



*Implementing
eNsite:
Are You Ready?*



eCommerce Industries, Inc.



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Welcome to eNsite

Congratulations! Your investment in the Silver Plus eNsite 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, Silver Plus 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 already loaded on your eNsite system when it arrives. You can access it by clicking the LGS icon on your desktop.

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. With her help, you'll also compile a training calendar. 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 email at training@ddms.com.

Convenient Training

An integral part of learning to use your eNsite 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. Click **Training** and **Virtual Classes**.

Practice

The goal of all this training is to "go live": to use your Silver Plus eNsite system for daily business transactions. Practice is the key to quickly implementing the system. The eNsite 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

In order 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 DDMS Training at (682) 831-9915.

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

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

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

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

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 system.

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 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 specialty customers: Cash, National Drop Ship, and so on.

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

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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 web site.

Inventory Database

- Load inventory database. *Do spot checks of 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 live quantities before going live.
- 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 system updates the history boxes.
- Understand allocate, backorder, and on order. Understand how those inventory boxes are updated by the system.
- Be familiar with the various inventory reports available: Item 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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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.
- Change the item's quantity, price, and cost by clicking in the box 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-mouse 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.

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Changing an order will 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.

Order Entry Changing and Deleting Application

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

Order Entry Verifying Application

- 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 Verifying section of the LGS program.

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Practice posting by selecting individual invoices in the Accounts Receivable window. Also, select invoices to pay by long P/O number, and by invoice date.

View totals for all batches and a specific batch.

The first three topics do not apply to ASP systems.

You can print the day-end and month-end procedures from the www.ddms.com web site.

Accounts Receivable (A/R) Application

- Send accounts receivable information to O/PUS to be converted. Or you can manually load all customer invoices. *If you convert, confirm that all account totals are correct.*
- Be familiar with how you will send statements. Test the format you'll use.
- Print statements from the (OR) Accounts Receivable Reports screen.
- Practice posting payments.
- Post invoice adjustments in the Accounts Receivable Post/Change tab.
- Understand accounts receivable batch numbers.
- View batch totals in the Accounts Receivable Batch Totals tab.
- Print an A/R Batch Report and understand the information shown.
- Release accounts receivable batches and understand why they must be released and when this procedure should be done.
- Print an A/R Trail Balance Report in the (OR) screen.

I have completed the Accounts Receivable section of the LGS program.

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General System Preparation

- Be familiar with the TBL Configuration on your server..
- Set up all users, printers, modems through TBL Configuration.
- Be familiar with the TBL Server, and know how to start it, if necessary.
- Log in and run eNsite software on each workstation.
- Test all preprinted form documents, including invoices, pick tickets, statements, A/P, and payroll checks.
- Understand all backup, day-end, and month-end procedures. *Complete and fax a proc request form for both your day-end, and month-end procedures.*

I have completed the General System Preparation 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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