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.

Menu 11 — Sales Analysis

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.

Menu 12 — File Maintenance

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.

Menu 16 — End-Of-Day Processing

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...:
```

Menu 19 — Inquiries

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.

Menu 20 — Utilities

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>

Menu 35 — Parameter Menu

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

30.20.32 Price Check Rpt

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:

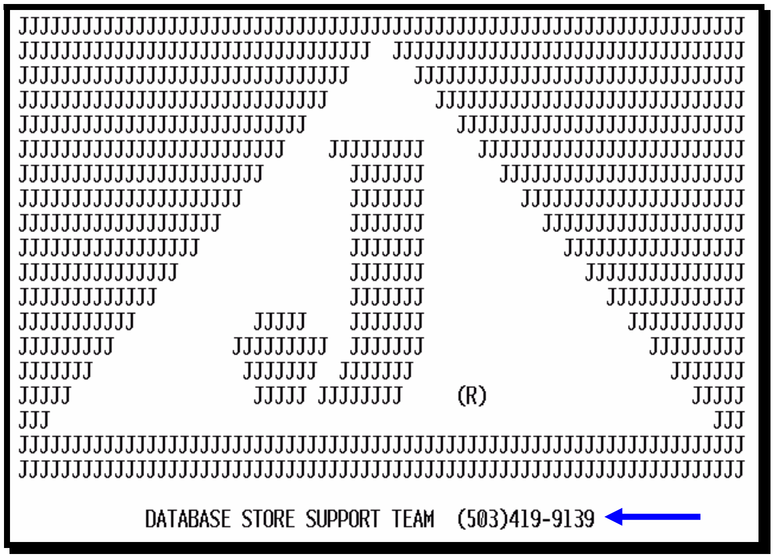
- Customer Name
- Customer Number
- Store Number the P&A was checked for
- Item checked
- Quantity that was available
- Price given
- Date checked
- Time checked

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.



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