow Xtensions. These include:

- Approval Link™ 2.0
- AutoComm
- Campaign Manager
- Notes Everywhere
- CCH Taxing
- O/PUS FileMapper
- O/PUS PT Updater
- O/PUS TechMapper.

### Approval Link 2.0

Processing credit cards through your DDMS system is easier and more flexible than ever. Recent enhancements give you:

- Level 3 line item detail
- Bill-complete flow and credit card authorization flow merge
- Control of approval numbers and dollars
- Greater prepaid transaction flexibility.

To process credit cards electronically at Level 1 or Level 2, you need:

- Automated authorization and capture software, such as POS-partner. POS-partner lets you receive authorizations, store transactions, settle transactions with your clearing house, report on your transaction dollars by type of card and communicate electronically using Internet TCP/IP.
- Approval Link 2.0 is the interface between your DDMS system and POS-partner.

## Workflow Xtensions

To process payments with Level 3 item detail, you need Approval Link + and POS-partner. (Approval Link + is only available with Ensite Pro Version 7.6 software.)

Together, Approval Link 2.0 and POS-partner cut costs for processing credit card transactions. Approval Link 2.0 and POS-partner let you:

- Be compatible with all major credit card services
- Accept procurement, corporate, major and private label credit cards
- Accept multiple merchant IDs
- Approve Level 1 and Level 2 transactions
- Change prepay orders
- Make fast, reliable TCP/IP connections from your server to POS-partner
- Use approved DDMS point-of-sale equipment
- Authorize credit card orders placed through Dealer Station.

## AutoComm

AutoComm makes faxing and emailing fast and easy. AutoComm (previously AutoFax), is the interface between your DDMS system and the Symantec™ WinFax™ PRO software. You can communicate directly from your system to any fax machine or computer. Simply connect your DDMS system to a PC running AutoComm and WinFax PRO software. Choose the information to fax or email and let AutoComm do the rest.

As with the previous versions of AutoFax, you can fax invoices, pick tickets, purchase orders, statements, and word processing files. Now you can email them as well. You can accurately transmit large volumes of information from your DDMS system. AutoComm passes faxes to WinFax PRO for faxing and sends email through your mail server.

Using either the (&) DDMS Faxing screen or the appropriate application screen, you can send invoices, account statements, and files to your customers. You can also fax purchase orders to your vendors. There are several faxing and emailing functions you can easily perform from the DDMS system.

## Campaign Manager

Campaign Manager lets you create automated marketing tasks based on a customer's status, such as new customers or growth customers. You can send emails to both internal and external customers. For example, if a customer hasn't made any purchases recently, you might email their salesperson internally to notify them. You could also email marketing flyers or perhaps a discount offer. Campaign Manager lets you automatically recognize and react to customers who haven't purchased recently. You simply set up the campaign and limit to the customers that fit your criteria.

Using Campaign Manager, you can apply the campaigns in any order simply by moving them up or down. You can create new campaigns or modify and delete campaigns. Campaign Manager allows you to run campaigns manually or automatically. Campaign descriptions are also shown in the Campaign Manager window.

Campaign Manager works with Notes Everywhere. Before using Campaign Manager, you must first set up Notes Everywhere. You must set up parameters in the Notes Everywhere General Configuration Parameters, shown in Figure 1, and the Notes Everywhere Passwords parameters. You must also set up note codes in the Note Setup dialog box.

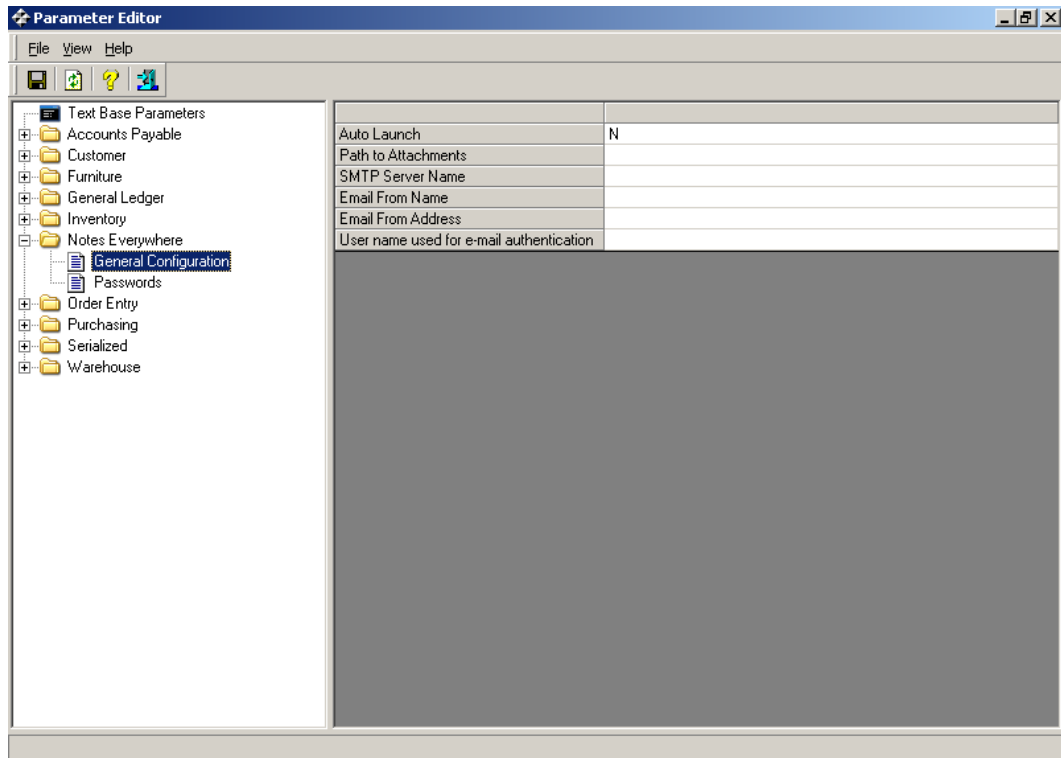
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**Note:** Campaign Manager is in the Platinum package and packages C and D. For more information, contact ECI<sup>2</sup> sales. To use Campaign Manager, you must also be authorized for Notes Everywhere.

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Two boxes in the Customer History Total Sales tab contain the last two active campaigns for this customer. The campaign code and the last activity date for these campaigns are displayed in the Campaign 1 and Campaign 2 boxes. This information is for display only and is stored in the C-SUPP file. You can also use these boxes for reporting purposes.

**Figure 1: The Notes Everywhere General Configuration Parameters**



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**Note:** Some anti-virus software programs will prevent emails from being sent. You may have to disable your anti-virus software to use Campaign Manager.

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### Notes Everywhere

You can use notes throughout Ensight Pro to provide important information. This feature keeps details directly at your fingertips. Notes Everywhere allows you to create customer notes and vendor notes. Customer notes are associated with the Customer database; Order Entry application; Accounts Receivable application and A/R invoices; Serialized machines and contracts; and existing project notes. Vendor notes are associated with the Vendor database; purchase order numbers, Accounts Payable application and A/P invoices.

You begin using notes by setting up parameters. You can set parameters so that the Notes Everywhere dialog box automatically opens each time you open Ensight Pro. This dialog box remains on top of other windows, so you can easily view notes for the selected customer, vendor, or invoice. What's more, the selected customer or vendor is automatically recognized when you retrieve the record and the notes display for you. The Notes dialog box blinks, notifying you that the selected customer has notes. You can also set passwords and set up parameters for Campaign Manager.

Next, you set up the codes and descriptions to use in the Note Setup dialog box. You can set up notes for email. Using Notes Everywhere parameters, you can also password-protect this feature. Give the password to only those people with access to the Notes Setup dialog box.

After you enter the codes and descriptions, you can begin setting up notes for Customers, Vendors, Order Entry, Purchase Order Entry, Accounts Receivable, Accounts Payable, Serialized, Furniture, and so on. You do this using the Notes Monitor.

### CCH Taxing

The CCH Taxing feature lets you have a tax table on your server that you can update on a regular basis. This gives you the flexibility to maintain tax information for customers nationwide. Tax rates are not only different from state to state or city to city, rates may differ within a zip code or city limits. CCH assigns a code to each tax table. This code is called a Geocode.

Use the CCH Taxing feature to set up individual items so they can be taxed correctly. To use this feature, you must:

- Subscribe to CCH taxing to access the current tax files.
- To use the CCH Taxing feature with Ensight Pro, you must be authorized.
- Download your tax files from CCH monthly and convert them.

- Set the CCH Taxability parameters.
- Set up any items in your database that require special taxing rules. You set up two boxes in the Item Settings tab: Product Group and Item Code. Use these drop down boxes to select product and item codes. These codes are set up in the CCH Taxability Parameters. These codes are also available in order entry.

Once you have completed these steps, you can query the tax information in the Tax Table Query dialog box. For more information, see your online help.

There are also new fields added to Report Writer in P-TAX, P-GLOBAL, and I-MASTER to enhance your reporting capabilities.

## O/PUS Tools

O/PUS offers several utilities for importing special pricing files into your DDMS system.

- **O/PUS FileMapper™:** With the O/PUS FileMapper, you can quickly convert inventory file information from manufacturers or other sources into a format which can be read by the DDMS system. You can even bring special pricing or other data in from a file you built yourself.
- **O/PUS PT Updater™:** Supplement your OPdb wholesaler information with pricing for your favorite direct buy vendors. PT Updater imports manufacturer pricing directly from Moore's Power Tools program and loads it into your DDMS inventory database. PT Updater can also load i2's competitor cross-reference table, a listing of superstore product numbers.
- **O/PUS TechMapper™:** Convert TechData item files into a format which can be read by the DDMS system. This Microsoft® Windows®-based program will convert the TechData file and transfer it to your DDMS server. These import utilities will be included on the quarterly OPdb catalog update CD-ROMs, beginning with the 2nd quarter of 2004. If you have pricing files that you need to process using these tools prior to the shipment of your 2nd quarter OPdb update CD-ROM, send your request via email to opus@eci2.com or send a fax to (682) 831-9916.