Johnstone Supply Data Services, LLC

U2007 Upgrades

Counter / Sales

Data Services Support Team

Table of Contents

Purpose

To provide the Database users with a printed form of the 2007 Upgrade Documentation, this document also includes Frequently Asked Questions and information regarding the DST Websites.

DST Websites

Data Services Support Team Website http://dst.sitemax.com/
This site has all the up-to-date information. We have included links to our most recent upgrade documentation and the DST Tip of the Week on our home page. We also include links to all menu paths and upgrade documentation, Database Projects; Signature Capture, Hand-Held Information, Training Conferences, JUG Committee Information, and Hardware Support.

DST-DOCS Website. http://dstdocs.sitemax.com/
DST is working on updating the documentation into a centralized, searchable site.
Recently updated menus include:

Menu 9 - Physical Inventory
Menu 11- Sales Analysis
Menu 15 - Warranty
Menu 25 - Printer Options
Menu 32 - Corp. Transmissions
Menu 32.14 - Buyback
Menu 35 - Parameter Menu
Centralized Product Display Areas
End-of-Year Documentation
Online Warranty Tag Procedures
Webstore

DST Support Desk

DST Support Desk - A personal logon is required to access to the DST Support Desk. Once logged onto the Support Desk a user can log a support job, review the status or post information to a current open job. Review past completed jobs for their individual store and browse our Knowledgebase of FAQs. We continually add new FAQ's to the Knowledgebase for users to access and review.
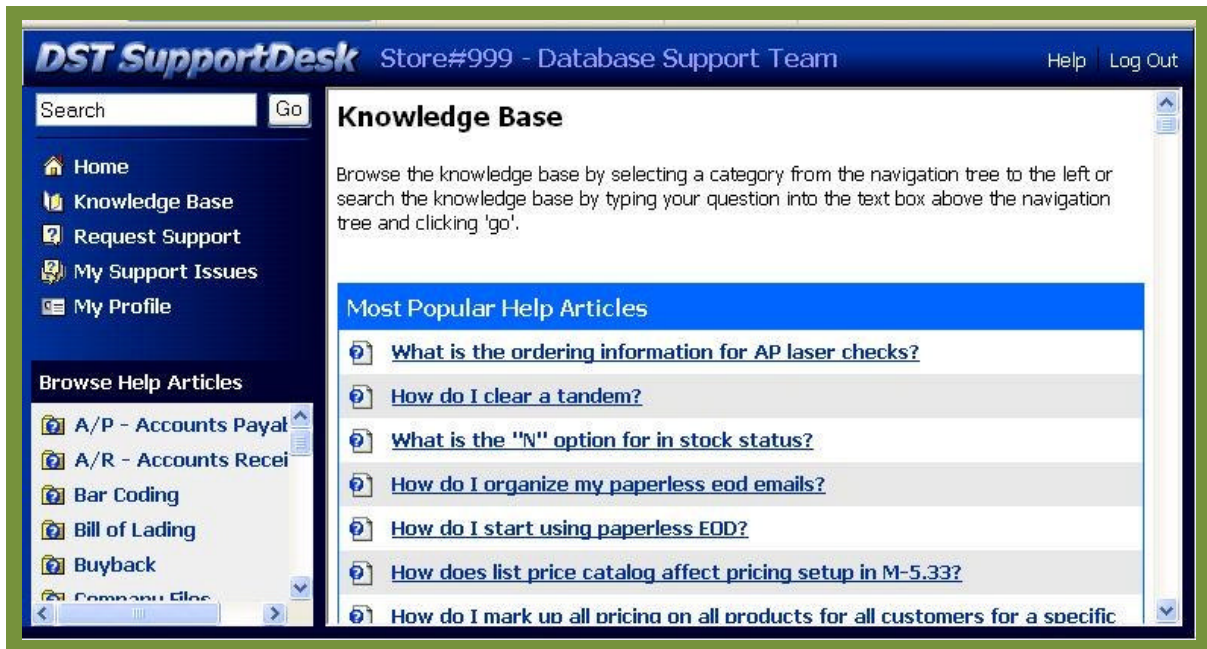
Frequently Asked Question

DST Support Desk- FAQ's

Q: How do I submit my own job on-line?
A: Go to http://www.myjohnstone.com/dst/, Enter your User Name and your Password

Q: What if I have forgotten my user name or password?
A: Send an email to databasesupport@johnstonesupply.com for your user name and password.

Q: What if I don't have a user name and password, how do I get one?
A: Send an email to databasesupport@johnstonesupply.com and we will set -up your individual user name and password.

Q: How do I check the status of a job I submitted On-Line?
A: After logging into Support Desk, locate the "My Support Issue" box in the upper-right corner. Type in the job #, or click on the link to your Open or Resolved jobs.

Q: How do I know my job number?
A: An email will be sent to you with your job number after the job is created. You can also click on either the Open or Resolved Link to view your jobs.

Q: How can I view a job that has been placed On-Hold?
A: After logging into Support Desk, locate the "My Support Issue" box and click on either the Open or Resolved Link, and then click on the On Hold tab.

Q: How do I add documents or additional information to my job?
A: You can upload documents to your job, by using the Upload Document Tab. You can also add additional information to your job using the New Post box. Type   your additional information or question in the box, click on the POST button. The posting will be posted to the job and emailed to the DST support person assigned to your job.

Q: What is the Knowledgebase?
You can always get 24x7 answers to your Database system questions by searching or browsing our knowledgebase. New information is posted to the Knowledgebase on a weekly basis. To access the DST knowledgebase, logon to the DST Support Desk and click the Knowledgebase button.

U2007 - Upgrades

Menu 1 - Order Entry

Description: Laser pick tickets using HTML

Menu Path: Multiple changes to Menu 1 (Order Entry & Invoicing)

Why use it: Menu 1 has been renumbered to make way for new features. We have added the display of PDF quote to Menu 1.30 and the email and fax of HTML pick packs thru the Linux server to Menu 1.35 and 1.36.

How to use it: The changes made to Menu 1 are shown in the screen shot below. We have moved the *OLD* Menu 1 to Menu 1.40 for review and comparison to the new menu.

***If you want to make the HTML pick tickets the default form for pick tickets, please run a pick ticket normally and then email yourself that same pick ticket to compare the two documents as most current pick tickets forms have some degree of customization. If there are issues between the two, please fax us or email us a copy of each for consideration on the new HTML pick pack forms. Some changes will not be possible on the new form.

Menu 1.30 Display PDF Quotes works like M-1.29 but for quotes. Enter quote number.
Must be connected to your local network.

Menu 1.35 Email Pick/Pack thru Linux Server –Put in the 11 digit release number, confirm to show pricing (Y/N), enter operator code and confirm email address for delivery confirmation or enter a new one, and finally confirm or enter an email address for the pick ticket recipient. See sample of a HTML Pick Ticket on the next page.

Menu-1.36 Fax Pick/Pack thru Linux Server – Enter the 11 digit release number, confirm pricing (Y/N), confirm the fax# or enter a new one, enter the Attention line, enter any special messages and when you file that away, the fax is delivered.

New Menu 1

NEW Menu 1 VS. OLD Menu 1	
New Menu 1	Old Menu 1
Menu 1.25 Reprint Invoice on Plain Paper	Old Menu 1.30
Menu 1.26 Reprint Sig Capture Inv	Old Menu 1.31
Menu 1.27 Fax Inv with Sig Cap	Old Menu 1.32
Menu 1.28 Email Selected Inv	Old Menu 1.33
Menu 1.29Display PDF Invoice	Old Menu 1.34
Menu 1.30 Display Quote PDF	NEW TO MENU 1
Menu 1.31 Upload Handheld Signatures	Old Menu 1.35 Upload Handheld Signatures
Menu 1.32 Email Invoice –No Linux Server	Menu 1.36 Email Invoice –No Linux Server
Menu 1.33 Copy Quote to Company/Customer	Menu 1.37 Copy Quote to Company/Customer
Menu 1.34 Email Quote thru Linux Server	Menu 1.38 Email Quote thru Linux Server
Menu 1.35 Email Pick/Pack thru Linux Server	NEW TO MENU 1
Menu 1.36 Fax Pick/Pack thru Linux Server	NEW TO MENU 1
Menu 1.40 OLD Menu-1	NEW TO MENU 1

Sample HTML/PDF Pick Pack

Description: Fax and email a quote from order entry total screen

Menu Path: Menu 1.2 (Order Entry/Invoicing)

Why Use it: Step saver by adding the ability to create the quote, file it away and send it off to the customer from a single menu path.

How to use it: In Menu 1.2, in the total screen, when the Invoicing Options display (see screen shot below) select 5A to fax the quote or 5B to email the quote.
- *If 5A is selected follow these quick steps*
  - Enter # of days to display honoring quote.
  - Enter to confirm is prices should display on quote.
  - Enter fax# or enter to accept default fax# on customer file.
  - Enter Attention or enter for account default.

- o Enter special messages or enter to send the fax.
- o Then the system files the quote away and sends it to customer.
- *If 5B is selected follow these quick steps:*
  - o Enter # of days to display for honoring the quote
  - o Enter to confirm if prices should display on the quote.
  - o Enter operator code
  - o Confirm Email confirmation address
  - o Confirm Email Recipient address –type in new address or enter to accept address on file
  - o Then the system files the quote away and sends it to customer.

NOTE: *Menu-35.12. Signature Capture Company Parameters Screen 2, Field 11. USE LINUX SERVER TO FAX QUOTES - needs to be set to Y*
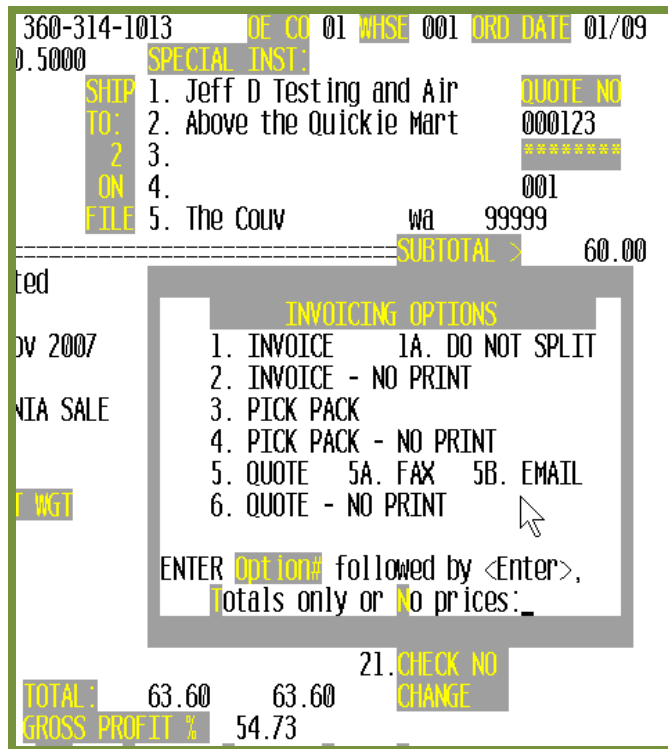
Menu 1.2 - Invoicing

Description: Additional digits added for authorized buyer display in Order Entry to accommodate customers with larger numbers of buyers

Menu Path: Menu 1.2 (Order Entry/Invoicing)

Why Use it: As more customers add more and more authorized buyers, this upgrade will allow the authorized buyer screen display to continue to work with a current maximum of 999.

How to use it: See sample screen shot below.

Authorized Buyers

Description: Send email confirmations for quotes and picks like we do for PO's

Menu Path: Menu 1.2 (Order Entry/Invoicing), Menu 1.34 (Email Quote thru Linux Server), & Menu 1.35 (Email Pick/Pack thru Linux Server)

Why Use it: Consistency of processes across PO's, Invoices, picks and quotes when emailing and faxing.
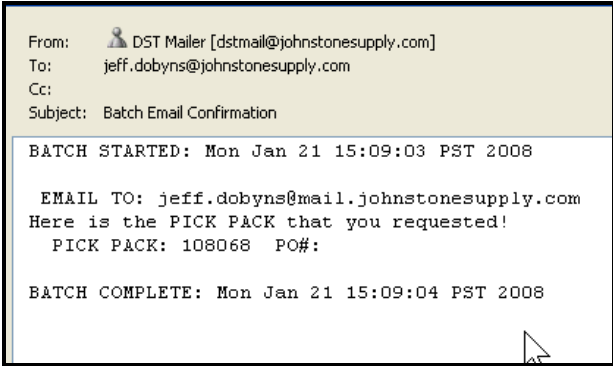
Description: Emailing/Faxing Quotes

Menu Path: 1.17, 1.38

Why use it: these new features allow Linux users to fax and email quotes. (Note: Stores without a Linux server can still fax quotes using Menu 1.17 but they will not appear in the HTML format that Linux provides).

How to use : For Quotes the following parameters must be setup.
Menu 35.12, screen 2, field 11 set to 'Y'

Field 12 has been added, Use Purchasing Fax# for Quotes, if this field is set to 'Y' then the fax number used to fax quotes is what is listed in Menu 12.2.2.2 field 29. If this field is set to 'N' or blank then the number listed in Menu 12.2.2.2 field 11 is used to fax the quotes.

The same concept is true for Field 2, Use Purchasing Fax# For Invoices. If this field is set to 'Y' then the number listed in Menu 12.2.2.2 field 29 will be used to fax invoices. However, if the field is set to 'N' or blank then the AR fax number will be used from Menu 12.2.2.2 field 11.

```
           SIGNATURE CAPTURE COMPANY PARAMETERS - SCREEN 2
COMPANY NUMBER      01        JOHNSTONE - FENTON
 1. PRINT 'O'RIGINAL OPERATOR OR 'S'ALESMAN  S
 2. USE PURCHASING FAX# FOR INVOICES          N
 3. PRINT TIME/DATE STAMP IN 2ND PO FIELD     Y
 4. PRINT USING UPDATED LASER FORMS           y
 5. PRINT RETAIL IN EACH PRICE COLUMN
 6. BYPASS SIGNATURE ON CASH INVOICES         y
 7. WEB ADDRESS TO PRINT ON NEW FORMS     www.johnstone-fenton.com
 8. PRINT ONE COPY IN ALL CASES
 9. ALWAYS PRINT 'INVOICE' ON LASER FORMS     n
10. PROMPT FOR NUMBER OF COPIES IN OE
11. USE LINUX SERVER TO FAX QUOTES            Y
12. USE PURCHASING FAX# FOR QUOTES            N
```

NOTE: Make sure port parameters are defined for the ports that are trying to fax/email quotes (m-35.13). If these ports do not print laser forms, you can set field 3, Order Entry Printer to "A" for All-Multi.

```
                  SIGNATURE CAPTURE PORT PARAMETERS

PORT NUMBER           -----              L-LOOKUP

 1. SIGNATURE CAPTURE PAD ATTACHED (Y/N)
 2. SIGNATURE CAPTURE PAD TYPE ('L'CD, 'N'ONE)
 3. ORDER ENTRY PRINTER ('L'ASER, 'P'LAIN, 'A'LL-MULTI)
```

Fax Quotes Menu 1.17 Stores with a Linux server will now fax an HTML cover sheet and quote through the Linux server. System prompts are 1) Quote Number, 2) Days to Honor Quote, 3) Print Prices, 4) Enter Fax Number, and 5) Attention.

```
Fax Quote thru Linux Server
<CR> to continue or 'END' to quit :


 Enter Quote Number (8N) :01001801

 Enter number or days to honor this quote :20

 Print Prices (Y/N) :Y

Enter fax# or <enter> for  413-254-7943
Enter Attention or <CR> for Jennifer
```

Users also have an option to enter a separate message that will print on the cover page of the quote.

Email Quotes; through Linux Server Menu 1.38 You will be prompted for the quote number, honor days, price printing, email address and operator code. The "email for confirmation" is the address that will be showing in the "from" section of the email sent to your customer. You will also be prompted for the "email recipient" which, will be pre-populated with the customer's email address. You can accept that address or enter a different address.

Note: Stores without a Linux server do not have the ability to email Quotes.

```
 Email Laser Quote


 Enter Quote Number (8N) ?01001801

 Enter number or days to honor this quote ?20

 Print Prices (Y/N) ?Y
Enter Operator Code

Enter Email for confirmation or <ENTER> for Store.Support@johnstonesupply.com
?jennifer.williams@johnstonesupply.com

[404] 1 items selected out of 1 items.
Enter Email recipient or <ENTER> for debra@paducahsupply.com
?jennifer.williams@johnstonesupply.com
```

Fax Notification – Real-time notification that faxes have been sent.
After sending a fax from Menu 1.17 an email confirmation will be sent to you to confirm that the fax was delivered. The fax confirmation will be sent to the email address setup in Menu 12.1.4 field 31 for the operator logged-in to that port.

Email Notification - Real-time notification of fax/email status
Once the email quote has been sent from Menu 1.38, a confirmation will be sent to the sender or the default confirmation address.

The following is a sample of an email quote confirmation:

BATCH STARTED: Thu May 17 10:45:03 PDT 2007

EMAIL TO jennifer.williams@mail.johnstonesupply.com
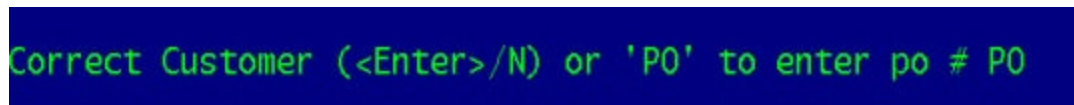Here is the QUOTE that you requested!
QUOTE: 01001801 PO#:

BATCH COMPLETE: Thu May 17 10:45:05 PDT 2007

Description: The ability to select a specific purchase order when pulling up a customer order

Menu Path: 1.2

Why use it: Will be able to bypass other purchase orders created for a customer.

How to use it: After looking up a customer the option will appear to type PO to display only the orders tied to the PO. The system will prompt for the first portion of the PO (only the first few digits are needed to pull the open orders).

Correct Customer (<Enter>/N) or 'PO' to enter po # PO

Enter PO Number or first portion (ie 1204):3366

Description: Display original operator on totals screen on new orders

Menu Path: Menu 1.2 (Order Entry/Invoicing)

Why use it: Provide easy reference to know who has started the order.

How to use it: Often times in Order Entry staff will walk away to track down some information or a product. Previously, there was no way to know who had started the order. The information in Menu 1.2 on the Order entry Total Screen in the 'STATUS OF RELEASE' area will display that it is a new order, but also who has started the order.

STATUS OF RELEASE 001 New Order
Orig Operator Store Support Team

1. RESTOCK CH%
2. TAX JURIS   07   STATE, CITY, RTD

Description: All Authorized Buyers setup for a customer, now appear as Authorized Signers

Menu Path: 1.2, 12.2.2.6

Why use it: Only need to enter Authorized Buyers

How to use: All Authorized Buyers setup for a customer in Menu 12.2.2.6 now appear on the Authorized Signers list as seen in Menu 1.2 Order Entry. The Order Entry Authorized Signers and the Authorized Buyers lists are a combined list in Order Entry.

```
CUSTOMER 810599          PHONE 717-741-9263      OE CO 01 WHSE 001 ORD DT 05/11/07
BUYER                    MULT 1.0000    SPECIAL INST:
BILL JOHN A WARD                   SHIP 1. JOHN A WARD              ORDER NO
TO:  2612 NATALIE DRIVE            TO:  2. 2612 NATALIE DRIVE       NEW
                                        3.                          REL
                                        4.                          001
     YORK  PA  17402                    5. YORK          PA    17402
================================================================================
 1. AUTH BUY                        AUTHORIZED SIGNERS         OTHER
 2. REQ DATE   05/11/07            1 Jennifer W
 3. DISCOUNT%                      2 Dave
 4. CUST PO#                       3 Jen
 5. SALESMAN   033 - HARRISBURG SHOP
 6. A/R TERMS  10 - *** CASH ONLY ***
 7. ORD SRC
 8. FAX #
 9. CERTIFY#
10. SPEC INST
11. CRED CARD
12. OMEG CERT
                                  Enter Line#, Temp Buyer, Add, Delete,
                                  Next,Previous,Backout,Search,Change:_
```

Description: Include original quote number as a message line when converting to an order

Menu Path: Menu 1.2 (Order Entry/Invoicing)

Why Use it: Better reference to tie the original quote to the newly created invoice.

How to use it: In Order Entry just like normal, convert the quote to an order and it will automatically appear. See sample:

```
    --------------------------------------------
    --ITEM NUMBER--    -------QUANTITIES-----
LN    DESCRIPTION      ORDER INVCD  PICK     B
001 b92-085                 1           1
    R22-30 REFRIGERANT
002 M
    Order converted from Quote# 01000113
```

Description: Add PO#, Job Name and Product Description to quote lookup

Menu Path: Menu 1.2 (Order Entry/Invoicing) 'QL' option

Why Use it: Additional information makes it easier to track down existing quotes.

How to use it: Access Menu 1.2, use the QL to lookup a quote. PO#, Job Name and Product Description have been added to quote lookup.

Description: Display the FDC inventory in the ORDER detail screen

**Menu Path**: Menu 1.2 (Order Entry/Invoicing) Line Detail Maintenance Screen

Why Use It: Quick access to DC product availability info. No longer need to go to 'W'eb stock status to view the same information.

How to use it: *This request is available on a request-by-request basis. Fill out a support job and we will load this code.* http://dst.myjohnstone.com/Login.asp

In order entry, Menu 1.2, put in a product, the list of DC's are located in the Order Entry Line Detail Maintenance screen, in the 'QUANTITIES IN OTHER WAREHOUSES' location.

See below:
FDC = Florida Distribution Center
PDC = Portland Distribution Center
MDC = Memphis Distribution Center
ADC = Allentown Distribution Center
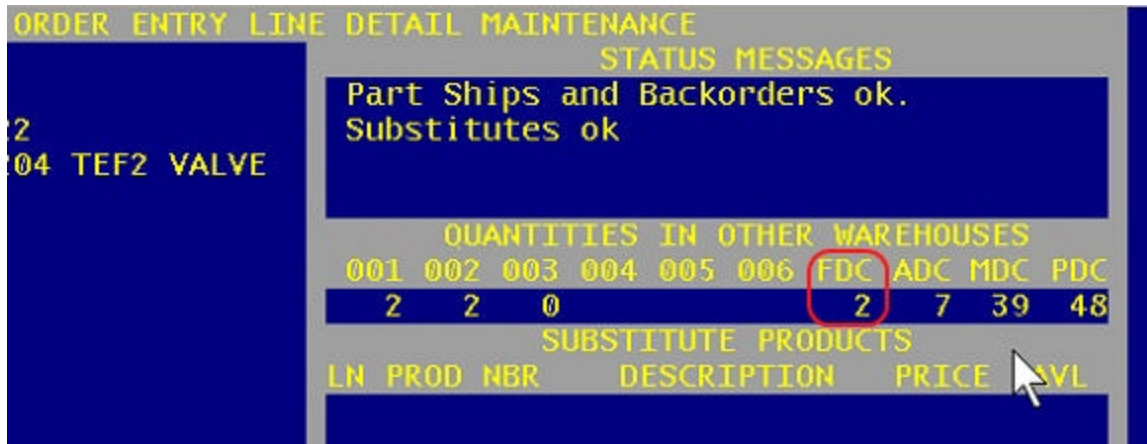
Description: Prompt to verify customer information is correct before faxing/emailing invoices/quotes

Menu Path: Menu 1.17 (Fax Quotes), 1.27 (Fax Invoice with Signature Capture) & Menu 1.34 (Email Quote thru Linux Server)

Why Use it: Confirm the right document is selected and set to go to the right customer. Catch a potential mistake prior to it happening.

How to use it: Enter menu path for what you are trying to send, and then when prompted if the correct customer is selected, press <ENTER> to confirm and move along or enter 'N' to end out and put in the invoice, release, quote number again.

Description: Invoices will be displayed in a PDF format

Menu Path: 1.34 Display PDF Invoices

Why use it: Invoices will only display in the PDF format if a Linux server is being used for invoicing.

How to use it: Menu 1.34 takes users to the Detailed Invoice/Release Inquiry (Menu 19.5). Users can pull up an order and select PDF on the Totals page to view the invoice. If a PDF is not found or if you are not on a Linux server then the invoice information will pull up in the normal 19.5 format (the PDF version will not appear).

```
=============================ORDER ENTRY INQUIRY=============SUBTOTAL >        37.27
    STATUS OF RELEASE 001 Printed        SHIPPED  ORDERED   TOTAL ORDER   BACK    SHIP
    Orig Operator Dave Chwastyk          DOLLARS  DOLLARS   LINES QUAN    QUAN    QUAN
    Last Access 10:56:11  21 Apr 2007     37.27    37.27      8     9       0       9
 1. RESTOCK CH%                            0.00
 2. TAX JURIS     01   PENNSYLVANIA SALES TAX
 3. TAX% 6.000 ON     37.27               2.24     2.24
 4. SHIP METHOD 00  PICK UP
 5. WEIGHT            PRODUCT WGT   0.0        A/R TERMS 10 *** CASH ONLY *
 6. NBR CTNS
 7. FREIGHT
 8. PICKER
 9. PACKER                                             20.CASH RECD      40.00
10. MISC CHRG                                          21.CHECK NO  CASH
11. TAX ONLY              TOTAL:    39.51    39.51        CHANGE          0.49
12. WORK ORDER#          GROSS PROFIT %    57.82
Line#, CL-Chg-Lines,CH-Chg-Hdr, PDF, or 0 to accept:
 1-END      2-INO
```


Description: Update quote audit trail to include when a quote was emailed

Menu Path: Menu 1.34 (Email Quote thru Linux Server), Menu 2.28 (Quote Audit), Menu 19.5 (Detailed Invoice/Release Inquiry) –AUD option

Why Use it: Provides and improved audit trail for quote activity.

How to use it: When emailing a quote using Menu 1.34 it will record whom the quote was emailed to. Menu 2.28, enter the quote number, see sample Quote audit.   Also, accesses detailed quote inquiry via Menu 19.5 and select the AUD option from the total screen.

```
Page   1     PRO.FORMA                                      09:54:

   ........ AUDIT1....................................................

   01000116 SST 09:51:58  27 Sep 2007 - 3 'QP'
            SST 09:53:10  27 Sep 2007 - 3 'EMAIL'
            SST Email transmission to JOHN B JACOBY.  Email je
            nnifer.williams@johnstonesupply.com

[405] 1 items listed out of 1 items.
 <CR> TO CONTINUE ?
```

Menu 8 - Inventory

Description: Menu 8.3 – Non-Purchase Order Receipts Posting

Menu Path: Menu 8.3

Why use it: In the past POR entries made in Menu 8.3 did not appear in Menu 19.7B until after day-end was run.

How to use: Entries made in Menu 8.3 now auto update to Menu 19.7B.

Menu 9 - Physical Inventory

Description: Menu 9.20.22 – Products with No Warehouse Location

Menu Path: Menu 9.20.22

Why use it: This report details the list of products that have no warehouse location listed in product detail (Menu 12.3.2.3). Before beginning your inventory, consider it a best practice to run this report.

How to use: To tie a product to a warehouse location use Menu 34.11 Scan Warehouse Locations. If you have the Symbol handheld scanner the S3 option 1 – Scan Location can also be used to tie a product to a location.

Menu 11 - Sales Analysis

Description: Display current month inventory values

Menu Path: Menu 11.4.10 (Inquiry by Company - from Sales Files)

Why use it: Quick snapshot of inventory value on total invoiced sales inquiry.

How to use it: Run Menu 11.4.10 like normal, inventory value added to the right-hand column. The inventory value is the summary of all products (catalog and non-catalog) on-hand quantity times average cost.

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).

How to use it: This new report is tied into the existing inquiry, Menu 11.4.20 (Vendor Sales Inquiry) which provides summary information, this new report provides the detailed data broken down for a vendor and time frame.

```
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
```

Menu 15- Warranty

Description: Enhanced audit information for warranty transactions

Menu Path: Menu 15.10 (Update Warranty File with Receiving) & Menu 19.7b (Inventory Transaction by Product)

Why Use it: The warranty receiving in inventory process (WAR transaction type) will now include the operator and sequence number when displayed in Menu 19.7B Inventory Transaction by Product

How to use it: Menu 15.10 will prompt for a valid operator number and Menu 19.7B will display this operator along with the warranty sequence number under the WAR transaction type.

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Menu 19 - Inquiries

Description: Add PO#, Job Name and Product Description to quote lookup inquiries.

Menu Path: Menu 19.1A (Quote Lookup Inquiries), Option 2

Why use it: More information makes it easier to track down existing quotes.

How to use: Access Menu 19.1A, Option 2 customer quote Listing, 'D'etailed listing…and the new fields are added into the detailed reports.

Description: Menu 19.7B – Inventory Transaction by Product

Menu Path: 19.7B

Why use it: When viewing and item users now have further type options to select when building the inquiry.

How to use: The following options are available:
?   ADJ = Adjustments
?   POR = PO Receiving
?   INV = Invoice
?   CM = Credit Memo (Returns to Stock)
?   NON = Credit Memo (Not Returned to Stock)
?   PI = Physical Inventory
?   DIN = Drop Ship Invoice
?   DPO = Drop Ship PO

```
                    INQUIRY BY PRODUCT                  05/07/07  18:28:46
ITEM#               ITEM DESCRIPTION
B10-120             083S DRYER


TNX  DATE     REF#          PO#-REAS CD   QTY      COST      PRICE CUST-VEND  OH AFTER














          ENTER TYPE (ADJ,POR,INV,C/M,NON,P/I,DIN,DPO) OR <ENTER> FOR ALL ▌
                                             INV.DET004
```

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Description: Menu 19.7B – Inventory Transaction by Product

Menu Path: 19.7B
Why use it: Complete PO information can be pulled up from a POR item.
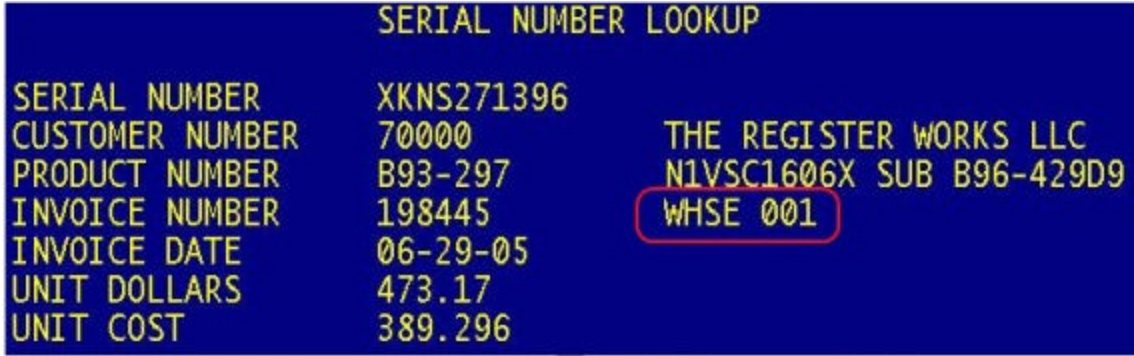
How to use: ?   Enter the 8-digit PO number


```
                    INQUIRY BY PRODUCT              05/21/07  11:38:56
ITEM#           ITEM DESCRIPTION
B92-085             R22-30 REFRIGERANT

TNX  DATE    REF#         PO#-REAS CD   QTY      COST    PRICE CUST-VEND  OH AFTER
INV 04/14/07 01040375001 TRUCK STOCK    -1     82.023   98.04 107457         122
                              OPER: GREGORY JOHNSON         COMPLETE SERVICE, IN
POR 04/12/07 061019         01128612    120    82.350          525           123

REL#(11N), PO#(8N), <ENTER>-NEXT PAGE  P-PREVIOUS  OR END:
```
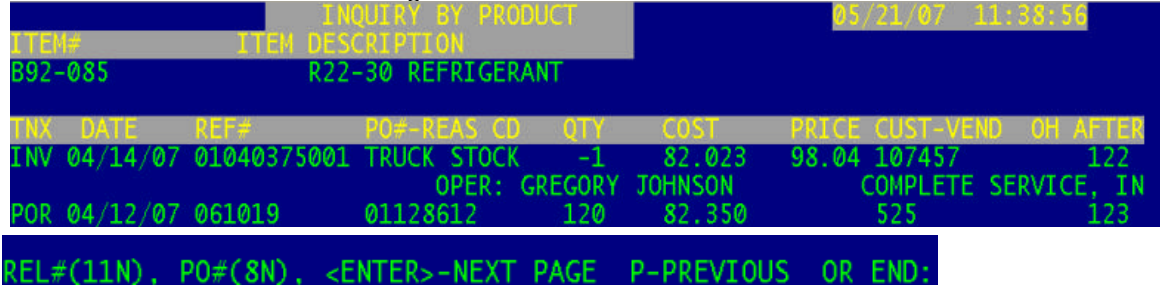
? Entering in an 8-digit PO number takes the user to Menu 19.12 to view the PO.
? Entering in an 11-digit Release number takes the user to Menu 19.5 to view the release.

Description: Menu 19.8 – Serial Number Inquiry

Menu Path: 19.8

Why use it: The warehouse number will now display to the right of the INVOICE number.

How to use: Input serial number at prompt or select 'L' for lookup, the Whse number will display on the screen.


```
                  SERIAL NUMBER LOOKUP

SERIAL NUMBER      XKNS271396
CUSTOMER NUMBER    70000           THE REGISTER WORKS LLC
PRODUCT NUMBER     B93-297         N1VSC1606X SUB B96-429D9
INVOICE NUMBER     198445          WHSE 001
INVOICE DATE       06-29-05
UNIT DOLLARS       473.17
UNIT COST          389.296
```

Description: Option to display Order Entry and Purchase Order audits from Inquiries 19.5 and 19.12

Menu Path: Menu 19.5 (Detail Invoice/Release Inquiry) and Menu 19.12 (Detail Open Purchase Order Inquiry)

Why use it: This option combines the quote, order entry and PO audit screens (Menu 2.28, Menu 2.27, Menu 7.23) into the Detail Invoice/Release Inquiry (Menu 19.5) and Detail Open Purchase Order Inquiry (Menu 19.12) so all the information you will need on a quote, invoice/release, or PO is accessible from a single menu path instead of splintered in multiple menu paths for each.

How to Use: Menu 19.5 "How to use the 'AUD' option?"   Pull up your quote/pick
pack/invoice/release and when you get to the total screen you will see a new option of 'AUD'it
After entering the AUD option, the typical audit detail will display on your screen.

Menu 19.12 PO Audit works the same as Menu 19.5   Pull up the PO, get to the PO total screen
and the AUD option will be available.   The PO audit information displays.

Description: Menu 19.14.1 – View Maintenance Menu for Customer Master

Menu Path: Menu 19.14.1, Screen 2 Field 7

Why use it: Allows people to view customer contracts who don't have access to Customer Master
through Menu 12.2.2.2.

How to use: Selecting field 7 takes the users to the Contract Maintenance Screen.

```
           CUSTOMER MASTER INQUIRY - SCREEN 2

 EX CUST #:   111688     CALVAN JOHNSON    INT CUST #:135856
 1.WHS/BR #                                20.SHIPTO CODE   001
 2.MASTER AR #                             21.SHIP METHOD   02  UPS
 3.CUST TYPE   NH  NURSING HOMES           22.SHIP ZONE
 4.CUST CLS    NH  NURSING HOMES           23.TERMS CODE    05  NET 10TH FOLL P
 5.TERRITORY  00107  62226                 24.TAXABLE       Y
 6.SPEC INST                               25.TAX JURIS     17119  STATE & COUN
 7.PROGRAMS                                26.TAX EXEMPT #
 8.DUN FLAG                                27.CREDIT METH   02
 9.OTHER CONT                              28.CREDIT LIM   500
10.PRC HOLD                                29.CREDIT HOLD   N
11.PO REQ     Y                            30.ACCEPT B/O    Y
12.MAILER REF 111688                       31.ACCEPT PART   Y
13.SERV. CHRG Y                            32.ACCEPT SUB    Y
14.LICENSE #                               33.NA CUST #
15.PAST DUE < %                            34.NA 2ND CUST REF
16.PAST DUE DAYS                           35.TRANSMIT NA INV
                                           36.TAX EX DATE
                                           37.LIST PRC MULT     0.5000


 Enter Line 7 to display Programs or <ENTER>:█
```

Menu 34 - Bar Coding Menu

Description: Menu 34.8 – Print Bar Code Labels

Math Path: Menu 34.8

Why use it: Users have the option to print the product number on the Bar Code label in all CAPS.

How to use : If you are interested in receiving this upgrade, log a job online with Database Support
http://dst.myjohnstone.com/Login.asp.

Description: Menu 34.26 Auto Update Receiver with Qtys from Corp Packing List

Menu Path: Menu 34.26

Why to use: This menu path has been changed to NOT include Centralized Shipments.

Database Warranty Tag Workflow

This great new feature allows Warranty Tags to be created in Order Entry accessing JEN. This is the first phase in a 3-part project to make the entire Warranty process online and paperless!

What are the benefits to entering a Warranty Tag online?
Easily accessed through JEN
Central location to manage all tags
Laser printed Warranty Tag
Legible – no more trying to decipher someone else's handwriting

This training document details the workflow for creating and searching for an Online Warranty Tag.

Warranty Activation

Menu 35.1 Order Entry Parameter Maintenance, Screen 3 - Field 9 Online Warranty Tag must be set to 'Y' in order to activate the Online Warranty Tag through Order Entry.

Creating a Warranty Tag - Menu 1.2 – Order Entry

Step 1
Enter Warranty part number with a quantity of –1 for return or 1r for replacement.
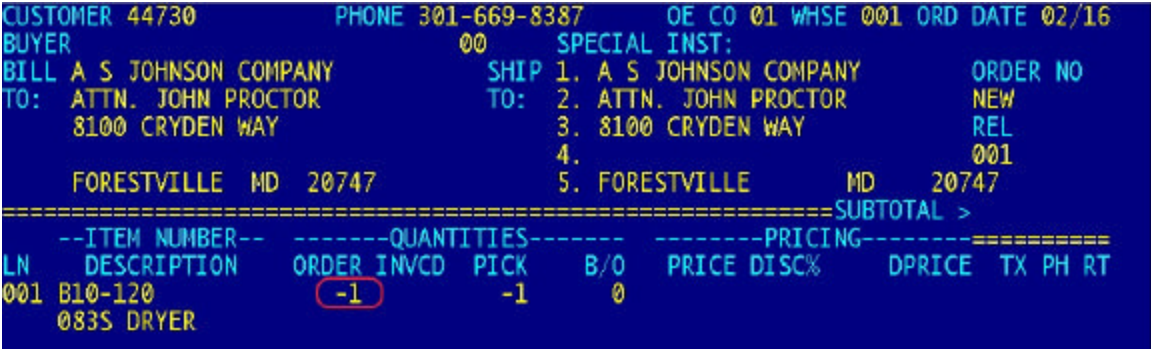
Step 2
On Field 7 of the Order Entry Line Detail Maintenance Screen enter a Reason Code of 006.

Step 3
On Field 11 of the Order Entry Line Detail Maintenance Screen, enter the Warranty Sequence number of your choice or type **NEW** for an auto-generated number from the Database system. The system will then provide the option to type in the original invoice number. The Warranty Sequence number will carry over and appear on the top right-hand corner of the Warranty Tag. The Tag format is store number, W (for Warranty) and warranty sequence number (i.e. 155W123456).

After entering the Warranty Sequence number or typing NEW the online Warranty Tag automatically appears. The fields highlighted in Blue will auto fill. The field highlighted in Yellow will auto fill after a new order is created. *(See below)*

Step 4
Enter in the remaining required information, "Product Installation Date" and "Explain the Nature of Failure".

Note: See Glossary on page 6 & 7 for field definitions

Step 5
Save and Close the Tag

Step 6
After Saving and Closing the Tag the system will return to the Order Entry screen to complete the order. The system will prompt you to print the Warranty Tag after the order is finalized.

Save	Save & Close	Close (No Save)
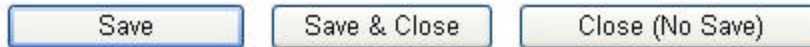
Note: The prompt for printing the tag will appear after the order is invoiced

Searching for a Tag

Step 1
Log onto the link below and select Warranty Tag from the Forms Menu. Use the <u>Search for a Tag</u> window to access a tag that has been created through Order Entry.
http://sp.johnstonesupply.com/default.aspx

Step 2
Search for a Warranty Tag that has already been created and saved.

```
                        Search for a Tag

             ☑ 997 Nairobi
 Store(s)    ☑ 998 Capetown
             ☑ 999 Timbuktu

 Invoice#          [                    ]
 Contractor Name   [                    ]
 Johnstone Stock#  [                    ]
 Salesperson Name  [                    ]
                              [ Search ]

 [ Open ]    Tag# [                      ]
```

Step 3
Enter desired search criteria and click the Search button.

Search Options
Store – Search by your specific store or all branch locations by checking the box(s)
Invoice# - Search for an Invoice number that was entered in the Original Invoice field in the Tag Generator window.
Contractor Name – Searches for a Service Contractor Name that was entered on Tag Generator window.
Johnstone Stock# - Searches for a Johnstone Stock number that was entered on the Tag Generator window.
Salesperson Name – Searches for a name in the Entered By field on the Tag Generator window.
Tag# - If the tag number is known, enter in the number and click Open.
Delete – Users with JEN Admin access will have the ability to DELETE tags. *(This feature is under development and will be released by the end of March 2007)*

Step 4
Select the Open button of the desired tag.

Download Tags to Excel – This option will download the entire list of tags (including Invoice#, Contractor Name, Entered By, etc…) that appear after a Search, into an Excel spreadsheet.

Step 5
After selecting Open in Step 4 the Warranty Tag will appear on the screen. Users have the option to print the tag again, Save, Close or create a new Tag.

Print – Prints and Saves the Warranty Tag. The Warranty Tag will print if all required information is entered. Otherwise, an "Identification Only" tag will print if the required information is not entered.
Save – Saves the Warranty Tag
Save & Close – Saves the Warranty Tag and closes the Warranty Tag screen
Close (No Save) – Closes the Warranty Tag screen without saving changes
New Tag – Refreshes the screen and creates a new tag (often used after selecting the Save button)

Submitting the Warranty Tag to Corp

Procedures have <u>not</u> changed when submitting a Warranty Tag to Corp. Go to the Warranty Pages on JEN for vendor specific warranty return instructions.

Note: See Page 5 & 6 for a sample of a printed Warranty Tag

RETURN MATERIAL TAG   Store Copy   Tag#997W 000147

Model # For Equip/Johnstone #		Serial # For Equip.		Today's Date: 03/06/2007
Product Installation Date:*	03/06/07	Date Part Failed:*	03/06/07	
Failed Vendor Model/Part#:*		New Vendor Model/Part #:*	083S	
083S				
Johnstone Stock #:* B10-120	Qty: 1	New Date Code/Serial #:		
Failed Date Code/Serial #		Replacement Invoice #: 143130		
Original Invoice #:*	147	Memo/Note:		
Product Owner Name:		Service Contractor:* FRED JOHNSON PAINT	Acct#	
Address:		Address:* 31 WEST RIDGE STREET		
City, State, & Zip:				

Explain Nature of Failure:* (Do Not Use Defective)
Worn Out

City, State, Zip:* LANSFORD, PA 18232

Vendor #:*	480	Store# 997 Nairobi
Vendor Name:*	PARKER HANNIFIN (	Entered By:* Store Support Team
Warranty Description:		Distrib. Name:* Johnstone Supply Easton
		Distrib. Address:* PO Box 3849
☐ Repair ☐ Credit Only ☐ Send Replacement Part		City, State, Zip:* Easton, PA 18043-3849

RETURN MATERIAL TAG   Vendor Copy   Tag#997W 000147

Model # For Equip/Johnstone #		Serial # For Equip.		Today's Date: 03/06/2007
Product Installation Date:*	03/06/07	Date Part Failed:*	03/06/07	
Failed Vendor Model/Part#:* 083S		New Vendor Model/Part #:*	083S	
Johnstone Stock #:* B10-120	Qty: 1	New Date Code/Serial #:		
Failed Date Code/Serial #		Replacement Invoice #:	143130	
Original Invoice #:*	147	Memo/Note:		
Product Owner Name:		Service Contractor:*	FRED JOHNSON PAINT	Acct#
Address:		Address:*	31 WEST RIDGE STREET	
City, State, & Zip:				

Explain Nature of Failure:* (Do Not Use Defective)

Worn Out   City, State, Zip:* LANSFORD, PA 18232

Vendor #:*	480	Store# 997 Nairobi
Vendor Name:*	PARKER HANNIFIN C	Entered By:* Store Support Team
Warranty Description:		Distrib. Name:* Johnstone Supply Easton
		Distrib. Address:* PO Box 3849
☐ Repair ☐ Credit Only ☐ Send Replacement Part		City, State, Zip:* Easton, PA 18043-3849

Glossary for Warranty Tag

Date Part Failed – The date the returned item failed.
Distributor Address (city/state/zip) – The address of the Johnstone store submitting the Warranty Tag.
Distributor Name – The name of the Johnstone store submitting the Warranty Tag.
Entered By – The name of the person entering the Warranty Tag during the Order Entry process.
Explain Nature of Failure – Select a Failure option from the dropdown list provided or enter in a specific reason in the Other field (Other field will print up to 45 characters)
Failed Date Code/Serial# - Enter the date code/serial number that is on the warranty item.
Failed Vendor Model/Part # - Enter the Vendor Model Number or Part Number of the item being returned
Johnstone Stock Number – Enter in the Johnstone product number of the item being returned on Warranty.
Memo/Note – Open field to enter desired information (will print up to 42 characters)
New Date Code/Serial# - Enter in the date code/serial number if a new item is being issued.
New Vendor Model/Part# - The Model/Part number of the item that the customer is taking in replacement for the failed part.
Original Invoice Number – Original invoice number of the item being returned
Product Installation Date – The date the product was installed
Product Owner Name & Address – The name and address of the person/Company who purchased the returned item from your customer.
QTY - Enter the quantity number of the item being returned.
Replacement Invoice Number – The invoice number that was entered for the replacement part the customer is receiving.
Service Contractor (address/city/state/zip) – Name and address of the customer returning the warranty item.
Store # - The Johnstone store that is submitting the Warranty Tag.
Tag Number – The tag number represents the store number, W for Warranty and an auto-generated number from Corp system.
Today's Date – Auto populates with the date the tag is created.

Unit Model # for Equip/Johnstone# – Enter Model number of the warranty item (optional to also add the Johnstone# as part of the model number).
Unit Serial # for Equip - Enter Serial number of the warranty item.
Vendor Name – Enter in the name of the Vendor that manufactures the item being returned.
Vendor Number – Enter in the Vendor number that manufactures the item being returned.
Warranty Description – Select Repair, Credit Only, or Send Replacement Part

New Look for Menu 1 Order Entry

Menu 1 has been renumbered to make way for new features. The changes made to Menu 1 are shown in the screen shot below. We have moved the *OLD* Menu 1 to Menu 1.40 for review and comparison to the new menu.

NEW Menu 1 VS. OLD Menu 1	
New Menu 1	**Old Menu 1**
Menu 1.25 Reprint Invoice on Plain Paper	Old Menu 1.30
Menu 1.26 Reprint Sig Capture Inv	Old Menu 1.31
Menu 1.27 Fax Inv with Sig Cap	Old Menu 1.32
Menu 1.28 Email Selected Inv	Old Menu 1.33
Menu 1.29Display PDF Invoice	Old Menu 1.34
Menu 1.30 Display Quote PDF	**NEW TO MENU 1**
Menu 1.31 Upload Handheld Signatures	Old Menu 1.35 Upload Handheld Signatures
Menu 1.32 Email Invoice –No Linux Server	Menu 1.36 Email Invoice –No Linux Server
Menu 1.33 Copy Quote to Company/Customer	Menu 1.37 Copy Quote to Company/Customer
Menu 1.34 Email Quote thru Linux Server	Menu 1.38 Email Quote thru Linux Server
Menu 1.35 Email Pick/Pack thru Linux Server	**NEW TO MENU 1**
Menu 1.36 Fax Pick/Pack thru Linux Server	**NEW TO MENU 1**
Menu 1.40 OLD Menu-1	**NEW TO MENU 1**