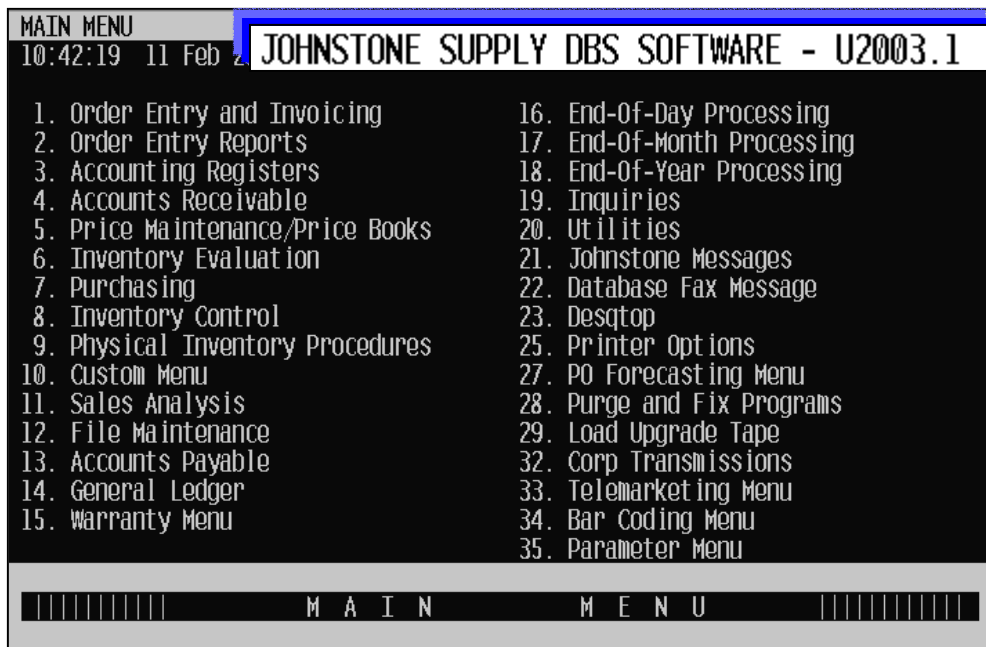# UPGRADE DOCUMENTATION

You will find a release version in the upper-right hand corner of your Main Menu screen. The release number (2003) is the year, the .1, .2, .3 etc… is the release version.

```
MAIN MENU
10:42:19  11 Feb 2    JOHNSTONE SUPPLY DBS SOFTWARE - U2003.1

  1. Order Entry and Invoicing      16. End-Of-Day Processing
  2. Order Entry Reports            17. End-Of-Month Processing
  3. Accounting Registers           18. End-Of-Year Processing
  4. Accounts Receivable            19. Inquiries
  5. Price Maintenance/Price Books  20. Utilities
  6. Inventory Evaluation           21. Johnstone Messages
  7. Purchasing                     22. Database Fax Message
  8. Inventory Control              23. Desqtop
  9. Physical Inventory Procedures  25. Printer Options
 10. Custom Menu                    27. PO Forecasting Menu
 11. Sales Analysis                 28. Purge and Fix Programs
 12. File Maintenance               29. Load Upgrade Tape
 13. Accounts Payable              32. Corp Transmissions
 14. General Ledger                 33. Telemarketing Menu
 15. Warranty Menu                  34. Bar Coding Menu
                                    35. Parameter Menu


||||||||||        M A I N        M E N U        ||||||||||
```

Menu 1   **Order Entry and Invoicing**

Enhancements to the Quote Fax Program

1.17 – Fax Quotes

This function requires the Desqtop program. If you already have Desqtop loaded on your computer, the first prompt is

ENTER RELEASE NUMBER (S): (11N) SEPARATED BY (;), OR **END**:?

Step 1   Enter the release number.
Step 2   Choose '*i*' for immediate, or '*o*' for overnight transmission when rates are lower and the receiving fax machine is not busy.
Step 3   Enter the customer fax number manually, or press **Enter** for the customers default fax number. Set the default fax number in Customer Master Maintenance, Menu 12.2.2.2, Field 11.
Note: If the fax number dialed is a local call based on the dialing location of your Desqserver modem, it is not necessary to enter an area code in Field 11, (ex. some local exchanges now require 10-digit dialing for local numbers. Check with your phone company regarding the specifics for your area).
Step 4   Enter your operator code to have your name print on the cover sheet, or press **Enter** to use the name of the operator who entered the order.
Step 5   Enter the number of days to honor the quote
Step 6   Enter the recipients name at the "attention name" prompt, or press **Enter** to use the default Authorized Buyer name from the order.
Step 7   Enter your user ID or press **Enter** to use Desqtop ID of the last person to use this port. (*Note: must have a valid Desqtop ID to fax).*
Step 8   Enter any special messages (type '*y*') to appear on the cover sheet. Messages are free form and are not limited in length.
When done entering special message(s), press **Esc,** then select '**S'ave**.
The fax is filed in the DQ fax queue and sent at the appropriate time.
Confirmation of the fax appears in your DQ mailbox.

Menu 7   **Purchasing**

Auto Create/Print Backorder Releases for Today's Receiving

7.22.10 - Auto Run Steps 1, 3 & 4

This program will run; 7.22.1-*Allocation Report*, 7.22.3-*Auto Create Backorder Releases* and 7.22.4-*Auto Print Backorder Releases.*

Items which have been received since the last End-of-Day, will be allocated and a pick ticket will be printed.

Service Experts Sales Report

11.14 - Service Experts Sales Report (FT only)

The following instructions are provided to assist in creating reports. This is only a temporary solution. A future upgrade will provide an exact spreadsheet for this report.

1) Run Report - Service Experts Sales Report (FT only)
    a) Menu 11.14
    b) Enter the Company number or <enter> to combine all companies on one report.
    c) Enter the beginning date for which to include sales information.
    d) Enter the ending date for which to include sales information.
    e) Continue with steps previously documented in the January 2003 User Bulletin.

Add Email Address to Mailer Maintenance

Menu 12.2.37.1 Mailing List Maintenance

New field #20 for email address in Mailing List Maintenance. This field is for informational purposes only.

Paperless End-of-Day Reports

16.5 EOD Report Xref Maintenance and 16.6 EOD Report Xref File Listings

Enable users to distribute day-end reports in a variety of ways including multiple printers, email. This will also allow the user to assign a No Print option to selected reports.
Implementation:
1. Print Menu 16.6. EOD Report Xref File Listing. This will list reports with corresponding identification numbers (EOD.XREF ID).
2. Menu 16.5. EOD Report Xref Maintenance. Enter the company #, dash, report ID (01-102) – The Report Name, Printer # and number of copies will automatically display.

Select a line number to change or maintain.
Line 1: RPT.NAME – Current default report name.
Line 2 – 5 Email Add – Up to four different email addresses may be added for each report.
Line 6 Printer # - To select more than one printer, enter printer number separated by a ';"
(printer#….0;1) will print the selected report on both printer 0 and printer 1.
Line 7 No. Copies – Number of copies of the selected report to be printed.

Initially, both Day-End procedures will run, in order for each store to verify the outcome. When you are comfortable with the outcome of the "paper-less" day end, go to menu 12.1.1 and change the printer # in field 38 to 'HS'. This will suppress the printing of your current day-end reports.

• **The paperless EOD reports will need to be set for all companies**.

```
EOD.XREF ID        --------- (Enter CO#-rpt# )
1. RPT.NAME....:
2. Email.Addr1.:
3. Email.Addr2.:
4. Email.Addr3.:
5. Email.Addr4.:
6. Printer#....:              (N=don't print, separate prt#'s by a ';')
7. No.Copies...:
```

Display of Corp Packing List Carton Numbers

19.6 – Stock Status

When an item that is on order from Corp. has been shipped, there will be an 'X' next to the On Order quantity.

To view information about the shipment type 'PO' <Enter> to display the Open P/O by Item Screen, (menu 19.13). From this screen the ship date and carton number (displayed in the REC column) may be viewed.

19.6 – Stock Status

Discontinued items with stock on hand have been added to the WEB stock status option.

Search and Print from Spooler

20.30 - Search Spooler

This new program lets you search the spooler by scrolling through all the reports or by typing in a portion of the heading for the report you need to print.

First, select the printer you want to re-print the report to.

Next, enter a portion of the report heading or press <enter> to see all of them.

Press <enter> to scroll through the list until you find the report you want.

Make note of the PEQS number.

Continue pressing <enter> until you reach the end of the list, where it will ask for the hold entry number to print.

Enter the PEQS number here and press <enter>

Corp On-line Catalog Reports

35.20.31 Internet Order Rpt

This report is a log of orders placed online. It is also run by date range. It gives the following information:

- ♦ Company Number
- ♦ Order Number
- ♦ Customer Name
- ♦ Customer Number
- ♦ Order Date
- ♦ Product(s) ordered
- ♦ Order Qty
- ♦ Invoiced Qty
- ♦ Price
- ♦ Total

<u>35.20.32 Price Check Rpt</u>
This report is based on items for which the price was requested, but not purchased online. You have the same options as the above report, plus a company number option to run it for only one branch. The information provided in the report includes:

- ♦ Customer Name
- ♦ Customer Number
- ♦ Store Number the P&A was checked for
- ♦ Item checked
- ♦ Quantity that was available
- ♦ Price given
- ♦ Date checked
- ♦ Time checked

This is intended for following up with customers who are looking at prices but not ordering.

Logon Screen   **Big 'J'**
New DST Phone Number
Changed the DST phone number on the Logon Screen.

```
JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ   JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ       JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJJJJJJ         JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJJJJJ          JJJJJJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJJJJ    JJJJJJJJJ     JJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJJJ        JJJJJJJ        JJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJ          JJJJJJJ        JJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJ            JJJJJJJ        JJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJ              JJJJJJJ        JJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJ                JJJJJJJ        JJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJ                  JJJJJJJ        JJJJJJJJJJJJJJ
JJJJJJJJJJJJJ                    JJJJJJJ        JJJJJJJJJJJJJ
JJJJJJJJJJJJ        JJJJJ    JJJJJJJ              JJJJJJJJJJJJ
JJJJJJJJJJ       JJJJJJJJJ   JJJJJJJ              JJJJJJJJJJJ
JJJJJJJJJ        JJJJJJJ  JJJJJJJJ                 JJJJJJJJ
JJJJJ             JJJJJ JJJJJJJJJ       (R)              JJJJJ
JJJ                                                    JJJ
JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ
JJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJJ

              DATABASE STORE SUPPORT TEAM   (503)419-9139  ←
```

Contact Store Support if the new number is not on your logon screen.
(503) 419-9139

Main Menu
New TCL Command
New TCL command to resend previous night's emailed EOD reports.
From the Main Menu, type 'X' and hit return
Type 'resend.email' and press return.
The emailed End-of-Day reports from previous day will be resent.

Menu 16   **End-Of-Day Processing**
New Paperless EOD Report Xref
16.5 EOD Report Xref Maintenance
The following EOD reports have been added to the EOD Report Xref.

01-160 – Open Drop shipment report
01-161 – Open Purchase Orders (Dropships)
01-162 – Follow-up Quote Report

Release Version U2003.3

Menu 1   **Order Entry and Invoicing**

Lookup Capability on Description line 2

         1.2 Order Entry

When looking up part numbers from Order Entry, you now have the capability to lookup with the first 5 characters of the 2nd description line.

This description will also be displayed in the lookup results screen.

Menu 4   **Accounts Receivable**

New Printer Select Option

         4.2.1 Daily Cash Receipts Journal

The Select Printer Option has been added to this menu selection.

Select 'HS' if you do not want to print, but want the Y*** option.

         4.2.8b Past Day's Cash Orders

The Select Printer Option has been added to this menu selection.

Widened Credit Limit Column

         4.3.34 Special Aging Report

Widened the credit limit field to 5 characters instead of 4. $10,000 credit limit now display as 10000 instead of 1000.

Menu 12   **File Maintenance**

Fax Number Field

         12.1.1 Company Maintenance

In preparation for Signature Capture, The fax number field (15) needs to be filled in with each companies fax number.

New Printer Specification for Month End Reports

         12.1.1 Company Maintenance

New Field #14 (PRNTR# EOM) Needs to have the printer number that you want your EOM Reports to go to. This is required because field #38 (PRNTR# EOD RPTS) will be HS for the Paperless End of Day.

New Password

         12.1.14 Processing Code/Password Maint

A password has been added to this menu. Please call DST for password.

New Printer Select Option

         12.2.32 Territory Maintenance List

The Select Printer Option has been added to this menu.

Menu 16   **End-Of-Day Processing**

File Statistics

         File Statistics are now going to be emailed to database support instead of faxed thru Desqtop

New Printer Select Option
  16.1 Invoicing End Of Day--Invoice Update
  The Select Printer Option has been added to this menu.

Corp Invoice Download
  16.1 Invoicing End Of Day--Invoice Update
  The Invoices are posted to the FTP server at corp. by 11:00 PM Pacific time.
  The End Of Day will download the invoices again at the end.
  If you are still not receiving your Invoices every day, consider using menu 16.2 to change your EOD wake-up time to a later time.

New Paperless EOD Report Xref
  16.5 EOD Report Xref Maintenance
  The following EOD report has been added to the EOD Report Xref.

  01-163 ROP Impact Report

Menu 19   **Inquiries**

New Stores Added to WEB Inventory
  19.1 Stock Status
  The following stores were added to the WEB inventory:
  Fresno, California
  Salinas, California
  Appleton, Wisconsin

  Due to the addition of the two California stores, it was necessary to split the WEST region into two categories. WEST 1 and WEST 2 (See Screen Shots on next Page.)

The WEST 1 region includes all stores previously in the WEST region that are outside of California

```
WEST-1                      STOCK STATUS INQUIRY            02/19/03  15:46:58
ITEM NO.          HAZ U/M ITEM DESCRIPTION        DISC  P/C    SUBSTITUTE ITEMS
B10-120             EA 083S DRYER                 N 317-01
BR# STORE LOCATION       ABC AVL OVS    BR# STORE LOCATION       ABC AVL OVS
MDC **MDC Memphis           576         189 UT Orem              C   6
PDC **PDC Portland          321           2 UT Salt Lake City    A  12
 40 AK Anchorage              2          80 WA Bothell           D   0
  7 ID Boise            A    6          208 WA Bremerton             0
 20 MT Billings         C    5            3 WA Seattle           D   0
167 MT Missoula         C    1            4 WA Spokane           B   2
243 UT Ogden            A   71           11 WA Tacoma                0
```

The WEST 2 region includes all California stores.

```
WEST-2                      STOCK STATUS INQUIRY            02/19/03  15:46:58
ITEM NO.          HAZ U/M ITEM DESCRIPTION        DISC  P/C    SUBSTITUTE ITEMS
D10-120             EA 083S DRYER                 N 317-01
BR# STORE LOCATION       ABC AVL OVS    BR# STORE LOCATION       ABC AVL OVS
MDC **MDC Memphis           576         192 CA Redding           C   0
PDC **PDC Portland          321          27 CA Sacramento        A  13
 32 CA Anaheim               36         140 CA Salinas               12
 21 CA Baldwin Park     A    3           34 CA San Bernardino    C   0
 97 CA El Cajon              31          24 CA San Diego             65
 43 CA Escondido             57          15 CA Santa Ana         A   2
 75 CA Fresno                 0         159 CA Santa Barbara     C   0
 68 CA Hawthorne        A   23           65 CA Sparks            A   6
 93 CA Long Beach       B    2           89 CA Stockton          A   6
 64 CA Modesto          A   17           33 CA Sun Valley        A  18
 22 CA Montebello       C    0          133 CA Thousand Oaks     C   0
 91 CA Northridge       A   22          112 CA Upland            A   4
145 CA Palm Desert      B    5          236 CA Valencia          A  16
125 CA Palmdale         C    0           81 CA Ventura           C   0
```

EOQ Displayed in Forecast Maintenance

27.5 Maintain Forecast

The EOQ is now being displayed in the Forecast Maintenance screen just to the right of the ROP

New Password

28.6 Clear Purchase Order File

A password has been added to this menu. The password is 'FIX'

NOTES _____ **Any Menu Path**
Product notes, customer notes, vendor notes, and purchase order notes will automatically
display when in Order Entry, purchase orders or stock status.

To ENTER NOTES type 'NOTES' at any menu path prompt (a prompt that requests a menu path).
　　　　Select 1 -　Product Notes
　　　　Select 2 -　Customer Notes
　　　　Select 3 -　Vendor Notes
　　　　Select 4 -　Purchase Order Notes

Product notes automatically display in Order Entry, Stock Status, and Purchase Order Entry.
Customer notes will display in the Order Entry Screen.
Vendor notes will display in Purchase Order Entry.
Purchase Order notes will show up in Purchase Order Entry.

Print List of Notes
To print a list of notes, type 'NOTES' at any menu path prompt (a prompt that requests a menu path).
Press 'P'rint
Select the printer to print to.
Select the type of notes to print.

```
PRINTOUT OF NOTES
    1. Products
    2. Customers
    3. Vendors
    4. Purchase Orders
ENTER 1 2 3 OR 4 ?_
```

Main Menu _____ **TCL Commands**
Program to alter data in multiple value warehouse locations

CALL DST BEFORE USING THIS FUNCTION!!!!!
Type ALTER.VALUE at TCL.

```
: ALTER.VALUE

FILE NAME...... PROD.DET
ATTRIBUTE...... 9
VALUE.......... 2
SUBVALUE....... 0
NEW DATA....... SR3
SAVE-LIST/'ALL' LR

COUNT:
```

Print customer fax number on Pick/Packs

Menu 1.2 Order Entry/Invoicing
When printing a pick/pack the customer fax number will be displayed below the sold to address. The fax number that prints is from the customer master (12.2.2.2) field #29 (Purchasing fax number.) If #29 is blank then it will print what is in field #11 (accounting fax number).

Convert a quote done in one branch to an order in another branch or customer.

Menu 1.37 Copy Quote to Company/Customer
This will allow you to convert a quote done in one branch to another branch or another customer. This is beneficial when quoting multiple items to multiple customers because you will not have to re-type the quote.

Enter the quote number (8N) you want to convert.
Select option #1, Company, if you want to copy to another store or select option #2, Customer, if you want to copy to another customer.
Enter the company (2N) or customer number that you want to copy the quote to.
Confirm the transaction (Y/N). You will then be informed of the new quote number.

Example of copying to another company:

```
PROGRAM TO COPY QUOTE TO ANOTHER STORE OR CUSTOMER

ENTER QUOTE NUMBER (8N) 01101454

COPY OPTIONS:
1. COMPANY
2. CUSTOMER
ENTER OPTION (1 OR 2) 1

ENTER COMPANY NUMBER TO COPY TO OR 'END' TO QUIT 02

QUOTE 01101454 WILL BE CONVERTED TO QUOTE 02200328

CONFIRM (Y/N)?
```

```
PROGRAM TO COPY QUOTE TO ANOTHER STORE OR CUSTOMER

ENTER QUOTE NUMBER (8N) 01101454

COPY OPTIONS:
1. COMPANY
2. CUSTOMER
ENTER OPTION (1 OR 2) 2

ENTER CUSTOMER TO COPY TO OR 'END' TO QUIT 242

QUOTE 01101454 WILL BE CONVERTED TO QUOTE 01101475
FOR CUSTOMER 242 DON LENTZ HTG AND CLG

CONFIRM (Y/N)?
```

Training Tip: When entering a quote number in Menu 1.2. always enter a "Q" before the six digit quote number. Example:

```
OPERATOR CD:        STORE SUPPORT TEAM

COMPANY NBR:        01

ORDER NUMBER:       Q101454_

CUSTOMER NBR:
```

Customer fax number appears in order entry.

Menu 1.2 Order Entry

The customer's fax number is now displayed in field #8 of the Order Entry Header screen. The fax number displayed is from Customer Master Maintenance Menu, 12.2.2.2, field 11.

```
 1. AUTH BUY
 2. REQ DATE   04/04/03
 3. DISCOUNT%
 4. CUST PO#
 5. SALESMAN   000 -
 6. A/R TERMS  12 - 1% 10TH/25TH:NET30
 7. ORD SRC
 8. FAX #      319-366-4900
 9. CERTIFY#
10. SPEC INST  MUST HAVE A PO#   !!
11. CRED CARD
12. OMEG CERT
```

Standard Pack Prompts in Order Entry

Menu 1.2 – Order Entry
This feature prevents items that are sold in standard packs only to be invoiced in non-standard pack quantities. AND products that can be sold individually, but are packed in quantities and sometimes get sold as one (Examples: B10-128 C&D access fittings, or batteries.)

First identify the products you will only sell in standard packs. Then in product master (12.3.2.2) field 2 (DESC2) enter '@SP' followed by the standard pack quantity.
(Example: @SP6) for 6. (You always start the line with @SP)
Now in Order Entry when you try to invoice a quantity that is not in increments of the standard pack quantity, you will get the following message:

Product has standard pack of 2. ACCEPT (Y***/<Enter>)?

Change serial numbers after Day End

Menu 1.4 Fix Serial Numbers after Day-end
To change a serial numbers after an release has gone through an end-of-day.
Select menu 1.4, enter the release number (11N), enter the old serial number, and at the next prompt, enter the correct serial number.

```
ENTER RELEASE NUMBER (11N) ?01071361001

A.PROD.NO            SERIAL NUMBERS
H25-193              291590

ENTER OLD SERIAL NUMBER ?291590

ENTER NEW SERIAL NUMBER ?h245587
```

Additional information displayed when faxing an invoice or quote

Menu 1.16 Fax Invoices and Menu 1.17 Fax Quotes

Customer number, customer name, invoice/quote date and total dollar amount will display when faxing an invoice or quote.
Start by entering the release (11N) /quote (8N) number you want to fax.
Confirm (Y/N) that you have the correct release number, and then follow the prompts as before.

Fax Invoice Example:

```
Enter Release number(S): (11N) separated by (;), or END:?01070781001
2678 COBBLESTONE COURT APTS 04/01/03 37.24
CONFIRM (Y/N) ?_
```

Fax Quote Example:

```
Enter Quote number(S): (8N) separated by (;), or END:?01101454
444 HUDSON HDWRE PLBG & HTG 03/19/03 496.48
CONFIRM (Y/N) ?
```

New message when entering a part that this customer already has on another order.

Menu 1.2 Order Entry
The message 'This item is still open on order 01######. Accept (Y***/<Enter>).' will appear in order entry if entering an item that the customer already has on order.

```
=============================================================SUBTOTAL >
    --ITEM NUMBER--   -------QUANTITIES-------   --------PRICING--------==========
LN    DESCRIPTION    ORDER INVCD  PICK     B/O    PRICE DISC%     DPRICE  TX PH RT
001 B14-083########




















This item is still open on order 02249402. Accept (Y***/<Enter>):
```

Customer Ranking

Menu 1.2 Order Entry
Customers will be ranked according to sales dollars, this ranking will display in Order Entry.
To enable this feature enter 'Y' in Menu 35.1 screen3, field 5. Customers are ranked as an 'A' if sales dollars are greater than $10,000/yr, 'B' if sales dollars are $5,000-$9,999, 'C' if sales dollars are $1,000-$4,999, 'D' if sales dollars are less than $1,000, and 'N' if the account is less than a year old and sales dollars remain under $5,000. This ranking is updated monthly during EOM. Each customer will be ranked based on total purchases from all branches.
        Call DST to disable this message, either system wide or for selected customers.

```
             ORDER ENTRY PARAMETER MAINTENANCE - SCREEN 3


    1. DISPLAY STOCK STATUS AFTER ENTERING A PRODUCT         N
    2. DISPLAY HEADER SCREEN 1ST ON EXISTING ORDERS          Y
    3. ALLOW UPDATE OF OMEGAFLEX CERTIFICATION IN OE          Y
    4. ALLOW UPDATE OF AVAILABLE QUANTITIES ON BACKORDERS     N
    5. ALLOW DISPLAY OF CUSTOMER ABC RANKING                 Y
```

New print option to choose a specific product on Contract Prices Below Minimum GP% Report

Menu 5.21 Contract Prices Below Minimum GP%
An option has been added to allow you to choose a specific product.
Start by going to menu 5.21, select which cost you would like to use (1. Branch, 2. Average, 3. Direct)

```
           CONTRACT PRICES BELOW MINIMUM GROSS PROFIT PERCENT



     PLEASE CHOOSE COST TO COMPARE CONTRACT PRICES AGAINST:

          1. BRANCH COST
          2. AVERAGE COST
          3. DIRECT COST
          PLEASE ENTER SELECTION OR 'END' TO END:
```

Then select #3 print product. Enter the warehouse you want to look at. Enter the product number(s) you would like, then enter the minimum GP% you want.

```
      1. PRINT CUSTOMER
      2. PRINT CONTRACT
      3. PRINT PRODUCT


      PLEASE ENTER SELECTION OR 'END' TO END: 3


ENTER WAREHOUSE NUMBER: 001

ENTER PRODUCT NUMBERS SEPARATED BY ';' OR <CR> FOR ALL: B10-120;B10-121

PLEASE ENTER ACCEPTABLE MINIMUM GROSS PROFIT PERCENT: 35_
```

New program to update contract prices from quote

Menu 5.28 Update Contract Prices from Quote
Select menu 5.28, enter the quote number to be converted (8N), and then enter the contract expiration date. A contract will then be created for the customer. This conversion updates the each price. Quantity breaks will have to be entered manually.

```
PROGRAM TO UPDATE CUSTOMER CONTRACT FILE FROM A QUOTE

ENTER QUOTE NUMBER (8N) ?01101454

ENTER CONTRACT EXPIRATION DATE (MM/DD/YY) ?03/29/04
```
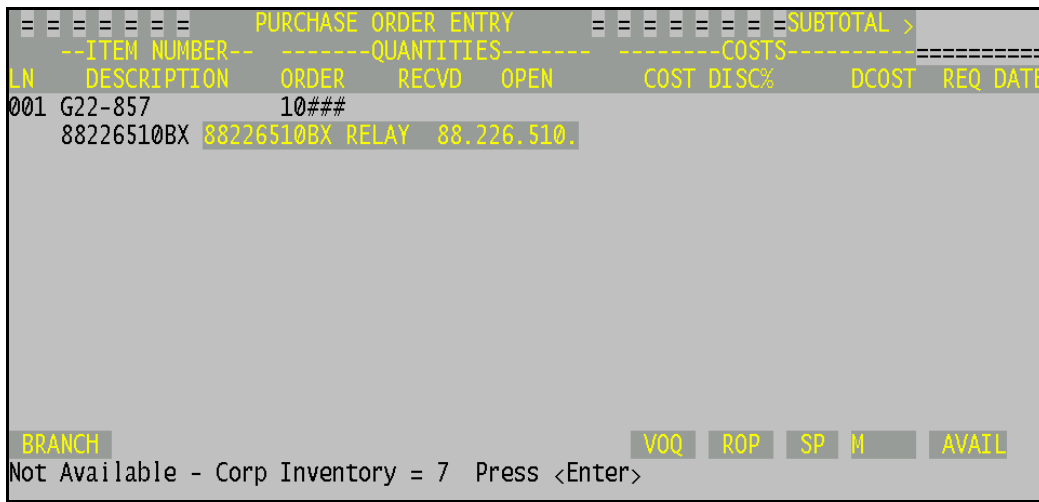
New warning message when inadequate qty avail at corp.

Menu 7.1 Purchase Order Entry & Edit
When creating a purchase order for Corp. the message '*Not available – Corp inventory = X. Press <enter>*' will display when the quantity available in your default Corp. warehouse is less than the quantity ordered on the purchase order.
In addition, when you are finished with the PO, it will ask you if '*you want to check this PO for available stock at Corp.*' If you say 'Y'es, it is ONLY going to display those items for which the quantity ordered is greater than the available qty at your default Corp. warehouse.
This comparison is performed by using the 'Web' quantity and accuracy will depend on the time of the latest transmission.

```
= = = = = = =         PURCHASE ORDER ENTRY       = = = = = = = =SUBTOTAL >
    --ITEM NUMBER--  -------QUANTITIES-------  --------COSTS----------==========
LN     DESCRIPTION    ORDER    RECVD    OPEN       COST DISC%      DCOST   REQ DATE
001 G22-857          10###
    88226510BX 88226510BX RELAY   88.226.510.




                                              VOQ   ROP   SP  M       AVAIL
 BRANCH
Not Available - Corp Inventory = 7  Press <Enter>
```
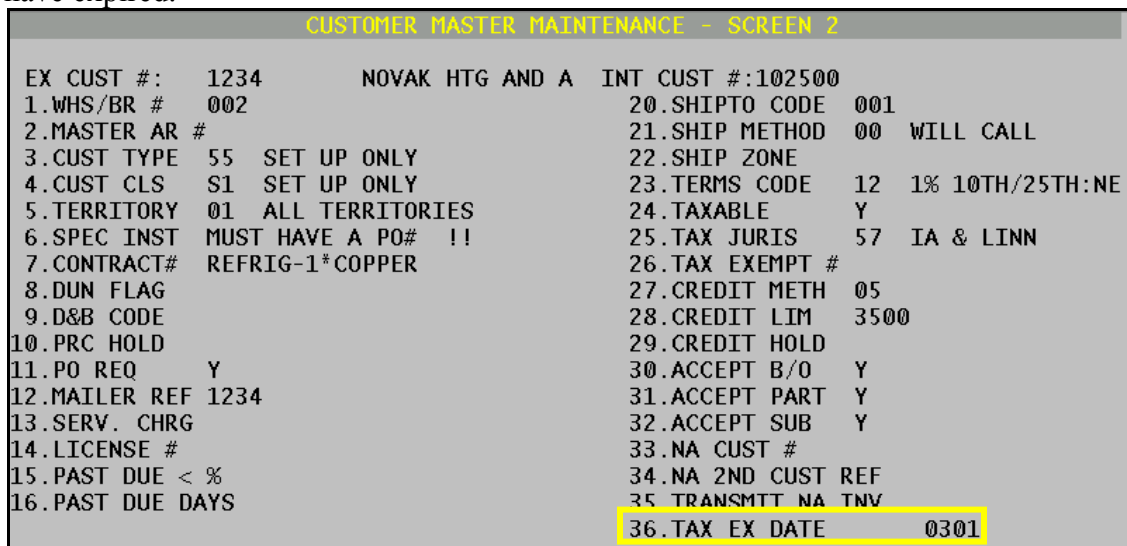
Sales Tax Expiration Dates

Menu 12.2.2.2 Customer Master Maintenance
In screen 2 of Customer Master Maintenance (M 12.2.2.2), enter the expiration date (YYMM) of the sales tax exemption number in field #36.
A report, Tax Exempt Expirations, will print during month end showing all exemption numbers that have expired.

```
              CUSTOMER MASTER MAINTENANCE - SCREEN 2

 EX CUST #:   1234       NOVAK HTG AND A  INT CUST #:102500
 1.WHS/BR #   002                         20.SHIPTO CODE   001
 2.MASTER AR #                            21.SHIP METHOD   00  WILL CALL
 3.CUST TYPE  55  SET UP ONLY             22.SHIP ZONE
 4.CUST CLS   S1  SET UP ONLY             23.TERMS CODE    12  1% 10TH/25TH:NE
 5.TERRITORY  01  ALL TERRITORIES         24.TAXABLE       Y
 6.SPEC INST  MUST HAVE A PO#  !!         25.TAX JURIS     57  IA & LINN
 7.CONTRACT#  REFRIG-1*COPPER             26.TAX EXEMPT #
 8.DUN FLAG                               27.CREDIT METH   05
 9.D&B CODE                               28.CREDIT LIM    3500
10.PRC HOLD                               29.CREDIT HOLD
11.PO REQ      Y                          30.ACCEPT B/O    Y
12.MAILER REF 1234                        31.ACCEPT PART   Y
13.SERV. CHRG                             32.ACCEPT SUB    Y
14.LICENSE #                              33.NA CUST #
15.PAST DUE < %                           34.NA 2ND CUST REF
16.PAST DUE DAYS                          35 TRANSMTT NA TNV
                                          36.TAX EX DATE       0301
```

On demand file maintenance history listing

Menu 12.7 File Maintenance History
Changes to file maintenance will now compile into a permanent file that can be reviewed and accessed indefinitely. This file will contain the same information that prints on EOD reports. You can specify whether you want to see changes made to a product record, a customer record or a vendor record.

Example: Product record changes

```
FILE MAINTENANCE HISTORY LIST


FILE OPTIONS:
   1. CUSTOMER
   2. PRODUCT
   3. VENDOR
ENTER 1 2 OR 3 ?_
```

```
MSTATUS-LOG   231360
  FILE.NAME    PROD.MAST
  DATE         04/30/03
  TIME         10:43AM
  INT.KEY      100875
  EXT.KEY      b10-120
  DICT.NAME    DESC.1
  OLD          083S DRYER
  NEW          1
  OPER         STORE
```

Certification field now accepts anything

Menu 12.2.2.9 OmegaFlex Certification Maintenance
Certification field now accepts any entry (previously only the date was acceptable)

Individual customer item numbers in order entry

Menu 12.2.17 Maintain Customer Item Numbers
This program stores and displays individual customer item numbers for each of our part numbers.
To enter the customer item numbers select Menu 12.2.17. Enter the customer number, enter the Johnstone part number, it will say "Not on file. Is this a new item? (Y/CR)" select Y, then enter the item number the customer uses. After entering these part numbers you can use either the Johnstone number or the customer item number in order entry. The customer item number will be displayed below the Johnstone number.

```
                    CUSTOMER ITEM MAINTENANCE

CUSTOMER:        242----------              PO BOX 1465
                 DON LENTZ HTG AND CLG
PRODUCT:         B10-120-------------       WATERLOO IA 50704
                 083S DRYER


1. CUSTOMER ITEM#        RE2005
```

Order entry example:

```
========================================================SUBTOTAL >      7.15
    --ITEM NUMBER--   -------QUANTITIES-------   --------PRICING--------==========
LN    DESCRIPTION   ORDER INVCD  PICK    B/O   PRICE DISC%     DPRICE  TX PH RT
001 B10-120            1          0      1    7.15              7.15  N  N
    083S DRYER
002 M
    CUST# RE2005
003 ##############
```

Menu 12.2.18 – Copy Cust Item#s to another Cust
This menu will allow you to copy customer item numbers from one customer to another customer.

```
Copy customer part numbers from one customer to another

Enter customer number to copy from ?242

Enter customer number to copy to ?998_
```

Menu 13   **Accounts Payable**
New AP check search lookup options

Menu 13.5 Vendor Payables Inquiry
Add options to AP check search. Select 'C' to look up by check number. Select 'V' to look up by voucher number.

Lookup feature added to A/P Maintenance

Menu 13.20.1 Accounts Payable Voucher Input
Menu 13.20.2 Purchase Order Receipts Upd to A/P
 The 'L' (lookup) feature was added to A/P Maintenance - G/L Distribution - Screen 1 (accessed through 13.20.1.field 15 or 13.20.2.field15). Type an 'L' in the G/L Distribution Field, enter the first digits of the account you are looking up, then select the line of the account you want.

Bug Fixes

Menu 13.20.1 Accounts Payable Voucher Input
Menu 13.20.2 Purchase Order Receipts Upd to A/P
This was a fix so the due date will not change back to default when changing the discount to zero.

Menu 13.20.2 Purchase Order Receipts Upd to A/P
When doing payables through 13.20.2 the discount amount now shows the first time through.

New indicator when a check has been cleared

Menu 13.5 Vendor Payables Inquiry
The letter "C" will appear next to the check number if the check has been cleared through bank reconciliation (Menu 13.2.9)

```
VOUCH# INV-DATE DUE-DATE GROSS-AMT DISC-AMT   AMT-PAID  LAST-DT CHECK#   AMT-DUE H
01020590  04/15 04/30/03    42.30-    0.00                       4226C      42.30-P
   INV#: 1692023-99    DESC:                  PERIOD: 0304
   G/L#: 01-1500-00    AMT:      -42.30       G/L#:            AMT:
01020589  04/10 04/30/03   260.39-    0.00                                 260.39-P
   INV#: 232515 99     DESC                   PERIOD  0304
```

Program to clear receiver numbers off of PO Receiving Not Yet Vouchered report.

Menu 13.20.27 Clear Open Receiver
This is an easier way (than the 'C' option) to clear receiver numbers off of the PO Receiving Not Yet Vouchered Report (menu 13.20.7.)
Go to Menu 13.20.27.
Select #1 to clear all receivers through a specific date. Enter the date and this will clear the receivers.

```
PROGRAM TO CLEAR A RECEIVER

1. Clear all receivers thru a date
2. Clear one Receiver/Purchase order at a time
3. Reopen one Receiver/PO/Line at a time
Enter 1 2 or 3 ?1
Enter Date (MM/DD/YY) to clear thru ?02/31/03
```

Select #2 to clear a specific receiver number. Enter the receiver number, found on the report 13.20.7, and this will clear the receiver.

```
PROGRAM TO CLEAR A RECEIVER

1. Clear all receivers thru a date
2. Clear one Receiver/Purchase order at a time
3. Reopen one Receiver/PO/Line at a time
Enter 1 2 or 3 ?2

Enter receiver ?098754
```

Select #3 to reopen a specific receiver. Enter the receiver number, enter the purchase order number, enter starting line number or <Enter> for all.

```
PROGRAM TO CLEAR A RECEIVER

1. Clear all receivers thru a date
2. Clear one Receiver/Purchase order at a time
3. Reopen one Receiver/PO/Line at a time
Enter 1 2 or 3 ?3

Enter receiver ?098754
Enter Purchase Order (6n) ?01157985
Enter starting line number or <enter> for all ?20_
```

Fixed Key entry charges on corp. invoices.

Menu 13.20.13 Build Corp Invoice Receipt File
Fix – Key entry charges will now be listed as a misc.charge on corp. invoices.

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New Paperless End Of Day Report

Menu 16.5 EOD Report Xref Maintenance
This will print a report showing possible inventory problems from the previous day. The report
will print on day end. It will be paperless day-end report number 01-151. The items displayed
on this report are determined by looking at any product that was cancelled the previous day, non-
stock items that were cancelled, and items that were cancelled that you normally do not stock.
This is a list showing possible problems. It should help determine items that need to be returned
to the vendor.
This report will have the following columns; Date, Warehouse, Product Number, Description,
Temporary Flag, Transaction type, Qty, ROP, Balance Before, Balance After, Cost, Release
Number, and Purchase Order.
Report Example:

```
11:49:03 06 May 2003      LIST OF INVENTORY PROBLEMS      PAGE    1


DATE.... WHSE A.PROD.NO...... DESC.................... TEMP TNX QTY.. ROP.. BAL.BEF BAL.AFT COST...... REL.NO..... PO.NO...


05/06/03 001  A92-430         2-1/2 TON 14 SEER PACKAGE A   OE   -1    0     -1      0      0.000 01073014001
05/06/03 001  A93-016         T019 MC TANK "EMPTY"          C/M   1    0      0      1     40.100 01073147001
```

Program to reprint Day End reports

Menu 16.10 Reprint EOD Reports
To reprint EOD Reports select menu 16.10. Enter the date or <enter> for the previous night.
Enter the original printer number, then enter printer number to send the reports to

```
Program to Reprint Spooler Jobs printed in last 24 hours

ENTER DATE (MM/DD/YY) OR <CR> FOR LAST NIGHT ?04/22/03
04/22/03
Enter Original Printer Number ?0

Enter Printer Number to send reports to ?0_
```

Program to resend Day End email reports

Menu 16.11 Resend EOD Emails
To resend EOD email, select menu 16.11. All emails will be sent immediately with no other prompts

Menu 18   End-of-Year

FIX – Able to now end out of the End of Year

Menu 18.3 Vendor File Year End Update
You will now be able to exit Vendor EOY Stream.

MONTH-END   End-of-Month

End-of-Month Order Entry Lockout.

MONTH-END.3 Disable Order Entry during Month-End
Disable Order Entry during the Month-end process until the 'Ok to start daily processing' message has printed. To set- log into month-end at "J", select 3, enter the time to disable. This prompt will automatically reset when used during month-end. This can also be used to disable order entry during the month, to set log into month-end at "J", select 3, enter the time to disable. To clear - select 3, and press Enter.

```
By setting this program, Order Entry will be disabled until
the 'OK TO START DAILY PROCESSING' message has been printed

Enter HH:MM to disable Order Entry?21:00_
```

Menu 19   Inquiries

You can now press <enter> for next page in inventory transaction history

Menu 19.7a Inventory Transaction By Customer
Menu 19.7b Inventory Transaction by Product
To forward to the next page you can hit enter to proceed (instead of 'Y'). The 'Y' option still works also.

Seamless Cross-reference with Stock Status and Order Entry

Menu 19.6 Stock Status
The option 'X' from the stock status screen and from the order entry screen will take to into the cross-reference (menu 19.8a). You may then pull a cross-referenced item with a Johnstone part number directly back into the Stock Status screen or Order Entry by selecting the line of the item in the cross-reference.

> *Example:*
> *From Menu 19.6 or from Order Entry Line Item Input, press X <enter>*
> *Enter your cross-reference information.*
> *If you find a Johnstone Number match, select the line number for that item and press <enter>*
> *This item will be pulled back to either Stock Status or Order Entry respectively.*

New Corp Shipment Indicator in Stock Status & Carton # Option

Menu 19.6 Stock Status
This program only works if you have your Corp. Invoices and packing lists transmitted.
When you pull up a Corp item in Stock Status that is on a Corp order that has been shipped, there
will be an 'X' next to the On Order quantity. This 'X' indicates that Corp has shipped that item.

```
                    STOCK STATUS INQUIRY          12/30/02  08:16:38
ITEM NO.        HAZ U/M ITEM DESCRIPTION      DISC P/C   SUBSTITUTE ITEMS
b10-120             EA 083S DRYER              N 317-01
                    S  3/8 ODF LIQUID DRIER
REGULAR PRC      CORE CHG      AVERAGE COST  BRANCH COST   DIR COST  VEND#    SP
    13.06           0.00           5.774        6.400       5.986   A480     25
      WHSE     ON      ON     SOLD    ON    IN          CON            SALES QTY  QTY
WHS   LOC     HAND   ORDER   TODAY   B/O   PICK  AVAIL   IP   EOQ  ROP  MTD   YTD  LY
A 1 SG3        35      0       0            0    23     12   13  015    6   150  149
A 2 T16]S35    34      0       0            0    29      5   14   15    2   195  152
A 3 c5b        24      0       0            1    23         12   11    5   105  100
B 4 SR7        13      0       0            0    13          9   12    4    75   68
A 5 C1A         8     11X      0            0     8         11   10    1    91  112

A 1 WC]SMA     39      0       0            0    39         23   39   14   426  280
A 2 SRG1]WC    15     13       0            1    11      3   13   12    5   121   92

TOTAL         168     24       0     0      2   146     20        114   37 1163  953

            1          10      25                                M109     AVAIL
        13.06       12.15   11.35                                          23
Enter Item#, 'L'ookup, 'S'ales, 'D'irect, 'N'otes, 'LS'st Sls, POAAAAAAAAAAAA

 1-END     2-X-REF   3-X-REF   4-INQ    5-JCASHT  6-      7-JCODT   8-JCOD
```

If you type 'PO' <enter> it will bring up the Open P/O by Item screen and list the Carton number
in the REC column next to the PO that it has been shipped for. This carton number corresponds
with a number and barcode that is labeled on the box that has this item in it.

```
                    OPEN P/O BY ITEM            12/30/02 08:20:58
ITEM-NO         DESCRIPTION     UM ON HAND  B/O  ON P/O IN TRAN  AVAIL FUTURE
B10-120         083S            EA    114    0     11     0       96     0

LINE PO#        LN#  ORD DT DUE   ORD    REC       OPEN D UNIT CST VENDOR CUST
1   05526366-006   12/23 01/06   11   C396334 12/24      6.400 001
```

Menu 27   PO Forecasting Menu
ROP Calculation Fix

Menu 27.1.6 New ROP Calc Program
All ROP calculation programs will not calculate non-stock items

New display and options in Forecast Maintenance

Menu 27.5 Maintain Forecast
MDC and PDC available quantities are displayed in the upper left hand corner of the screen.
New options:

       'W' - to get to the Web
       'PO' - to get to menu 19.13 Open Purchase Order by Item
       'S' - to get to stock status

```
 PDC 412  MDC 781        PO FORECAST MAINTENANCE          *** NEW ITEM ***
 TOTALS 0007.040                        955 UNITS       -----FY SALES HISTORY----
                                                          2003    2002    2001
   WAREHOUSE    001   JOHNSTONE SUPPLY WATERLOO     JAN
                                                   FEB
   PRODUCT#     B10-120        083S DRYER           MAR
                                                   APR      *       *
    1 VENDOR#           001   JOHNSTONE SUPPLY, INC. MAY
    2 COST              5.340     B/O    =          JUN
    3 FCST QTY                  AVAIL  = 0          JUL              *       3
    4 STANDARD PACK     25    5 ROP = 00   EOQ=3    AUG
      NEEDED QTY              6 DAYS.S = 30         SEP
      VOQ * >LEAD DA    0 *     AOC = A480 FLYER    OCT
                                                   NOV
 SUBSTITUTE ITEMS         7 SEASON CD = S           DEC
 B12-260  13                CAT PAGE# = 886         TOT      0       0       3
                         8 #LOST SLS =                    PRICE BREAKS
 BR COST =      5.340*   AVG COST = 6.170    EACH PR = 7.15        0.00
                                                                  0.00
 DIR CST =      5.000                               -------------
 DIR QTY =          1                                             0.00
                                                                  0.00
 LN#, 0-ACCEPT, 'B'ACKOUT, 'D'ELETE, S#-STORE,  PO', 'S', 'SE',  'W'eb:
```

New Prompt when corp. stock level is less than forecast qty.

Menu 27.5 Maintain Forecast
This will identify which items on a corp. order were not available through your current warehouse (MDC or PDC). During the process of converting a PO Forecast (Menu 27.5) to a PO, you will see a listing that shows you which items on the PO were not available. After the list is displayed you will have to enter 'C' to continue. After this you will see your PO number.

```
WARNING: BE CAREFUL ABOUT USING THE 'ALL' OPTIONS. EACH END-OF-DAY
REFORECASTS THE ENTIRE PRODUCT FILE FOR ALL VENDORS AND ALL
WAREHOUSES. IF YOU USE THE 'ALL' OPTION, YOU MAY CREATE MORE PURCHASE
ORDERS THAN YOU INTENDED.


ENTER OPERATOR CODE:

ENTER VENDOR#'S SEPARATED BY SEMI-COLONS, OR 'ALL' VENDORS ==>:001

ENTER WAREHOUSE NUMBER (001 OR 002 OR ...) OR 'ALL' WAREHOUSES :002

ENTER 'REQUIRED DATE' TO APPEAR ON THE P/O (MM/DD/YY) OR <CR>:

ENTER SHIP VIA OR <CR> :

ENTER TERMS OR <CR> :

NOW CHECKING YOUR INPUT
DO YOU WANT TO CHECK THIS ORDER FOR AVAILABLE STOCK AT CORP (Y/N) ?Y

[404] 38 items selected out of 8136 items.
A.PROD.NO  DESCRIPTION                ORD.QTY  CORP
L39-039    1F83-261 NON-PROG T-STAT      1       0  **NOT AVAIL AT CORP**
S88-190    RB1204A MOTOR                 1       0  **NOT AVAIL AT CORP**
ENTER C-ONTINUE?
```

New parameter to allow update of available quantities on backorders

Menu 35.1 Order Entry Parameter Maintenance
If you have a customer who has ordered 100 of an item and you only have 57 Available, even if you put all 100 on B/O, your avail qty displayed in Order Entry is still going to be -43 (see screen shot). This parameter will determine whether or not the available quantity that is displayed should be affected by customer B/O quantities. When you place an "N" in 35.1, screen 3, field 4 you will turn on the parameter. With the parameter turned on any customer B/O quantities will NOT reduce the available quantity that is displayed in the Order Entry screen. (By default this field is a Yes)

```
     --ITEM NUMBER--   -------QUANTITIES-------   --------PRICING--------==========
LN    DESCRIPTION     ORDER INVCD  PICK     B/O   PRICE DISC%      DPRICE  TX PH RT
001 b10-120            #####
    083S DRYER 3/8 ODF LIQUID DRIER




         * FLYER       EACH                                              AVAIL SP
              7.15       7.15                                    C886     -43 25
```

In this example, while in the Order Entry Line Detail Maintenance screen, you will change the PICK QTY (line 3) to 0 which will change the BO QTY (line 4) to 100.

```
ORDER ENTRY LINE DETAIL MAINTENANCE      ORDER ENTRY LINE DETAIL MAINTENANCE

ORDER LINE #: 1                          ORDER LINE #: 1
 1. PRODUCT #.. b10-120                    1. PRODUCT #.. b10-120
 2. DESCRIPTION 083S DRYER                 2. DESCRIPTION 083S DRYER
 3. ORDER QTY.. 100                        3. ORDER QTY.. 100
 4. PICK QTY... 57                         4. PICK QTY... 0
 5. BO QTY..... 43                         5. BO QTY..... 100
 6. WHSE....... 001                        6. WHSE....... 001
 7. REASON CODE                            7. REASON CODE
 8. RETURN IND.                            8. RETURN IND.
 9. TAXABLE.... Y                          9. TAXABLE.... Y
10. PRICE HOLD. Y                         10. PRICE HOLD. Y
11. WARR SEQ...                           11. WARR SEQ...
12. PRICE CODE. F                         12. PRICE CODE. F
13. PRICE...... 5.94                      13. PRICE...... 5.94
14. DISC %..... -10.00                    14. DISC %..... -10.00
15. COST....... 5.941                     15. COST....... 5.941
16. CORE....... 0.00                      16. CORE....... 0.00
17. CORE COST.. 0.000                     17. CORE COST.. 0.000
18. DROPSHIP...                           18. DROPSHIP...
```

Continued……

Now the Available qty will be 57 the next time someone pulls up this part in order entry.

```
      --ITEM NUMBER--   -------QUANTITIES-------   --------PRICING--------==========
LN     DESCRIPTION      ORDER INVCD  PICK    B/O    PRICE DISC%     DPRICE  TX PH RT
001 b10-120            #####
    083S DRYER 3/8 ODF LIQUID DRIER




    * FLYER      EACH                                              AVAIL SP
        7.15       7.15                                   C886     57 25
```

New parameter to auto-run Vendor Buying Transmission (menu 32.12) and Vendor Returns Transmission (menu 32.13)

Menu 35.10 Auto Cost Update at EOD
This can be used to run Vendor Buying Transmission (menu 32.12.1 and 32.12.5) and Vendor Returns Transmission (menu 32.13) automatic. Enter a 'Y' in menu 35.10, field 5. Vendor transmissions will be updated daily during the eod process.

```
                    EOD Update Parameter Maintenance

      1. Print List of New Products to Maintain          N
      2. Bulk Maintain New Products                      Y
      3. List PO's with Differenct Costs than Received   Y
      4. List of Contract Prices with Cost Changes       Y
      5. Receive and Update Vendor Buying during EOD     Y
```

Menu 1   **Order Entry**

Option to pull up online catalog page from order entry
AccuTerm 2k2 Users Only
Menu 1.2 – Order Entry
You can now access the online catalog page, www.johnstonesupply.com from the order entry
screen. Enter the item, at the quantity prompt, enter "U" <enter>, the online catalog page will
display. To return to order entry, click on the RETURN button at the bottom of the catalog page.

New option to reprint an invoice on plain paper
Menu 1.30 – Reprint Invoice on Plain Paper
This reprint program works just like menu 1.10 – Reprint Invoice. Menu 1.10 allows the use of
pre-printed invoice paper. Menu 1.30 prints on plain paper and will print both the logo and
lines. Menu 1.30 will be the base invoice print program for signature capture at the counter.

Example Invoice re-printed with Menu 1.10   *Example Invoice re-printed with menu 1.30*

New report showing customer discounts
Menu 5.23 – Customer Discount Listing
This new report will list customer number, customer name, co#, class, product, vendor
and customer discount; based on discounts entered in menu 5.3 -Customer Discounts. To
run, use menu 5.23, select the printer number to print to or 'FT' for file transfer, press <enter> to
print or file transfer the report.

Inventory Adjustment Value Report
Menu 8.4A - Inventory Adjustment Value Report
Additional options have been added to this report. Options include selecting by warehouse and
by vendor.

```
          INVENTORY ADJUSTMENT VALUE REPORT
          *************************************


       HIT RETURN TO CONTINUE, 'END' TO EXIT :


       ENTER STARTING DATE TO SELECT (MM/DD/YY) :06/01/03


    ENTER ENDING DATE TO SELECT (MM/DD/YY) :06/30/03

    ENTER WAREHOUSE (3N) OR [ENTER] FOR ALL ?001

    ENTER AOC VENDOR (IE A391) OR [ENTER] FOR ALL ?A630
```

Customer Activity Analysis - print only active customers
Menu 11.2.1 Customer Activity Analysis
This report has been modified, only customers with sales activity during the proceeding 24-
months will be printed.

New List of items sold report
Menu 11.15 – List of Items Sold by Customer (FT Only)
This non-printed report lists the customer name, city, state, customer number, part numbers,
descriptions, category, sold price and quantities sold for the specified period. It is saved as a file
on your PC called 'ft.txt' in a folder called PICK on your C: / drive (manually created.)

```
LIST OF ITEMS SOLD BY CUSTOMER


ENTER COMPANY (2N) OR <CR> FOR ALL ?01

ENTER CUSTOMER NUMBER ?1005

ENTER BEGINNING DATE (MM/DD/YY) ?01/01/03

ENTER ENDING DATE (MM/DD/YY) ?06/01/03

HEADING OPTIONS:
   1) JAN - MAR
   2) JAN - JUN
   3) JAN - SEP
   4) JAN - DEC
ENTER 1 2 3 OR 4 ?2_
```

Headings are printed as Qty1, Qty2, Qty3 Etc…(For Jan, Feb, Mar etc…)

Email address - added to Customer Master Maintenance

Menu 12.2.2.2 – Customer Master Maintenance

Field 17- Email Address - currently this field can be used only for reference. In the future, use this field when Signature Capture is enabled. Invoices will be emailed to the recipient listed in field 17.

```
14.PP FRT LB                              32.AUTH BUY REQ
15.FLYER FLAG                             33.VIP REPORTING
16.NO PRICES                              34.SPLIT CREDIT MEMO
17.EMAIL ADDR tammi.frank@johnstonesupply.com
```

New flags for invoice faxing and emailing at EOD

Menu 12.2.2.2 – Customer Master Maintenance

In field 31 – Fax Inv at EOD new options have been added for future use with *Signature capture, and ◆Xpedite – all options include:

F = Fax Invoice at EOD and Statement at EOM (Using Xpedite)

◆I = Fax Invoice at EOD only

◆FS = Fax Statement at EOM only

N = Do not print Statement

*FE = Fax and Email Invoices at EOD and Fax Statement at EOM

Customer Detail Maintenance Listing
All companies combined on Report.

Menu 12.2.24 Customer Detail Maintenance Listing

Previously this report listed the total sales year-to-date. The report has been changed to list all companies and the total sales for the last 12-months combined.

Print Listing of Customers ABCD Ranking

Menu 12.2.40 Customer ABC Report

All customers have been assigned an A, B, C or D ranking according dollars. This rank is flashed on the screen in order entry.

Customers are ranked based on total annual purchases from all branches. Customer will be ranked as an

"A" Sales dollars are greater than $10,000/year,

"B" Sales dollars are $5,000- $9,999/year,

"C" Sales dollars are $1,000-$4,999/year,

"D" Sales dollars are less than $1,000/year.

Customers will be ranked as an "N" if they have been a customer for less than one-year and sales dollars remain under $5,000. To run, select menu 12.2.40, select printer number to print. Select A, B, C, D, N or <enter> for all.

Print Listing of all Corp. Product Categories

Menu 12.3.34 Product Category Listing

To run, select menu 12.3.34, select printer number to print, "C" to continue, a numerical listing of all Corp. Product Categories will print.

Screen resorted

Menu 19.1 – Customer Orders Not Purged

This screen has been re-sorted to show open orders by date first, and then completed orders by date. Previously this screen sorted only by date requiring the users to scroll through all orders to find an open order.

Option to pull up online catalog page from stock status

Menu 19.6 – Stock Status

AccuTerm 2k2 Users Only

With a catalog item on the stock status screen, press 'U' <enter> to display the catalog page from www.johnstonesupply.com. Currently only Johnstone Catalog items are listed. Once the url (web address) is known non-catalog items can be added.
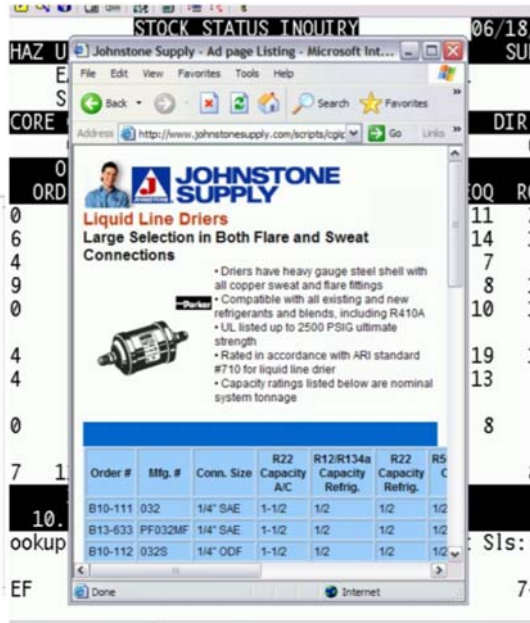

Menu 27   **PO Forecasting Menu**

Print ABC ranking and Seasonal Flag

Menu 27.4 Report Forecast

Report will now display the ABC Ranking and Seasonal Flags

Menu 32   **Corp Transmissions**

Address 3 line added to PO transmission

Menu 32.9 – Purchase Order Transmissions

Previously when transmitting a PO to Corporate, the only Address 1, Address 2, City, State and Zip code were transmitted to Corp. The Address 3 line is now included.

New option to bypass OE open order check

Menu 35.9 – Order Entry Open Order Check

Parameter to bypass specified customers for the Open Order check in Order Entry. Enter the customer number, select line 1 Flag, and enter an 'N' if you do not want that customer to check open orders for this customer.

```
CUSTOMER:  ---------------              NAME:
1. FLAG
```

New parameter for receiving and updating vendor information

Menu 35.10, field 5 – Receive and Update Vendor Buying during EOD

Parameter to choose whether or not to receive and update the Vendor Master (12.4.1.2) information. "Y" to Receive and Update, "N" not to Receive and Update. Vendor Buying information (Menu-12.4.1.5 and 12.4.1.6) will always be updated for viewing in Notes.

```
                    EOD Update Parameter Maintenance

    1. Print List of New Products to Maintain          N
    2. Bulk Maintain New Products                      Y
    3. List PO's with Differenct Costs than Received   Y
    4. List of Contract Prices with Cost Changes       Y
    5. Receive and Update Vendor Buying during EOD     Y




    Enter Line#, Backout, DELETE, Edit, 0 to Accept
```