



## Hardware Installation Checklist

**Order Equipment:** DST will order required equipment after stores sign a price quote. Price Quotes can be obtained from DST. For pricing information refer to [Sig\\_Cap\\_Price\\_List.asp](#)

1. Install Linux Server
  - a. When Signature Server arrives on site call DST for installation steps.
2. Install stands for Signature Capture pads (optional) at counter.
  - a. Remove stands from packaging.
  - b. Remove top of stand by pulling top while holding base.
  - c. Push cord with connection to pad through bottom of base. You can drill a hole through the counter or run the cord through the channel in the base of the stand.
  - d. Determine best position of stand considering customer accessibility and cable connections. Mount stands by screwing four screws into the counter.
  - e. Replace top of stand.
  - f. Mount the signature pad on the stand by lining up the mounting holes over the three screws on the stand.
  - g. Once pad is in place, there is a screw that needs to be hand tightened to secure the signature pad to the stand.
3. Install LCD Signature Capture pads at counter
  - a. Remove LCD from package.
  - b. Mount LCD to stand or to counter (See section #2 above)
  - c. Plug the cable into the back of the LCD pad.
  - d. Plug the other end of the cable into the serial port on the back of the PC that the invoices will be entered on.
  - e. Plug the power transformer into 120V outlet.
  - f. Plug other end of the power cord into the hole on the serial cable that is plugged into the serial port on the PC.
4. Install Printers

**NOTE:** Instructions are only for the recommended HP LaserJet

  - a. Remove from package and install toner and load paper tray per the manufacturer instructions.
  - b. Plug in power and plug in network cable to data jack, switch or hub.
  - c. Assign printer an IP address (follow steps in section #5)
5. Setting up Printer IP Address
  - a. Decide on an IP address for this printer. An address will also be required for Subnet Mask and Gateway. Call DST for assistance if you do not have the required IP information.
  - b. On the front of the printer push the green button to enter setup.
  - c. Push the down arrow until CONFIGURE DEVICE is highlighted and then press the green button.
  - d. Push the down arrow until I/O is highlighted and then press the green button.
  - e. Push the down arrow until EIO\* is highlighted and then press the green button.
  - f. Push the down arrow until TCP/IP is highlighted and then press the green button.
  - g. Push the down arrow until CONFIG METHOD is highlighted and then press the green button.

- h. Push the down arrow until MANUAL is highlighted and then press the green button.
- i. Push the down arrow until IP ADDRESS is highlighted and then press the green button.
- j. The next screen that appears looks like an IP address. For instance 192.168.44.70 (this is only an example, your IP address may look different). The next steps require you to push the up or down arrow and select the green button for each section of the IP address. For instance, press the down arrow until 192 and then press the green button, press down arrow until 168 and then press the green button, press down arrow until 44 appears then press the green button, press the down arrow until 70 appears and then press green button.
- k. Push down arrow to SUBNET MASK and press green button. Follow instructions in step J to complete this process. **NOTE:** Most Subnet Masks are 255.255.255.0.
- l. Push down arrow until DEFAULT GATEWAY and press green button. Follow instructions in step J to complete this process. **NOTE:** In most cases the Default Gateway will be the IP address of your internet router.

The Signature Capture Hardware is now setup. The next step is to install the [Signature Capture software](#). Contact Database Support if you don't already have an implementation date scheduled for the software installation.



## Database System Installation and Maintenance Documentation

### PART I - INSTALLATION

#### 1. Setup Signature Capture Company Parameters Menu 35.12

Go to Menu 35.12 – Signature Capture Company Parameters

SIGNATURE CAPTURE COMPANY PARAMETERS		
COMPANY NUMBER	01	JOHNSTONE SUPPLY
1. ENABLE SIGNATURE CAPTURE		Y
2. SIGNATURE CAPTURE SOFTWARE VERSION		2
3. SIGNATURE CAPTURE SERVER NAME		signature
4. SIGNATURE CAPTURE FAX-SERVER NAME		signature
5. ENABLE SIGNATURE TABLETS		N
6. ENABLE LASER PRINTED QUOTES		Y
7. PRINT EACH PRICE ON LASER INVOICE		N
8. PRINT 2ND COPY ONLY ON CASH TICKETS		Y
9. PRINT INVOICES EVERY END-OF-DAY		N
10. END-OF-DAY INVOICE PRINTER		inv160_1
11. Remit to Name		Johnstone Supply -
12. Remit to Addr1		11710 Central Pkwy-
13. Remit to Addr2		
14. Remit to City-St-Zip		Jacksonville, FL 32224
15. PRINT STORE-TRANSFER INVOICES		n
16. PRINT 2ND COPY ON CREDIT MEMOS		N
17. PRINT 2ND COPY ON DELIVERY TICKETS		N
18. PRINT 'T'AX FLAG ON TAXABLE LINES		N
19. WATERMARK TO PRINT ON FORM	1	1 = PACKING LIST
20. BYPASS SIG CAPTURE PASSWORD		
21. FAX COVER PAGE - COMPANY	01	

Enter Company number at prompt

To setup and enable Signature Capture, fill in all fields by selecting the line number and entering the following:

1. ENABLE SIGNATURE CAPTURE – enter 'Y'
2. SIGNATURE CAPTURE SOFTWARE VERSION – If you are unsure of your version number, contact [DST](#).
3. SIGNATURE CAPTURE SERVER NAME – enter SIGXXX where XXX is your store number (must be 3 digits, Ex: Store 76 would be SIG076)

4. SIGNATURE CAPTURE FAX-SERVER NAME – same as Field 3
5. ENABLE SIGNATURE TABLETS – enter 'Y'
6. ENABLE LASER PRINTED QUOTES – enter 'Y'
7. PRINT EACH PRICE ON LASER INVOICE – enter 'Y' if you want an each price on the invoice, or enter 'N' if you do not want the each price to print on the invoice.
8. PRINT 2ND COPY ONLY ON CASH TICKETS – enter 'Y' if you want to print a 2nd copy (for internal use) for cash, credit card, or check invoices only. Entering 'N' will print two copies of every invoice. Or 'O' to print only ONE copy, including cash tickets.
9. PRINT INVOICES EVERY END-OF-DAY – enter 'Y' if you want to print your invoices every night during EOD. Enter 'N' if you want to customize your printing options using Menu 1.20.27. *IMPORTANT: To keep from having missing invoices, if you select "N" at this prompt you can ONLY change the fax flag in customer master on the day that your invoices are mailed. For example; if you print on Thursday night and mail on Friday you can only change the fax flag in customer master on Friday.*
10. END-OF-DAY INVOICE PRINTER - enter laser printer name where you want the invoices printed either during EOD or using custom options in Menu 1.20.27. Must enter printer name using this format – 'invXXX\_1' where - XXX is three digit store number followed by \_1, or \_2, \_3, etc. (EX. inv044\_1)
11. REMIT TO NAME: Enter the company name here.
12. REMIT TO ADDRESS 1: Enter the first address line here
13. REMIT TO ADDRESS 2: Enter the second address line here, if applicable.
14. REMIT TO CITY, ST,ZIP: Enter the remit to city, state and zip code here.  
*Note: When the remit to address prints on the bottom of the invoice, it prints on two lines. We suggest putting \* or commas after the company name and each of the address lines to create a nice separation.*
15. Print store-transfer invoices - Y – prints a copy of store transfer invoices when batch printing customer invoices. N – removes store transfer invoices from the nightly/weekly batch print. Leaving this field blank will default to Y. Either option will still print a copy at time of shipping to use for packing list.
16. Print 2nd copy on credit memos – enter Y if you would like a second copy of the credit memo to print. Enter N if you do not want these to print. Blank defaults to Y. This flag is independant of the flag in field 8.
17. Print 2nd copy on delivery tickets – enter Y if you would like a second copy of the delivery tickets to print. Enter N if you do not want these to print. Blank defaults to N. This flag is independant of the flag in field 8.
18. Print tax flag – Enter Y if you would like the tax flag to print on invoices. Enter N if you do not want the tax flag to print. Blank defaults to N.
19. Watermark to print on form – Enter '1' to have the words 'Packing List' print on the background of all non-cash invoices printed at the counter. This watermark will not print on the invoices that are batch printed during EOD processing.
20. Bypass Sig Capture Password: Enter the password to be used in Order Entry when bypassing the need for a signature.
21. FAX COVER PAGE - COMPANY 01: If 'Y', the fax cover page will be the address, phone and

fax from company 01. If 'N' or blank, the fax cover page will be the address, phone and fax for the company of the invoice that is being faxed.

*If you have multiple companies repeat these steps for each location. (Note\*\*\*do not answer yes to 35.12 Field 1 until the signature capture equipment is installed that location)*

### Menu 35.12, Screen 2 - Signature Capture Company Parameters

SIGNATURE CAPTURE COMPANY PARAMETERS		
COMPANY NUMBER	01	JOHNSTONE SUPPLY WAT
1. PRINT ORIGINAL OPERATOR OR SALESMAN		0
2. USE PURCHASING FAX# FOR INVOICES		N
3. PRINT TIME/DATE STAMP IN 2ND PO FIELD		Y
4. PRINT USING UPDATED LASER FORMS		N
5. PRINT RETAIL IN EACH PRICE COLUMN		N

1. SIGNATURE CAPTURE PAD ATTACHED (Y/N) – Enter 'Y' if a pad is attached to this terminal otherwise enter 'N' (This field determines whether the PC is going to prompt for a signature or not.)
2. SIGNATURE CAPTURE PAD TYPE ('LCD', 'NONE') – Enter 'L' if the port has a LCD pad attached or 'N' if it does not have a LCD pad.
3. ORDER ENTRY PRINTER ('LASER', 'PLAIN', 'ALL-MULTI') – Enter 'L' if the customer invoice/packslip should print on the Laser printer, or enter 'A' to default to the printer in port control in Menu 12.10. Enter 'P' if you would like to print to a dot matrix printer using plain white paper (this would be used in an emergency if a laser printer broke or did not work).
4. LASER PRINTER DEFINITION (EX. inv044\_1) – enter laser printer name – must be in format 'invXXX\_1' where XXX is the store number (Ex: Store 76 = 076)
5. BRANCH NUMBER THAT PORT IS MAPPED TO – Enter the branch number where the port is located. Single digit branch numbers must be entered as a 2 digit number. 2 or 3 digit branch numbers are entered like normal. (Ex: Branch 4 – enter '04", Branch 76 – enter '76', Branch 155 – enter '155')
6. PRINT BAR CODE ON INVOICE (Y/N) – Enter Y if you would like a barcode to be printed on the packlist and invoice (you would want this if you are using a handheld for deliveries). Enter N if you do not need barcodes to print on the packlist/invoice.

## 1a. Setup Scheduled EOD's to print Invoices

Menu 1.20.27

*This only needs to be completed if you answered 'N'o in field #9 (Print Invoices Every End-of-Day) in menu 35.12 above. And needs to be completed only once for all stores setup this way.*

In menu 35.12 Field 9, users have the option of selecting 'N' so invoices do not print at the end of each day. When selecting 'N' in 35.12 you need to go into Menu 1.20.27 and tell the system which days the invoices need to print.

### Menu 1.20.27

```
LIST OF SCHEDULED END-OF-DAY DATES TO PRINT SIGNATURE CAPTURE INVOICES
06/24/04
06/30/04
07/08/04
07/14/04
07/15/04
07/22/04
07/30/04
07/31/04

ENTER OPTION:
  1. ADD NEW DATE
  2. DELETE DATE
ENTER 1 OR 2 ?_
```

When entering the invoice dates it's important to clarify that with the first running, **the first date entered must be before the day you need the invoices to print.** For instance if you want your invoices to print on July 28th, and you have never used the program before, the first date that you would want to enter would be July 26th. Otherwise the system keeps looking back indefinitely. It needs a benchmark. With this example, on the 28th it would print the invoices from July 26th – 28th.

It's also important to remember that you will need to enter a month end date that you want the invoices to print on. The invoices will not automatically print at the end of the month. A date must be entered in 1.20.27.

It is recommended to input several dates at a time, like one or two months worth, to limit the possibility of forgetting to input a date, therefore not having your invoices printed when you expect to.

Tip – set yourself a reminder in your email program to update these dates on a monthly basis.

## 2. Setup Signature Capture Port Parameters

Menu 35.13

You will need to set up this screen for every port (PC or Terminal) in your organization (examples below). If you do not know your port numbers they can be found in Menu 12.10 Port Control or by looking in the upper right corner of the screen at the Main Menu.

Go to menu 35.13 Signature Capture Port Parameters

SIGNATURE CAPTURE PORT PARAMETERS		
PORT NUMBER	56	CNTR 1 TELNET
1. SIGNATURE CAPTURE PAD ATTACHED (Y/N)		Y
2. SIGNATURE CAPTURE PAD TYPE (L'CD, 'N'ONE)		L
3. ORDER ENTRY PRINTER (L'ASER, 'P'LAIN, 'A'LL-MULTI)		L
4. LASER PRINTER DEFINITION (EX. Inv044_1)		INV155_1
5. BRANCH NUMBER THAT PORT IS MAPPED TO		155

Enter port number

Fill in all fields as follows:

1. SIGNATURE CAPTURE PAD ATTACHED (Y/N) – Enter 'Y' if a pad is attached to this terminal otherwise enter 'N' (This field determines whether the PC is going to prompt for a signature or not.)
2. SIGNATURE CAPTURE PAD TYPE (L'CD, 'N'ONE) – Enter 'L' if the port has a LCD pad attached or 'N' if it does not have a LCD pad.
3. ORDER ENTRY PRINTER (L'ASER, 'P'LAIN, 'A'LL-MULTI) – Enter 'L' if the customer invoice/packslip should print on the Laser printer, or enter 'A' to default to the printer in port control in Menu 12.10. Enter 'P' if you would like to print to a dot matrix printer using plain white paper (this would be used in an emergency if a laser printer broke or did not work).
4. LASER PRINTER DEFINITION (EX. inv044\_1) – enter laser printer name – must be in format 'invXXX\_1' where XXX is the store number (Ex: Store 76 = 076)
5. BRANCH NUMBER THAT PORT IS MAPPED TO – Enter the branch number where the port is located. Single digit branch numbers must be entered as a 2 digit number. 2 or 3 digit branch numbers are entered like normal. (Ex: Branch 4 – enter '04', Branch 76 – enter '76', Branch 155 – enter '155')

Examples:

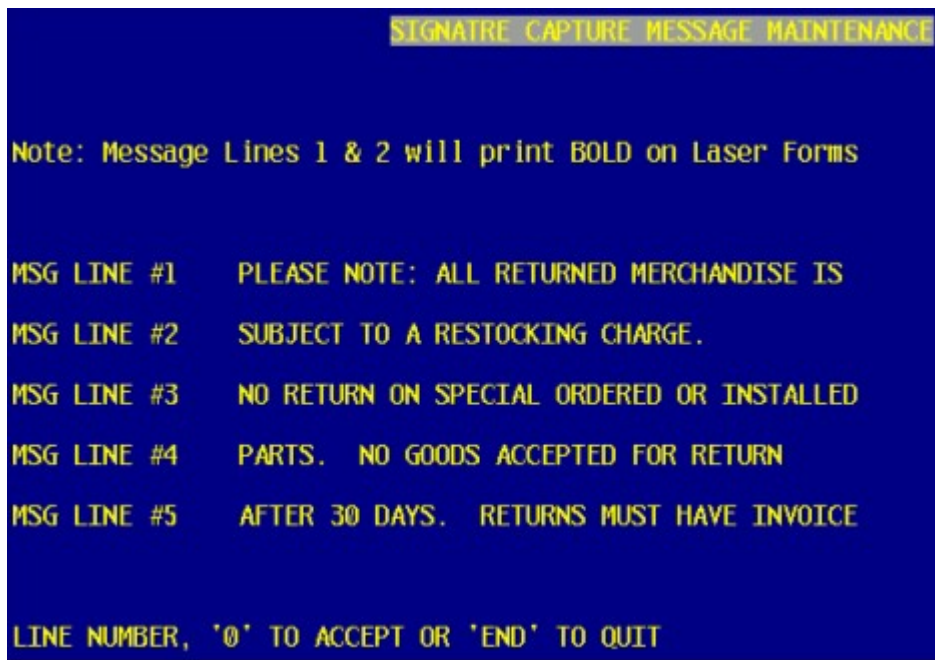
<b>Typical PC at counter with LCD pad attached</b>	<b>Typical Shipping terminal (PC) that prints to 3 part invoice</b>
1. Y 2. L 3. L 4. INV155_1 5. 155	1. N 2. N 3. A 4. INV155_1 5. 155
<b>Typical dumb terminal With no pad attached</b>	<b>Typical PC with no pad attached</b>
1. N 2. N 3. A 4. INV155_1 5. 155	1. N 2. N 3. L 4. INV155_1 5. 155

### 3. Set up Laser forms default

Menu 1.20.7

The message specified here will print on the bottom of every laser invoice. Message lines 1 & 2 will print in bold print, lines 3-5 will be regular.

Go to Menu 1.20.7



Select the first message line and enter the message you want to appear on the invoice. Continue through lines 2, 3, 4, & 5 by selecting the line and then entering



your message. If you do not want a message in one of the lines enter '\*' to clear the line.

When finished, type '0' to accept.

#### 4. Set up store defaults for laser invoices

Menu 12.1.1

```
COMPANY FILE MAINTENANCE
COMPANY #: 01
1.CO NAME JOHNSTONE SUPPLY WAT
2.ADDRESS 1 329 W 6TH ST
3.ADDRESS 2
4.CITY WATERLOO
5.STATE IA
6.ZIP CODE 50701
7.PHONE NO 319-233-0525
8.REGIST. #
9.GL FORMAT ##-###-##
10.GL-MATCH 2N-4N-2N
11.PL BRK G/L # 01-3200-00
12.CUR YR EARN
13.FISCAL MO 1
14.PRINTR# EOM 0
15.FAX# 319-233-3001
16.PRT CO ADDR N
17.W/C SM 00 WILL CALL
18.TAX JURIS 07 IA & BLACK HAWK
19.CORP WHSE 001
20.PORT 1 PSWD 1992
Enter Line#, Backout, DELETE, Edit, 0 to Accept _
```

Go to Menu 12.1.1

Select your company number – Ex: 01 or 02  
Verify fields 1, thru 7 and 15 are filled in and accurate. These will print on the top of every invoice for this company.  
Repeat for each company if you have multiple locations.

Go to menu 1.20.21

```
EMAIL INVOICE DEFAULT MAINTENANCE SCREEN
Email addresses to johnstonesupply will be modified to mail.johnstonesupply
1. Store.From.Email.Addr:
   chris.schmitt@mail.johnstonesupply.com
2. Default.Subject.Line.:
   Invoices attached are from Johnstone Supply
3. Default.Message.Line.:
   Here are the Invoices that you requested!
4. Unix.Control.Directory:
   /home/johnstone/data/adhoc
5. Use Master A/R Email Addr:
   Y
```

1 STORE.FROM.EMAIL.ADDR: Enter the email address that you want the email containing the invoices/statements, to be coming from.

*Note: the system will modify your address after it is entered.*

2. DEFAULT SUBJECT LINE: Enter the desired subject line for Invoice emails (i.e., "Invoices attached are from Johnstone Supply")

3. DEFAULT MESSAGE LINE: **Please change line #3 to say "Here are the Invoices that you requested. Adobe Acrobat 5.0 or higher is required to view the attachment(s)"**

4 UNIX CONTROL DIRECTORY: Enter /home/johnstone/data/adhoc unless directed otherwise.

5. USE MASTER A/R EMAIL ADDR: Enter 'N' if you would like the customers invoices/statements to get emailed to the email address listed in Menu 12.2.2.2, Field 17. Enter 'Y' if you prefer to have the invoices/statements emailed to the address listed in the Master A/R account. Type '0' to accept changes.

## 6. Set up Paperless EOD Report 'List of Invoice Signatures' Menu 16.5

Go to Menu 16.5

Enter 'XX-167' – where XX is your company number (ie; 01-167, 02-167 etc.)

Fill in desired fields with necessary information. ([See Paperless EOD Procedures for more detailed information](#))

This report shows you all of the invoices that were finalized the previous day and whether they have an OK, Missing or Unreadable signature on them. This report should be looked at daily to ensure that the necessary signatures are being captured. If signatures are listed as missing or unreadable the invoice should be researched. Because we are not able to collect signatures on every invoice yet, it also gives you the ship method, the port number it was finalized on, the total dollar amount and the operator who finalized it - in case you have questions - to help determine whether a signature was required or not. See a sample of the report below:

RELEASE....	INV#..	OPERL.....	SHIP.METH.DESC.....	INV.DAT.	SIGNATURE.	TOT.AMT.....	CASH.RECD	PORT
01082577001	082577	Bob Miller	CUST P/U	03/26/04	MISSING	1,178.77	0.00	28
01082726001	082726	Bob Miller	CUST P/U	03/26/04	MISSING	221.21	0.00	246
01082916001	082916	Bob Miller	CUST P/U	03/26/04	MISSING	111.59	0.00	246
***								
01081377001	081377	CARMEN ALLISON	CUST P/U	03/26/04	OK	141.79	0.00	245
01082873001	082873	CARMEN ALLISON	CUST P/U	03/26/04	OK	156.02	0.00	206
01082169001	082169	CARMEN ALLISON	SHIPPED DIRECT	03/26/04	OK	104.84	0.00	245
***								
01082290001	082290	CYMEL COLEY	DELIVERY	03/26/04	MISSING	1,076.99	0.00	48
01082717001	082717	CYMEL COLEY	DELIVERY	03/26/04	MISSING	2,291.68	0.00	345
***								
01082773001	082773	DANIEL SCRECIU	CUST P/U	03/26/04	OK	285.16	0.00	342
01082779001	082779	DANIEL SCRECIU	CUST P/U	03/26/04	OK	434.53	0.00	342
01082783001	082783	DANIEL SCRECIU	CUST P/U	03/26/04	UNREADABLE	35.08	35.08	343
01082790001	082790	DANIEL SCRECIU	CUST P/U	03/26/04	OK	4.98	0.00	343
01082793001	082793	DANIEL SCRECIU	CUST P/U	03/26/04	OK	70.04	70.04	342
01082796001	082796	DANIEL SCRECIU	CUST P/U	03/26/04	OK	0.64	0.64	342
01082800001	082800	DANIEL SCRECIU	CUST P/U	03/26/04	OK	174.07	0.00	342
01082841001	082841	DANIEL SCRECIU	CUST P/U	03/26/04	OK	-29.96	0.00	342
01082843001	082843	DANIEL SCRECIU	CUST P/U	03/26/04	OK	31.04	0.00	342
01082847001	082847	DANIEL SCRECIU	CUST P/U	03/26/04	OK	38.19	38.19	342
01082859001	082859	DANIEL SCRECIU	CUST P/U	03/26/04	OK	7.93	0.00	342

## 7. Set up 'List of Laser Printed Invoices' paperless EOD Report Menu 16.5

Go to Menu 16.5

Enter 'XX-168' - where XX is your company number (ie; 01-168, 02-168 etc.)

Fill in desired fields with necessary information. ([See Paperless EOD Procedures for more detailed information](#))

This report is intended for you to confirm that all of your laser invoices to be mailed (customers who are not on the Fax or Email program) have printed. This report will print with End-of-Day the same day that your laser invoices print. If you print your laser invoices daily, you will receive this report daily. If you print your invoices weekly, you will receive this report weekly. The report is printed in alpha order by customer name, the same order as your invoices printing on the printer. See example of this report below:

```
08:55:58 13 Jul 2004    LIST OF LASER PRINTED INVOICES - 05    PAGE    1
A.CUST.NO.... CUST.NAME..... INV.DAT. INV#.. TOT.AMT.....
1353          ALLAN & ROGERS  07/12/04 511366    148.17
104310        BROADERICK HTG  07/12/04 511823     20.42
102338        CENTRAL FLORIDA 07/12/04 511790     59.58
11003         FIELDS MECHANIC 07/12/04 511777     32.45
104266        JAMES ENTERPRIS 07/12/04 511717    955.47
104266        JAMES ENTERPRIS 07/12/04 511730    150.30
104266        JAMES ENTERPRIS 07/12/04 511805   -676.24
104266        JAMES ENTERPRIS 07/12/04 511806    676.24
100353        KILBURY & SONS  07/12/04 511766     88.20
107483        KURT'S SALES &  07/12/04 511446     50.36
107483        KURT'S SALES &  07/12/04 511473    826.58
107483        KURT'S SALES &  07/12/04 511703    245.69
104991        LEXTRON ANIMAL  07/12/04 511764     50.41
102325        MUNN'S SALES AN  07/12/04 511601     96.20
102325        MUNN'S SALES AN  07/12/04 511602     29.99
102304        SUPERIOR A/C &  07/12/04 511718    123.48
102304        SUPERIOR A/C &  07/12/04 511779     62.24
26410        WINN-DIXIE STOR 07/12/04 511846   -200.00

[405] 18 items listed out of 18 items.
```

```
MENU-1.20          SIGNATURE CAPTURE MENU
16:48:23 09 Jul 2004          61 jwat JWAT
SIGNATURE CAPTURE PROCESSES          REPORTS
1. Reprint Signature Capture Invoice  30. Invoice Email Log Rpt
3. Fax Invoice thru Linux Server
4. Fax Yesterday's Invoices
5. Turn ON/OFF Signature Capture
6. Print Invoices by Date by Customer
7. Update Laser Forms Messages Lines  27. Scheduled EOD's to Print Invoices
8. Phone Exchange Maintenance
9. Phone Local Maintenance

EMAIL AND FTP PROCESSES
20. Email Selected Invoices Screen
21. Email Defaults Maint Screen
```

Faxing invoices to customers through EOD processing – using a local fax server (Linux server).

Due to various long distance dialing issues, DST has created two different options to help configure your systems long distance dialing requirements. These programs will tell your computer when a '1' is needed in order to dial a long distance number. Either option must be implemented with the help of DST. Please start this process by determining which of the following options best suits your needs, gather the necessary information in a spreadsheet and then contact DST.

\*\*\*Note – if you do not set this up your system may not fax correctly. \*\*

Typical format for phone number is XXX-XXX-XXXX. The area code is the first three digits and the exchange is the next three digits. (area-exchange-XXXX)

Currently the base system determines whether a '1' is necessary by looking first at menu 12.2.2.2 field 29, and then to field 11. If in 12.2.2.2 field 29, or field 11 you have a 10-digit number the system will add a '1' before dialing. If it finds a 7-digit number in Field 29 or field 11, it will not add a '1' when dialing. For multiple store users, you must consider the dialing requirements from the location that the fax server is located. Please gather the exchange information on a spreadsheet with two columns labeled area code and exchange. DST will set up the initial installation - then it will be up to each store to maintain.

Option A – Menu 1.20.8 – Phone Exchange – Use this option if you want to enter the exchanges in your area that require a '1' when dialing long distance.

Option B – Menu 1.20.9 – Phone Local Maintenance – Use this option if you want to enter the exchanges in your area that do not require a ‘1’ when dialing long distance, or if your area requires 10-digit dialing.

## 9. Setup fax or e-mail invoices for customers Menu 12.2.2.2

The customer now has a choice to receive their copy of the invoice via snail mail, e-mail, fax, or not at all. All choices are outlined below.

Use Menu 12.2.2.2, Screen1, Field 31 to select the fax indicator for each customer.

If you are faxing the invoices to your customer go to Menu 12.2.2.2, Screen1, Field 11 and enter the fax number you want to send the invoices to. Only fill in the area code if it is long distance to dial it from the location of the Linux server. If you are emailing the invoices to your customer, go to Menu 12.2.2.2, Screen1, Field 17 and enter the email address you would like the emailed invoices to be sent to. On the base package the invoices can only be faxed or emailed to one number or address.

*Note: Any of the options that include faxing statements will only work if using Xpedite. DBS (non Xpedite) functionality projected for 3rd quarter 2004.*

```
CUSTOMER MASTER MAINTENANCE - SCREEN 1
EX CUST #: 242          INT CUST #:101190
  A/R                    PURCHASING
1.SLD TO NA  DON LENTZ HTG AND CLG    19.
2.SLD TO A1  PO BOX 14                 20.
3.SLD TO A2                                     21.
4.SLD TO A3                                     22.
5.CITY      WATERLOO                    23.
6.STATE     IA                          24.
7.ZIP      50704                        25.
8.A/R CONT                                     26.
9.PHONE #                                       27.
10.OTHER CONT DON LENTZ                    28.
11.FAX NUMBER                                   29.
12.CREATE DAT 04/29/92                      30.AUTH BUYER UPD
13.PP FRT $                                       31.PRINT-FAX-EMAIL
14.PP FRT LB                                       32.AUTH BUY REQ
F= FAX INVOICES/STATEMENTS  FS= FAX STATEMENTS ONLY
FE=FAX & EMAIL INV ONLY    I= FAX INVOICES ONLY
E= EMAIL INVOICES/STMNTS  N= DO NOT PRINT, FAX OR EMAIL
NULL (BLANK) = PRINT ONLY
Hit Return
```

### **Field 31. PRINT-FAX-EMAIL Options:**

**Leave Blank** – The customer invoices will print daily during EOD and Statements will print at EOM. *Note: To blank out the field if there is already something there, enter a \* (shift+8) in the field.*

**F** – Fax Invoices & Statements. This will fax the customer their invoices daily

during EOD and their statements monthly (if using Xpedite)

**FE** – Fax and Email Invoices Only. Adobe Acrobat 5.0 or higher is required for the customer to view the attached invoices. This will fax the customer their invoices daily during EOD and also send a duplicate email to the customer daily during EOD. *Note: This could be used if you want to send the fax to one person and the email to another.*

**E** – Email Invoices & Statements. Adobe Acrobat 5.0 or higher is required for the customer to view the attached invoices. This will email the customer their invoices daily during EOD and print statements during EOM.\*

**FS** – Fax Statements Only. This will fax statements to the customer during EOM processing. Invoices will be printed and mailed.

**I** – Fax invoices only. This will fax invoices to the customer daily during EOD processing. Statements will be printed and mailed at EOM.

**N** – Do Not Print, Fax, or Email. This will remove customer from any printed, faxed or emailed invoices. Statements will still be printed and mailed at EOM.

See chart below for additional clarification:

Option	Fax Inv	Fax Stmt	Email Inv	Email Stmt*	Print Inv	Print Stmt
<b>F</b>	Y	Y	N	N	N	N
<b>FS</b>	N	Y	N	N	Y	N
<b>FE</b>	Y	N	Y	N	N	Y
<b>I</b>	Y	N	N	N	N	Y
<b>E</b>	N	N	Y	N	N	Y
<b>N</b>	N	N	N	N	N	Y

*\* Functionality to email statements is projected for 4th quarter 2004.*

## PART II - MAINTENANCE AND OTHER FUNCTIONALITY

### Signature Capture Account Update Letter

A lot of you may want to send a letter to your customers letting them know about your new email and fax capabilities. [Here is a sample letter that Santa Ana sent to their customers - this is a great example.](#)

### Menu 1

### Order Entry and Invoicing

#### Menu 1.3 Maintain POs on Finalized Invoices

This menu is not new, but it does have some new functionality. When you maintain a PO using this menu, it will now ask you if you want to reprint the invoice, if you select 'Y'es, it will print on the default laser invoice printer for that port. This is for your customer if he/she needs a copy with the PO number printed on it.

#### Menu 1.31 Reprint Signature Capture Invoice

To use this menu, enter the release number(s) separated by a semicolon (;) and press <enter>. The program will determine whether it is a signature capture invoice or the old style invoice and print it on a printer accordingly. Either the default laser invoice printer for that port or the default report printer as a plain paper invoice.

Invoice/Credit Memo Reprint

Enter Release Number(s) (11N), separate multiples with ;'  
:01123456001;01123454001

#### Menu 1.32 Fax Invoice with Signature Capture

Use this menu to fax an invoice to your customer. Only one invoice can be faxed at a time through this menu.

Program to fax invoices from Server

Enter release number (11N) ?01084077001

Enter fax# or <enter> for 904-358-0975 ?  
request id is 6795 (group id 6795) for host localhost (1 file)

press <enter> ?

Enter the release number that you want to fax.

Enter the fax number or press <enter> to use the default that is displayed on the screen.

When you are prompted to press <enter> again, your fax is complete.



### Menu 1.33 Email Selected Invoices Screen

```
EMAIL INVOICES MAINTENANCE SCREEN
Enter New data, <return> for default, 'END' to stop, 'DEL' to clear field.
1. Co#:Invoice#: ----- 7. Co#:Invoice#:
2. Co#:Invoice#:          8. Co#:Invoice#:
3. Co#:Invoice#:          9. Co#:Invoice#:
4. Co#:Invoice#:         10. Co#:Invoice#:
5. Co#:Invoice#:         11. Co#:Invoice#:
6. Co#:Invoice#:         12. Co#:Invoice#:
-----
13. TO Email Address:
14. FROM Email Address:
15. Subject Line :      Invoices attached are from Johnstone Supply
    Message Line1:      Here are the Invoices that you requested!
    Message Line2:
    Message Line3:
    Message Line4:
    Message Line5:

Type 'REL' to enter Release# instead of Invoice#
```

Use this menu to email Signature Capture invoices. You can send up to 12 invoices in one email.

Enter the company number then invoice number (ie; 01123456) in line 1. If you have a release number and not the invoice number, type REL to enter the release number instead. To enter multiple invoice numbers, continue to enter invoice numbers in the consecutive fields.

When you have entered all the invoice numbers, press <enter> and you will be taken to line 13. The TO email address field. This field is automatically filled in with the email address that is on file for the customer whose invoice number is in line 1, if there is an address on file. To accept the default address, press <Enter> again, or else enter the email address you would like to send the invoices to and press <Enter>.

Next you will be at line 14. the FROM address field. This field is automatically filled in based on what was setup in menu 1.20.21. To accept this default, press <Enter> otherwise, enter the email address you want the invoices to come from and press <Enter>.

The next prompt is the Subject Line, this information is also filled in with the default that was setup in menu 1.20.21, to accept the default, press <Enter>, otherwise enter the desired subject and press <Enter>

Again, the Message Line(s) is/are filled in automatically with the default that was specified in menu 1.20.21. Press <Enter> to accept the default or enter the desired Message text.

Once you have all of the information filled out, press 0 <enter> to accept and your invoice(s) will be emailed and the FROM email address will receive an email confirmation that the invoices have been sent.

## Menu 1.20

## Signature Capture Menu

### Menu 1.20.4 Fax Yesterday's Invoices

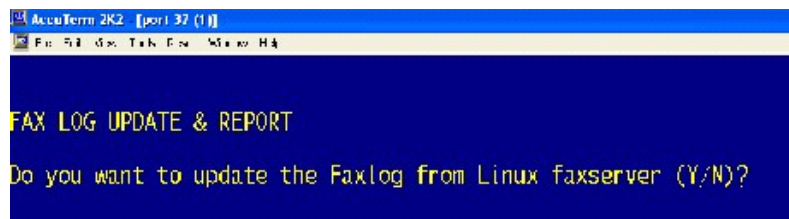
### Menu 1.20.5 Turn ON/OFF Signature Capture

### Menu 1.20.6 Print Invoices by Date by Customer

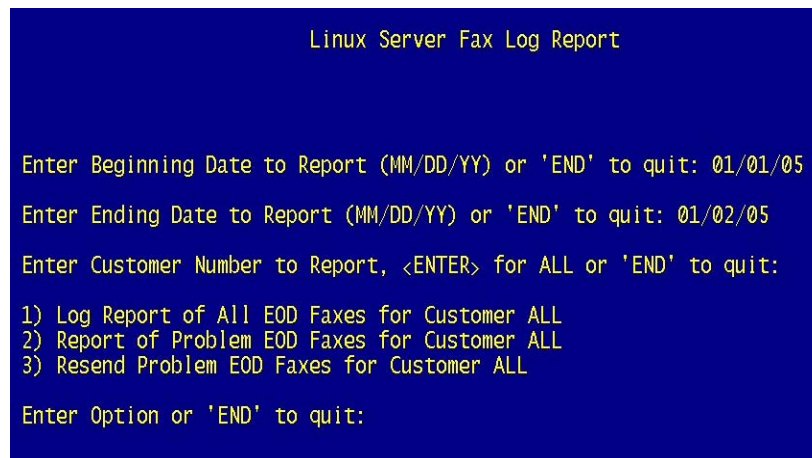
## Menu 1.20.31

## EOD Fax Log Update & Report

On Demand Fax Report Menu 1.20.31. This report can be configured to show a log of all EOD faxes, EOD problem faxes, or EOD resend problem faxes for a given date or date range.



```
AcuTerm 2K2 [port 37 (1)]
F: 51 G: 1 N: 1 M: 1 H: 1
FAX LOG UPDATE & REPORT
Do you want to update the Faxlog from Linux faxserver (Y/N)?
```



```
AcuTerm 2K2 [port 37 (1)]
Linux Server Fax Log Report

Enter Beginning Date to Report (MM/DD/YY) or 'END' to quit: 01/01/05
Enter Ending Date to Report (MM/DD/YY) or 'END' to quit: 01/02/05
Enter Customer Number to Report, <ENTER> for ALL or 'END' to quit:

1) Log Report of All EOD Faxes for Customer ALL
2) Report of Problem EOD Faxes for Customer ALL
3) Resend Problem EOD Faxes for Customer ALL

Enter Option or 'END' to quit:
```

Begin by going to Menu 1.20.31. Select the printer to print the report to. Even if you are resending problem faxes, you will still need to select a printer (nothing will print). The system will then take a moment to update the information. (See the above figures)

Enter the report beginning date.  
Enter the report ending date.  
Enter the customer number or "Enter" for All customers.

Select the report option:

1. Report on all EOD faxes
2. Report list only problem EOD faxes
3. Resend EOD problem faxes

Note: It is a good habit to print 1.20.31, Report 2 on a daily basis. If there are items appearing, run option 3 to resend the faxes. After resending the problem faxes, re-run option 2. This report should be blank.

On Demand Fax Report Menu 1.20.32. This report can be configured to show a log of all Manual faxes, Manual problem faxes, or Manual resend problem faxes for a given date or date range.

```
Manual FAX LOG UPDATE & REPORT
Now updating the Faxlog information from the faxserver
-
```

```
Linux Server Fax Log Report

Enter Beginning Date to Report (MM/DD/YY) or 'END' to quit: 01/01/05
Enter Ending Date to Report (MM/DD/YY) or 'END' to quit: 01/02/05
Enter Customer Number to Report, <ENTER> for ALL or 'END' to quit:

1) Log Report of All Manual Faxes for Customer ALL
2) Report of Problem Manual Faxes for Customer ALL
3) Resend Problem Manual Faxes for Customer ALL

Enter Option or 'END' to quit: _
```

Begin by going to Menu 1.20.32. Select the printer to print the report to. Even if you are resending problem faxes, you will still need to select a printer (nothing will print). The system will then take a moment to update the information. (See the above figures)

Enter the report beginning date.

Enter the report ending date.

Enter the customer number or "Enter" for All customers.

Select the report option:

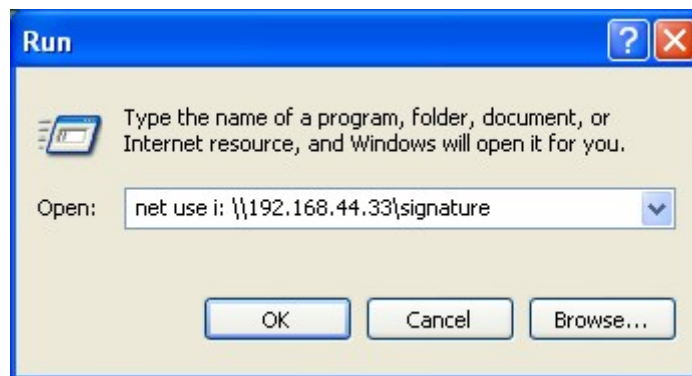
1. Report on all Manual faxes
2. Report list only problem Manual faxes
3. Resend Manual problem faxes

Note: It is a good habit to print 1.20.32, Report 2 on a daily basis. If there are items appearing, run option 3 to resend the faxes. After resending the problem faxes, re-run option 2. This report should be blank.

## Signature Capture PC Software Installation Documentation Windows XP Professional installation instructions for the HHP3101 signature capture pad as of 7.27.04

First, you will need to map a network drive to the signature capture server. To do this

- Close all programs currently running on your computer.
- Click [START > RUN](#)
- Type in - [net use i: \\yourIPAddress\signature](#) ([Contact DST](#) to obtain your IP address if you do not have it.)
- Click OK



You will briefly see a black window come up and go away and this step will be complete.

Next, install the Signature Capture Software on each PC with a signature pad attached. To do this

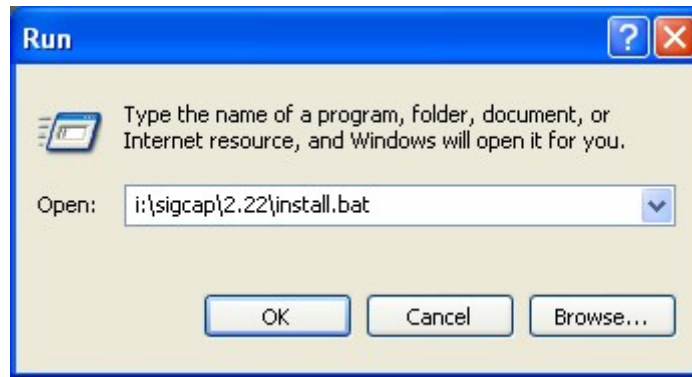
- Close all programs currently running on your computer.
- Click [START>RUN](#)
- Type in one of the following depending on which version of Windows you are running:

Windows XP or 2000: [i:\sigcap\X.XX\install.bat](#)

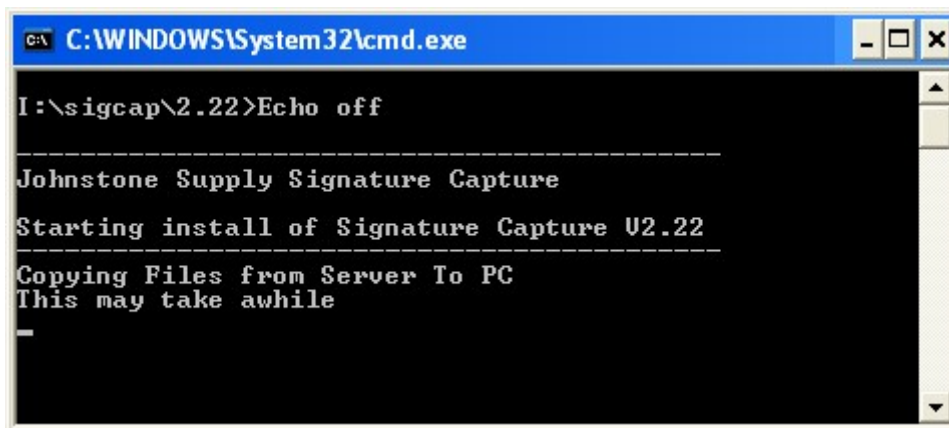
Windows 98: [i:\sigcap\X.XX\install98.bat](#)

**NOTE: X.XX represents the current version of signature capture. [Contact DST](#) to find out what the latest version of signature capture is, currently it is 2.22.**

- Click OK



You will see the following window on your screen:



Just be patient while the necessary files are being copied to the PC. Once this is done you will get the File Download dialog box, click OPEN.



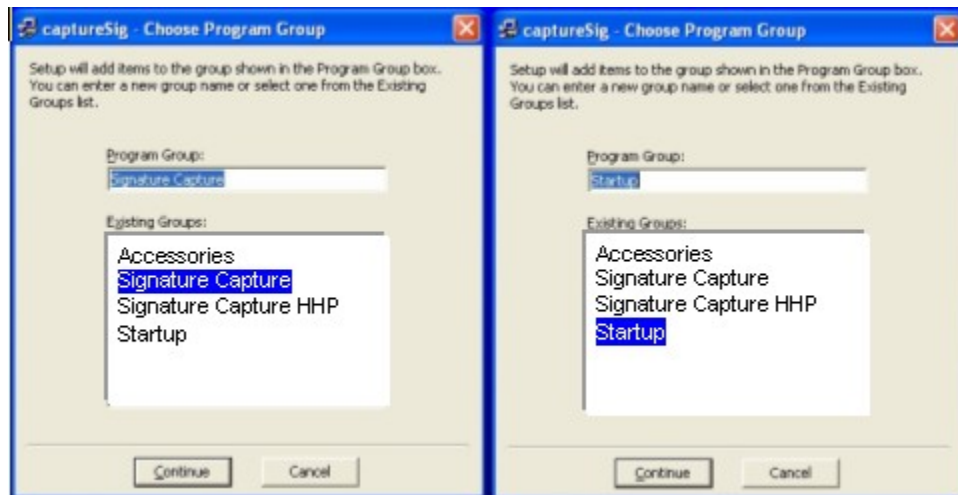
Next, you will get the welcome screen that reminds you to close all running programs. Once you have confirmed that your programs are closed, click OK

The next window will look like this:



Click the box that the arrow above is point to to begin the installation.

You will next be prompted for two different program groups, accept what is already highlighted and click Continue. The first will be Signature Capture and the second will be Startup.

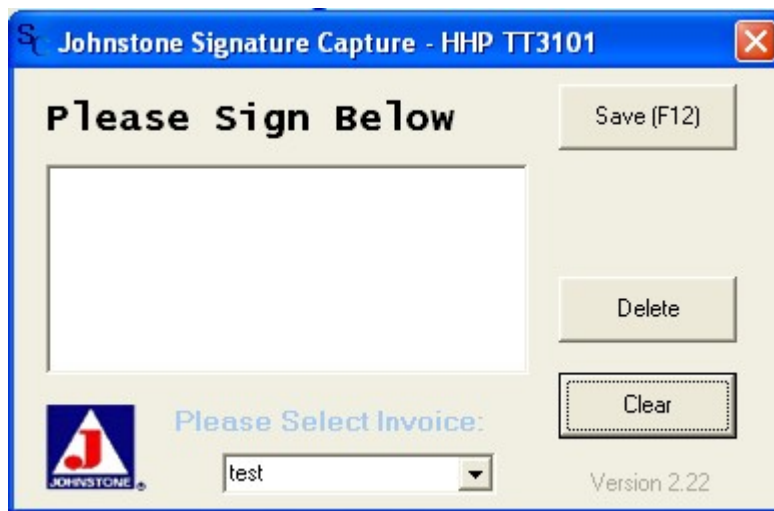


You should next see the installation progress and then finally Signature Capture Install Successful, click OK.

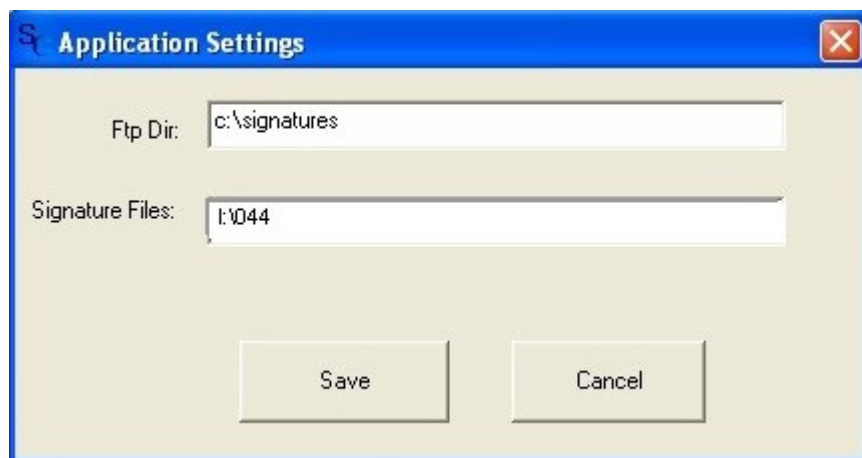


Once your software is installed on the PC, you need to tell it where to store the signatures. To do this

Click START > PROGRAMS > SIGNATURE CAPTURE > SIGNATURE CAPTURE to start the Signature Capture software running and to open the signature capture window on the pc.



Click the Johnstone J Logo  to get into the Application Settings.





The ***Ftp Directory*** field remains C:\Signatures

In the ***Signature Files*** field type I:\ your store number, for example I:\044

Click SAVE, then click Delete on the signature capture window to close it out.

## **Signature Capture Work-flow**

### **"How it works at the counter"**

Make sure you have a good PO on the order before finalizing it, if at all possible.

No differences in the Order Entry screen until it is finalized.

When you finalize an invoice, within 1-2 seconds you should see the signature capture window pop up on the PC screen. When that window pops up the Signature Capture Pad will also have a signature box appear. Have the customer sign in that box and touch OK with the marking pen or you can click Save/F12 on the signature capture window or press F12 on your keyboard.

You will then be prompted at the bottom of the screen to press <enter>. When you press <enter> it checks to make sure the signature is there and valid, if it is it will print the invoice on your laser printer.

If the signature is not there it will prompt you that the signature is missing and to press 'R' to retry. If you press 'R' to retry it will bring the signature capture window up again and allow the customer to sign again.

It will continue this process until there is a good signature captured. This is to assure that a valid signature gets on the invoice.

You also have the option - not displayed on the screen - to bypass the signature by putting in a 'B' to bypass, this option requires a Password. Currently this password is hard coded into the program - call DST to find out the password if you do not know it. Soon, it will be user controlled.

If you were not able to get a valid PO number before finalizing the invoice, use [Menu 1.3](#) to correct the PO after the fact. This program will prompt you as to whether you want to reprint the invoice or not.

When you are choosing your finalizing option, if you select 1N to print the invoice with no pricing, immediately after you capture the signature and print the invoice, the program will regenerate the file and amend it to have pricing. This is so when it is reprinted, faxed or emailed it will have prices.