

Signature Capture

UPGRADE 2004.2

Menu 1

Order Entry and Invoicing

Menu 1.20.8 Phone Exchange Maintenance/1.20.9 Phone Local Maintenance

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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.



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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.

Menu 1.31 Reprint Signature Capture Invoice

To reprint an invoice after signature capture has been installed use this menu. Enter release number (11-digit) for the invoice to be reprinted. If you would like to print multiple invoices enter a semicolon (;) between release numbers. If the release number that was entered was a signature captured invoice it will automatically print to the laser printer that port is configured to. If the release number that was entered was an invoice created prior to signature capture you will be prompted to select the printer you want to print to. Make your printer selection and the invoice will print.

Menu 12

File Maintenance

Menu 12.1.1 Company Maintenance

If Line 40 is ‘Y’ for yes, when an invoice is cancelled it will print a copy of the cancelled invoice with a ‘VOID’ watermark across the invoice. It will print to the laser printer your terminal is assigned to. Line 39 (Printer# Can Inv) becomes inactive at the time you go onto signature capture. ‘N’ for no will turn this option off. Leaving this field blank will default to no.

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COMPANY FILE MAINTENANCE			
COMPANY #:	01		
1.CO NAME	JOHNSTONE SUPPLY WAT	21.INT.CUST #	107760
2.ADDRESS 1	329 W 6TH ST	22.ITEM FORMAT	ANN-NNN
3.ADDRESS 2		23.ITEM MATCH	0X
4.CITY	WATERLOO	24.INT.ITEM#	140950
5.STATE	IA	25.JOURNAL ENT #	100147
6.ZIP CODE	50701	26.BANK NUMBER	001
7.PHONE NO	319-233-0525	27.VOUCHER #	24009
8.REGIST. #		28.INTER CASH G/L#	01-1100-00
9.GL FORMAT	##-###-##	29.CRED.AUTH.PSWD	ABCD
10.GL-MATCH	2N-4N-2N	30.NO. CRED.DAYS	30
11.PL BRK G/L #	01-3200-00	31.MIN SERV CHRG \$	
12.CUR YR EARN		32.MIN ORDER \$	
13.FISCAL MO	1	33.A/P G/L #	01-2000-00
14.PRNTR# EOM	0	34.EARN DISC G/L#	01-6000-00
15.FAX#	319-233-3001	35.YTD INCOME G/L#	01-3200-00
16.PRT CO ADDR	N	36.CORP CUST #	221376
17.W/C SM	00 WILL CALL	37.BRANCH #	155
18.TAX JURIS	07 IA & BLACK HAWK	38.PRNTR# EOD RPTS	HS
19.CORP WHSE	001	39.PRINTER# CAN INV	0
20.PORT 1 PSWD	1992	40.PRINT CAN @ OE/OM Y	
Enter Line, Backout, DELETE, Edit, 0 to Accept			
1-END	2-END	3-OFF	4-INQ
5-CASHT	6-CASH	7-CODT	8-COD

Menu 12.2.2.2 Customer Master Maintenance

The chart below is intended to clarify the Fax Indicator options in Screen 1, Line 31 of customer master maintenance.

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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/STHNTS   N= DO NOT PRINT, FAX OR EMAIL
NULL (BLANK) = PRINT ONLY

Hit Return
  
```

Option	Fax Inv	Fax Stmt	Email Inv	Email Stmt*	Print Inv	Print Stmt
F	Y	Y	N	N	N	N
FS	N	Y	N	N	Y	N
FE	Y	N	Y	N	N	Y
I	Y	N	N	N	N	Y
E	N	N	Y	N	N	Y
N	N	N	N	N	N	Y

* This option will change when laser statements are completed.

Menu 35 **Parameter**
Menu

Menu 35.12 - Signature Capture Company Parameters

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SIGNATURE CAPTURE COMPANY PARAMETERS
COMPANY NUMBER      01      JOHNSTONE SUPPLY WAT
1. ENABLE SIGNATURE CAPTURE                Y
2. SIGNATURE CAPTURE SOFTWARE VERSION      21
3. SIGNATURE CAPTURE SERVER NAME          sig155
4. SIGNATURE CAPTURE FAX-SERVER NAME      sig155
5. ENABLE SIGNATURE TABLETS              Y
6. ENABLE LASER PRINTED QUOTES            Y
7. PRINT EACH PRICE ON LASER INVOICE      Y
8. PRINT 2ND COPY ONLY ON CASH TICKETS    Y
9. PRINT INVOICES EVERY END-OF-DAY       N
10. END-OF-DAY INVOICE PRINTER            inv155_1
11. Remit to Name                          Johnstone Supply,
12. Remit to Addr1                         329 W 6th St,
13. Remit to Addr2
14. Remit to City-St-Zip                   Waterloo, IA 50701
15. PRINT STORE-TRANSFER INVOICES        Y
16. PRINT 2ND COPY ON CREDIT MEMOS
17. PRINT 2ND COPY ON DELIVERY TICKETS
18. PRINT 'T'AX FLAG ON TAXABLE LINES    Y
19. WATERMARK TO PRINT ON FORM            1    1 = PACKING LIST
Enter Line#, Backout, DELETE, Edit, to Accept
```

Enter Company number at prompt

The following new fields have been added to this menu:

[Complete documentation of menu 35.12 can be found here.](#)

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.

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.

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.