

Software Efficiencies Training

DST Training Conference
Denver, CO, -April 24th and 25th



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Software Efficiencies

- Upgrade Process
- Flyer attachments
- Vendor Returns
- Quotes
- Sales/Customer Analysis
- U2008.1, .2, .3 U2007.3, .2, .1
- Q & A
- Evaluations

No Frills Airlines

- They don't sell tickets, they sell chances.
- Before the flight, the passengers get together and elect a pilot.
- You cannot board the plane unless you have the exact change.
- Before you took off, the stewardess tells you to fasten your Velcro.
- When they pull the steps away, the plane starts rocking.
- The Captain yells at the ground crew to get the cows off the runway.
- You ask the Captain how often their planes crash and he says, "Just once."
- No movie. Don't need one. Your life keeps flashing before your eyes.
- You see a man with a gun, but he's demanding to be let off the plane.
- All the planes have both a bathroom and a chapel.

Actual Headlines

County to pay \$250,000 to advertise lack of funds

BY MATT COOPER
The Register-Guard

Lane County will spend up to \$250,000 this year publicizing its tight financial picture, in hopes that voters in November will approve higher taxes for public-safety services.

It's an amount for county spending on publicity that has been unparalleled in at least the past 10 years. And it illustrates the seriousness of the effort to persuade voters

Actual Headlines

Army vehicle disappears

AN Australian Army vehicle worth \$74,000 has gone missing after being painted with camouflage.

Police are seeking public help to find the four-wheel drive, which was

Actual Headlines



Meeting
on open
meetings
is closed

The image shows a newspaper clipping with a headline. The text is arranged in four lines: "Meeting", "on open", "meetings", and "is closed". The font is a bold, serif typeface. The background of the clipping is a light, textured paper. There is a faint vertical line on the right side of the clipping, possibly indicating a page edge or a column boundary. The entire clipping is set against a dark blue background.

Actual Headlines

Waterford boy, 8, saves sister's life

Youngster used Heimlich, which he learned from TV

By PATRICIA DADDONA
The Staff Writer

Waterford — Saving his 6-year-old sister from choking on a hard candy by performing the Heimlich maneuver is not something 8-year-old Zachary Buskwick brags about. He doesn't understand the fuss.

"I wouldn't do it again," the second grader said as he spun nickels on a tabletop while his sister, Meghan, related the story. "She's been a pain this week."

But Waterford Police Officer Dana

"I wouldn't do it again. She's been a pain this week."

Zachary Buskwick, sitting about how he used the Heimlich technique to dislodge candy from his sister's throat.

chocolate or caramel. Zachary is bent on embellishing details as Meghan tries to narrate.

Their mother, Doana, said they play and fight like any other brother and sister, but the bond between them strengthened on dinnerflow one Friday night when their aunt, Rose Corrala, was baby-sitting them at her home in New London.

As "Zani Frolic," who it, one of the candies she gave Zachary — Hershey Taste-tastic buttercream, she said — found its way to Meghan, who was drinking a glass of water.

He calmly pepped right out."

"It took two times," Zachary explained.

Zachary said he reacted when he realized his sister couldn't breathe. He learned the Heimlich maneuver from watching a television show, "Norman and Ied," on Fox Family TV. He doesn't like the show, but Meghan does.

"I'm proud of him," Meghan said.

Zachary considers the incident no big deal, but he's the only one who does.

"My stomach was so weird," Doana

Software Efficiencies

- Upgrade Process
 - Job requests
 - User Suggestions
 - Review Process
 - Development/Documenting
 - Testing
 - Implementation

Software Efficiencies

Location of upgrade docs

- M-19.6 -DST
- <http://dst.sitemax.com>
- <http://dst.sitemax.com/Upgrades.asp>

U2008.2 –Flyer Attachments

- **Description:** *This feature provides the ability to add a PDF attachment to ALL faxed and emailed laser statements with the EOM statement run.*

[Document](#)

***On Demand!!!!

Vendor Returns

- Setup
 - Customers
 - Reason Code
 - GL Considerations
- Processing
 - Item in your inventory
 - Item not in your inventory
 - Menu 15
 - Credit Received

Quotes

- Overview
 - Development
- Creating
- Accessing
- Tracking
- Purge

Quotes -Development

- PRO.FORMA.DEL -Previously, once a quote was cancelled or purged it was no longer available to access unless it was restored from a save tape. Now, when a quote is purged or cancelled, we copy it to a hold file where it will remain indefinitely. What this allows us to do, is regain access to it if we need to, display via inquiry for deleted quotes

..... AUTOMATIC PURGE PARAMETER


- 1) DAY OF WEEK - 6 FRIDAY
- 2) DATE..... - 1

----- NUMBER OF DAYS TO KEEP FOR EACH FILE -----

3) Inventory Transactions.....(INQ.7A/7B)	1825	INV.HIST
4) Accounting Reports.....(M.3/M.11.17)	1095	INVOICE
5) Hangout Report.....(M.2.6)	180	RELEASE
6) Detailed Release Inquiry & Reprint.(INQ.5/M.1.10)	1825	RELEASE.HIST
7) Customer Orders Not Purged.....(INQ.1)	180	ORDER
8) Detail Open Purchase Order Inquiry.(INQ.12)	1825	PO
9) A/R Detail History.....(M.4.1.11)	1825	AR.HIST
10) Product Master Maint - TEMP.....(PM.27)	600	NS ITEMS
11) Detailed Quote Inquiry & Reprint...(INQ.5/M.1.11)	90	PRO.FORMA
12) Bar Code Receipts Report.....(M.34.10)	90	REC.BC.SAVE
13) Order Verification.....(M.1.2.V)	90	RELEASE.CHECK

Accessing Quotes

Help Article# 106117

 When accessing a quote, I get the message the the order is complete and gone through EOD...why?

The reason is that order entry wants to access orders first. And this scenario is comes about when an order number is the same as the quote number. They truly are two different files, but the number are the same. To access the quote, put a "Q" in front of the quote number at the order number prompt. EX: Q123456 This tells order entry to look directly for that quote number.

Accessing Quotes M-1.2

M-1.2 and 19.5
QL and QD

OPERATOR CD: Store Support

COMPANY NBR: 01

ORDER NUMBER: QL####

CUSTOMER NBR:

OPERATOR CD: Store Support

COMPANY NBR: 01

ORDER NUMBER: QD####

CUSTOMER NBR:

Accessing Quotes M-1.2

M-1.2 'V' option
M-35.9

LN	DESCRIPTION	ORDER	INVC	PICK	B/O	PRICE	DISC%	DPRICE	SUBTOTAL
001	b92-085								

This item is still open on QUOTE 01000113 - <ENTER> or 'V'iew _
1-FND 2-INO

CUSTOMER: JLD
1. FLAG N

NAME: Jeff D Testing and Air

Accessing Quotes M-19.1A

M-19.1A –Quote Lookup Inquiries

Quote Lookup Inquiries

1. Price Quotes Lookup
2. Customer Quote Listing

Enter Option or 'END' to quit :

Quotes –Reporting

M-2.29 List ALL Quotes (FT Only)

New listing for quotes that can be run by company, salesman 1 or 2 (from customer detail), providing operator, customer info, phone, PO#, salesman and total amount to help track quotes on the live file and do as needed.

A	B	C	D	E	F	G	H	I	J	K	
pro.forma.	op.name.....	co#	A.CUST.NO....	CUST.NAME.....	PHONE.NO.....	CUST.PO.NO.....	SLSM	SLSM2	tot.amt....	ord.date1	
1105629	Bill Bright	1	100160	GLENN S BENTON	864-877-1611	3ton hp quote		0	1,992.90	3/28/2009	
1105201	Bill Bright	1	209453	Wilson's Heating & Plumbi	864-862-7786	kay relestate		0	453.29	1/31/2009	
1105695	Bobby Hunter	1	100181	FRI GREENVILLE II LLC	864-232-1998	Balometer		3	12	3,255.50	4/10/2009
1105680	Bobby Hunter	1	100181	FRI GREENVILLE II LLC	864-232-1998		22996	3	12	916.31	4/8/2009
1105674	Bobby Hunter	1	209087	Greenville Hilton and Tow	864-232-4747	pool heater		3		821.5	4/7/2009
1105671	Bobby Hunter	1	14577	Commercial A/C Service	864-271-7637		0	3	11	2,780.04	4/6/2009
1105622	Bobby Hunter	1	210609	Greenville Place LLC	864-288-3331			0		3,885.76	3/27/2009
1105628	Bobby Hunter	1	210356	Climate Control	269-5576	David		3		1,925.17	3/27/2009
1105615	Bobby Hunter	1	100476	The Woodlands at Furman	246-8606	JIM CHRISTMAS		0		2,006.72	3/26/2009
1143825	Bobby Hunter	1	14577	Commercial A/C Service	864-271-7637		200645	3	11	5,135.31	3/26/2009
1105605	Bobby Hunter	1	14115	CERTIFIED TECH STORE 172				0	2	503.97	3/24/2009
1105566	Bobby Hunter	1	14115	CERTIFIED TECH STORE 172		NHC Boiling Springs Rd.		0	2	29,914.12	3/18/2009
1105568	Bobby Hunter	1	210817	AM Mechanical Inc	864-843-9903	MIKE		3		1,957.23	3/18/2009
1105472	Bobby Hunter	1	210266	HVAC DEPT FURMAN UNIVERSI		STOCK ROOM		3	11	141.89	3/9/2009

Quotes -EOD.XREF

M-16.5

01-162 Follow-up Quote Report

EOD.XREF MAINTENANCE

```
EOD.XREF ID      01-162      (Enter CO#-rpt#)
1. RPT.NAME..... FOLLOWUP QUOTE REPORT
2. Email.Addr1.. jeff.dobyns@johnstonesupply.com
3. Email.Addr2..
4. Email.Addr3..
5. Email.Addr4..
6. Printer#..... N
7. No.Copies.... 1
8. Font size....
```

Last EOD hold entry 859

Quotes –Audit

M-2.28 Quote Audit

```
..... AUDIT1.....  
01016064 Greg Dipple 09:57:30 06 Aug 2005 - 110 'Q'  
Store Support 09:48:46 11 Apr 2008 - 2 'FAX'  
Store Support Fax transmission to AERNI & HITZEL F  
UEL INC.. Fax # 13603261815  
05] 1 items listed out of 1 items.  
CR> TO CONTINUE ?
```

Quotes –Print Labels

M-34.38 –Print Labels for a Quote

BARCODE LABEL PRINTER

BARCODE LABEL PRINT OPTIONS:

=====

1. ENTER SPECIFIC PRODUCT NUMBERS
2. PRINT ALL PRODUCTS FOR SPECIFIC QUOTE
3. PRINT ALL PRODUCTS FOR A VENDOR
4. PRINT ALL PRODUCTS FOR A LOCATION

ENTER OPTION: ?2

ENTER QUOTE NUMBER (8N): ?01000148

PRINT ONLY ONE LABEL PER PRODUCT (Y/<CR>) ?Y

Sort by L-ine number P-art number (L/P) ?P

Quotes –Online

- Quote handling online. Look for it summer 2009!
- www.johnstoneds.com

Sales/Customer Analysis

- Review
 - [Documentation for a starting point](#)
- Common Reports
- Some new stuff too!

Online Sales Tracking

- Custom Report –available upon request. This report dumps directly to excel. Use it to provide your customers with usage tracking as an added service.
- [Sample](#)

Sales Report

- M-11.2.15 –Customer Sales Report by Salesman (FT Only)
 - Very excel friendly, great report for tracking salesman activity. Comprehensive customer/salesman sales analysis reporting tool, with salesman and date selection, consolidated (showing sales for all locations), including credits, providing month-to-date, year-to-date and last year totals.

Sales Report

M-11.2.15

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	sism	CUST#.....	CUSTOMER NAME.....	tot.sales.mtd	tot.gp.mtd.	gp%.mtd	tot.sales.ty	tot.gp.ty..	gp%.ty.	tot.sales.lmtd	tot.gp.lmtd	gp%.lmtd	tot.sales.lytd	tot.gp.lytd	gp%.lytd
2	0	210742	3M Company	0	0	0	1,517.85	642.92	42.35	0	0	0	383.1	102	26.62
3	0	210496	A Quality Repair	0	0	0	1,394.60	349.6	25.06	2,084.47	670.31	32.15	3,662.01	1,166.02	31.84
4	0	210538	A#1 HEATING & AIR	0	0	0	0	0	0	117.3	39.03	33.27	168.35	76.9	45.67
5	0	210589	A+ Mechanical Co	0	0	0	0	0	0	0	0	0	0	0	0
6	0	13641	A-1 Heating & Air	0	0	0	0	0	0	0	0	0	2,062.60	346.26	16.78
7	0	210409	A/C Medic of Greenville	0	0	0	4,049.42	1,637.99	40.44	0	0	0	3,278.88	1,253.19	38.22
8	0	210344	A/C Medic of Spartanburg	0	0	0	744.25	208.73	28.04	60.61	21.42	35.34	1,515.00	488.71	32.25
9	0	210705	A1A Electro-Mechanical Se	0	0	0	785.45	213.2	27.14	0	0	0	0	0	0
10	0	210599	AAA Heating Cooling	0	0	0	314.06	36.87	11.73	0	0	0	5,312.24	1,190.22	22.4
11	0	210297	AAA Quinn's Heating Cooli	0	0	0	1,184.99	200.91	16.95	0	0	0	0	0	0
12	0	100171	AAC	11.88	3.81	32.07	1,078.58	293.17	27.18	0	0	0	0	0	0
13	0	100030	ABBEVILLE COUNTY SCHOOLS	0	0	0	3,441.64	1,154.85	33.55	0	0	0	122.67	50.8	41.41
14	0	100016	ABC Heating & Air	78.98	26.4	33.42	1,884.06	531.26	28.19	0	0	0	501.81	172.64	34.4
15	0	210823	Abels AC	0	0	0	100.79	20.17	20.01	0	0	0	0	0	0
16	0	100020	Abernathy Electrical Cont	182.84	86.44	47.27	3,093.15	891.26	28.81	204.33	52.94	25.9	1,866.66	557.99	29.89
17	0	100403	Abraham Terry	288.59	129.43	44.84	439.34	188.74	42.95	0	0	0	0	0	0
18	0	210527	Accent Heating & Cooling	107.03	9.46	8.83	6,437.74	2,107.13	32.73	360.06	154.23	42.83	10,046.16	4,387.80	43.67

Customer/Vendor Sales

- M-11.19 Customer Sales Report (FT Only)
- Great report for tracking customer activity by vendor and by period. This report shows total sales, cost, this year, last YTD, and comparing with vendor sales.

```
Customer Vendor Sales Report YTD vs LY thru selected month (FT Only)
Only run this on ONE port at a time - it clears/calcs the data
<CR> to continue or 'END' to quit :
```

```
Enter AOC Vendor(s) (ie A544;0544;C544;544) :a544;o544;c544;544
```

```
Enter Company Number (2N) or <CR> for ALL :01
```

```
Enter ending period (YYMM) :0812
```

Customer/Vendor Sales

- M-11.30 Customer Sales Report (FT Only)
- Previously, M-11.10 was the report to run when you wanted to see customer/vendor sales for a specific customer. Now there is an option to run this for all customers and narrowed down by product class. EX: Equipment sales (vendor 544) for all accounts....this is the report to run.

Customer Vendor Sales

M-11.30

14:30:14 14 Apr 2009 LIST OF ITEMS SOLD FOR VENDOR a544 o544 c544 544 FROM 04/01/09 TO 04/13/09
1

A.CUST.NO. CUST.NAME..... QTY... SALES.....

13644	Advantage Mechanical LLC	1	254.45
210641	Batson's Heating	8	3,992.44
100142	BERNIE'S WELDING	1	757.33
210573	Bryan Teat	2	1,211.27
14115	CERTIFIED TECH STORE 172	1	355.96
210300	Dan Wilkin	1	333.71
201442	Ed Burns Heating & Air	2	993.29
s02	Johnstone Easley	6	2,889.96
S04	Johnstone Hickory	4	2,880.40
s03	Johnstone Spartanburg	6	4,097.88
100321	Michael Collins	2	1,636.81
100147	QUALITY MECHANICAL	1	868.56
203058	Tommy Allison	1	1,765.21
11301	W.B. Guimarin	1	644.19
		37	22,681.46



U2007.3 –Sales Analysis

Description: New sales report to show items sold and GP for a vendor

- **Menu Path:** Menu 11.4.40 (Vendor Sales – Detail by Product)
- **Why Use it:** The Vendor Sales report provides detailed information for vendor data from Menu 11.4.20 (Vendor Sales Inquiry).

U2007.3 –Sales Analysis

16:38:57 21 Jan 2008 Vendor Sales - Detail by Product Page 1

A.PROD.NO.....	VEND.DESC.....	CATEG.	QTY...	SALES.....	GP.AMT.....
3/8FLAREUNION	A 00327		7	4.41	1.330
3/8X1/4X50	4068050B3B6		2	222.70	44.540
B92-234	61080251	325-07	4	289.27	148.630
B92-236	61080501	325-07	3	375.09	219.210
B92-238	61280251	325-07	65	5,822.39	1,173.024
B92-240	61280501	325-07	77	12,458.52	2,678.687
B92-242	61480251	325-07	26	3,005.74	766.257
B92-244	61480501	325-07	50	9,887.01	1,668.989
B92-599	40680150B3B6	325-07	2	99.18	24.790
B92-600	40680350B3B6	325-07	3	292.17	90.705
B92-603	41080150B3B6	325-07	1	110.28	66.690
B92-604	41080350B3B6	325-07	1	107.01	20.810
B92-695	61080350B3B6	325-07	2	248.74	49.750
B96-640	40880500B3B6	325-07	1	141.15	41.984
B96-642	61080500B3B6	325-07	4	1,272.76	763.000
			248	34,336.42	7,758.396



-

Sales Analysis

- **Job Desc:** Addition of columns to sales reports.
- M-5.21 and M-11.4.11
- **Why Use it:** Additional critical info has been added to these reports/Inquiries. By adding these fields we have helped streamline your sales monitoring by incorporating more pertinent fields into specific reports.

Sales Analysis

- M-11.4.11 we have added columns to this inquiry that reports the number of invoices, the average value of the invoice in the current year, the average value per invoice in the previous year, the average value per invoice back 2 years.
 - The new columns display in the first three columns of the inquiry.
 - Depending on which year option selected, will determine which historical data will display.
 - If you select 1) This YEAR –you will get current year values and last year.
 - If you select 2) LAST YEAR –you will get last year values and 2 years ago.
 - If you select 3) 2YR AGO –you will get 2 years ago and 3 years ago (as the data is built).

Sales Analysis

M-11.4.11

CO# 01 <CR> FOR ALL TOTAL INVOICED SAL

ENTER 1) THIS YR 2) LAST YR 3) 2YR AGO 1

	#INV	AVG. INV THIS YR	AVG. INV LAST YR	SALES-\$ THIS YR	SALES-\$ LAST YR
JAN	820	98.59	104.79	80845	346215
FEB			109.89		351208
MAR			110.82		282915
APR			131.24		240557
MAY			163.99		259593

Sales Analysis

- M-5.21 –We have added some sales columns to this report to make it more useful in monitoring activity and effectiveness of your programs..
 - This will list sales for a program. The sales values in this report are MTD -Month-To-Date, YTD -Year-To-Date and LY-Last Year.

Sales Analysis

M-5.21

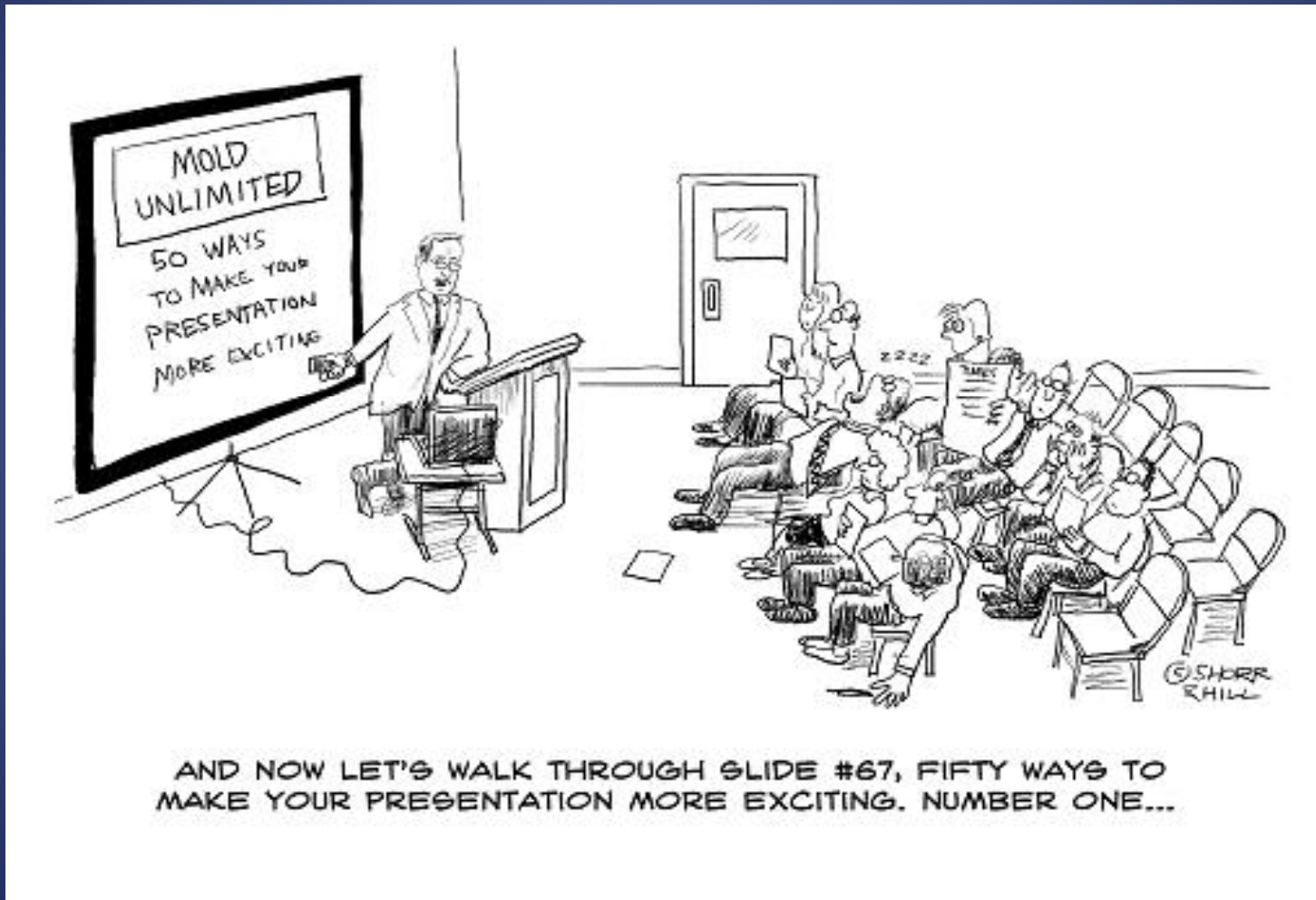
17:43:03 09 Jan 2009							CUSTOMER LIST FOR CONTRACT (2000C)		PAGE	8
CONTRACT..	CUST #..	CUSTOMER NAME	sism	CDATE...	MTD...	YTD...	LY....			
2000C	105656	ABOVE HTG, COOLING, & PLM						392		
2000c	113005	ABSOLUTE AIR SYSTEMS								
2000C	106052	Absolute Comfort	029	08/26/08				1871		
2000c	113250	ABSOTEMP CLIMATE CONTROL								
2000c	113117	ABUNDANT LIFE WINSLOW								
2000C	107618	ABUNDANT SUPPLY, INC	010							
2000C	105811	ACCE INC								
2000c	113195	ACCU-AIR MECHANICAL	031							
2000C	110050	ACCURATE HEATING & COOLIN	033	09/27/08				2526		
2000c	113577	ACE ELECTRIC HTG								
2000C	105151	ACE HEATING & COOLING	013					3980		
2000C	102982	ACE PLUMBING			297	297		5009		
2000C	107834	ACKERMAN PLUMBING & HEATI	026							
2000c	02765	ACR MECHANICAL						7		
2000C	100788	ACTION AIR CONDITIONING	013					12703		
2000c	105899	ACTION MECHANICAL CONTRAC	028	03/13/08						
2000c	106857	Adam Heating & Cooling						2176		

Break Time!



5 min break

Yes, More slides!!!!



U2008.2

- Parameter driven notification of standard 'P'ack quantities in order entry.
- Goal -eliminate the potential for over/dead stock before it even gets into your warehouse. This can be prevented with a little information that is already available in the 'P'ack quantities, notifying counter staff of the pack requirements in order entry.
- *Benefits*
 - *Correct order quantities*
 - Chances for Up-selling

U2008.2

- Setup -The following conditions must be met:
- The parameter needs to be set in M-35.1, screen 3, field 12 to 'Y'
- Product detail record, M-12.3.2.3, field 15 must have a pack quantity with a 'P' . EX: 12P
- Quantity Ordered Requirement Notification: in order entry M-1.2, the customer attempts to order a quantity of a product that is <<MORE>> than what is on-hand (creating a customer B/O scenario –kicking off the purchasing process). IF the customer orders less than what is currently on-hand that is OK, but if they order more - counter staff will be notified of the Pack quantity requirement and prompted for 'Y***' to continue or increase the order to meet the purchasing pack requirement..

U2008.2

Screen Shot 1: Setup the Parameter M-35.1, screen 3, field 12.

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	Y
5. ALLOW DISPLAY OF CUSTOMER ABC RANKING	Y
6. AUTO C/M MSG: '1'-NO MSG '2'-WARRANTY ONLY '3'-ALL	3
7. USE 'IM' INV MSG	
8. MSDS SHEETS: '1'	
9. ONLINE WARRANTY	
10. ALLOW CHANGE OF	
11. ONLY ALLOW QUANT	
12. REQUIRE Y*** IF	

Screen Shot 2: Standard Pack Flags

STANDARD PACK

- '##I' = INFORMATION PACK QTY ONLY
- '##P' =
- '##U' =

Screen Shot 3: Order Entry Quantity Requirement

LN	DESCRIPTION	ORDER	INVC	PICK	B/O	PRICE	D
001	b82-235	9###					
	BKQ BIO-KLEAN QUART						

EACH

Product has standard pack of 12. ACCEPT (Y***/<Enter>)?

U2008.2

- Additions to Serial# report
 - Date and Part Number ranges
 - M-12.3.30
- Serial number reports that need to be refined by specific product#, customer#, warehouse, or serial# as well as date range. The new version of this serial number report provides you with the flexibility and selection criteria to tailor your report for the most commonly requested needs.

U2008.2

- Allow PPM messages in PO's that do not show on faxed and emailed copies
- M-7.1 and M-7.30
- **Why Use it:** Sometimes it's necessary to add message lines to purchase orders for internal informational or reference purposes that don't need to display on the final document that the vendor receives. For example, these could be message lines specific to a customer order or delivery information for the receiving department.

U2008.2

How to Use it: When creating the PO, enter the message line like you normally do using 'M' for message like and simply preface the text of the message with PPM. Any message line with leading PPM will not print on the PO.

PURCHASE ORDER ENTRY						
LN	DESCRIPTION	ORDER	RECVD	OPEN	COST	DT
001	b92-085 R22-30	1		1	159.000	
002	M PPM Ref Customer Order 01123456					
003	M PPM Ship complete-----					

|



U2008.1

- Assign contract to all customers within a specific customer class.
 - Often times there is a need to assign a pricing program(s) to all accounts of a certain customer class. In the past, each customer within that class would need to be touched with the program(s) entered into their customer master. Now, all that is needed to be done is identify which customer class needs which programs and maintain it once within the customer class maintenance.

U2008.1

- **How to use it:** Setup your pricing programs and then apply those to the affected customer classes.
- Setup your programs in M-5.3 or M-5.15.
- Access customer class maintenance M-12.2.8 and enter the class to maintain.
 - To get a listing of customer classes use M-12.2.28
- Select lines 2 through 15 and put in the program name(s) assigned to the specific customer class.
- Pricing is available immediately in Order Entry

U2008.1

M-12.2.8

CUSTOMER CLASS MAINTENANCE

CUSTOMER CLASS: 99

1. DESCRIPTION

Misc Customer

2. PROGRAM

Spring2008

3. PROGRAM

Summer2008

4. PROGRAM

AugustREFRIG

5. PROGRAM

SPS2008

6. PROGRAM

7. PROGRAM

8. PROGRAM

9. PROGRAM

10. PROGRAM

11. PROGRAM

12. PROGRAM



U2008.1

- **Order Entry Product Memos**
- **Why Use it:** Great way to add multiple lines of information that is keyed off the entry of the products to order entry.
- **How to use it:** This menu option has been around for some time as M-12.1.13. The functionality remains but this is much more logically accessed from the product related screens.
 - Access M-12.3.2.20
 - Put in a product number in the CODE field.
 - Put in up to 10 lines of text.
 - Pull the product up in Order Entry and the message lines automatically are added.

U2007.3 -EOM

- **Description:** Archive AR EOM reports to the Linux server
- **Menu Path:** Menu 17.1a (EOD/EOM Combo), Menu 17.5 (EOM Report Xref Maintenance), & Menu 17.6 (EOM Report Xref File Listing)
- **Why Use it:** Enhancement to the EOM Xref system for automatic archival of AR EOM reports to the Linux server.

U2007.3 -EOM

- **How to use it:** This feature is already setup and will automatically start for those with a Linux server. The AR EOM reports are setup to be automatically archived to the Linux server. The file name of the report is stored in Menu 17.5, Field 9. The file name is what will appear on the Linux server in the EOM folder.

U2007.3 -EOM

EOM.XREF MAINTENANCE

EOM.XREF ID 01-110 (Enter CO#-rpt#)
1. RPT.NAME.....: Johnstone supply Summary Aging
2. Email.Addr1.: jeff.dobyns@johnstonesupply.com
3. Email.Addr2.:
4. Email.Addr3.:
5. Email.Addr4.:
6. Printer#.....: N
7. No.Copies...: 1
8. Font size...:
9. Filename.....: SUM_AGING

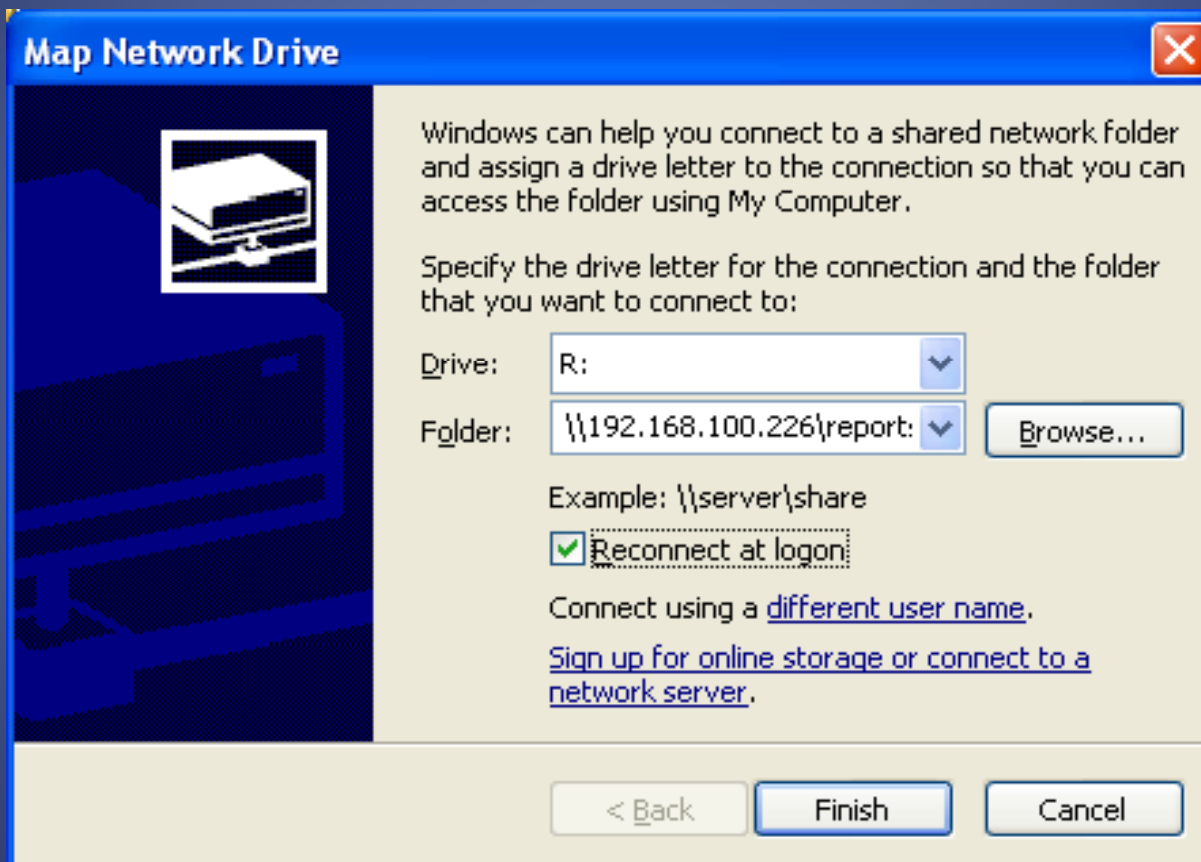
Last EOM hold entry 1011

U2007.3 -EOM

To access the reports off the Linux server, setup the following:

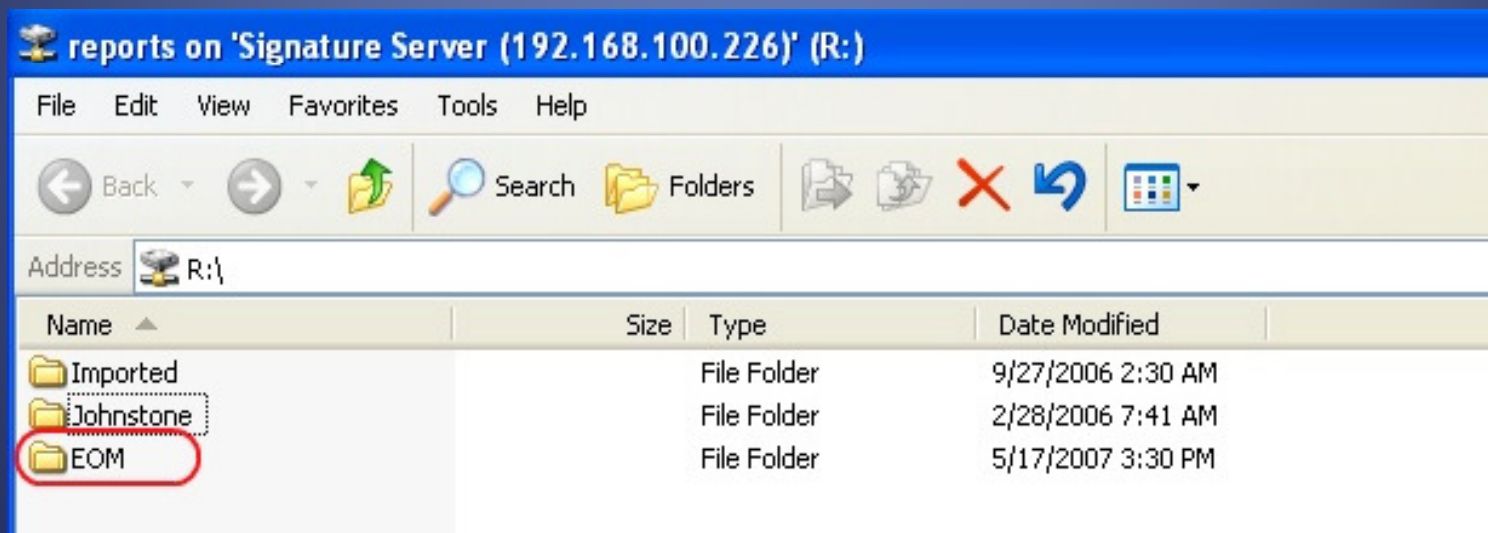
- Map a drive – Open up My Computer from your Desktop icon.
- Tools > Map Network Drive > Select 'R:' from the dropdown list.
- In the Folder field enter **YOUR LINUX IP ADDRESS**\reports
- For Example - \\192.168.100.226\reports
- Reconnect at logon – Check this Box
- Select Finish

U2007.3 -EOM



U2007.3 -EOM

Open the EOM folder to view the EOM reports



U2007.1 -Purge Parameters

- What/Why-
 - Expanded numbers of days for retaining file information
 - More on-screen Info (areas of system affected)
- Recommendations

U2007.1 -Purge Parameters

..... AUTOMATIC PURGE PARAMETER

- 1) DAY OF WEEK - 7 SATURDAY
- 2) DATE..... - 5

----- NUMBER OF DAYS TO KEEP FOR EACH FILE -----

3) Inventory Transactions.....(INQ.7A/7B)	9999	INV.HIST
4) Accounting Reports.....(M.3/M.11.17)	9999	INVOICE
5) Hangout Report.....(M.2.6)	120	RELEASE
6) Detailed Release Inquiry & Reprint.(INQ.5/M.1.10)	9999	RELEASE.HIST
7) Customer Orders Not Purged.....(INQ.1)	180	ORDER
8) Detail Open Purchase Order Inquiry.(INQ.12)	400	PO
9) A/R Detail History.....(M.4.1.11)	620	AR.HIST
10) Product Master Maint - TEMP.....(PM.27)	999	NS ITEMS
11) Detailed Quote Inquiry & Reprint...(INQ.5/M.1.11)	60	PRO.FORMA
12) Bar Code Receipts Report.....(M.34.10)	90	REC.BC.SAVE
13) Order Verification.....(M.1.2.V)	90	RELEASE.CHECK

ENTER: LN# TO CHANGE-'0' TO ACCEPT-'DELETE' TO DELETE-'ABORT' TO EXIT _



Product Warnings

- Use Like Regular Soap –Dial Soap
- Product will be hot after heating –
Microwaveable meal
- Warning: Keep out of Children –Knife
- Not to be used for other use. –food
processor
- Warning: Contains nuts –Bag of peanuts

Actual Newspaper Headlines (1997)

- Include Your Children when Baking Cookies
- Something Went Wrong in Jet Crash, Expert Says
- Police Begin Campaign to Run Down Jaywalkers
- Safety Experts Say School Bus Passengers Should Be Belted
- Panda Mating Fails; Veterinarian Takes Over
- Eye Drops Off Shelf
- Enraged Cow Injures Farmer With Ax
- Plane Too Close to Ground, Crash Probe Told
- Miners Refuse to Work after Death
- Stolen Painting Found by Tree
- Two Sisters Reunited After 18 Years in Checkout Counter
- If Strike Isn't Settled Quickly, It May Last a While
- Cold Wave Linked to Temperatures
- Typhoon Rips Through Cemetery; Hundreds Dead.
- Man Struck By Lightning Faces Battery Charge
- New Study of Obesity Looks for Larger Test Group
- Kids Make Nutritious Snacks
- Local High School Dropouts Cut in Half
- New Vaccine May Contain Rabies
- Hospitals are Sued by 7 Foot Doctors

Printscreens

- Good Info
- www.gadwin.com

The screenshot shows a web browser window displaying a dialog box titled "Create Job -- Web Page Dialog". The dialog box has a blue title bar with a close button (X) in the top right corner. It contains four main input fields, each with a vertical scrollbar on the right side:

- Description of Problem**: A large text area for entering a description.
- Menu Path**: A text field for specifying the menu path.
- Answers to Prompts**: A text area for providing answers to prompts.
- Sample Data**: A text area for entering sample data.

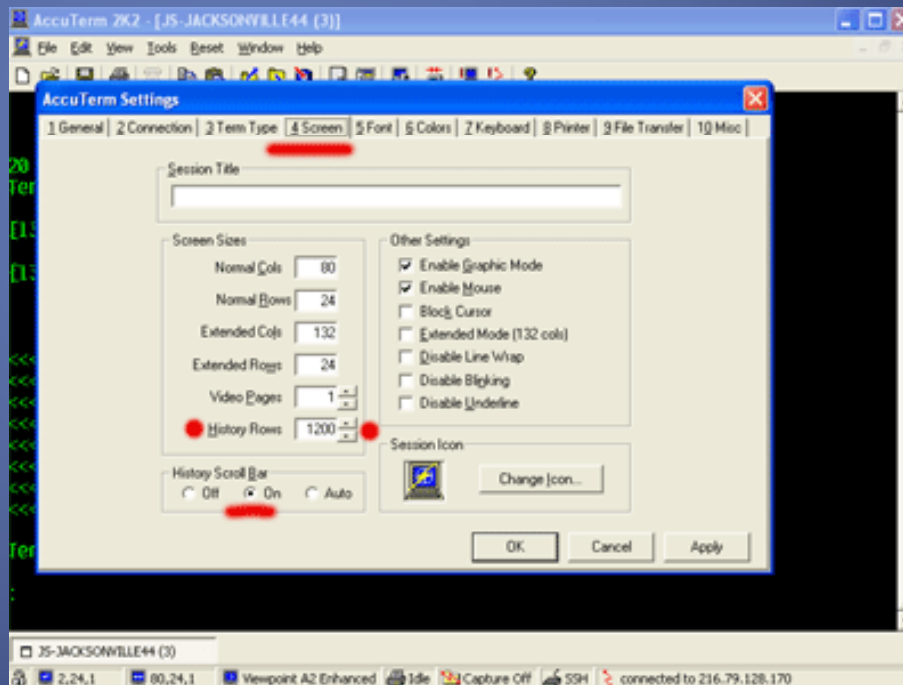
Below the "Sample Data" field, there is a checkbox labeled "Check if you are faxing sample data - (413) 254-7943". At the bottom of the dialog box, there are two buttons: "Cancel" on the left and "Create" on the right. The browser's address bar at the bottom shows the URL "http://dst.myjohnstone.com/admin/dlg/FS_Create" and the text "Internet".

KB –Laser Checks

- Order Laser Checks from Leading Edge Printing
- Contact Gary Moser at 1.800.765.8868. Several stores are using this standard laser check form.
 - **HP laser printer recommended.
 - ***Customization from this recommended form will be billable programming.
- [Sample Check](http://dst.myjohnstone.com/config/uploads/Shared_lasercheckssample10122005.pdf)
(http://dst.myjohnstone.com/config/uploads/Shared_lasercheckssample10122005.pdf)

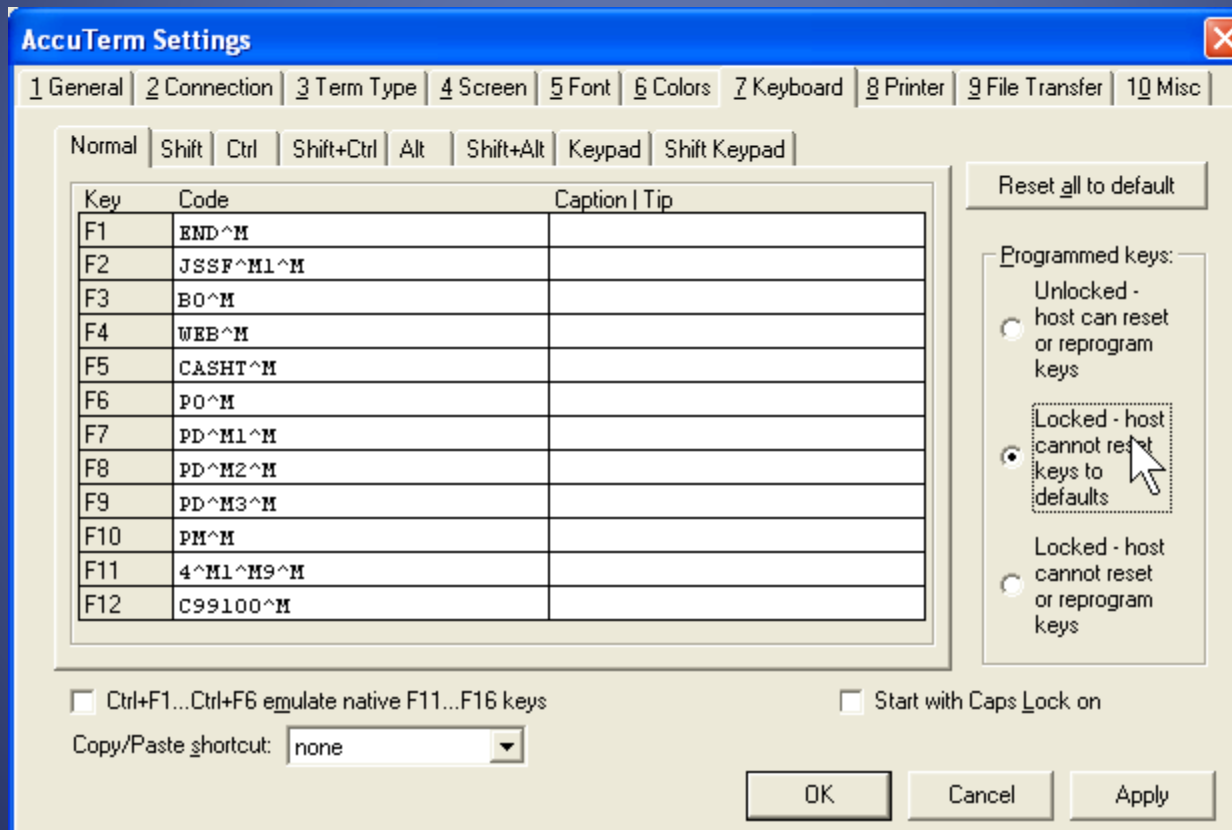
AccuTerm Session History

- History allows you to go back to previous screens for review or copying and pasting (into jobs).



AccuTerm F-Keys

- Setup F-Keys to reduce keystrokes



Q & A

- Open Discussion Time



Evaluations

- **AVERAGE:**Not too bright.
- **EXCEPTIONALLY WELL PREPARED:**Has committed no major blunders to date.
- **ZEALOUS ATTITUDE:**Opinionated.
- **CHARACTER ABOVE REPROACH:**Still one step ahead of the law.
- **QUICK THINKING:**Offers plausible excuses for errors.
- **TAKES PRIDE IN WORK:**Conceited.
- **STERN DISCIPLINARIAN:**A real jerk.
- **TACTFUL IN DEALING WITH ATTENDEES:**Knows when to keep mouth shut.
- **APPROACHES DIFFICULT PROBLEMS WITH LOGIC:**Finds someone else to do the job.
- **A KEEN ANALYST:**Thoroughly confused.
- **EXPRESSES SELF WELL:**Can string two sentences together.
- **CONSCIENTIOUS AND CAREFUL:**Scared.
- **METICULOUS IN ATTENTION TO DETAIL:**A nitpicker.
- **DEMONSTRATES QUALITIES OF LEADERSHIP:**Has a loud voice.
- **JUDGEMENT IS USUALLY SOUND:**Lucky.
- **MAINTAINS PROFESSIONAL ATTITUDE:**A snob.
- **KEEN SENSE OF HUMOR:**Knows lots of dirty jokes.
- **STRONG ADHERENCE TO PRINCIPLES:**Stubborn.
- **SLIGHTLY BELOW AVERAGE:**Stupid.
- **HARD WORKER:**Usually does it the hard way.
- **ENJOYED CLASS:**Better than root canal.
- **WELL ORGANIZED:**Does too much busywork.
- **COMPETENT:**Is still able to get work done if supervisor helps.
- **USES TIME EFFECTIVELY:** Clock watcher.
- **VERY CREATIVE:** Finds 22 reasons to do anything except original work.
- **USES RESOURCES WELL:** Delegates everything.

Thank you for attending!