ECi Regional Users Meeting

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

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Going Paperless: Operational & Billing Efficiencies

ECi™ ECi DDMS®

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Contents

Introduction to Going Paperless

This session covers three main topics: using AutoComm II to streamline your business, saving operational documents to files, and sending documents by fax or email. First, you can use AutoComm II to enable your business to go paperless. AutoComm II streamlines faxing and emailing from your DDMS system. Next, we cover how to save operational documents to files, for example, setting up text printers and shared folders. Then we cover how to easily export those documents, including importing Report Writer files into Microsoft Excel®.

In this session, we'll also briefly discuss the new SQL Reporting tool.

Faxing and Emailing on Your DDMS System

Autocomm II makes faxing and emailing quicker and easier than ever! With AutoComm II, you can communicate directly from your system to any fax machine or computer. AutoComm II streamlines the process of sending customer documents like invoices, account statements, and reports. AutoComm II eliminates the costs of postage, paper and forms! Using 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.

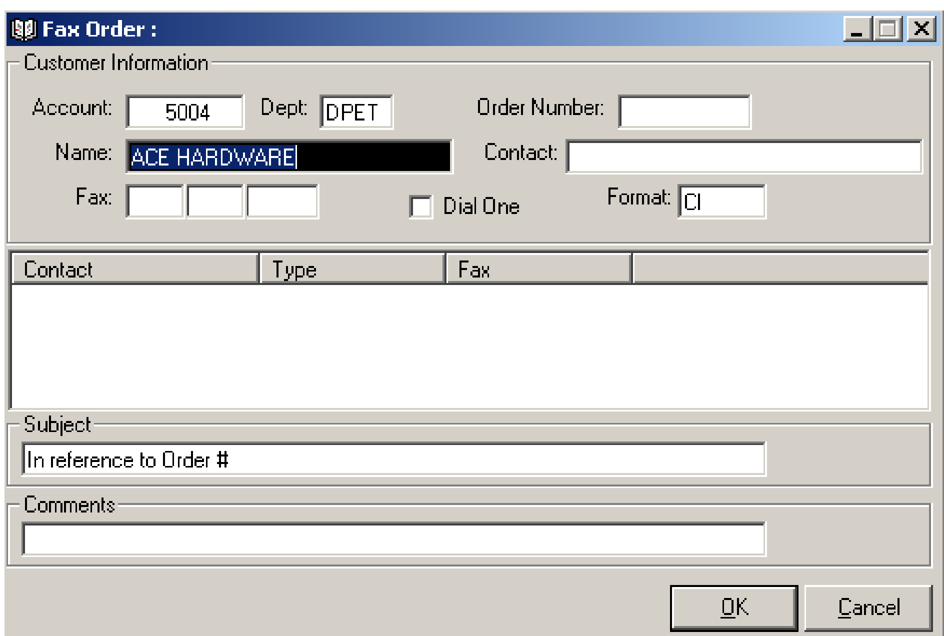


Figure 1: The Fax Order Dialog Box

Faxing using your DDMS System

You can fax invoices, purchase orders, statements and files from several windows in DDMS.

Using Order Entry History

1 Double-click .

2 Retrieve the invoice to send.

3 Click . The Fax Order dialog box opens, shown in Figure 1. The Account, Dept, Order Number and Name boxes display customer information.

4 Click the Contact box. You can enter the name of the person you are faxing.

5 In the Fax boxes, enter the 10-digit fax number.

6 Check the Dial One box if the fax number is long distance. Clear it if the fax number is local.

7 Click the Format box to enter the fax format. The invoice format provided by DDMS is CI. The pick ticket format provided by DDMS is CT. You can enter up to two alphanumeric characters.

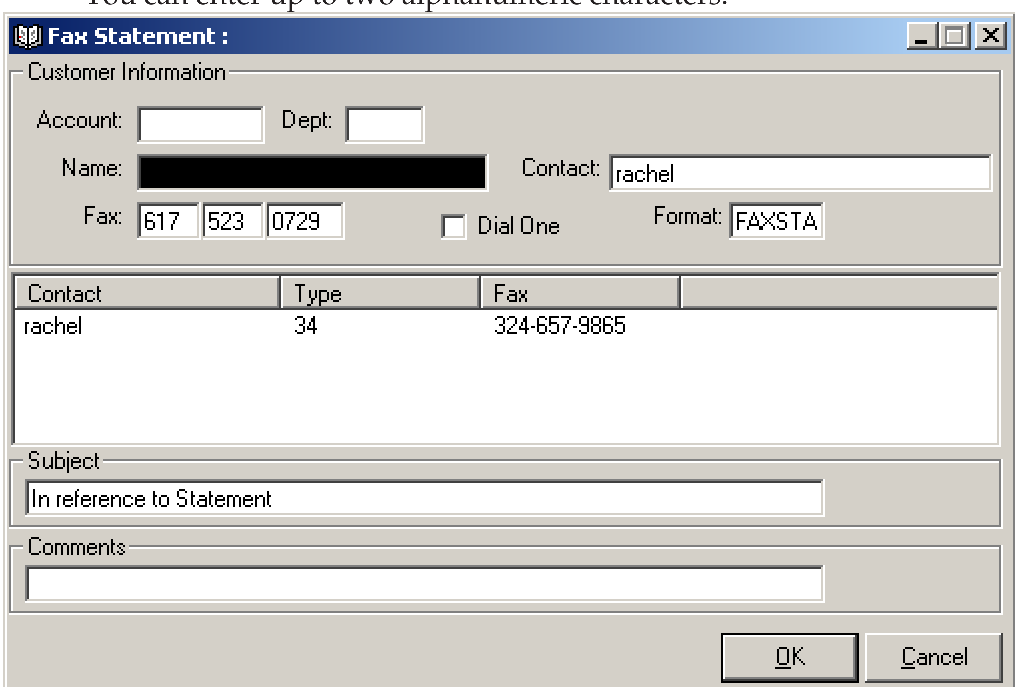


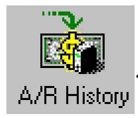
Figure 2: The Fax Statement Dialog Box

8 To change the subject line text, click the Subject box and enter the new text.

9 To add text to the fax, click the Comments box. You can enter up to 40 characters.

10 When you finish, click OK to send the fax.

Using Accounts Receivable History

1 Double-click 

.

2 Retrieve the statement to send.

3 Click . The Fax Statement dialog box opens, shown in Figure 2. The Account, Dept and Name boxes display customer information.

4 Click the Contact box. You can enter the name of the person you are faxing.

5 In the Fax boxes, enter the 10-digit fax number.

6 Check the Dial One box if the fax number is long distance. Clear it if the fax number is local.

7 Click the Format box to enter the fax format.

8 To change the subject line text, click the Subject box and enter the new text.

9 To add text to the fax, click the Comments box. You can enter up to 40 characters.

10 When you finish, click OK to send the fax.

Using Purchase Order Entry History

1 Double-click 

.

2 Retrieve the purchase order to send.

3 Click . The Fax P/O dialog box opens, shown in Figure 3. The Account, P/O Number and Name boxes display customer information.

4 Click the Contact box. You can enter the name of the person you are faxing.

5 In the Fax boxes, enter the 10-digit fax number.

6 Check the Dial One box if the fax number is long distance. Clear it if the fax number is local.

7 Click the Format box to enter the fax format.

8 To change the subject line, click the Subject box and enter the new text.

9 To add text to the fax, click the Comments box. You can enter up to 40 characters.

10 When you finish, click OK to send the fax.

Faxing Files from the Text-Based (&) Screen

1 In the (&) screen, type **4** in the Fax Type field.

2 In the Name field, enter the customer name and press Enter.

3 At the Correct Customer prompt, type **Y**.

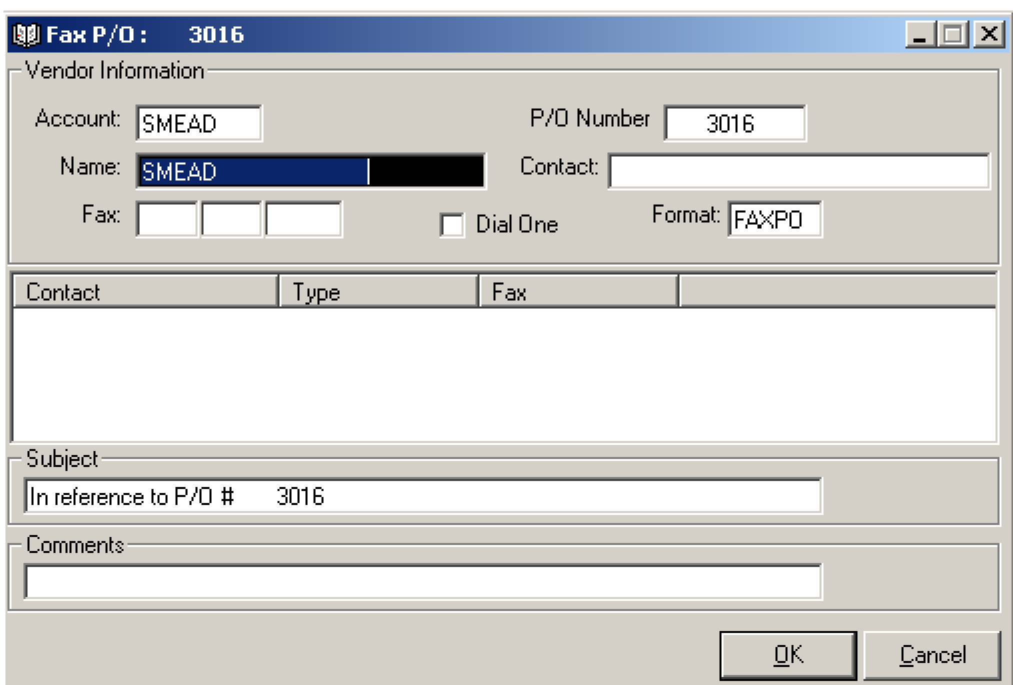
4 The contact name appears at the bottom of the screen. At the Correct prompt, type **Y** to accept the name as it appears. Type **N** to select another name from a list of contacts. Type **C** to enter a different name.

5 At the Fax Number Correct prompt, type **Y**. Type **N** to change.

6 At the Does Fax Number Require 1+ prompt, type **N**. (You set up your dialing rules in Microsoft® Fax Services when setting up AutoComm II.)

7 In the File Name field, enter the name of the file to fax and press Tab.

Figure 3: The Fax P/O Dialog Box



8 In the Vol field, enter the volume serial where the file is located.

9 At the Ready To Fax prompt, type **Y**.

10 At the Change Modem Parameters prompt, type **N** to accept the parameters.

11 At the Enter Comments prompt, you can enter additional text to print on the cover sheet. To enter text, type **Y**. In the Comments field, enter up to 50 characters. If you do not completely fill the field, press Enter.

12 At the Change Subject prompt, type **N** to accept the default. Type **Y** to change it. Enter the new text in the Subject field.

13 When the file is built, you are connected to the AutoComm II program on your PC. The Sending to AutoComm II message displays, then the Sending Fax Information message appears.

14 When the fax is sent, the Fax Was Successfully Transmitted Press Any Key prompt appears. Press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax. See **Monitoring Faxes and Emails**.

Emailing using your DDMS System

You can email invoices, purchase orders, statements and files.

Using Order Entry History

1 Double-click 

.

2 Retrieve the invoice to send.

3 Click . The Email Order dialog box opens. The Account, Dept, Order Number and Name boxes display customer information.

4 In the Contact box, you can enter the name of the person you are emailing.

5 In the Email box, enter the email address to use.

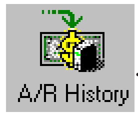
6 Click the Format box to enter the fax format.

7 To change the subject line, click the Subject box and enter the new text.

8 To add text to the email, click the Comments box. You can enter up to 40 characters.

9 When you finish, click OK to send the email.

Using Accounts Receivable History

1 Double-click 

.

2 Retrieve the statement to send.

3 Click . The Email Statement dialog box opens, shown in Figure 4.

The Account, Dept and Name boxes display customer information.

4 In the Contact box, you can enter the name of the person you are emailing.

5 In the Email box, enter the email address to use.

6 Click the Format box to enter the statement format.

7 To change the subject line, click the Subject box and enter the new text.

8 To add text to the email, click the Comments box. You can enter up to 40 characters.

9 When you finish, click OK to send the email.

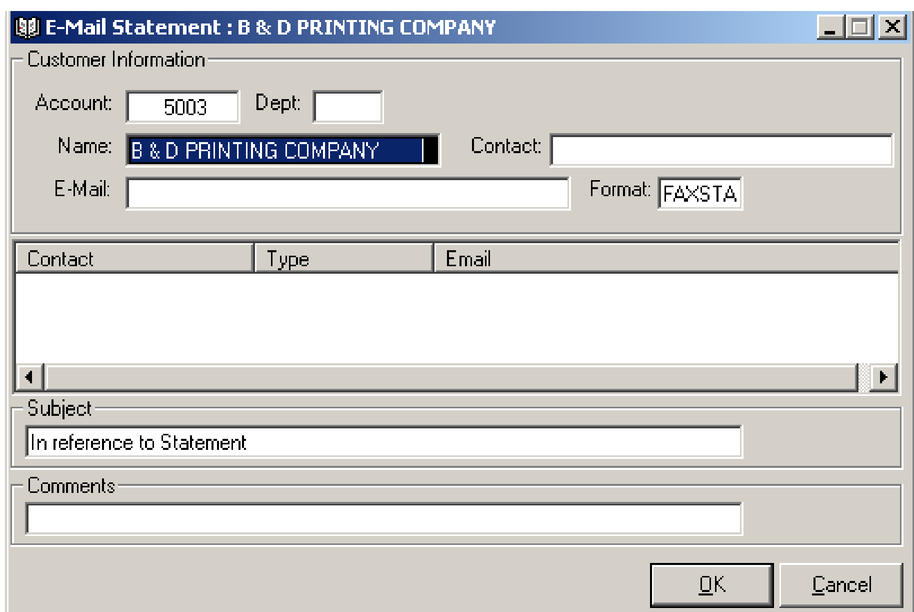


Figure 4: The Email Statement Dialog Box

Using Purchase Order Entry History

1 Double-click 

.

2 Retrieve the P/O to send.

3 Click . The Email P/O dialog box opens. The Account, P/O Number and Name boxes display customer information.

4 In the Contact box, you can enter the name of the person you are emailing.

5 In the Email box, enter the email address to use.

6 Click the Format box to enter the P/O format.

7 To change the subject line, click the Subject box and enter the new text.

8 To add text to the email, click the Comments box. You can enter up to 40 characters.

9 When you finish, click OK to send the email.

Emailing Files from the (&) Screen

1 In the (&) screen, with the cursor in the Fax Type field, press Esc.

2 In the Fax/Email field, type **E**.

3 In the Fax Type field, type **4**.

4 In the Name field, enter the customer name and press Enter.

5 At the Correct Customer prompt, type **Y**.

6 At the Change Email Address prompt, type **Y** to change the address. Type **N** to accept it.

7 In the File Name field, enter the name of the file to send and press Tab.

8 In the Vol field, enter the volume serial where the file is located.

9 At the Ready to Email prompt, type **Y**.

10 At the Enter Comments prompt type **Y** to add extra text. Type **N** if you are not adding extra text.

11 At the Change Subject prompt, type **Y** to enter a subject line. Type **N** to leave it blank.

12 After the email is sent, press Enter to return to the (&) screen.

Batch Faxing and Emailing Statements

You can send statements automatically by using the batch faxing and emailing feature. Once you begin a batch fax or email, the system sends one fax or email at a time until the entire batch has been sent.

To batch fax or email, you must create a special batch file.

Creating a Batch File

You can create a batch file in the (+X) Manual Report Executor Selector screen. The file you use to batch fax must include the text to fax, repeated once for each fax number. DDMS created a default batch faxing format for statements named CFBAT. The CFBAT file is designed to create a file of statements to be faxed.

The format for batch emailing is named CEBAT. The CEBAT file is designed to create a file of statements to be emailed.

You set limits in the (+X) screen.

1 Double-click 

.

2 In the Keyop Menu, double-click 

.

3 In the (+) Special Programs screen, type **X** in the Enter Program Request field.

Batch Faxing from the (&) Screen

Once you have created the batch file, you can batch fax.

1 In the (&) screen, type **6**.

2 In the Batch Fax subscreen, the Enter File Name To Transmit message appears. Enter the name of your batch file. If the name you enter does not completely fill the field, press Tab.

3 In the Vol field, enter the volume serial where the batch file is located, and press Tab.

4 At the Ready To Fax prompt, type **Y.**

5 At the Change Modem Parameters prompt, type **N**.

6 After the fax is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax. Refer back to the heading **Monitoring Faxes and Emails**.

Batch Faxing from the (TR) Screen

1. In the (A) screen, type **F** in the Hold field. This keeps the invoices from automatically printing during the (TR)[B] and (TR)[A] functions.
2. In the (TR) screen, type **M** in the Report field.
3. At the Process Fax, Email, or All Invoices F/E/A prompt, type **F**.
4. In the Pick# field, enter the range of pick numbers to fax.
5. At the Include, Exclude, or Only Furniture Orders I/E/O prompt:

   To include furniture orders, type **I**.

   To exclude furniture orders, type **E**.

   To include only furniture orders, type **O**.
6. Enter the route in the Route # field.
7. In the Sort Order field, press Tab to move to the Loc field.
8. In the Loc field, type the location.
9. At the Are You Sure prompt, type **Y**. The invoices are faxed.

Batch Emailing

Once you have created the batch file, you can batch email.

1. In the (&) screen, with the cursor in the Fax Type field, press Esc.
2. In the (F)ax/(E)-Mail field, type **E**.
3. In the Fax Type field, type **6**.
4. In the Batch Fax subscreen, the Enter File Name To Transmit message appears. Enter the name of your batch file. If the name you enter does not completely fill the field, press Tab.
5. In the Vol field, enter the volume serial where the batch file is located, and press Tab.
6. At the Ready to Email prompt, type **Y.**
7. After the email is transmitted, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the email. Refer to the heading **Monitoring Faxes and Emails**.

Batch Emailing from the (TR) Screen

1 In the (A) screen, type **E** in the Hold field. This keeps the invoices from automatically printing during the (TR)[B] and (TR)[A] functions.

2 In the (TR) screen, type **M** in the Report field.

3 At the Process Fax, Email, or All Invoices prompt, type **E**.

4 In the Pick# field, enter the range of pick numbers to email.

5 At the Include, Exclude, or Only Furniture Orders I/E/O prompt:

To include furniture orders, type **I**.

To exclude furniture orders, type **E**.

To include only furniture orders, type **O**.

6 Enter the route in the Route # field.

7 In the Sort Order field, type the two ways to sort the invoices.

8 In the Loc field, type the location.

9 At the Are You Sure prompt, type **Y**. The invoices are emailed.

Mass Faxing and Mass Emailing

You can fax or email a file to multiple fax numbers or email addresses. For example, you can fax or email a promotional flyer to the customers who use a certain product. With AutoComm II, you can create this file on your PC. Creating a fax file on your PC lets you utilize the many advantages your PC has to offer. For example, you can create a flyer complete with graphics to catch your customers' attention.

Creating a Mass Fax Phone Number and Email File

To mass fax files, you must first create a file with a list of the fax numbers and email addresses to which to send the fax or email. You can create this file on your PC, in the DDMS Word Processor, or through the (+Z) Setup Formats for Reports screen. DDMS has standard formats. The CPH# format is the fax phone number list and the CEML format is the email address list.

To create the phone number file through the word processor:

1 Double-click 

, then double-click 

.

2 In the (Z) screen, type **B** then **7**.

3 In the Word Processor, open a new file. (For instructions, go to www.ddms.com/support/doc/ver4doc.htm.)

4 You must use a specific format in the phone number file. For each fax number, type the area code and phone number. You can also enter 30 characters of text after column number 41 for each fax number.

Each fax number must be on a new text line. For example, to send the data file to the following four fax numbers: (817) 432-6678, (213) 950-4365, (214) 534-9988, and (212) 656-1134, your phone number file would look like the following:

8174326678

2139504365

2145349988

2126561134

Creating an email list works the same way as a fax list. For each email address, type the email address. You can also enter 30 characters of text after column number 41 for each email address.

Each email address must be on a new text line. Your email file would look like the following:

joesmith@ddms.com

brendajones@ddms.com

mikesmith@ddms.com

5 Save the file under a name you can easily remember when specifying the phone number file.

Creating the Fax File Name

After you have created your fax and email file on your PC and created your phone number file, you must go to the DDMS Word Processor and create a file that contains the name of the PC fax file for use with mass faxing.

1 Go to the DDMS Word Processor. You must create a one line file to identify the name of the PC file. When you open the DDMS Word Processor, select the [A] Edit a Document action code.

2 When the Enter Document Name and Unit Number prompt appears, enter the name of this file. For example, you could name this file MASSFAX. (You can reuse this file next time you mass fax by changing the first line of the file to include the PC file name.) Press Tab and then enter the unit number.

3 When the cursor moves to the first line of the word processor file, you must enter the name of the file to fax with the complete DOS path to the file from the AutoComm II PC. For example, you might type C:\documents\massfaxpromo.txt. The file does not have to reside on

the AutoComm II PC. If the PC is connected to a LAN you can pull it from any machine on that LAN as long as it is in a shared folder. For example, you might enter: \\testmachine\shared\massfax.txt. (For more information on shared folders, see the heading **Creating a Shared Folder**.)

After you have created the DDMS Word Processor file, you are ready to begin the mass fax or email.

Mass Faxing

1. In the (&) screen, type **5** to select the [5] Mass Fax a file function.
2. The Mass Fax subscreen opens. At the Enter File Name To Transmit message, enter the name of the data file to fax. Using the example above, you would type **MASSFAX**. If you do not completely fill the field, press Tab.
3. In the Vol field, enter the volume serial where the data file is located and press Tab.
4. At the Enter Phone Number File message, enter the name of the file of phone numbers or email addresses to which to fax the data file. If the file name is fewer than 10 characters, press Tab.
5. In the Vol field, enter the volume serial where the phone number file is located, and press Tab.
6. At the Ready To Fax prompt, type **Y**.
7. At the Change Modem Parameters prompt, type **N**.
8. After the fax is sent, press Enter to return to the (&) screen.

Note: In case an error occurs while the message is being sent, you should frequently check the monitor screen to view the status of the fax. Refer to the heading **Monitoring Faxes and Emails**.

Mass Emailing

1. In the (&) screen, with the cursor in the Fax Type field, press Esc.
2. In the (F)ax/(E)-Mail field, type **E**.
3. The cursor returns to the Fax Type field. Type **5** to select the [5] Mass Fax a file function.
4. In the Mass Fax subscreen, the Enter File Name To Transmit message displays. Enter the name of the data file to fax. Using the example above, you would type **MASSFAX**. If the file name is fewer than 10 characters, press Tab.

5 The cursor moves to the Vol field. Accept the default volume serial by pressing Tab, or enter the volume serial where the data file is located and press Tab.

6 At the Enter Phone Number File message, enter the name of the file of phone numbers or email address to fax the data file to. If the file name is fewer than 10 characters, press Tab.

7 In the Vol field, enter the volume serial where the phone numbers file is located, and press Tab.

8 At the Ready To Email prompt, type **Y.**

9 After the message is sent, press Enter to return to the (&) screen.

Monitoring Faxes and Emails

You can check the progress and status of an email or fax using the Monitor option in the (&) screen. You can find out who sent the message, as well as the date and time it was sent. You can also request the fax number or email address to which it was sent. You can delete, purge, resend, or inquire about a fax or email.

There are four different status codes used in the monitor screen.

- If the Status field is blank, nothing has been sent.
- A status of I means the message or document has gone to AutoComm II and is processing.
- An S means the email was successfully sent or the fax has gone to Microsoft Fax Services.

Figure 5: Deleting in the Monitor Screen

```
15:36:40                   AutoComm Monitor  REV. (06/13/03)            07/16/07
--------------------------------------------------------------------------------
 Action ? [D] (I=Inquiry, D=Delete, P=Purge, R=Resend, B=BacK To &)
--------------------------------------------------------------------------------
 L  Who  Date  Time  Limit      Request    S T Fax Number   E-Mail Address
 == ==== ===== ===== ========== ========== = = ============ ====================
  2  202 03/05 09:25       2694 Pur. Order   E
  2 202  07/18 14:22       2676 Pur. Order   F
  1 202  04/25 11:13       2659 Pur. Order   E 8174315290
  1 202  04/25 11:32       2662 Pur. Order   E 8174315290
  1 202  04/25 13:57       2662 Pur. Order   E 8174315290
  1 202  04/25 14:32       2662 Pur. Order   E 8174315290
  2 202  04/26 09:13       2666 Pur. Order   E
  1 202  04/26 09:16       2659 Pur. Order   E 8174315290
  1  221 03/26 11:46        936 Statement    F 6172681291
  1  210 03/30 14:29    10001-0 Invoice      F 1111111111
  1  210 03/30 14:40    10001-0 Invoice      E 1111111111   a
  1 202  08/30 11:47       2679 Pur. Order   F
  1      03/30 14:32        936 Statement    F 2345678907
  1      03/30 14:35        123 Pur. Order   F 9728769807
  1      03/30 14:43        936 Statement    E 2345678907   mary@yahoo.com
  1      03/30 14:45        123 Pur. Order   E 9728769807
  1      03/31 11:17        936 Statement    E 2345678907   mary@yahoo.com
"X" to Mark for Deletion
```

- An E in the Status field indicates an error.

To perform the following functions, In the (&) screen, choose the [7] Monitor action code. You can view the messages sent or perform other actions.

Deleting in the Monitor Screen

1. In the (&7) screen, type **D** in the Action field.
2. The X to Mark for Deletion prompt appears, shown in Figure 5. Type **X** next to the message(s) to delete and press Enter.
3. At the Are You Sure prompt, type **Y**. The documents are deleted. The cursor returns to the Action field.

Purging from the Monitor Screen

Purging lets you delete a group of emails by the sent date.

1. In the (&7) screen, type **P** in the Action field.
2. The Purge from X to X prompt appears. (X stands for the date range.) Enter the beginning date in the Purge From field. Enter the ending date in the To field.
3. At the Are You Sure prompt, type **Y**. The documents are deleted. The cursor returns to the Action field.

Resending from the Monitor Screen

You can also resend documents from this screen.

1. In the (&7) screen, type **R** in the Action field.
2. At the X to Mark to Resend prompt, type **X** next to the message(s) to resend. Press Enter.
3. At the Are You Sure prompt, type **Y**. The document is sent. The cursor returns to the Action field.

Exporting Reports in Windows

You can easily export information from DDMS reports into other applications, such as Microsoft® Excel or Access. Once you export the report, you can import this information into Excel.

Exporting files from a DDMS Windows system requires two steps: exporting the file from your Windows system and importing into your application. First, we'll export the files as text files and as database files. Then, we'll import both file types into Excel.

Exporting Information as Text Files

Exporting information from your Windows system as a text file involves three basic steps:

- Setting up a generic file printer
- Adding the file printer to your TBL server
- Creating the file.

Setting up a Generic File Printer

1. On your Windows server, click Start, then select Settings and then click Printers.
2. In the Printers window, double-click Add Printer.
3. In the Add Printer Wizard, click Next.
4. Select Local Printer. Make sure the Automatically Detect and Install My Plug and Play Printer box is clear. Click Next.

   You can set up file printers in two ways:

   - Use the File port, which lets you specify the path and file name each time you print, so you can create several text files before you import them. To set up this type of file printer, go to **Step 5**.

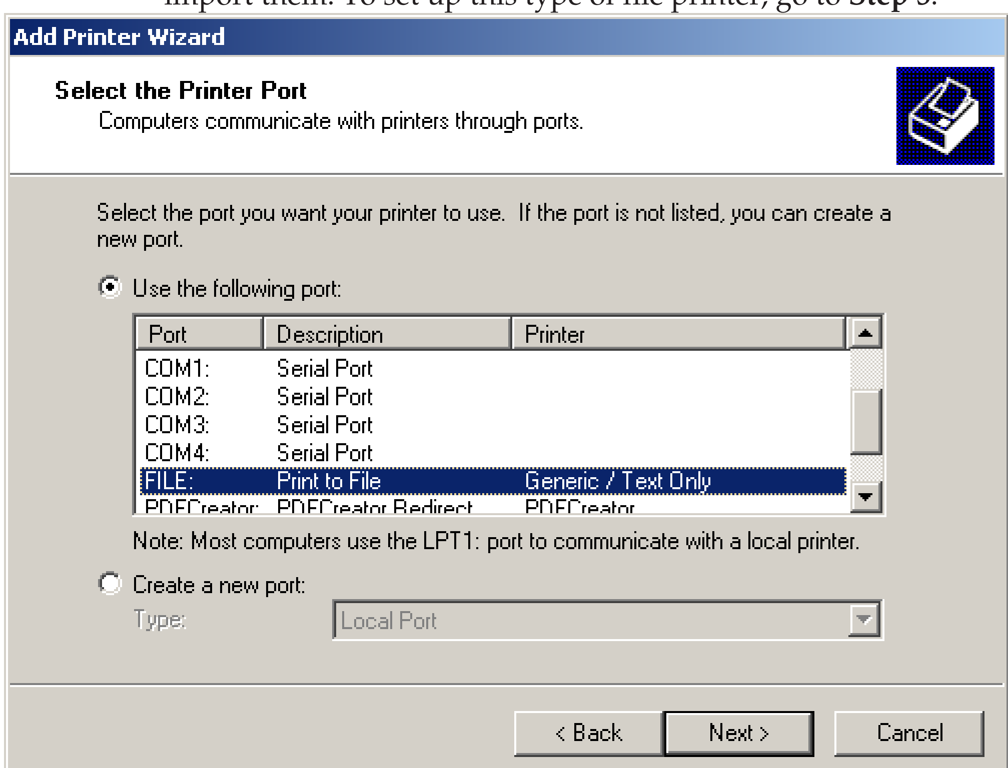


Figure 6: Selecting the File Printer

- Add a new port, which lets you predetermine the path and file name of the printer text file. However, you must import each text file before printing the next, or the new data overwrites the previous data. To set up this type of file printer, go to **Step 6**.

5 Set up a file printer with the File port.

5.1 The Use the Following Port box is selected. Scroll through the list and select File. See Figure 6. Then click Next.

5.2 In the Manufacturers list, click Generic.

5.3 In the Printers list, click Generic/Text Only, and then click Next.

5.4 In the Generic/Text Only window, click Keep Existing Driver, and then click Next.

5.5 In the Printer Name box, keep the default name or specify another name.

5.6 Make sure the Do You Want Windows-based Programs to Use This Printer as the Default Printer is set to No. Click Next.

5.7 Click Do Not Share this printer then click Next.

5.8 Set the Do You Want to Print a Test Page box to No. Then click Next.

5.9 When you finish adding the printer, click Finish. Go to **Step 7**.

6 Set up a file printer by adding a new port.

6.1 In the Select the Printer Port window, click Create a New Port.

6.2 In the Type box, use the drop down arrow to select Local Port. Click Next.

6.3 In the Port Name dialog box, specify the path for the reports to export, followed by the file name FILE.TXT. For example, you might type C:\DDMS\FILE.TXT. Click OK.

For the files to be accessible from a client machine, make sure that the folder you specify is a shared folder. (For more information on shared folders, see the heading **Creating a Shared Folder**.)

6.4 In the Manufacturers list, click Generic.

6.5 In the Printers list, click Generic/Text Only. Then click Next.

6.6 Make sure the Keep Existing Driver box is selected then click Next.

- **6.7** In the Printer Name box, keep the default name or specify another name.
- **6.8** Make sure the Do You Want Windows-based Programs to Use This Printer as the Default Printer is set to No. Then click Next.
- **6.9** Make sure Do Not Share this Printer is set to No and click Next.
- **6.10** Click No in the Would You Like to Print a Test Page box. Click Next.
- **6.11** When you finish adding the printer, click Finish.

7 From the Windows server desktop, double-click TBL Configuration.

8 In the TBL Config window, click Printer Definitions to highlight it.

9 With Printer Definitions highlighted, right-click to display Add New and click it.

10 In the Printer Definition window, click next to the **P** in the TBL Name field and specify the number to assign this printer. You must specify a unique number. If your system already has printers P1–P4, for example, make the file printer P5. To do this, type 5 after the P in the TBL Name field.

11 In the Network box, use the drop down arrow to select the printer you added earlier. (If you used our example, it's Generic/Text Only.)

12 In the Emulation box, use the drop down arrow to select PR.

13 In the Description box, enter the printer description, such as FILE PRINTER. Click **OK**.

14 Before you can create a file, you must close TBL Server and restart. ***This is a dedicated function.*** Make sure that all other users have logged off the system before you close TBL Server.

15 To export information, print a report as you normally would, with one exception: specify the file printer. (Using our previous example, where we defined P5 as the file printer, you would specify P5 to export a report.)

If you added a new port, the system automatically saves your information in file.txt, which is created in the folder you specified in **Step 6**. To import your file, go to **Importing a Text File into Excel**.

If you used the file port, at Output File Name, specify the path where to save the file as well as a unique file name. ***Make sure you add an extension of .txt.***

Note: The default path for these files is C:\Winnt\system32. To use this path, type a file name, such as report.txt, without a path.

Exporting Information as Database Files

You can export information from your Windows system as a database file, if the information can be generated from a Report Writer screen. (Report Writer screens use selectors; examples are the (N) and (R) screens, but not the (NR) or (RR) screens.)

1. Go to the screen where you normally print the report. Print the report as you normally would, with one exception: in the Prt field, instead of specifying a printer, type **S** and press Tab.
2. When you complete the last field in the screen, the prompt Save Print to File appears. Specify the file name to create and press Enter. See Figure 7. (You do not need to specify the .dbf file extension.)
3. Complete the report request as you normally would. The system creates a file from your report on your work unit. It has a .dbf extension.

   Go to **Importing a Database File into Excel**.

Importing a Text File into Excel

The following instructions explain how to import a text file containing information from your DDMS system into Excel. Importing text files into other Windows programs is similar.

Note: These instructions are for Microsoft® Excel 2000; other versions of Excel are similar, if not identical.

1. Open Microsoft Excel.

Figure 7: The Save Print to File Prompt

```
15:45:00           (R) INVENTORY SELECTORS   rev. (04/22/99)           03/31/00
Number     Report: R_CAT3                       Selector: R-CAT3
  1 =  * * * CLASSIC REPORTS * * *          SELECT THE CLASSIC R SCREEN WITH #1
  2 = BASIC INVENTORY SET-UP REPORT         SORT: 1-ITEM #, 2-CO.   NO LIMITS
  3 = ITEM CATALOG MASTER LISTING           SORT: 1-ITEM #, 2-CO.   NO LIMITS
  4 = ITEM ALIAS MASTER LISTING             SORT: CUSTOMER NAME     NO LIMITS
  5 = ITEM CATALOG: O/O, O/H, B/O           SORT: 1-ITEM #, 2-CO.   NO LIMITS
  6 = ITEM CATALOG: COST, PRICE, MARGIN     SORT: 1-ITEM #, 2-CO.   NO LIMITS
  7 = ITEM CATALOG: AVG, REPLACE, PRICE     SORT: 1-ITEM #, 2-CO.   NO LIMITS
  8 = ITEM PRODUCT LABELS W/LIST PRICE      SORT: 1-ITEM #, 2-CO.   NO LIMITS
  9 = ITEM PRODUCT LABELS W/BIN LOCATIONS   SORT: 1-ITEM #, 2-CO.   NO LIMITS
 10 = ITEM SHELF LABELS                     SORT: 1-ITEM #, 2-CO.   NO LIMITS
 11 = ITEM SHELF LABELS W/QUANTITY BREAKS   SORT: 1-ITEM #, 2-CO.   NO LIMITS
 12 = LOW STOCK WHOLESALER REPORT-MIN/MAX   SORT: ITEM #,CO.,LIMIT: NEEDED ITEM
 13 = LOW STOCK WHOLESALER REPORTS-CYCLE    SORT: ITEM #,CO.,LIMIT: NEEDED ITEM
 14 = INVENTORY EXTENDED DOLLARS            SORT: 1-ITEM #, 2-CO.   NO LIMITS
 15 = INVENTORY USAGE REPORT                SORT: 1-ITEM #, 2-CO.   NO LIMITS
 16 = CONTRACT REPORT                       SORT: 1-CONTRACT #, 2-ITEM #, 3-CO.
 17 = CONTRACT REPORT FOR CUSTOMERS         SORT: 1-CONTRACT #, 2-ITEM #, 3-CO.


Lowstock [          ] Weeks [10] Dpt Pricing (MN WX PQ) [P] Up Qty [ ] Up Rec[ ]
[6 ] Selector  Totals Only :N Loc :   Prt :S  Copies :  1 Recs :      Chain :
SAVE PRINT TO FILE [ITEMLIST  ] (NO PRINT)
```

2 Click File then Open.

3 In the Open window, use the drop down arrow in the Files of Type box to select Text Files.

4 Navigate to the folder containing your text file.

5 Double-click the file name to open the Text Import Wizard.

6 In the Original Data Type box, click Fixed Width.

7 The bottom portion of the window shows what each row of the file contains.

   Determine the top row to include. DDMS recommends selecting the row containing the column headings, since they'll make it easier to define column breaks, which you'll do in the next step.

8 In the Start Import at Row box, specify the top row to import. You do this by entering the number of the line for which to start the import. Click Next.

9 In the next window, adjust the column breaks:

   • To add a column break, click to the right of the column heading.

   • To delete a column break, double-click it.

   • To move a column break, click and drag it.

   When you finish adjusting the column breaks, click Next.

10 In Step 3 of the Text Import Wizard, click General and then click Finish. Your data is now displayed in an Excel spreadsheet.

Importing a Database File into Excel

The following instructions explain how to import a database file containing information from your DDMS system into Excel. Importing database files into other Windows programs is similar.

Note: These instructions are for Microsoft® Excel 2000; other versions of Excel are similar, if not identical.

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1 Open Microsoft Excel.

2 Click File then Open.

3 In the Open window, use the drop down arrow in the Files of Type box to select dBase Files.

4 Navigate to your DDMS work unit.

5 Double-click the file name to open in Excel.

6 The majority of the data appears in a single column. Click the column heading to select the entire column. (Column headings are lettered: A, B, C, and so forth.)

7 From the Data menu, click Text to Columns to open the Convert Text to Columns Wizard window.

8 In the Original Data Type box, click Fixed Width. Click Next.

9 In the next window, adjust the column breaks. To do this, scroll down in the Data Preview window until you see the report's column headings. Then adjust the column breaks so each heading has its own column. To do this, follow these steps:

- To add a column break, click to the right of the column heading.
- To delete a column break, double-click it.
- To move a column break, click and drag it.

When you finish adjusting the column breaks, click Next.

10 In the next window, click General and then click Finish.

11 At the Do You Want to Replace the Contents of the Destination Cells prompt, click OK.

Note: The column that originally contained the majority of the data retains its original width, so at first it may be all that you see. Drag one of its borders to make it a manageable width.

Creating a Shared Folder

You probably need to save reports in a shared folder on your drive.

1 Determine where to create the new folder.

2 Click the My Computer icon on the Windows desktop and select either the C:\ or D:\ drive.

3 Right-click anywhere on the page and select New. Select Folder from the menu.

4 A new folder is created with the name New Folder. To name the new folder, right-click it and select Rename.

5 To share the folder, right-click the folder and select the Sharing and Security option.

6 When the folder Properties window opens, select the Share This Folder option.

7 To share this folder with all users that have access to the network, click Apply at the bottom of the Properties window.

8 Click OK to close the Properties window.

Using SQL Reporting

The new Preview Reports function in the Report Menu is designed to allow both new and experienced users to easily view and print SQL reports. Information is displayed in an Excel-style grid with columns that can be fully customized using sorts and limits.

In this handout, we'll discuss the basics of printing and emailing a report. For more information on SQL Reporting, refer to DDMS online help.

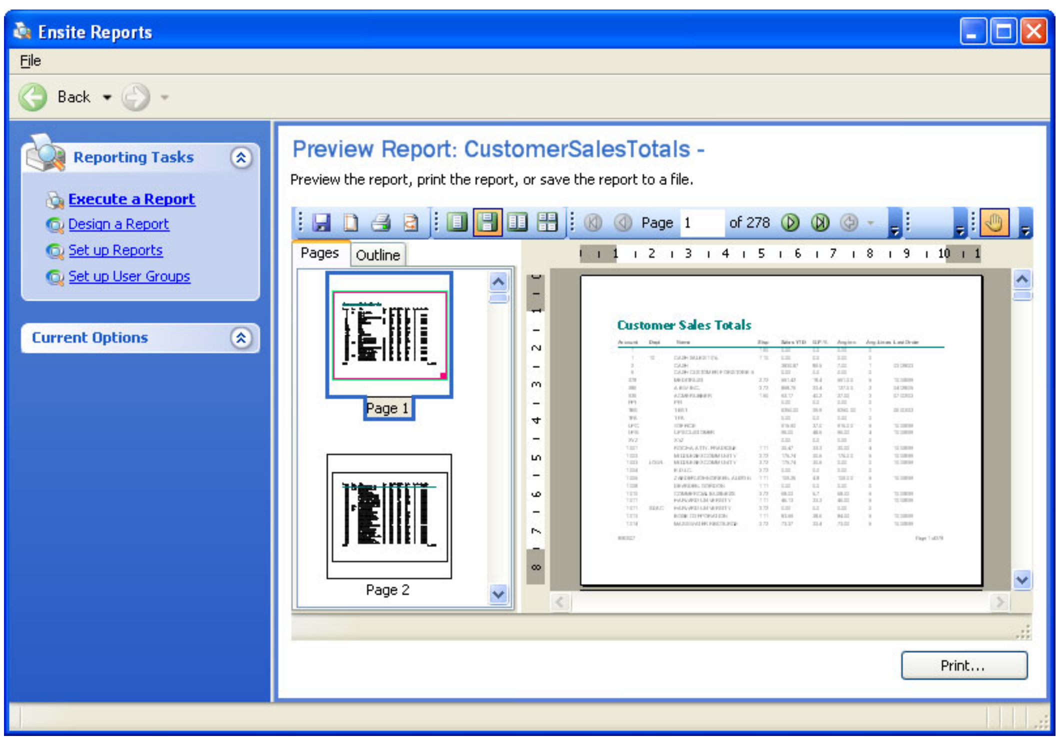
Previewing the Report

In the Preview Report window, you can preview the report, print the report, or save the report to a file. See Figure 8.

Every time the client clicks print or preview, the system queries data on the server and brings back all the data to the client and formats it on the client machine.

- Set up your page just like you would in any other program, such as portrait or landscape
- Change the view from Single Page, Continuous, Pages Facing, and Pages Facing Continuous

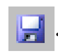
Figure 8: The Preview Report Window



- Use the Find function to search for text
- Move through the pages using the arrow keys or the scroll bar
- Zoom in to view the report more clearly and use the hand icon to move the zoomed picture to a particular location on the report
- Print reports or export to a file.

1 Click Preview Reports.

2 In the Print Preview window, you can print or save to a file.

To export to a file, click . You can save the file as a pdf, htm, rtf, xls, or emf.

To print, click . If you select print, you can print to any local printer or any printer you have access to on your network.

3 Once you save a report to one of these formats, you can manipulate data and print as needed from other applications such as Excel. You can email the report by attaching the file to an email as you normally would.