



# System Admin Primer

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## Chapter 1 - **Set up IBM User Profiles vs. User ID Control Panels**

Each user and physical device must be defined to the AS/400 operating system and to the Dancik software. In order to set up users and devices, you need to have an authority level which enables you to do so. You also need to have "command line access". Command line access means the system allows you to enter commands from a menu command line. A menu command line is the input area at the bottom of the menu.

```

DANC1K INTERNATIONAL CO# 2
File Maintenance Menu
-----
Opt Description                Opt Description
1 Billto (Customer)           : Additional Menu Functions : File
2 Item File                   :                               : Special Price File
3 Supplier File               : Set Menu As Initial       : cation Codes File
4 Manufacturer File           : Change Menu Sequence      : tistics by Warehouse File
5 Company File                : View History Log         : Line Stats by Warehouse
6 Branch File                 : Main Menu                 :  user Stats by Warehouse
7 Salesperson File           : Command Line              : Statistics by Branch
8 Warehouse File              : F6=Return                 : ter File
9 Price File                  :                               : Matrix File
10 Cost File                  :                               : Order Charges File
11 Packaging File              :                               : Charges File
12 Product Line File          :                               : Sale Price File
13 Stock Keeping Uni          : F6=Return                 :
-----
Command
====>
F4=Prompt  F9=Retrieve  F12=Cancel

```

Work User Profile (**WRKUSRPRF**) is the highest level of authority. This is where you start with brand new users. The profile is created so that a user can sign in to the application and has rights to certain functions such as menus, print devices, access to command lines, ability to move their spool files, run backups, etc. **User ID Control Panel** (Dancik menu SET option 32) is the next level of authority that must be created for a new user.

*Set up IBM User Profiles vs. User ID Control Panels*

# User Profiles

Work User Profile is the highest level when it comes to the AS400. Every user who will be signing on to the Dancik system will have to have an AS400 profile. Once you create an AS400 profile Dancik recognizes that profile, then you must assign rights to that profile. The command you would issue is **WRKUSRPRF**, work user profile. You can prompt it by pressing **F4** and filling in the specific name that you want it to go to. Use **WRKUSRPRF \*ALL** to get a listing of all of your user profiles.

1. type the command **WRKUSRPRF \*ALL**

```

DANC1K INTERNATIONAL CO# 2
File Maintenance Menu
-----
Opt Description                               Opt Description
1 Billto (Customer) .....
2 Item File : Additional Menu Functions : File
3 Supplier File :                               : Special Price File
4 Manufacturer File : Set Menu As Initial       : cation Codes File
5 Company File : Change Menu Sequence         : tistics by Warehouse File
6 Branch File : View History Log              : Line Stats by Warehouse
7 Salesperson File : Main Menu                : umer Stats by Warehouse
8 Warehouse File : Command Line                : Statistics by Branch
9 Price File : F6=Return                       : ter File
10 Cost File :                               : Matrix File
11 Packaging File :                               : Order Charges File
12 Product Line File :                       : Charges File
13 Stock Keeping Uni : F6=Return                : Sale Price File
-----
Command
====> WRKUSRPRF *ALL
F4=Prompt F9=Retrieve F12=Cancel

```



2. press **ENTER**

```
Work with User Profiles

Type options, press Enter.
 1=Create  2=Change  3=Copy  4>Delete  5=Display
12=Work with objects by owner

  User
Opt Profile  Text
--  -
 1  ANGYEN    Anna Nguyen - R12 Production
 2  ANGYEN2   Anna Nguyen - R12 Production
 3  A02PCS    Night Jobs Profile for A02PCS
 4  BOLIPHANT Brian Oliphant - R12 Production
 5  BOQAA01  Brian Oliphant - A01 QA
 6  BOQAA02  Brian Oliphant - A02 QA
 7  BRAVOUSER Dancik Web Application Signon - Q/A Environment
 8  BRIANA01P Andy Parham - A01 PD
 9  BRIANA01Q Andy Parham - A01 Q.A.
More...

Parameters for options 1, 2, 3, 4 and 5 or command
====>
F3=Exit  F5=Refresh  F12=Cancel  F16=Repeat position to  F17=Position to
F21=Select assistance level  F24=More keys
```

This screen displays all the user profiles currently set up on your system. In this example, various profiles are displayed along with text describing the user. Entries appear even if you have not yet set up any users. This is because each AS/400 contains various system user profiles such as **QSECOFR** (the system security officer) and **QSYSOPR** (the system operator).

Dancik International has recommended settings for certain types of users including default menus, security levels, and so on. Dancik will create default user profiles for you to copy when creating your own. Obtain specific instructions from Dancik International's Implementation Team or the Client Services department (for existing customers).

## Look at existing user profile AKAISAND

1. access the command line
2. type **WRKUSRPRF AKAISAND**
3. press **ENTER**
4. **TAB** to **OPT** field
5. type a **2** in the **OPT** field next to user **AKAISAND**
6. press **ENTER**

```

Change User Profile (CHGUSRPRF)

Type choices, press Enter.

User profile . . . . . > AKAISAND      Name
User password . . . . .  SAME  NONE      Character value, *SAME, *NONE
Set password to expired . . . . .  NO      *SAME, *NO, *YES
Status . . . . .  ENABLED      *SAME, *ENABLED, *DISABLED
User class . . . . .  USER      *SAME, *USER, *SYSOPR...
Assistance level . . . . .  SYSVAL      *SAME, *SYSVAL, *BASIC...
Current library . . . . .  QS36F      Name, *SAME, *CRTDFT
Initial program to call . . . . . DODOPEN      Name, *SAME, *NONE
Library . . . . .  LIBL      Name, *LIBL, *CURLIB
Initial menu . . . . . NEWDOD      Name, *SAME, *SIGNOFF
Library . . . . .  LIBL      Name, *LIBL, *CURLIB
Limit capabilities . . . . .  NO      *SAME, *NO, *PARTIAL, *YES
Text 'description' . . . . . 'Amanda Kaisand - Regular User'
-----
Bottom
F3=Exit  F4=Prompt  F5=Refresh  F10=Additional parameters  F12=Cancel
F13=How to use this display  F24=More keys

```

**User password**- you may change the password from here or issue a password for a new user.

**Status** – weather it is enabled or disabled. A user might vary their profile off and when this happens you will come into the status and change it from **\*DISABLED** to **\*ENABLED**.

**User class** - if you are creating a new user you want it to be **\*USER** for a regular user or **\*SYSOPR** for a system operator.

**Current Library** – is going to be your current data library, whatever that happens to be. For our example it is **QS36F**.

```

Change User Profile (CHGUSRPRF)

Type choices, press Enter.

User profile . . . . . > AKAISAND      Name
User password . . . . . *SAME_____ Character value, *SAME, *NONE
Set password to expired . . . . . *NO_____ *SAME, *NO, *YES
Status . . . . . *ENABLED_____ *SAME, *ENABLED, *DISABLED
User class . . . . . *USER_____ *SAME, *USER, *SYSOPR...
Assistance level . . . . . *SYSVAL_____ *SAME, *SYSVAL, *BASIC...
Current library . . . . . QS36F      Name, *SAME, *CRTDFT
Initial program to call . . . . . DODOPEN   Name, *SAME, *NONE
  Library . . . . . *LIBL_____ Name, *LIBL, *CURLIB
Initial menu . . . . . NEWDOD_____ Name, *SAME, *SIGNOFF
  Library . . . . . *LIBL_____ Name, *LIBL, *CURLIB
Limit capabilities . . . . . *NO_____ *SAME, *NO, *PARTIAL, *YES
Text 'description' . . . . . 'Amanda Kaisand - Regular User'

-----

Bottom
F3=Exit  F4=Prompt  F5=Refresh  F10=Additional parameters  F12=Cancel
F13=How to use this display  F24=More keys
    
```

### Initial program to call – DODOPEN

Library - **\*LIBL** this allows the Dancik Application to open up as soon as the user signs in.

**Initial menu** – For some of you it will be **NEWDOD** if you are in the new menu and for others it will be **US** if you are still in the old menu system. If you want to activate the new menu system one of the changes you would have to make is to change this field from **US** to **NEWDOD**.

**Limit capabilities** – **\*NO**, **\*PARTIAL** or **\*YES**, sets weather a user will have access to issue commands on a command line. Even though in the new menu system your can grant access to the command line, if you have **\*YES** in this field the user would not be able to issue commands such as **WRKACTJOB** (work active jobs).

## Additional Parameters – F10

1. press **F10**
2. press the **PAGEDOWN** key

```

Change User Profile (CHGUSRPRF)

Type choices, press Enter.

Additional Parameters

Special authority . . . . . *ALLOBJ *SAME, *USRCLS, *NONE...
                          *JOBCTL
                          *SAVSYS
                          *SPLCTL
+ for more values
Special environment . . . . . *S36 *SAME, *SYSVAL, *NONE, *S36
Display sign-on information . . *SYSVAL *SAME, *NO, *YES, *SYSVAL
Password expiration interval . . *SYSVAL 1-366, *SAME, *SYSVAL, *NOMAX
Block password change . . . . . *SYSVAL 1-99, *SAME, *SYSVAL, *NONE
Local password management . . . *YES *SAME, *YES, *NO
Limit device sessions . . . . . *SYSVAL *SAME, *SYSVAL, *YES, *NO...
Keyboard buffering . . . . . *SYSVAL *SAME, *SYSVAL, *NO...
Maximum allowed storage . . . . *NOMAX Kilobytes, *SAME, *NOMAX
Highest schedule priority . . . . 3 0-9, *SAME

More...

F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display
F24=More keys
    
```

**Special authority** – depends on what the user is able to do.

Normal users would have:

- \***ALLOBJECT** which would grant them access to all the data files required for application running.
- \***SPLCTL** if the user is able to move their Spool files from place to place i.e. redirect them to a printer.

System Administrators would have:

- \***IOSYSCFG**
- \***JOBCTL**
- \* **SAVSYS**
- \***SECADM**



## More Parameters

1. press the **PAGEDOWN** key

```

Change User Profile (CHGUSRPRF)

Type choices, press Enter.

Job description . . . . . DES12PRD      Name, *SAME
Library . . . . .          EVUSER       Name, *LIBL, *CURLIB
Group profile . . . . .    *NONE      Name, *SAME, *NONE
Owner . . . . .           *USRPRF   *SAME, *USRPRF, *GRPPRF
Group authority . . . . . *NONE      *SAME, *NONE, *ALL...
Group authority type . . . *PRIVATE   *PRIVATE, *PGP, *SAME
Supplemental groups . . . *NONE      Name, *SAME, *NONE
      + for more values
Accounting code . . . . . *BLANK
Document password . . . . *SAME      Name, *SAME, *NONE
Message queue . . . . .   AKAISAND   Name, *SAME, *USRPRF
      Library . . . . .     QUSRSYS   Name, *LIBL, *CURLIB
Delivery . . . . .        *NOTIFY   *SAME, *NOTIFY, *BREAK...
Severity code filter . . . 0           0-99, *SAME
Print device . . . . .    *WRKSTN   Name, *SAME, *WRKSTN, *SYSVAL

More...

F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys

```

**Job description** - defines the library list that gets called when this user signs in. The Job Description changes if you have multiple environments. If you have multiple environments you are going to need a profile for each environment. The Job description is linked to the same environment. For example, akaisand's current library is **QS36F** which is linked to **DES12PRD**.

**Print device** – The Dancik application controls where reports will print. Anything that does not get controlled by the Dancik Application is controlled by this user profile. If **AKAISAND** was going to run an **X by Y Report** she is set with **\*WRKSTN** which will direct this report to print at the default printer for her workstation device. If it does not find the printer device it will go to the default system printer. Dancik recommends setting the print device to go to a phantom printer to allow users to locate reports in their Spool File and control if or where they will print. To assign the Phantom Printer as the Print Device, place it's two character code (**P9**) in the field instead of **\*WRKSTN**.

## More Parameters

- press the **PAGEDOWN** key

```

Change User Profile (CHGUSRPRF)

Type choices, press Enter.

Output queue . . . . . *WRKSTN      Name, *SAME, *WRKSTN, *DEV
Library . . . . .          Name, *LIBL, *CURLIB
Attention program . . . . . MNUB01CL  Name, *SAME, *SYSVAL...
Library . . . . .          *LIBL      Name, *LIBL, *CURLIB
Sort sequence . . . . . *SYSVAL   Name, *SAME, *SYSVAL, *HEX...
Library . . . . .          Name, *LIBL, *CURLIB
Language ID . . . . . *SYSVAL   *SAME, *SYSVAL...
Country or region ID . . . . . *SYSVAL   *SAME, *SYSVAL...
Coded character set ID . . . . . *SYSVAL   *SAME, *SYSVAL, *HEX...
Character identifier control . . . . . *SYSVAL   *SAME, *SYSVAL, *DEVD...
Locale job attributes . . . . . *SYSVAL   *SAME, *SYSVAL, *NONE...
+ for more values
Locale . . . . . *SAME

User options . . . . . *NONE      *SAME, *NONE, *CLKWD...
+ for more values

More...

F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys
    
```

**Attention program** - are the menu bars that display when you press the **ESC** key from within a Dancik menu. This allows the user to move around to different parts of the system. There are eight different menu bars. To change a user's menu bar, insert the name of the desired bar in the Attention Program field.

Menu Bar	Description
MNUB01CL	For basic users. Offers very limited operational control.
MNUB02CL	For users who have system operator responsibilities.
MNUB03CL	For users with both operational and file maintenance responsibilities.
MNUB04CL	For users with both operational and file maintenance responsibilities.
MNUB05CL	This menu bar is designed for accounting personnel and should be used only from accounting programs. It contains files and inquiries commonly used by accounting personnel.
MNUB06CL	This menu bar is intended for customer service personnel who require a few limited operations and file options, event management, and some utility programs.
MNUB07CL	For Purchasing users.
MNUBWHCL	For Warehouse personnel

## Set up a New User Profile

The following example illustrates how a new user profile can be set-up using a Dancik International supplied setting. For the purposes of this example, a basic system user profile will be established for a new employee (**GBRANNEN**).

1. Type **WRKUSRPRF \*ALL** on the command line and press **ENTER** to access the Work with User Profiles screen.
2. Navigate around the screen using the **Page Up** and **Page Down** until you find a profile that suits your needs. For example, for an operator that will need a basic set up you can use the Dancik setting **REGULAR** – Regular User Profile.
3. On the Work with User Profiles screen, enter a **3** in the **Opt** field beside **REGULAR** as shown.

```

Work with User Profiles

Type options, press Enter.
 1=Create  2=Change  3=Copy  4=Delete  5=Display
12=Work with objects by owner

  Opt  User Profile      Text
  ---  -
  ---  QUSER              Work Station User
  ---  QWSERVICE         QWSERVICE
  ---  QYCMCIMOM         IBM-supplied User Profile
  ---  QYPSJSVR          IBM-supplied User Profile
  3_   REGULAR         Dancik International - Regular User
  ---  RF               Dancik International - RF Signon
  ---  SUPPORT          Dancik International - Support
  ---  TBULLARD         Terry Bullard
  ---  WH              Dancik International - RF Signon
                                           More...

Parameters for options 1, 2, 3, 4 and 5 or command
====>
F3=Exit   F5=Refresh   F12=Cancel  F16=Repeat position to  F17=Position to
F21=Select assistance level      F24=More keys

```

4. Press **ENTER** to access the Create User Profile screen.



## Set up IBM User Profiles vs. User ID Control Panels

```

Create User Profile (CRTUSRPRF)

Type choices, press Enter.

User profile . . . . . _____ Name
User password . . . . . *USRPRF Character value, *USRPRF...
Set password to expired . . . . > *NO *NO, *YES
Status . . . . . > *ENABLED *ENABLED, *DISABLED
User class . . . . . > *USER *USER, *SYSOPR, *PGMR...
Assistance level . . . . . > *SYSVAL *SYSVAL, *BASIC, *INTERMED...
Current library . . . . . > QS36F Name, *CRTDFT
Initial program to call . . . . > DODOPEN Name, *NONE
Library . . . . . > *LIBL Name, *LIBL, *CURLIB
Initial menu . . . . . > NEWDOD Name, *SIGNOFF
Library . . . . . > *LIBL Name, *LIBL, *CURLIB
Limit capabilities . . . . . > *NO *NO, *PARTIAL, *YES
Text 'description' . . . . . > 'Dancik International - Regular User'

More...
F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display
F24=More keys

```

5. Type in the new user's name (or other form of ID) in the **User profile** field. You can also change the information in the **Text description** field to something more descriptive. This will create a copy with the same level of authority as a regular user.

```

Create User Profile (CRTUSRPRF)

Type choices, press Enter.

User profile . . . . . GBRANNEN Name
User password . . . . . *USRPRF Character value, *USRPRF...
Set password to expired . . . . > *NO *NO, *YES
Status . . . . . > *ENABLED *ENABLED, *DISABLED
User class . . . . . > *USER *USER, *SYSOPR, *PGMR...
Assistance level . . . . . > *SYSVAL *SYSVAL, *BASIC, *INTERMED...
Current library . . . . . > QS36F Name, *CRTDFT
Initial program to call . . . . > DODOPEN Name, *NONE
Library . . . . . > *LIBL Name, *LIBL, *CURLIB
Initial menu . . . . . > NEWDOD Name, *SIGNOFF
Library . . . . . > *LIBL Name, *LIBL, *CURLIB
Limit capabilities . . . . . > *NO *NO, *PARTIAL, *YES
Text 'description' . . . . . > 'Gary Brannen - Regular User'

More...
F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display
F24=More keys

```

**Note:** The default User password assigned is **\*USRPRF**. This will make the user's password the same as their User Profile. Once in, they can change their password through the **CHGPWD** command. For example Gary's first login would be Username **GBRANNEN** and Password **GBRANNEN**.

6. Press **ENTER**. The Work with User Profiles screen will reappear

```

Work with User Profiles

Type options, press Enter.
 1=Create  2=Change  3=Copy  4=Delete  5=Display
12=Work with objects by owner

  Opt  User
      Profile  Text
  ---  ---
  ---  QUSER      Work Station User
  ---  QWSERVICE
  ---  QYCMCIMOM   IBM-supplied User Profile
  ---  QYPSJSVR    IBM-supplied User Profile
  █    REGULAR   Dancik International - Regular User
  ---  RF         Dancik International - RF Signon
  ---  SUPPORT    Dancik International - Support
  ---  TBULLARD   Terry Bullard
  ---  WH         Dancik International - RF Signon
                                           More...

Parameters for options 1, 2, 3, 4 and 5 or command
===>
F3=Exit  F5=Refresh  F12=Cancel  F16=Repeat position to  F17=Position to
F21=Select assistance level  F24=More keys
User profile GBRANNEN created.
    
```

*Note: If the new profile is not created, you are probably not configured to establish or copy user profiles. If this is the case, you will see the following error message on the bottom of the screen: \*SECADM is required to create or change user profiles.*

7. Press **F5** to refresh the screen.

8. Press **Page Up** or **Page Down** to locate the new user.

```

Work with User Profiles

Type options, press Enter.
 1=Create  2=Change  3=Copy  4=Delete  5=Display
12=Work with objects by owner

  Opt  User
      Profile  Text
  ---  ---
  █    DPETERS   David Peters
  ---  GBRANNEN   Gary Brannen - Regular User
  ---  JADAMS     John Adams
  ---  JGULAS     John Gulas
  ---  JOE        Joe Berentes
  ---  JPOLANIK   Joe Polanik
  ---  JTHORNTON  Jack Thornton
  ---  LIMITED    Dancik International - Limited Capability User
  ---  MIKEK     Mike Kowalewski
                                           More...

Parameters for options 1, 2, 3, 4 and 5 or command
===>
F3=Exit  F5=Refresh  F12=Cancel  F16=Repeat position to  F17=Position to
F21=Select assistance level  F24=More keys
    
```



# User ID Control Panels

The User ID Control Panel grants the user application specific rights and assigns defaults. This file accesses the **CTRLUSER** program for the current user. It is recommended that you use the Dancik menu of **SET** option **32** (Master Control User File) to access and create the user's ID Control Panel. This user administration program combines all of the user-related settings into one place. It combines all of the user defaults, security fields, and parameters related to any application, including web applications like IWMS, Decor 24, and Selection Sheet Manager.

## Set up a New User's ID Control Panel

For this example we will be setting up a User ID Control Panel for our new employee (**GBRANNEN**).

1. Access the **SET** menu
2. Type **32** in the **OPTION#** field
3. Press **ENTER**

The screenshot shows a terminal window titled "System Settings Menu". The menu lists various options, with option 32, "Master Control User File", highlighted in red. A cyan box highlights the "Enter Password for Authorization ..." prompt, and a red box highlights the "SET 32" input at the bottom of the screen. The bottom of the screen shows function key shortcuts: F1=Add, F2=Select, F5=Personal, F9=Additional, F10=Scan, F11=Alt View.

Opt	Description	Opt	Description
31	Master Attributes File		
32	Master Control User File		
35	Auto Back Order Fill Whs Settings	**	UNIVERSAL OPTIONS **
36	Maintain Pick List Printer Format	993	Display System Messages
37	Maintain Label Printer Formats	994	Send System Messages
38	Order P		ut
40	Language		on
301	Maintai		
302	Custom		
303	Maintai		
304	Maintai		
305	Maintain X By Y Job Queues		
306	Maintain TNSSN File (Telnet)		
307	Item/Image Cross Reference File		

Enter Desired Menu / Option# ==>> SET 32

Bottom

F1=Add F2=Select F5=Personal F9=Additional F10=Scan F11=Alt View

4. Type the high level **PASSWORD**
5. Press **ENTER**
6. **TAB** to the **OPT** field next to **DANC1K** user

7. Type a **C** in the **OPT** field

```
3/12/10          Control User File Maintenance          FM3010R@
14:03:20                                               V3

Opt  User      Name      Dft  Navigator
Init  Auth Class
C   DANC1K     Dancik International      *ALL

Options ==> C=Cpy  D=Del  I=Inq  U=Upd  W=Web Access  Y=Web Control Panel
F7=Exit  F8=Password
Users that are HIGHLIGHTED indicate that the User profile does not exist.
```

8. Press **ENTER**

9. Fill out the new user's information

- User
- Full Name
- Update new Record

```
3/12/10          Control User File Maintenance          FM3010R@
14:03:20                                               V3

Copy New Control User Record

User .....: CBRANNEN
Full Name .....: Gary Brannen
Update new Record : Y Y

F6=Return  F7=Exit

Options ==> C=Cpy  D=Del  I=Inq  U=Upd  W=Web Access  Y=Web Control Panel
F7=Exit  F8=Password
Users that are HIGHLIGHTED indicate that the User profile does not exist.
```

10. Press **ENTER**

3/12/10 14:16:00	<b>Control User File Maintenance</b>	FM3010MA V4
User .....	GBRANNEN	Change
Full Name .....	Gary Brannen	
ODS Dft - Email Address ...		
Default Initials .....		Allow To Adjust Inv Locations : Y Y/N
Default Department.....		Allow To Adjust Inv Shades ... : Y Y/N
Event Mgmt Security Level :		Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders .....	Y Y/N	Allow To Adjust Inv Quantity : Y Y/N
Limit to Business Entity ..	?	Allow To Adjust Inv Cost ..... : Y Y/N
Billto Notepad Option .....	S I/U/S/N	Allow To Enter Orders .....
Update Salesperson in O/E :	Y Y/N/B/V	Allow To Enter Direct Ships ...
Limit To Salesperson# .....	?	Allow To Enter P.O.s .....
Default Retail Acct# .....	000000 ?	Allow Build-A-Truck Updates ...
Limit Credit Release Screen To:		Default Order Inquiry Options:
Company# .....	?	Open Only .....
Branch .....	?	# Of Prior Months .....
Credit Manager Code .....		
F6=Return F7=Exit F11=Screen 2		

Fill out the various fields on each screen to grant the new user specific applications rights and assign defaults.



```

Control User File Maintenance
-----
User .....: GBRANNEN                               Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Default Initials .....: GB
Default Department.....:
Event Mgmt Security Level : U
Show Costs on Orders .....: N Y/N
Limit to Business Entity ..: ?
Billto Notepad Option .....: I I/U/S/N
Update Salesperson in O/E : Y Y/N/B/V
Limit To Salesperson# .....: ?
Default Retail Acct# .....: 000099 ?

Allow To Adjust Inv Locations : Y Y/N
Allow To Adjust Inv Shades ...: Y Y/N
Allow To Adjust Inv Sts Codes : Y Y/N
Allow To Adjust Inv Quantity : Y Y/N
Allow To Adjust Inv Cost .....: Y Y/N
Allow To Enter Orders .....: Y Y/N/H
Allow To Enter Direct Ships ...: Y Y/N
Allow To Enter P.O.s .....: Y Y/N
Allow Build-A-Truck Updates ...: N Y/N

Limit Credit Release Screen To:
Company# .....: ?
Branch .....: ?
Credit Manager Code .....:

Default Order Inquiry Options:
Open Only .....: Y Y/N
# Of Prior Months .....: 1 1-12

F6=Return F7=Exit F11=Screen 2
    
```

**ODS Dft - Email Address-** Enter the user's work e-mail address or their department's e-mail address.

**Default Initials** – Enter the user's initials. The system uses these initials as the default for the Order Entry initials field. If this field is left blank, the Work Station Control Panel default initials are used in Order Entry.

**Default Department** – This code is used to group each user into departments. For example, CS could indicate customer service or **PU** could indicate purchasing. This code is used by the Event Management System and other department oriented functions. These department codes must also be defined using the System Cross Reference Table (**SET 5**).

**Event Management Security Level-** This field determines the security level of the user for the use of Event Management, which includes the Quote Management system.

**A= Administrator Level.** The user accesses all Event Management records, and maintains the various codes and definitions. The user employs any department codes.

**U= User Level.** The user can access all records, but cannot maintain codes and definitions. The user employs any department codes.

**D= Departmental User.** The user can only access Event Management records for the department represented by the default department code on this screen. The user cannot maintain codes and definitions. This option is the most restrictive.



```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com
-----
Default Initials .....: GB          Allow To Adjust Inv Locations : Y Y/N
Default Department.....:          Allow To Adjust Inv Shades ...: Y Y/N
Event Mgmt Security Level : U          Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders .....: N Y/N    Allow To Adjust Inv Quantity  : Y Y/N
Limit to Business Entity .:          ?    Allow To Adjust Inv Cost .....: Y Y/N
Billto Notepad Option ....: I I/U/S/N  Allow To Enter Orders .....: Y Y/N/H
Update Salesperson in O/E : Y Y/N/B/V    Allow To Enter Direct Ships ..: Y Y/N
Limit To Salesperson# ....:          ?    Allow To Enter P.O.s .....: Y Y/N
Default Retail Acct# .....: 000099 ?    Allow Build-A-Truck Updates ..: N Y/N

Limit Credit Release Screen To:          Default Order Inquiry Options:
Company# .....:          ?          Open Only .....: Y Y/N
Branch .....:          ?          # Of Prior Months .....: 1 1-12
Credit Manager Code ....:          ?

F6=Return  F7=Exit  F11=Screen 2
    
```

**Show Costs on Orders** - Use this parameter to establish, by user, who can view product costs in certain programs. Enter **Y** to allow costs to show on Order Entry. Optionally, enter **N** to indicate that costs or gross profit statistics should not be displayed to this user on Order Entry. This option affects the Order Entry, Order Change, Order Inquiry, and Invoice Inquiry Screens. Furthermore, prices on POs and transfers will not display while performing searches.

*Note: If you enter an N in this field, the user is restricted to only running X by Y Reports in customer version.*

**Limit to Business Entity** - Business Entities are groupings of companies, branches, and/or cost centers. For example, you can group all your branches in one region into a business entity. Or you can create a business entity by product such as grouping ceramic tile and wood products. Entering a Business Entity code in the **Limit to Business Entity** field causes that business entity code to appear in any application that has the business entity parameter. This currently includes X by Y Reports.

```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Default Initials .....: GB          Allow To Adjust Inv Locations : Y Y/N
Default Department.....:          Allow To Adjust Inv Shades ...: Y Y/N
Event Mgmt Security Level : U          Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders .....: N Y/N    Allow To Adjust Inv Quantity  : Y Y/N
Limit to Business Entity ..:          ?    Allow To Adjust Inv Cost .....: Y Y/N
Billto Notepad Option .....: I I/U/S/N  Allow To Enter Orders .....: Y Y/N/H
Update Salesperson in O/E : Y Y/N/B/V  Allow To Enter Direct Ships ...: Y Y/N
Limit To Salesperson# .....:          ?    Allow To Enter P.O.s .....: Y Y/N
Default Retail Acct# .....: 000099 ?    Allow Build-A-Truck Updates ...: N Y/N

Limit Credit Release Screen To:          Default Order Inquiry Options:
Company# .....:          ?          Open Only .....: Y Y/N
Branch .....:          ?          # Of Prior Months .....: 1 1-12
Credit Manager Code .....:          ?

F6=Return  F7=Exit  F11=Screen 2
    
```

**Billto Notepad Option** - This field can be used to in addition to or instead of the Billto File passwords to control access to the Billto File Notepad. The options are as follows:

- I** - Inquire only. User cannot update Billto File notepad regardless of password.
- U** - Update - Billto File notepad can be updated when the user accesses the Billto File in update mode. The Billto File passwords are checked.
- S** - Special Update Authority. The user can update the notepad even when in inquiry mode. This is recommended for users who require update access to the notepad but not to the other Billto File screens. Billto File password is not required for updating the notepad
- N** - Notes only. The user can inquire or update the Billto Notepad depending on the password entered, but cannot update the other Billto File screens regardless of password. This option is recommended for salespeople who require update access to the notepad, but who need to be restricted from the other updates regardless of whether they know the passwords or not.

```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Default Initials .....: GB                               Allow To Adjust Inv Locations : Y Y/N
Default Department.....:                               Allow To Adjust Inv Shades ...: Y Y/N
Event Mgmt Security Level : U                          Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders .....: N Y/N                    Allow To Adjust Inv Quantity : Y Y/N
Limit to Business Entity ..: ?                          Allow To Adjust Inv Cost .....: Y Y/N
Billto Notepad Option ....: I I/U/S/N          Allow To Enter Orders .....: Y Y/N/H
Update Salesperson in O/E : Y Y/N/B/V                Allow To Enter Direct Ships ...: Y Y/N
Limit To Salesperson# .....: ?                          Allow To Enter P.O.s .....: Y Y/N
Default Retail Acct# .....: 000099 ?                  Allow Build-A-Truck Updates ...: N Y/N

Limit Credit Release Screen To:                Default Order Inquiry Options:
Company# .....: ?                                     Open Only .....: Y Y/N
Branch .....: ?                                     # Of Prior Months .....: 1 1-12
Credit Manager Code .....:

F6=Return   F7=Exit   F11=Screen 2
    
```

**Update Salesperson in O/E** - The following codes are available for this field:

**Y** - allows the **Salesperson Number** field to be updated or removed on the Order Entry Screens. This option does not verify entries against the Salesperson File.

**N** - blocks the **Salesperson Number** field from being updated or removed on the Order Entry screens.

**V** - allows the **Salesperson Number** Field to be updated or removed on the Order Entry Screens, but verifies that any salesperson numbers entered are in the Salesperson File.

**B** - means that the salesperson field on the header screen of Order Entry can only be updated if blank. This setting is recommended for retail sales environments in which you only want salespeople to override a salesperson number when the account does not have an assigned salesperson.

**Limit To Salesperson#** - If a number is entered into this field, then the user is restricted to records related only to the corresponding salesperson. A record is considered to be related to a salesperson if the record itself or its related Billto file record contains that salesperson's number or related salesperson listed in the Salesperson Relationship File. This only applies to the following programs:

- Salesperson File
- Billto File
- Open AR Inquiry
- AR History Inquiry
- Invoice Inquiry
- Order Inquiry (**COU 2, ORD 11, CUS 10**)
- X by Y Reports
- Reports based on customer, that include a salesperson number option

```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Default Initials .....: GB                               Allow To Adjust Inv Locations : Y Y/N
Default Department.....:                               Allow To Adjust Inv Shades ...: Y Y/N
Event Mgmt Security Level : U                               Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders .....: N Y/N                     Allow To Adjust Inv Quantity  : Y Y/N
Limit to Business Entity ..:                               Allow To Adjust Inv Cost .....: Y Y/N
Billto Notepad Option .....: I I/U/S/N           Allow To Enter Orders .....: Y Y/N/H
Update Salesperson in O/E : Y Y/N/B/V           Allow To Enter Direct Ships ...: Y Y/N
Limit To Salesperson# .....:                               Allow To Enter P.O.s .....: Y Y/N
Default Retail Acct# .....: 000099 ?           Allow Build-A-Truck Updates ...: N Y/N

Limit Credit Release Screen To:
Company# .....: ?
Branch .....: ?
Credit Manager Code .....:

Default Order Inquiry Options:
Open Only .....: Y Y/N
# Of Prior Months .....: 1 1-12

F6=Return F7=Exit F11=Screen 2
    
```

**Default Retail Acct#** - Each user can be assigned to a default customer account number to use when placing orders for retail customers. This setting works in conjunction with a "Google Style" customer search feature within order entry. When a search is performed and a retail customer is selected, the program checks for "Default Retail Account #", as entered in the **Default Retail Acct#** field. If it finds a Default Retail Account#, the program uses the selected retail customer and the Default Retail Account#. The Default Retail Account# is normally an account such as "CASH RETAIL SALES".

**Limit Credit Release Screen to Company#** - Enter the company number of the company whose credit information this user may view. You can leave this field blank to include all companies. This option and the two following options pertain to the Credit Held Orders Screens. You can enter a (?) and press **Enter** to display the options for this field.

**Limit Credit Release Screen to Branch** - Enter the branch number of the branch whose credit information this user may view. You can leave this field blank to include all branches. Users restricted to a branch can only run invoice registers and access Billto records for their assigned branch. You can enter a (?) and press **Enter** to display the options for this field

**Limit Credit Release Screen to Credit Manager Code** - Enter the credit manager code of the credit manager whose credit information this user may view. You can leave this field blank to include all credit managers.

Control User File Maintenance																
User .....	GBRANNEN <span style="float:right">Change</span>															
Full Name .....	Garu Brannen															
ODS Dft - Email Address ...	gbrannen@dancik.com															
Default Initials .....	GB															
Default Department.....																
Event Mgmt Security Level :	U															
Show Costs on Orders .....	N Y/N															
Limit to Business Entity ..																
Billto Notepad Option .....	I I/U/S/N															
Update Salesperson in O/E :	Y Y/N/B/V															
Limit to Salesperson# .....																
Default Retail Acct# .....	000099 ?															
<table border="1" style="width:100%"> <tr> <td>Allow To Adjust Inv Locations :</td> <td>Y</td> <td>Y/N</td> </tr> <tr> <td>Allow To Adjust Inv Shades ... :</td> <td>Y</td> <td>Y/N</td> </tr> <tr> <td>Allow To Adjust Inv Sts Codes :</td> <td>Y</td> <td>Y/N</td> </tr> <tr> <td>Allow To Adjust Inv Quantity :</td> <td>Y</td> <td>Y/N</td> </tr> <tr> <td>Allow To Adjust Inv Cost .....</td> <td>Y</td> <td>Y/N</td> </tr> </table>		Allow To Adjust Inv Locations :	Y	Y/N	Allow To Adjust Inv Shades ... :	Y	Y/N	Allow To Adjust Inv Sts Codes :	Y	Y/N	Allow To Adjust Inv Quantity :	Y	Y/N	Allow To Adjust Inv Cost .....	Y	Y/N
Allow To Adjust Inv Locations :	Y	Y/N														
Allow To Adjust Inv Shades ... :	Y	Y/N														
Allow To Adjust Inv Sts Codes :	Y	Y/N														
Allow To Adjust Inv Quantity :	Y	Y/N														
Allow To Adjust Inv Cost .....	Y	Y/N														
<table border="1" style="width:100%"> <tr> <td>Allow To Enter Orders .....</td> <td>Y</td> <td>Y/N/H</td> </tr> <tr> <td>Allow To Enter Direct Ships ... :</td> <td>Y</td> <td>Y/N</td> </tr> <tr> <td>Allow To Enter P.O.s .....</td> <td>Y</td> <td>Y/N</td> </tr> <tr> <td>Allow Build-A-Truck Updates ... :</td> <td>N</td> <td>Y/N</td> </tr> </table>		Allow To Enter Orders .....	Y	Y/N/H	Allow To Enter Direct Ships ... :	Y	Y/N	Allow To Enter P.O.s .....	Y	Y/N	Allow Build-A-Truck Updates ... :	N	Y/N			
Allow To Enter Orders .....	Y	Y/N/H														
Allow To Enter Direct Ships ... :	Y	Y/N														
Allow To Enter P.O.s .....	Y	Y/N														
Allow Build-A-Truck Updates ... :	N	Y/N														
<table border="0" style="width:100%"> <tr> <td>Limit Credit Release Screen To:</td> <td>Default Order Inquiry Options:</td> </tr> <tr> <td>Company# .....</td> <td>Open Only .....</td> </tr> <tr> <td>Branch .....</td> <td># Of Prior Months .....</td> </tr> <tr> <td>Credit Manager Code .....</td> <td></td> </tr> </table>		Limit Credit Release Screen To:	Default Order Inquiry Options:	Company# .....	Open Only .....	Branch .....	# Of Prior Months .....	Credit Manager Code .....								
Limit Credit Release Screen To:	Default Order Inquiry Options:															
Company# .....	Open Only .....															
Branch .....	# Of Prior Months .....															
Credit Manager Code .....																
F6=Return    F7=Exit    F11=Screen 2 <span style="float:right">H</span>																

### Allow To Adjust Inventory Locations, Shades, Status Codes, Quantity and Cost –

These options control the type of inventory adjustments the user can perform. These settings also apply to conventional terminals, PCs, and RF cycle count procedures.

Allow To Enter Orders - The following options can be set for this field:

- Y** - the user can enter orders without any restrictions. This is the default.
- N** - the user cannot even get in to the header of an order.
- H** - the user can enter the order, but cannot use any of the keys to process the order, but can only continue with options **F2**, **F3**, **F6**, or **F7**.

**Allow to Enter Direct Ships, and POs** – These are **Yes** or **No** options. If left blank, the option defaults to **Y**.

**Bld-A-Trk Updates** - The **Build-A-Truck Updates** field designates if the user can perform updates in the Build-A-Truck Program. A **Y** in this field enables the full use of Build-A-Truck features. An **N** in this field allows you to use the Inquiry mode of Build-A-Truck, but not the Update mode. It is important to set this flag for all users since the Build-A-Truck Program can be accessed from Order Entry and several other places.

```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Default Initials .....: GB          Allow To Adjust Inv Locations : Y Y/N
Default Department.....:          Allow To Adjust Inv Shades ...: Y Y/N
Event Mgmt Security Level : U          Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders .....: N Y/N    Allow To Adjust Inv Quantity  : Y Y/N
Limit to Business Entity ..:          ?    Allow To Adjust Inv Cost .....: Y Y/N
Billto Notepad Option ....: I I/U/S/N  Allow To Enter Orders .....: Y Y/N/H
Update Salesperson in O/E ..: Y Y/N/B/V  Allow To Enter Direct Ships ...: Y Y/N
Limit To Salesperson# .....:          ?    Allow To Enter P.O.s .....: Y Y/N
Default Retail Acct# .....: 000099 ?    Allow Build-A-Truck Updates ...: N Y/N

Limit Credit Release Screen To:
  Company# .....:          ?
  Branch .....:          ?
  Credit Manager Code .....:

Default Order Inquiry Options:
  Open Only .....: Y Y/N
  # Of Prior Months .....: 1 1-12

F6=Return  F7=Exit  F11=Screen 2
    
```

### Default Order Inquiry Options:

**Open Only** - Enter **Y** to view only open orders. Optionally, enter **N** to view both open and closed (invoiced or cancelled) orders. You can override this default from the Order Inquiry Screen.

**# of Prior Months** - Enter a number between **1** and **12**. This is the default number of months prior to today that should be searched by the Open Order Inquiry Program. We recommend entering a number between **1** and **4** in this field. This field controls the default date span that displays on the Order Inquiry Screen. The user can override these defaults.

11. After entering the default options for the user, press **ENTER**

12. Press **F11** to advance to **Screen 2**

```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Allow Access to the "All Prices" Display in O/E & Quick Quoter ...: Y Y/N
Access Allocation Swapping by Item#, by Order/Line# or by Both ...: B I/O/B
Allocation Swapping Options to Disable for this User.....:
Allow Access to the Order Change and Cancel Programs .....: Y Y/N
Allow Access to the Update Order Status & Shipping Data Program ...: Y Y/N
Default Sort For Inventory Analysis Screen .....:          ?
Default View# for Order & Invoice Inquiry .....: 1 ?
Maximum Variance for Order Date Field .....: 002 1-999
User Can't Cancel or Change Qty on Orders with these Status Codes : F2=Update
      A S X -----
User Can't Change Status on Orders with these Status Codes .....: F2=Update
-----

Order Inquiry Function Access:          Adjust Inv from Allocation Swap By
  Credit Holds: Y  Print: Y  F24: Y          Serial# X X -OR- Inv Inquiry  X

F6=Return  F7=Exit  F11=Screen 3
    
```

```

Control User File Maintenance
-----
User .....: GBRANNEN                               Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Allow Access to the "All Prices" Display in O/E & Quick Quoter ...: Y Y/N
Access Allocation Swapping by Item#, by Order/Line# or by Both ...: B I/O/B
Allocation Swapping Options to Disable for this User.....:
Allow Access to the Order Change and Cancel Programs .....: Y Y/N
Allow Access to the Update Order Status & Shipping Data Program ...: Y Y/N
Default Sort For Inventory Analysis Screen .....: ?
Default View# for Order & Invoice Inquiry .....: 1 ?
Maximum Variance for Order Date Field .....: 002 1-999
User Can't Cancel or Change Qty on Orders with these Status Codes : F2=Update
                                     A S X _ _ _ _ _
User Can't Change Status on Orders with these Status Codes .....: F2=Update
-----
Order Inquiry Function Access:          Adjust Inv from Allocation Swap By
Credit Holds: Y Print: Y F24: Y        Serial# X X -OR- Inv Inquiry _ X
F6=Return  F7=Exit  F11=Screen 3
    
```

## Allow Access to the "All Prices" Display in Order Entry & Quick Quoter –

Enter N in this option to disable this user's access to the "All Prices" display. The "All Prices" display is available in Order Entry and Quick Quoter and displays all available prices for an item.

## Access Allocation Swapping by Item# or by Order/Line# or by Both (I/O/B) –

**I** - Access by item number. The user can enter an item number and view all of the orders for that item number.

**O** - Access by order and line number. The user can enter an order and line number and view only that line item. This is designed primarily for users who are only allowed to use the Reallocation option within Allocation Swapping.

**B** - Access by either method. The user can enter an item number or press **F10** to enter an order or line number instead.

```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Allow Access to the "All Prices" Display in O/E & Quick Quoter ...: Y Y/N
Access Allocation Swapping by Item#, by Order/Line# or by Both ...: B I/O/B
Allocation Swapping Options to Disable for this User.....:
Allow Access to the Order Change and Cancel Programs .....: Y Y/N
Allow Access to the Update Order Status & Shipping Data Program ...: Y Y/N
Default Sort For Inventory Analysis Screen .....: ?
Default View# for Order & Invoice Inquiry .....: 1 ?
Maximum Variance for Order Date Field .....: 902 1-999
User Can't Cancel or Change Qty on Orders with these Status Codes : F2=Update
                                     A S X
User Can't Change Status on Orders with these Status Codes .....: F2=Update
-----

Order Inquiry Function Access:          Adjust Inv from Allocation Swap By
Credit Holds: Y Print: Y F24: Y        Serial# X X -OR- Inv Inquiry _ X

F6=Return  F7=Exit  F11=Screen 3

```

**Allocation Swapping Options to Disable for this User** - This option allows you to disable all or certain Allocation Swapping options for a user. You can enter any of the above options to be disabled.

**A** - Allocate inventory to a back order.

**D** - Deallocate inventory from an order, making it a back order.

**E** - Exchange allocation status between two orders.

**S** - Split a line into two lines whose total quantity equals the original line.

**R** - Reallocate inventory. Change the serial number or bin number allocated.

**Allow Access to the Order Change and Cancel Programs (Y/N)** - If set to **N** the user cannot use the **F6** - Change/Cancel functionality from within order inquiry, or access the Cancel/Change Orders option from various menus. The default value is **Y**.

**Allow Access to the Update Order Status & Shipping Data Program (Y/N)** - If set to **N**, the user cannot use the **F12** - Shipping update functionality from within order inquiry, or access the Update Order Status & Shipping Data program from various menus. The default value is **Y**.



```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ..: gbrannen@dancik.com

Allow Access to the "All Prices" Display in O/E & Quick Quoter ...: Y Y/N
Access Allocation Swapping by Item#, by Order/Line# or by Both ...: B I/O/B
Allocation Swapping Options to Disable for this User.....:
Allow Access to the Order Change and Cancel Programs .....: Y Y/N
Allow Access to the Update Order Status & Shipping Data Program ...: Y Y/N
Default Sort For Inventory Analysis Screen .....: ?
Default View# for Order & Invoice Inquiry .....: 1 ?
Maximum Variance for Order Date Field .....: 002 1-999
User Can't Cancel or Change Qty on Orders with these Status Codes : F2=Update
                                     A S X
User Can't Change Status on Orders with these Status Codes .....: F2=Update
-----
Order Inquiry Function Access:          Adjust Inv from Allocation Swap By
Credit Holds: Y   Print: Y   F24: Y           Serial# X X -OR- Inv Inquiry _ X
F6=Return   F7=Exit   F11=Screen 3
    
```

**Default Sort for Inventory Analysis Screen-** The Inventory Analysis Screen Sort Code controls the way inventory records are sorted on the Inventory Analysis Screen, which is accessed in Order Entry and Order Change with an "I" in the selection field. Enter a "?" in this field to see a list of the available sort options. This default may be changed when using the Inventory Analysis screen.

*Note: This sort can be of great importance for optimizing inventory selections, especially for orders requiring multiple shades, serial numbers, rolls, and/or cuts of the same item. For example, sorts SS and WS group shades together, and then show the smallest shade groups first. Carefully review how these codes affect the Inventory Analysis screen, and then select the appropriate defaults for each user.*

**Default View# for Order & Invoice Inquiry** - The View# field controls the way the columns are displayed on the Order Inquiry review screen, the Order Inquiry by Account search, and the Invoice Inquiry screens, For example, View# 1 displays quantity and extended prices, while View# 3 displays quantity and weight. Enter a "?" to see and select from a list of the available View#s.

**Maximum Variance for Order Date Field** - Enter a number between 1 and 999. This is the maximum number of days that a "hold" will remain allocated within the system. For example, if you enter 30 in this field, then this user will only be allowed to advance the Order Date (on Order Entry header screen) 30 days from today's date. Holds are automatically deallocated the night after the header order date. In Order Entry, the default Order Date is "today", which means that (unless advanced as stated here) holds are deallocated "tomorrow night".

*Note: This hold date logic may be further offset by a global entry in Option for Removal of Unprocessed Orders from the System- SET 4.*

```

Control User File Maintenance
-----
User .....: GBRANNEN                               Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

Allow Access to the "All Prices" Display in O/E & Quick Quoter ...: Y Y/N
Access Allocation Swapping by Item#, by Order/Line# or by Both ...: B I/O/B
Allocation Swapping Options to Disable for this User.....:
Allow Access to the Order Change and Cancel Programs .....: Y Y/N
Allow Access to the Update Order Status & Shipping Data Program ...: Y Y/N
Default Sort For Inventory Analysis Screen .....: ?
Default View# for Order & Invoice Inquiry .....: 1 ?
Maximum Variance for Order Date Field .....: 002 1-999
User Can't Cancel or Change Qty on Orders with these Status Codes : F2=Update
      A S X -----
User Can't Change Status on Orders with these Status Codes .....: F2=Update
-----

Order Inquiry Function Access:
Credit Holds: Y Print: Y F24: Y

Adjust Inv from Allocation Swap By
Serial# X X -OR- Inv Inquiry X

F6=Return F7=Exit F11=Screen 3
    
```

### User Can't Cancel or Change Qty on Orders with these Status

**Codes:** Enter order status codes here and users will not be allowed to cancel or change the quantity on order lines that have any of these status codes. You may press **F2** to select from a list of status codes, and update this screen.

### User Can't Change Status on Orders with these Status Codes:

Enter order status codes here and users will not be allowed to change the status of an order line that has any of these status codes. You may press **F2** to select from a list of status codes, and update this screen

**Order Inquiry Function Access: Credit Holds, Print, and F24** - Entering an N for **Credit Holds** denies the user access to the Credit Holds screen from within Order Inquiry. Entering N for **Print** denies the user access to the **F10** = Print function of the Order Inquiry program. Entering an N for **F24** denies the user access to the **F24** Additional Functions menu from within Order Entry and Order Change.

### Adjust Inventory from Allocation Swap by Serial# OR by Inv.

**Inquiry** - Enter **X** beside your choice. This causes either the Adjustment by Serial# program or the Adjustments from within Inventory Inquiry program to be used when this user chooses to adjust inventory while in the allocation swapping program. If you do not enter **X** next to either of the options, then the user cannot adjust inventory from within the allocation swapping program.

13. After entering the default options for the user, press **ENTER**

14. Press **F11** to advance to **Screen 3**

```
Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

ODS Fax/Email Acknowledgements Option .....: 1 (1,2,3)
      (1=Always Ask, 2=Ask if Customer has Fax/Email, 3=Never Ask)

Billto/Shipto File Updates:
-----
User can update basic information (contact info)?      Y (Y/N)
User can update pricing information?                   Y (Y/N)
User can update credit & A/R information?              Y (Y/N)
User can update logistics info (ware, trk rte, etc)?  Y (Y/N)
User can update marketing info (slmn, mktg pgms)?     Y (Y/N)

In Order Entry F2 (Item# Search) screen, only show the requested warehouse,
even when the warehouse matrix is activated: N (Y/N)

-----
F6=Return  F7=Exit  F11=Screen 1
```

```

Control User File Maintenance
-----
User .....: GBRANNEN                                     Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com

ODS Fax/Email Acknowledgements Option .....: 1 (1,2,3)
(1=Always Ask, 2=Ask if Customer has Fax/Email, 3=Never Ask)

Billto/Shipto File Updates:
-----
User can update basic information (contact info)?      Y (Y/N)
User can update pricing information?                   Y (Y/N)
User can update credit & A/R information?              Y (Y/N)
User can update logistics info (ware, trk rte, etc)?  Y (Y/N)
User can update marketing info (slmn, mktg pgms)?    Y (Y/N)

In Order Entry F2 (Item# Search) screen, only show the requested warehouse,
even when the warehouse matrix is activated: N (Y/N)

F6=Return  F7=Exit  F11=Screen 1
    
```

**ODS Fax/Email Acknowledgements Option** - This option controls distribution of order acknowledgements by fax or email via ODS.

- **Option 1 (Always Ask)** - Causes the Order Entry program to always display the Fax/Email screen whenever an acknowledgement is requested.
- **Option 2 (Ask if Customer has Fax/Email)** - Causes the Order Entry program to display the Fax/Email screen only if the customer has a valid email or fax entry in the Phone Number File, already designated for the receipt of acknowledgements.
- **Option 3 (Never Ask)** - Directs the Order Entry program to not display the Fax/Email screen.

If option 1 is used, or option 2 is used, and the customer has fax/email capabilities, the Fax/Email Distribution Selections screen appears when F4 or F5 is pressed on the Order Entry Cash Register screen to print an Acknowledgement. Sending acknowledgements through ODS requires some set-up with the ODS application. For more information, refer to the Phone Number File, and to documentation regarding Output Distribution System (ODS).

**Billto/Shipto File Updates:** These fields allow you to restrict specific users from performing certain types of updates in the Billto and Shipto files; even if they have a password. This feature enables you to allow users to update the Billto File without having to use a password, yet have each user limited to the types of information they are allowed to update. These fields can be used to deny update capabilities to the following sections of the Billto and Shipto files; regardless of the password entered.

- Basic contact info (name, address, phone numbers, basic coding)
- Pricing info (list price, handling charges, F9 exceptions)
- Credit & AR info (credit limit, bank ids, statement codes, etc)
- Logistics info (warehouse, ship via, truck rte & FOB)
- Marketing (salespeople, marketing programs, and displays)

```
Control User File Maintenance
-----
User .....: GBRANNEN                               Change
Full Name .....: Garu Brannen
ODS Dft - Email Address ..: gbrannen@dancik.com
ODS Fax/Email Acknowledgements Option .....: 1 (1,2,3)
      (1=Always Ask, 2=Ask if Customer has Fax/Email, 3=Never Ask)
Billto/Shipto File Updates:
-----
User can update basic information (contact info)?      Y (Y/N)
User can update pricing information?                   Y (Y/N)
User can update credit & A/R information?              Y (Y/N)
User can update logistics info (ware, trk rte, etc)?   Y (Y/N)
User can update marketing info (slmn, mktg pgms)?     Y (Y/N)
In Order Entry F2 (Item# Search) screen, only show the requested warehouse,
even when the warehouse matrix is activated: N (Y/N)
-----
F6=Return  F7=Exit  F11=Screen 1
```

**In Order Entry F2 (Item# Search) screen, only show the requested warehouse, even when the warehouse matrix is activated:** This setting gives you control over the warehouses that appear when an F2 item search is performed on the Order Entry detail screen, and Inventory Inquiry screen. Normally, if a user's Control Panel is set to use the Warehouse Matrix, the F2 search shows all warehouses in the matrix. If this setting is activated, the F2 search only shows the current warehouse (the warehouse in the detail line warehouse field). This has the benefit of allowing more items to show for the current warehouse on a single page.

15. After entering the default options for the user, press **ENTER**

16. Press **F7** to Exit

## Chapter 2 - **Understand IBM Device Descriptions vs. Workstation ID Control Panels**

---

Workstation devices are the ones that have a direct correlation to control panels. In other words, for every workstation device description on the server (A5, C5, D4, whatever it may be) there should be a control record with the same two character ID. Our software matches the two character id of the device signing on to the corresponding record in the control panel file and assigns the job whatever defaults have been configured for it such as Default Warehouse, Default Company, etc.

### **IBM Devices on the AS/400**

Terminals, printers, personal computers, communication lines, and remote controllers are all considered devices on the AS/400. Numerous methods are available to define and configure devices on the AS/400, including an auto-configuration option which enables the AS/400 to sense new devices and configure them automatically. Complete documentation of this option is available in the AS/400 library of documentation.

Common devices:

- Workstation devices (the ones you connect to through a client access session)
- Print Devices
- Tape devices (normally T1, TC, TAP01)

# Creating a Workstation ID for a user via Auto-Configuration through Client Access

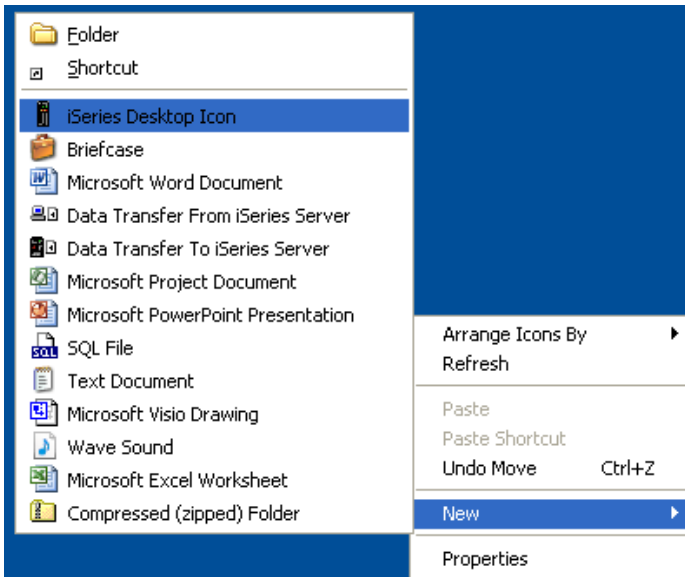
Prerequisite: Must have Client Access Loaded on each PC.

Reference: [www3.dancik.com/cheatsheets](http://www3.dancik.com/cheatsheets)

## Access a New Session

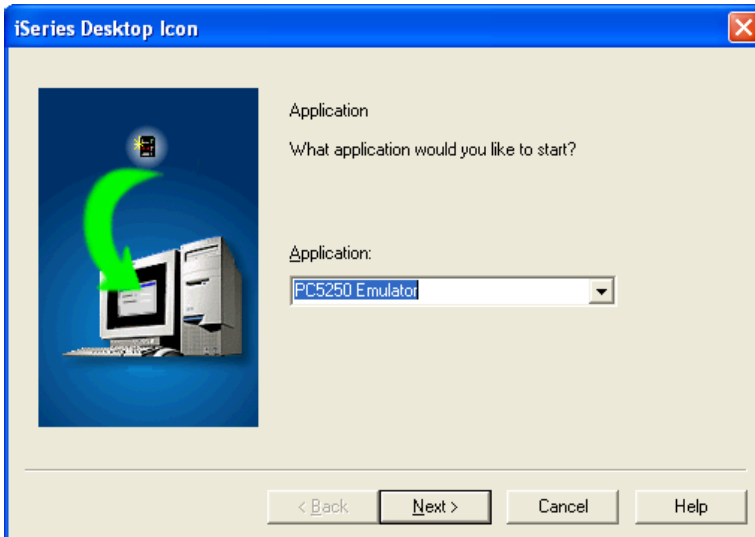
1. **RIGHT CLICK** on the **DESKTOP**

2. click **NEW**

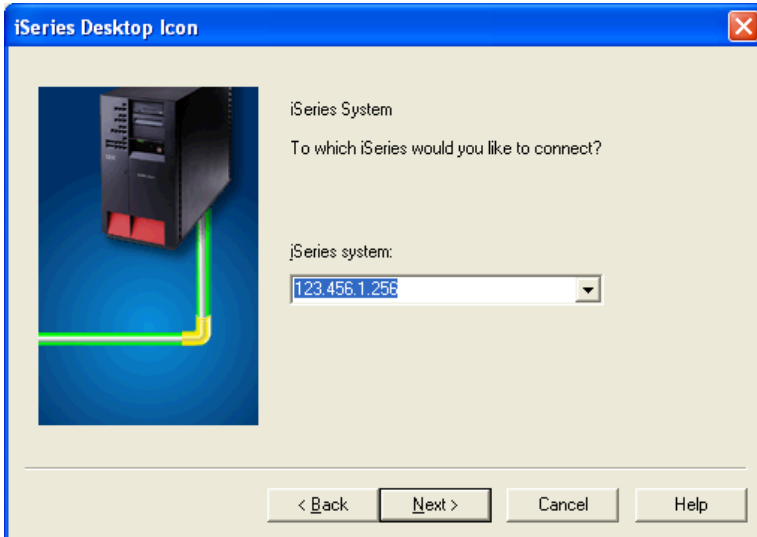


3. click on **iSeries Desktop Icon** or **System iDesktop Icon**

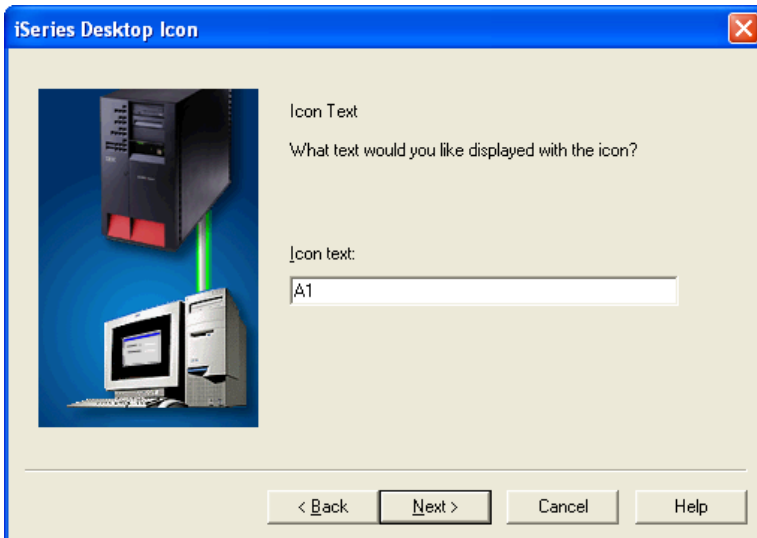
4. select **PC5250 Emulator** from the **APPLICATION** drop down



5. click **NEXT**
6. type the IP Address of the iSeries in the **iSeries system** field



7. click **NEXT**
8. type the device name in the **ICON TEXT** field



*Note: We have typed A1 because we are configuring a Dancik icon for Gary Brannen and assigning him to the A1 Workstation.*

9. click **NEXT**
10. click **FINISH**





An iSeries icon will be created on the desktop.

## Configure Session

1. double click on the **iSeries Icon**
2. type in the **WORKSTATION ID** in the **SPECIFY WORKSTATION ID** field (**A1**)
3. select **DISPLAY** as the **TYPE OF EMULATION**
4. click on **SIZE** drop down and select **27x132**
5. **Host Code Page** is **037 United States**
6. **Port Number** is **23**

The screenshot shows the 'Configure PC5250' dialog box with the following settings:

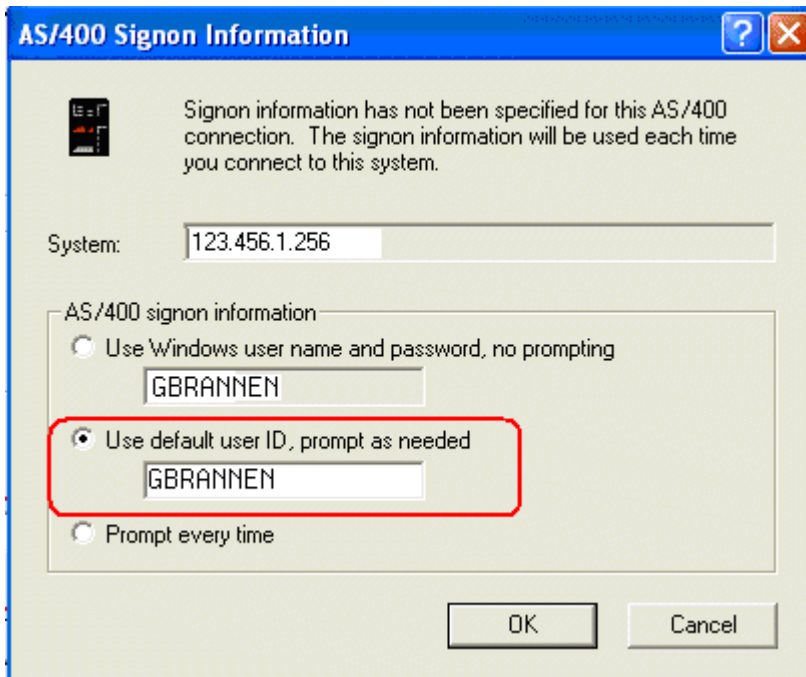
- System name:** 123.456.1.256
- Workstation ID:**
  - Use Computer name
  - Use Windows user name
  - Specify workstation ID (with text box containing 'A1')
- Type of emulation:**
  - Display (with 'Size' dropdown set to '27x132')
  - Printer
- Host code-page:** 037 United States
- Port number:** 23

The 'OK' button is highlighted with a red box.

7. click on **OK** button

## Fill out iSeries Signon Information

1. select one of the following **iSERIES SIGNON INFORMATION** options
  - **USE WINDOWS USER NAME AND PASSWORD, NO PROMPTING**
  - **USE DEFAULT USER ID, PROMPT AS NEEDED**
    - type in the **USER ID** of the person assigned to the computer
  - **PROMPT EVERY TIME**



*Note: The shot above shows the **USE DEFAULT, PROMPT AS NEEDED** option. By selecting this option it will be necessary to type in the **USER ID** (GBRANNEN).*

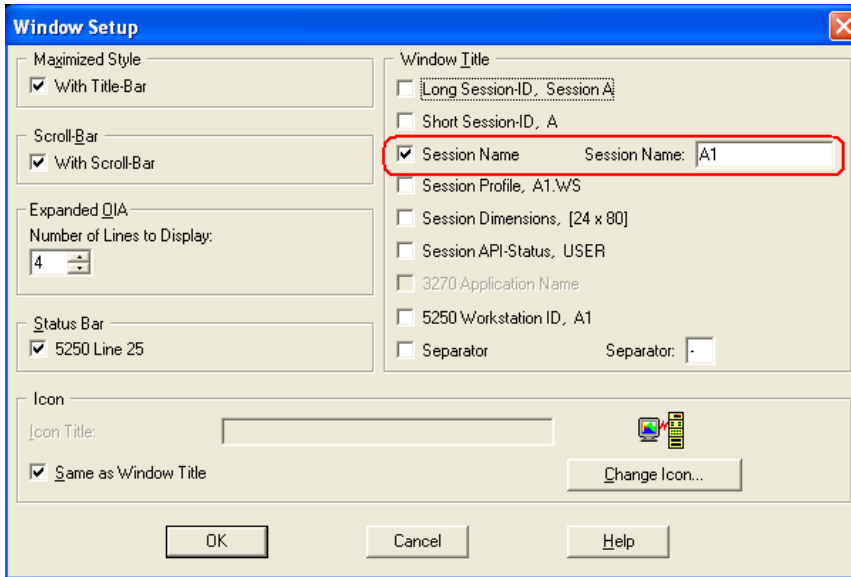
2. click **OK** button

## Sign on to iSeries

1. type in the **USER ID**
2. type in the **PASSWORD**
3. click on **OK** button

## Window Setup

1. click on **EDIT** from the session menu bar
2. click **PREFERENCES**
3. click **APPEARANCE**
4. click **WINDOW SETUP**
5. click on **Session Name** check box
6. type in the Session Name in the **SESSION NAME** field (**A1**)



7. click **OK**



## Access Work Device Description

1. access a command line
2. type **WRKDEVD \*ALL**
3. press **ENTER**

```

Work with Device Descriptions
System: DEEDED
Position to . . . . . Starting characters
Type options, press Enter.
 2=Change  3=Copy  4=Delete  5=Display  6=Print  7=Rename
 8=Work with status  9=Retrieve source
Opt  Device      Type      Text
-   A1           3477     Device created for DEEDED.
-   ETHLITCP    *NET     CREATED BY AUTO-CONFIGURATION
-   OPTVRT01    632B     CREATED BY AUTO-CONFIGURATION
-   OPT01       6337     CREATED BY AUTO-CONFIGURATION
-   OPT02       6337     CREATED BY AUTO-CONFIGURATION
-   P1          3812
-   P9          3812
-   QCONSOLE    3179     Console description created during IPL.
-   QESPAP      *APPC
More...
Parameters or command
===>
F3=Exit   F4=Prompt  F5=Refresh  F6=Create  F9=Retrieve  F12=Cancel
F14=Work with status
    
```

*Note: The new device appears.*

## Maintaining the System 36 Table

There is a special table on the server that must be maintained in order for device ids to be recognized correctly.

1. access a command line
2. type **CHGS36**
3. press **ENTER**

```
Change S/36 Environment Configuration
S/36 environment . . . . . : #LIBRARY
Type options, press Enter.
 2=Change
Option   Configuration Description
-        S/36 display IDs
-        S/36 printer IDs
-        S/36 tape IDs
-        S/36 diskette ID
-        S/36 3270 device emulation values
-        S/36 environment values
-        S/36 MRT security and performance

F3=Exit  F12=Cancel
(C) COPYRIGHT IBM CORP. 1980, 2007.
```

4. type a **2** in the **Option** field next to **S/36 display IDs**

5. press **ENTER**

Change S/36 Display IDs		
S/36 environment . . . . . : #LIBRARY		
Type new/changed values, press Enter.		
i5/OS Display	S/36 Display ID	S/36 Default Printer ID
V1	V1	---
V2	V2	---
V3	V3	---
V4	V4	---
V5	V5	---
V6	V6	---
V7	V7	---
V8	V8	---
V9	V9	---
QCONSOLE	W@	---
DSP01	ZZ	---
A1	A1	---
Bottom		
F3=Exit F5=Refresh F6=Sort S/36 display IDs F10=Set S/36 display IDs F12=Cancel		

Note: Make sure that the first column matches the second column. If there are conflicts you should contact Dancik's Client Services Department for assistance.

6. press **F3** to exit

7. select **EXIT OPTION**

8. press **ENTER**

9. type a **2** in the **Option** field next to **S/36 printer IDs**

Change S/36 Printer IDs				
S/36 environment . . . . . : #LIBRARY				
Type new/changed values, press Enter.				
i5/OS Printer	S/36 Printer ID	Lines Per Inch	Characters Per Inch	Font
QFQOUTQ	P4	---	---	---
P1	P1	---	---	---
P9	P9	---	---	---
Bottom				
F3=Exit F5=Refresh F6=Sort S/36 printer IDs F10=Set S/36 printer IDs F12=Cancel				

Note: Make sure that the first column matches the second column. If there are conflicts you should contact Dancik's Client Services Department for assistance.



10. press **F3** to exit
11. select **EXIT OPTION**
12. press **ENTER**

# Workstation ID Control Panels

In the previous section we talked about Device Descriptions. Device descriptions are objects on the server that define an attached hardware device. These devices have a one to one correlation in the Dancik software's Control Panel. The control Panel is a physical file in the Dancik software that is keyed by a Device Name field. When a user signs into the system, the user's device id is matched against the control record in the Control Panel File and the corresponding settings are assigned to the user's session. This is the Control Panel program for each work station. System administrators can also use this program by entering CONTROL WS at a command line. WS indicates the two character W.S.I.D. that you want to update. For example, enter **CONTROL A1** to access the Control Panel for the work station device **A1**.

A control panel entry is made for each workstation. Details of the Control Panel are managed by your system administrator or data processing manager. However, there are some important settings that you should discuss with each user to ensure that their requirements are properly addressed. The Control Panel contains options and parameters that affect Order Entry and other systems, based on the work station being used. For example, you can set where certain documents print depending on the work station that requests the document.

You can enter **CONTROL** from the command line or menu **SET** option **1** to access the Control Panel Maintenance program. This is the program which establishes system defaults and restrictions for each work station, and allows for:

- Viewing of all Control Panel records
- Scrolling through all Control Panel records
- Seeing the AS/400 device description that relates to each Control Panel entry
- Logical grouping of system parameters
- Mass updating of Control Panel records
- Copying of one Control Panel record to another
- Accessing multiple views

## Access the Workstation ID Control Panels

1. type in **SET** in the **Enter Desired Menu** field
2. press **ENTER**

```

YOUR COMPANY NAME HERE : 1
System Settings Menu
-----
Opt Description                               Opt Description
 1 Work Station Control Panel File           16 Warehouse Areas Table
 2 User ID Control Panel                     17 Warehouse Matrix File
 3 Company Settings                          18 Expected Customer Rebates Table
 4 System Wide Settings                      Menu D24(ShoppingCart) & F24(B2B)
 5 System Cross Reference Table              20 ISO (Inv Selection Optimizer)
 6 Label Cross Reference File                 21 Maintain PRTMSG Printer Table
 7 Order & Serial# Status Codes              22 Maintain PRTMSG Dept Table
 8 InterWarehouse Freight Cost File          23 Maintain Macro Message Manager
 9 Freight Cost Override Table               24 AutoTimer Maint For Print Xfers
10 Expected Supplier Rebates Table           25 Submit AutoTimer Job for Xfers
11 Currency Code/Exch Rate Table             26 Barcode Label Pool Default File
12 Supplier/Vendor Currency Code            27 Warehouse Capacity Planning Mode
13 Duty Rates Table                          28 Salesperson Relationships/Access
14 Warehouse Settings Table                  29 System Tables Maintenance
15 Warehouse Locations Table                  30 Auto B/O Fill Algorithm Matrix
                                           More...

Enter Desired Menu / Option# ==> SET
-----
F1=Add  F2=Select  F5=Personal  F9=Additional  F10=Scan  F11=Alt View
    
```

3. type **1** in the **Option#** field
4. press **ENTER**
5. type the high level password in the **PASSWORD** field
6. press **ENTER**

```

Control Panel File Maintenance
A1
VIEW 1
-----
Type options, press Enter.
C=Copy  D=Delete  I=Inquiry  M=Mass Update  U=Update

Work
Opt Station  Co#  Description
-----
 1 V1          0    Device created for DEEDEE.
  ] V2          0    Device created for DEEDEE.
  ] V3          0    Device created for DEEDEE.
  ] V4          0
  ] V5          0    Device created for DEEDEE.
  ] V6          0    Device created for DEEDEE.
  ] V7          0    Device created for DEEDEE.
  ] V8          0    Device created for DEEDEE.
  ] V9          0    Device created for DEEDEE.

Bottom
-----
F1=Create  F7=Exit  F8=Password  F9=Clear Search Parameters  F11=View 2
Password entered is valid for *ALL options...
    
```

## Create a Workstation ID Control Panel

```
Control Panel File Maintenance
A1
VIEW 1
Type options, press Enter.
C=Copy D=Delete I=Inquiry M=Mass Update U=Update

  Work
Opt Station Co# Description
  V1      0 Device created for DEEDDEE.
  V2      0 Device created for DEEDDEE.
  V3      0 Device created for DEEDDEE.
  V4      0
  V5      0 Device created for DEEDDEE.
  V6      0 Device created for DEEDDEE.
  V7      0 Device created for DEEDDEE.
  V8      0 Device created for DEEDDEE.
  V9      0 Device created for DEEDDEE.

Bottom
F1=Create F7=Exit F8=Password F9=Clear Search Parameters F11=View 2
Password entered is valid for *ALL options...
```

1. press **F1**
2. type in the **Work Station ID** in the **WORK STATION** field

```
Control Panel File Maintenance
A1
F6=Create

Work Station . . . . . : A1

F6=Return F7=Exit
```

3. press **ENTER**
4. press **F6**

5. **TAB** to the **OPT** field next to the new Work Station
6. type a **U** in the **OPT** field

```

Control Panel File Maintenance
A1
VIEW 1
Type options, press Enter.
C=Copy D=Delete I=Inquiry M=Mass Update U=Update

Work
Opt Station Co# Description
A1
U A1 0 Device created for DEEDEE.
V1 0 Device created for DEEDEE.
V2 0 Device created for DEEDEE.
V3 0 Device created for DEEDEE.
V4 0
V5 0 Device created for DEEDEE.
V6 0 Device created for DEEDEE.
V7 0 Device created for DEEDEE.
V8 0 Device created for DEEDEE.
V9 0 Device created for DEEDEE.

Bottom
F1=Create F7=Exit F8=Password F9=Clear Search Parameters F11=View 2 H
Record(s) have been modified successfully...
    
```

7. press **ENTER**

```

Control Panel File Maintenance
General Default & Restriction Options
A1
PAGE 1
Work Station . . . . . : A1
Update
DFT Company# . . . . . : 0 ? DFT F.O.B. . . . . . : _ ?
DFT Warehouse . . . . . : _ ? DFT Restocking Charge% . . . . . : _0
DFT Search Warehouse . . . . . : _ ?+ DFT Price List . . . . . : _ ?
DFT Branch# . . . . . : _ ?+ DFT Manufacturer . . . . . : _ ?+
DFT Cash Branch# . . . . . : _ ? DFT Roll U/M . . . . . : _ ?
DFT Initials . . . . . : _ DFT Serial#/Roll Search View : _ ?
DFT Ship Via . . . . . : _ ? DFT Days-Old to Highlight . . . . . : _00

Auto-Search Phone# File From Customer Search Program . . . . . : _ Y/N
Restrict This Work Station To DFT Company# . . . . . : _ Y/N
Restrict This Work Station To DFT Warehouse . . . . . : _ Y/N
Restrict This Work Station To DFT Manufacturer . . . . . : _ Y/N
Restrict This Work Station To Selected Branch# . . . . . : _ Y/N
Selected Branch# . . . . . : _ ?
Restrict This Work Station To Mfgs Assigned to DFT Company# . . . . . : _ Y/N
Restrict This Work Station From Updating Orders At Status "S" . . . . . : _ Y/N

F1=Next Record F6=Return F7=Exit F11=Page 2 H
Press ENTER to accept modifications being made...
    
```

## PAGE 1 – Workstation ID Control Panel

1. fill out **PAGE 1** fields

Control Panel File Maintenance		A1
General Default & Restriction Options		PAGE 1
		Update
Work Station . . . . .	A1	
DFT Company# . . . . .	0 ?	DFT F.O.B. . . . . . : _ ?
DFT Warehouse . . . . .	WAR ?	DFT Restocking Charge% . . . . . : _0
DFT Search Warehouse . . . . .	*MX ?+	DFT Price List . . . . . : _ ?
DFT Branch# . . . . .	C* ?+	DFT Manufacturer . . . . . : █ ?+
DFT Cash Branch# . . . . .	_ ?	DFT Roll U/M . . . . . : _ ?
DFT Initials . . . . .	_	DFT Serial#/Roll Search View : _ ?
DFT Ship Via . . . . .	_ ?	DFT Days-Old to Highlight . . : _00
Auto-Search Phone# File From Customer Search Program . . . . .		_ Y/N
Restrict This Work Station To DFT Company# . . . . .		_ Y/N
Restrict This Work Station To DFT Warehouse . . . . .		_ Y/N
Restrict This Work Station To DFT Manufacturer . . . . .		_ Y/N
Restrict This Work Station To Selected Branch# . . . . .		_ Y/N
Selected Branch# . . . . .		_ ?
Restrict This Work Station To Mfgs Assigned to DFT Company# . . . . .		_ Y/N
Restrict This Work Station From Updating Orders At Status "S" . . . . .		_ Y/N
F1=Next Record F6=Return F7=Exit F11=Page 2		⏏

**Work Station** - The ID of the work station whose control panel is being updated.

**DFT Company #** -The Company number this work station is most often associated with.

**DFT Warehouse** -The warehouse most often utilized by this work station. This warehouse is the default that appears on the Inventory Inquiry screen for this work station.

**DFT Search Warehouse** -Enter **ALL** to see all warehouses when checking stock using the serial number display. Enter a specific warehouse to see only that warehouse, unless you specify otherwise at the time you are searching. If your default warehouse is different than your search warehouse, both are displayed. Enter **\*MX** to display serial numbers in a warehouse sequence as specified in the Warehouse Matrix File. The Warehouse Matrix File causes the customer's warehouse to display first, followed by the warehouses as specified in the Warehouse Matrix File in the System Settings Menu. This setting primarily affects the serial number display that is included in the Order Entry, Order Change, Invoicing, and Inventory Inquiry programs. It also affects the warehouses that display on the **F2** and Partial Item Number Search Screen within the programs mentioned above.

**DFT Branch** -Enter the branch code that should be credited with all orders entered at this work station. If this work station can be used for entering orders for multiple branches, either enter **ALL** to cause the Order Entry program to ask the user to specify a branch, or enter **C\*** to cause the Order Entry program to always use the branch code in the Billto File record. Enter **C\*** if you have multiple branches and centralized order entry.

Control Panel File Maintenance		A1
General Default & Restriction Options		PAGE 1
Work Station . . . . .	A1	Update
DFT Company# . . . . .	0 ?	DFT F.O.B. . . . . ?
DFT Warehouse . . . . .	WAR ?	DFT Restocking Charge% . . . . . 25
DFT Search Warehouse . . . . .	*MX ?+	DFT Price List . . . . . ?
DFT Branch# . . . . .	C* ?+	DFT Manufacturer . . . . . ?+
DFT Cash Branch# . . . . .	? ?	DFT Roll U/M . . . . . ?
DFT Initials . . . . .	GB	DFT Serial# / Roll Search View . . . . . ?
DFT Ship Via . . . . .	? ?	DFT Days-Old to Highlight . . . . . 00
Auto-Search Phone#	File From Customer Search Program . . . . .	Y/N
Restrict This Work Station To	DFT Company# . . . . .	Y/N
Restrict This Work Station To	DFT Warehouse . . . . .	Y/N
Restrict This Work Station To	DFT Manufacturer . . . . .	Y/N
Restrict This Work Station To	Selected Branch# . . . . .	Y/N
Selected Branch#	. . . . .	?
Restrict This Work Station To	Mfgrs Assigned to DFT Company# . . . . .	Y/N
Restrict This Work Station From	Updating Orders At Status "S" . . . . .	Y/N
F1=Next Record F6=Return F7=Exit F11=Page 2		

**DFT Cash Branch** -Enter in a branch code to assign that branch to any order desk cash receipts recorded at this work station. This branch is used by the Order Desk Cash Reconciliation programs.

**DFT Initials** -The initials of the primary user of this work station to ensure proper credit for the orders entered here. If multiple users share this work station, leave this field blank. You can also enter default initials based on the user ID using the CTRLUSER program.

**DFT Ship Via** -Leave blank to default to the Ship Via codes entered for each customer in the Billto File. Enter a Ship Via code, such as WC for "will call," if most orders entered at this work station are shipped the same way regardless of customer. Refer to the Classification Codes File for a list of valid Ship Via codes.

**DFT F.O.B.** -Leave this field blank to default to the FOB code as entered in the Billto File for each customer. Enter a code, such as W for "our warehouse" if most orders entered at this work station require the same FOB code. Refer to the Classification Codes File for a list of valid FOB codes.

**DFT Restocking Charges%** - Leave blank if the restocking charge percentage on returns is decided on a customer-by-customer or case-by-case basis. Enter a percentage from 01-99 (with no decimal places), if you have a set restocking charge percentage. It can be overridden in Order Entry.

**DFT Price List** - Enter the default price list to be displayed when accessing the Item Search program. If this field is left blank, code LP is assumed.

Control Panel File Maintenance		A1
General Default & Restriction Options		PAGE 1
		Update
Work Station . . . . .	A1	
DFT Company# . . . . .	Q ?	DFT F.O.B. . . . . : _ ?
DFT Warehouse . . . . .	WAR ?	DFT Restocking Charge% . . . . : 25
DFT Search Warehouse . . . . .	*MX ?+	DFT Price List . . . . . : _ ?
DFT Branch# . . . . .	C* ?+	DFT Manufacturer . . . . . : _ ?+
DFT Cash Branch# . . . . .	_ ?	DFT Roll U/M . . . . . : _ ?
DFT Initials . . . . .	GB	DFT Serial#/Roll Search View : 1 ?
DFT Ship Via . . . . .	_ ?	DFT Days-Old to Highlight . . : 360
Auto-Search Phone# File From Customer Search Program . . . . .		Y Y/N
Restrict This Work Station To	DFT Company# . . . . .	Y/N
Restrict This Work Station To	DFT Warehouse . . . . .	Y/N
Restrict This Work Station To	DFT Manufacturer . . . . .	Y/N
Restrict This Work Station To	Selected Branch# . . . . .	Y/N
	Selected Branch# . . . . .	_ ?
Restrict This Work Station To	Mfgrs Assigned to DFT Company# . . . . .	Y/N
Restrict This Work Station From	Updating Orders At Status "S" . . . . .	Y/N
F1=Next Record F6=Return F7=Exit F11=Page 2		F

**Dft Mfgr** -Leave blank for normal use of the three-character manufacturer portion of the Item# field on Order Entry and Inventory Inquiry. Enter an actual manufacturer code if you deal primarily with the products of one manufacturer. Enter \*NO if you want the cursor to skip the Manufacturer Code field and start from the color#.

**DFT Roll U/M** - If you sell rolled goods enter **SY**, **LF**, **SF** or **FT** to automatically default to square yards, lineal fee, square feet, or feet/inches. This default is used when you leave the U/M field blank on the Order Entry screen for rolled goods. **FT** is the usual entry.

**DFT Serial# Roll Search View** - This code controls the default inventory screen format for serialized items and rolled goods. You can choose from five formats. These formats do not apply to items with their own special formats, such as marble and stone slabs. You can enter a question mark (?) to display the options.

**DFT Days-Old to Highlight** - Enter the number of days old a serial number has to be in order to have an asterisk (\*) placed next to the date received on the Serial Number or Roll Search screens. The asterisk (\*) is used to highlight serial numbers at least this many days old. This field is overridden automatically by the "days old" parameter in the Item File (for each specific item), if that field is used.

**Auto Search Phone# File From Customer Search Program** - Enter **Y**, if you want the customer (Billto) Search program to search the phone number file (as well as the Billto file) when searching by phone number. This accesses the F10 screen of the Billto file.



Control Panel File Maintenance		A1	
General Default & Restriction Options		PAGE 1	
Work Station . . . . .	A1	Update	
DFT Company# . . . . .	0 ?	DFT F.O.B. . . . . .	— ?
DFT Warehouse . . . . .	WAR ?	DFT Restocking Charge% . . . . .	25
DFT Search Warehouse . . . . .	*MX ?+	DFT Price List . . . . .	— ?
DFT Branch# . . . . .	C* ?+	DFT Manufacturer . . . . .	— ?+
DFT Cash Branch# . . . . .	— ?	DFT Roll U/M . . . . .	— ?
DFT Initials . . . . .	GB	DFT Serial#/Roll Search View . . . . .	1 ?
DFT Ship Via . . . . .	— ?	DFT Days-Old to Highlight . . . . .	360
Auto-Search Phone#	File From Customer Search Program . . . . .	Y	Y/N
Restrict This Work Station To	DFT Company# . . . . .	N	Y/N
Restrict This Work Station To	DFT Warehouse . . . . .	N	Y/N
Restrict This Work Station To	DFT Manufacturer . . . . .	N	Y/N
Restrict This Work Station To	Selected Branch# . . . . .	N	Y/N
Selected Branch#	. . . . .	—	?
Restrict This Work Station To	Mfgrs Assigned to DFT Company#. . . . .	N	Y/N
Restrict This Work Station From	Updating Orders At Status "S" . . . . .	█	Y/N
F1=Next Record    F6=Return    F7=Exit    F11=Page 2			

**Restrict This Work Station to DFT Company#** - Enter **Y** to restrict the user from seeing, entering, or updating transactions or records from other than the assigned company number. This restriction applies to all Order Desk System programs, as well as many other programs, but it does not affect all applications. Users with global system access are not restricted to this company in all programs.

**Restrict This Work Station to DFT Warehouse** - Enter **Y** to restrict the user from seeing, entering, or updating transactions or records involving any other than either the search or default warehouses as assigned on the first screen of the Control Panel. This field is ignored if assigned to warehouse ALL. This restriction applies to all Order Entry programs, as well as many other programs, but does not affect all applications. Users with global system access are not restricted to this company in all programs.

**Restrict This Work Station to DFT Manufacturer** - Enter **Y** to restrict the user to items that are assigned to the manufacturer that is entered in the **Default Mfgr** field of the Control Panel.

**Restrict This Work Station to Selected Branch#** - Enter **Y** to restrict the user from seeing, entering, or updating transactions or records involving any other than the branch you enter within this parameter. This parameter only affects certain menus and programs, such as the Order Entry System. This restriction also applies to the Order Entry Reports, and when posting cash. This functionality is useful for companies that have multiple branches that independently list and post cash.

**Restrict This Work Station to Mfgrs Assigned to DFT Company#** - Enter **Y** to restrict inventory access to manufacturers that have the designated company numbers in the Manufacturer File. This restriction applies to all Order Desk System Programs, as well as many other programs, but it does not affect all applications. Users with global system access are not restricted to this company in all programs.

Control Panel File Maintenance		A1	
General Default & Restriction Options		PAGE 1	
Work Station . . . . .	A1	Update	
DFT Company# . . . . .	0 ?	DFT F.O.B. . . . .	_ ?
DFT Warehouse . . . . .	WAR ?	DFT Restocking Charge% . . . . .	25
DFT Search Warehouse . . . . .	*MX ?+	DFT Price List . . . . .	_ ?
DFT Branch# . . . . .	C* ?+	DFT Manufacturer . . . . .	_ ?+
DFT Cash Branch# . . . . .	_ ?	DFT Roll U/M . . . . .	_ ?
DFT Initials . . . . .	GB	DFT Serial#/Roll Search View . . . . .	1 ?
DFT Ship Via . . . . .	_ ?	DFT Days-Old to Highlight . . . . .	360
Auto-Search Phone#	File From Customer Search Program . . . . .	Y	Y/N
Restrict This Work Station To	DFT Company# . . . . .	N	Y/N
Restrict This Work Station To	DFT Warehouse . . . . .	N	Y/N
Restrict This Work Station To	DFT Manufacturer . . . . .	N	Y/N
Restrict This Work Station To	Selected Branch# . . . . .	N	Y/N
Selected Branch# . . . . .			?
Restrict This Work Station To	Mfgrs Assigned to DFT Company# . . . . .	N	Y/N
Restrict This Work Station From Updating Orders At Status	"S" . . . . .	Y	Y/N
F1=Next Record F6=Return F7=Exit F11=Page 2			

**Restrict This Work Station from Updating Orders At Status "S"** - Enter **Y** to restrict users at this work station from changing or canceling an order/line with a status code of **S** (shipped).

- press **ENTER**
- press **F11** to access **PAGE 2**

Control Panel File Maintenance		A1	
Order Entry & Invoicing Options		PAGE 2	
Work Station . . . . .	A1	Update	
Allow Order If Qty Not Avail . . . . .	Y/N/X	Invoicing Default B/O Code . . . . .	_ 1/2
Allow Order Desk To Invoice . . . . .	Y/N	Invoicing Status Codes . . . . .	_
Retail Environment . . . . .	Y/N	Make JobName Mandatory on O/E . . . . .	Y/N
Cash Register Screen . . . . .	Y/N	Charge Tax On Freight . . . . .	Y/N
Variable Charge Field . . . . .	?	Auto-Transfer . . . . .	Y/N
Tax Variable Charge . . . . .	Y/N/C	Length Control, in Inches . . . . .	00
General Ledger# . . . . .		Min Deposit on Cash Reg Scrn . . . . .	0 %
Auto-ISO Option . . . . .	Y/N/M		
ISO Border Color . . . . .	B/G/P/R/T/W/Y		
Line or Window . . . . .	L/W		
Mandatory To Key Description/Reason For Order Change Or Cancellation . . . . .	Y/N		
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . . . . .	Y/N		
Allow A Price Override To Bypass Error Message On "Locked Out" Items . . . . .	Y/N		
Auto-Display Bill-Of-Material Windows on Order Entry . . . . .	Y/N		
F1=Next Record F6=Return F7=Exit F11=Page 3			
Press ENTER to accept modifications being made...			



## PAGE 2 - Workstation ID Control Panel

1. fill out **PAGE 2** fields

Control Panel File Maintenance		A1
Order Entry & Invoicing Options		PAGE 2
		Update
Work Station . . . . .	: A1	
Allow Order If Qty Not Avail . . . . .	: X Y/N/X	Invoicing Default B/O Code . . . . . : _ 1/2
Allow Order Desk To Invoice . . . . .	: N Y/N	Invoicing Status Codes . . . . . : _____
Retail Environment . . . . .	: █ Y/N	Make JobName Mandatory on O/E: _ Y/N
Cash Register Screen . . . . .	: _ Y/N	Charge Tax On Freight . . . . . : _ Y/N
Variable Charge Field . . . . .	: _ ?	Auto-Transfer . . . . . : _ Y/N
Tax Variable Charge . . . . .	: _ Y/N/C	Length Control, in Inches . . . . . : _ 00
General Ledger# . . . . .	: _____	Min Deposit on Cash Reg Scrn : _ 0 %
Auto-ISO Option . . . . .	: _ Y/N/M	
ISO Border Color . . . . .	: _ B/G/P/R/T/W/Y	
Line or Window . . . . .	: _ L/W	
Mandatory To Key Description/Reason For Order Change Or Cancellation . . . . .	: _ Y/N	
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . . . . .	: _ Y/N	
Allow A Price Override To Bypass Error Message On "Locked Out" Items . . . . .	: _ Y/N	
Auto-Display Bill-Of-Material Windows on Order Entry . . . . .	: _ Y/N	
F1=Next Record F6=Return F7=Exit F11=Page 3		⏏
Press ENTER to accept modifications being made...		

**Allow Order if Qty Not Available** - Enter **Y** to allow the order entry operator at this work station to place orders against stock even when the message "Not Enough Available" is displayed. Enter **N** if you do not want the operator to be able to place orders against the stock when this message is displayed. Enter **N** if the operator is not permitted to use judgment regarding borrowing stock that is currently held or ordered by other customers. Enter **X** if you do not want to allow the operator to place orders exceeding the quantity available, and if you do not want serial numbers with no quantity available to appear on the order entry serial number display. Entering **Y** can cause inventory available figures to become negative. If you enter **Y**, proper management controls must be in place to ensure negative inventory is resolved by de-allocating one customer's order to service another order for the same inventory.

**Allow Order Desk to Invoice** - Enter **Y** if the order entry operator at this work station is allowed access to the point-of-sale (F9) invoice function. This function creates an invoice without first creating a pick list. Enter **N** to disable this function at this work station.

```

Control Panel File Maintenance
Order Entry & Invoicing Options
A1
PAGE 2
Work Station . . . . . : A1
Update
Allow Order If Qty Not Avail : X Y/N/X Invoicing Default B/O Code . . : _ 1/2
Allow Order Desk To Invoice : N Y/N Invoicing Status Codes . . . : _
Retail Environment . . . . . : Y Y/N Make JobName Mandatory on O/E: _ Y/N
Cash Register Screen . . . . . : Y Y/N Charge Tax On Freight . . . . : _ Y/N
Variable Charge Field . . . . . : ? Auto-Transfer . . . . . : _ Y/N
Tax Variable Charge . . . . . : Y Y/N/C Length Control, in Inches . . : _ 00
General Ledger# . . . . . : _ Min Deposit on Cash Reg Scrn : _ 0 %

Auto-ISO Option . . . . . : _ Y/N/M
ISO Border Color . . . . . : _ B/G/P/R/T/W/Y
Line or Window . . . . . : _ L/W

Mandatory To Key Description/Reason For Order Change Or Cancellation : _ Y/N
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . . : _ Y/N
Allow A Price Override To Bypass Error Message On "Locked Out" Items . . : _ Y/N
Auto-Display Bill-Of-Material Windows on Order Entry . . . . . : _ Y/N

F1=Next Record F6=Return F7=Exit F11=Page 3
Press ENTER to accept modifications being made...
    
```

**Retail Environment** - Enter **Y** to grant access to various retail features and screens. The retail environment protects and drops certain fields that are primarily applicable in a wholesale environment. It also assumes that each order has an entry in the **Salesperson#** field of the Order Header screen, and that the salesperson name prints on the point-of-sale invoices generated. The Retail Environment parameter only needs to be activated at the workstations that require the retail-oriented features. You can operate with some control panels having the retail environment activated and other not activated (**Retail Environment = N**). The retail environment option fine-tunes certain aspects of the system including the following:

- Activates the display of "balance due" for all orders on the Order Inquiry program
- Activates printing salesperson names on invoices and acknowledgements

**Cash Register Screen** - Enter **Y** to activate the Cash Register screen. The Cash Register screen appears instead of the Print Selection Screen when an order is completed. It includes all of the print selection options, in addition to fields for the entry of cash, check, and/or credit card payments. It can display change amounts and balance due for cash transactions. Enter **Y** if this work station is operating in a retail or cash counter environment.

**Variable Charge Field** -This parameter defines the variable charge field on the last screen of the Invoicing program. This field affects only the invoicing program. It specifies which of the three variable charge codes to display in addition to the **Freight** field, which is always available. **HC** causes the invoicing program to display a field for handling charges when each invoice is processed. **DC** causes invoicing program to display a field for delivery charges when each invoice is processed. **PC** causes the invoicing program to display a field for packing charges when each invoice is processed. This entry is not applicable if you are using automatic invoicing by status code.

```

Control Panel File Maintenance
Order Entry & Invoicing Options
A1
PAGE 2
Work Station . . . . . : A1
Update
Allow Order If Qty Not Avail : X Y/N/X Invoicing Default B/O Code . . : 2 1/2
Allow Order Desk To Invoice : N Y/N Invoicing Status Codes . . . : S
Retail Environment . . . . . : Y Y/N Make JobName Mandatory on O/E : N Y/N
Cash Register Screen . . . . . : Y Y/N Charge Tax On Freight . . . . . : Y Y/N
Variable Charge Field . . . . . : ? Auto-Transfer . . . . . : Y/N
Tax Variable Charge . . . . . : N Y/N/C Length Control, in Inches . . : 00
General Ledger# . . . . . : Min Deposit on Cash Reg Scrn : 0 %
Auto-ISO Option . . . . . : - Y/N/M
ISO Border Color . . . . . : - B/G/P/R/T/W/Y
Line or Window . . . . . : - L/W
Mandatory To Key Description/Reason For Order Change Or Cancellation : - Y/N
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . : - Y/N
Allow A Price Override To Bypass Error Message On "Locked Out" Items : - Y/N
Auto-Display Bill-Of-Material Windows on Order Entry . . . . . : - Y/N
F1=Next Record F6=Return F7=Exit F11=Page 3
Press ENTER to accept modifications being made...
    
```

**Tax Variable Charge** - Enter **Y** to always tax the Variable Charge .Enter **N** to never tax the Variable Charge. Enter **C** to tax the Variable Charge field only if the customer is taxable.

**General Ledger#** - Enter the general ledger account number for the Variable Charge field.

**Invoicing Default B/O Code** - Enter **1** if default is not to leave the unshipped quantity open when an item is partially shipped. Enter **2** if the default is to leave the unshipped quantity open when an item is partially shipped. Code **1** automatically cancels unshipped quantity. Code **2** leaves it open. This parameter is automatically overridden when order handling codes are used on orders and invoices. Code **1** is also referred to as "Fill/Kill," because items that are not filled are cancelled. Code **2** is referred to as "Ship As Available," since all uninvoiced material is left open for later shipment.

**Invoicing Status Codes** - Enter the status codes that orders must have in order to be invoiced. Order lines not at this status are not invoiced, unless these defaults are overridden at the time of invoicing.

**Make JobName Mandatory on O/E** - Enter **Y** to make the **Job Name** field on order entry a required field for every order. This field is on the lower right-hand side of the Order Entry Header screen, and prints under the customer's purchase order number on all documents.

**Charge Tax on Freight** - Enter **Y** to default to taxable for miscellaneous charges in Order Entry. Enter **N** to default to non-taxable for miscellaneous charges. This parameter affects only taxable customers and orders. It automatically enters a "=" sign at the end of the F6 line description to tax the F6 line. Set this parameter in accordance with local tax regulations.

Control Panel File Maintenance		A1
Order Entry & Invoicing Options		PAGE 2
Work Station . . . . .	A1	Update
Allow Order If Qty Not Avail : X	Y/N/X	Invoicing Default B/O Code . . : 2 1/2
Allow Order Desk To Invoice : N	Y/N	Invoicing Status Codes . . . . : S
Retail Environment . . . . .	Y Y/N	Make JobName Mandatory on O/E: N Y/N
Cash Register Screen . . . . .	Y Y/N	Charge Tax On Freight . . . . . : Y Y/N
Variable Charge Field . . . . .	? ?	Auto-Transfer . . . . . : Y Y/N
Tax Variable Charge . . . . .	N Y/N/C	Length Control, in Inches . . . : 00
General Ledger# . . . . .		Min Deposit on Cash Reg Scrn : 50 %
Auto-ISO Option . . . . .	Y/N/M	
ISO Border Color . . . . .	B/G/P/R/T/W/Y	
Line or Window . . . . .	L/W	
Mandatory To Key Description/Reason For Order Change Or Cancellation	: _ Y/N	
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders	: _ Y/N	
Allow A Price Override To Bypass Error Message On "Locked Out" Items	: _ Y/N	
Auto-Display Bill-Of-Material Windows on Order Entry . . . . .	: _ Y/N	
F1=Next Record F6=Return F7=Exit F11=Page 3		
Press ENTER to accept modifications being made...		

**Auto-Transfer** - Always enter **Y** if you have inter-warehouse transfers to ensure that any stock drawn from a warehouse other than the warehouse on your order header screen is transferred. We recommend always setting this field to **Y**.

**Length Control, in Inches** - This default is for rolled goods only, and controls which rolls display on the Roll Search based on the quantity you enter. For example, if you enter a length control of 120 inches, when you enter an order for 40 ft, the system searches for all rolls at least 40 ft less 120 inches, or 30 ft. If the length control is 0 inches and order is for 40 ft, the system starts the search at exactly 40 ft. If the length control is 999 inches and the order is for 40 ft, the system starts search at 0 ft and displays all rolls, regardless of size. We recommend that you enter a value between 60 and 999.

**Min Deposit On Cash Reg Scrn** - If you use the Cash Register screen, you can use this field to specify a minimum deposit percentage to collect for all COD or cash orders. This is primarily for goods that are shipped or picked up at a later date or for special orders. For example, entering **50** in this field causes the system to suggest a collection of 50 percent of the order total. On the Order Desk Invoicing screen, when goods are partially shipped, the program always suggests the amount to collect that will pay for all invoiced material and ensure that a 50 percent deposit remains on all back ordered non-stock material. This is a powerful tool for regulating complex, multiple shipment, or multiple payment orders.

Control Panel File Maintenance		A1
Order Entry & Invoicing Options		PAGE 2
Work Station . . . . .	A1	Update
Allow Order If Qty Not Avail : X	Y/N/X	Invoicing Default B/O Code . . : 2 1/2
Allow Order Desk To Invoice : N	Y/N	Invoicing Status Codes . . . : \$
Retail Environment . . . . .	Y Y/N	Make JobName Mandatory on O/E: N Y/N
Cash Register Screen . . . . .	Y Y/N	Charge Tax On Freight . . . . .
Variable Charge Field . . . . .	? ?	Auto-Transfer . . . . .
Tax Variable Charge . . . . .	N Y/N/C	Length Control, in Inches . . . : 00
General Ledger# . . . . .		Min Deposit on Cash Reg Scrn : 50 %
Auto-ISO Option . . . . .	Y Y/N/M	
ISO Border Color . . . . .	R B/G/P/R/T/W/Y	
Line or Window . . . . .	W L/W	
Mandatory To Key Description/Reason For Order Change Or Cancellation : █	Y/N	
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . . .	Y/N	
Allow A Price Override To Bypass Error Message On "Locked Out" Items . . .	Y/N	
Auto-Display Bill-Of-Material Windows on Order Entry . . . . .	Y/N	
F1=Next Record F6=Return F7=Exit F11=Page 3		
Press ENTER to accept modifications being made...		

**Auto-ISO Option** - Enter a **Y** in this field to allow the system to automatically select the best stock when placing an order from this workstation.

The other options are:

- **N** - To not automatically use ISO. This is the default value. With this option, the operator has to invoke ISO by entering an A on the L# field of Order Entry.
- **M** - Mandatory use of ISO. When this option is used, the operator is mandated to use ISO and it can only be overridden by use of a function key. Within Order Entry and Order Change, if a valid item number, but no quantity is entered, instead of displaying the inventory (F3 screen), the error message "Please Enter Quantity" is displayed.

**ISO Border Color** - Enter a color code in this field to control how the ISO screen border is displayed.

- **R** - Red
- **P** - Pink
- **G** - Green
- **B** - Blue
- **T** - Turquoise
- **Y** - Yellow
- **W** - White

**Line or Window** - If you chose a color in the above field, use this field to choose whether the color border displays as a window or within a thinly lined box.

- **W** - Window
- **L** - Line



```

Control Panel File Maintenance
Order Entry & Invoicing Options
A1
PAGE 2
Work Station . . . . . : A1
Update
Allow Order If Qty Not Avail :  Y/N/X Invoicing Default B/O Code . . : 2 1/2
Allow Order Desk To Invoice :  N Y/N Invoicing Status Codes . . . : S
Retail Environment . . . . . :  Y Y/N Make JobName Mandatory on O/E :  N Y/N
Cash Register Screen . . . . . :  Y Y/N Charge Tax On Freight . . . . . :  Y Y/N
Variable Charge Field . . . . . :  _ ? Auto-Transfer . . . . . :  Y Y/N
Tax Variable Charge . . . . . :  N Y/N/C Length Control, in Inches . . : 00
General Ledger# . . . . . : _____ Min Deposit on Cash Reg Scrn : 50 %

Auto-ISO Option . . . . . :  Y Y/N/M
ISO Border Color . . . . . :  R B/G/P/R/T/W/Y
Line or Window . . . . . :  W L/W

Mandatory To Key Description/Reason For Order Change Or Cancellation :  Y Y/N
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . . :  N Y/N
Allow A Price Override To Bypass Error Message On "Locked Out" Items :  N Y/N
Auto-Display Bill-Of-Material Windows on Order Entry . . . . . :  Y Y/N

F1=Next Record F6=Return F7=Exit F11=Page 3
Press ENTER to accept modifications being made...
    
```

**Mandatory To Key Description/Reason For Order Change or Cancellation** - Enter **Y** if you require a reason for changing or canceling each order. The reason or description is stored on the orders notepad.

**Mandatory To Have Valid Non-Blank Order Handling Code on All Orders** - This option enables you to make order handling codes a mandatory field on Order Entry and incoming EDI orders. Enter **Y** in this field to force this workstation to use order handling codes. Set the Control Panel used for inbound EDI orders in order to control this feature for EDI or have this setting put into any customized EDI maps.

**Allow A Price Override To Bypass Error Message On "Locked Out" Items** - Enter **Y** if you allow this work station to override the price for customers not allowed to purchase certain materials.

**Auto-Display Bill-Of-Material Windows on Order Entry** - Enter **Y** if you want to auto-display the Bill-Of-Materials screen. Enter **N** if you do not want to auto-display the Bill-of-Materials screen. In general, users entering orders while on the phone with customers should set this field to **Y**, whereas users placing orders from faxes should set this field to **N**.

2. press **ENTER**
3. press **F11** to access **PAGE 3**

## PAGE 3 - Workstation ID Control Panel

- fill out **PAGE 3** fields

Control Panel File Maintenance		A1
Inventory, Warehouse & Printing Options		PAGE 3
Work Station . . . . .	A1	Update
	<u>Prt ID</u> <u>FormCode</u>	
Print Orders on . . . . .	P9 ?	L
Print P/Os on . . . . .	P9 ?	-
Print Invoices on . . . . .	P9 ?	L
Print Credit Held on . . . . .	XX ?	-
Print Packing Lists on . . . . .	P9 ?	█
Print Checks on . . . . .	- ?	- ?
Print Cash & Carry Labels on :	- ?	
Price On Pick/Pack Lists . . . . .	- Y/N/C	
Auto-Print P0 Date Change Rpt:	- Y/N	
On Printer . . . . .	- ?	
DFT Inventory Screen Type . . . . .	- ?	Warehouse Order
Enabled for Barcode Scanning?:	- Y/N	Status Update Requires Scan Of:
R/F Code for Work Station . . . . .	- ?	Item # : - Y/N BadgeID : - Y/N
Work Station Type . . . . .	- ?	S/N # : - Y/N To Loc . : - Y/N
		From Loc: - Y/N
F1=Next Record F2=Printer Overrides F6=Return F7=Exit F11=Page 1		
Press ENTER to accept modifications being made...		

**Print Orders on** - Enter the printer ID on which customer orders should print. This controls order acknowledgements, quotations, and point-of-sale invoices only. Pick lists and other warehouse documents are usually controlled in the Warehouse File program. Pick lists print only on the printer designated here if no pick list printer is designated in the Warehouse File.

**Print P/Os on** - Specify the printer ID for purchase orders.

**Print Invoices on** - The printer ID here is used for regular batch invoices. Point-of-sale invoices (via **F9**) print on the printer specified in the Print Orders option.

**Print Credit Held on** - The printer ID entered here is used for printing an acknowledgement of a credit held order when orders are automatically diverted to a credit hold. You should ensure this printer is in the credit department. Enter **XX** if you do not have a printer in the credit department, or if your credit department works with the credit screens and does not require a printed acknowledgement that an order is on credit hold.

### Print Packing Lists on

Enter the printer ID for the printer on which you want the packing lists to print. Packing lists are a print option in the Warehouse Shipping Reports Program. They print on the same form as picking lists and are very similar to picking lists. This option pertains to packing lists that are generated using the Warehouse Shipping Reports option, as well as to individual packing lists printed via the **F10** print option in Order Inquiry.

Control Panel File Maintenance		A1
Inventory, Warehouse & Printing Options		PAGE 3
Work Station . . . . .	A1	Update
	<u>Prt ID</u>	<u>FormCode</u>
Print Orders on . . . . .	P9 ?	L
Print P/Os on . . . . .	P9 ?	-
Print Invoices on . . . . .	P9 ?	L
Print Credit Held on . . . . .	XX ?	-
Print Packing Lists on . . . . .	P9 ?	-
Print Checks on . . . . .	P9 ?	L ?
Print Cash & Carry Labels on . . . . .	- ?	
Price On Pick/Pack Lists . . . . .	- Y/N/C	
Auto-Print PO Date Change Rpt: . . . . .	- Y/N	
On Printer . . . . .	- ?	
		Warehouse Order
DFT Inventory Screen Type . . . . .	- ?	<u>Status Update Requires Scan Of:</u>
Enabled for Barcode Scanning?: . . . . .	- Y/N	Item # : - Y/N
R/F Code for Work Station . . . . .	- ?	BadgeID : - Y/N
Work Station Type . . . . .	- ?	S/N # : - Y/N
		To Loc : - Y/N
		From Loc: - Y/N
F1=Next Record    F2=Printer Overrides    F6=Return    F7=Exit    F11=Page 1		

**Print Checks on** - Enter the printer ID if you want to print checks on a specified printer. If this field is blank, checks print to your default system printer.

**Form Code** - This code is used to indicate special print instructions. Some of the available codes are:

- **C** - (for checks) Canadian Cheque Form on line printer
- **D** - (for checks) Canadian Cheque Form on laser printer

*Note: All checks used by customers of financial institutions operating in Canada must follow the standard format for checks.*

- **M** - (for checks) This laser style code increases the font size making the checks easier to read. Form Code "M" can be used in the United States, Canada, and Australia. Do not change check form codes until you have performed a test run on plain laser paper, and then worked with your forms printer to adjust your pre-printed forms to match the new layout.
- **L** - enables laser style "portrait" invoices to print on various laser printers.
- **1** or blank - For 8.5" x 11" dot matrix forms in landscape mode.
- **2** - For 8.5" x 11" dot-matrix forms in landscape mode, for PC-style printers that cannot print on the top line of the form, this code causes the print alignment to alter slightly.
- **K** - This format uses the columns: (List) Price, U/M, Discount%, and Extended Amount. The use of forms code K requires a special pre-printed form with new column headings. Do not activate this feature before ordering a new form, with a new design, as approved Dancik International.

Control Panel File Maintenance		A1
Inventory, Warehouse & Printing Options		PAGE 3
Work Station . . . . .	A1	Update
	<u>Prt ID</u> <u>FormCode</u>	
Print Orders on . . . . .	P9 ?	L
Print P/Os on . . . . .	P9 ?	-
Print Invoices on . . . . .	P9 ?	L
Print Credit Held on . . . . .	XX ?	-
Print Packing Lists on . . . . .	P9 ?	-
Print Checks on . . . . .	P9 ?	L ?
Print Cash & Carry Labels on . . . . .	- ?	
Price On Pick/Pack Lists . . . . .	N Y/N/C	
Auto-Print PO Date Change Rpt: . . . . .	N Y/N	
On Printer . . . . .	- ?	
		<u>Warehouse Order</u>
DFT Inventory Screen Type . . . . .	- ?	<u>Status Update Requires Scan Of:</u>
Enabled for Barcode Scanning?: . . . . .	N Y/N	Item # : _ Y/N BadgeID : _ Y/N
R/F Code for Work Station . . . . .	█ ?	S/N # : _ Y/N To Loc : _ Y/N
Work Station Type . . . . .	- ?	From Loc: _ Y/N
F1=Next Record    F2=Printer Overrides    F6=Return    F7=Exit    F11=Page 1		

**Print Cash & Carry Labels on** - The setting sets a default printer for cash and carry labels. This feature allows a customer to buy inventory in a retail setting (such as items stored behind a counter) and carry it out instead of having to go through the warehouse. A label is printed at the counter to show that the customer has paid for the material. As soon as the order is processed, the system directs a label to be generated. These cash and carry labels automatically bypass the pick label pool.

**Price on Pick/Pack Lists** - This parameter controls whether or not prices print on pick and packing lists. If you enter **C** in this field, a unit price prints for each line of a COD or cash order. Enter **Y** to always print a unit price on every pick list. Enter **N** to never print the unit price on the pick list. Note that COD and cash pick lists always show the total amount of the order, regardless of the settings in this field.

**Auto-Print PO Date Change Report** - Enter **Y** if you want a report of back orders affected by changes in ship dates on purchase orders, when changes are keyed using the Update Shipping Data program. Also specify the ID of the printer on which you want to print this report.

**DFT Inventory Screen Type** - Leave blank unless you want one of the special Inventory Screen type codes to be used as a default each time you access the Inventory Inquiry program. Enter a "?" in the **TP** (type) field in Inventory Inquiry for a list of type codes and their meaning.

**Enabled for BarCode Scanning?** - Enter **Y** if a bar code scanner is attached to this work station.

```

Control Panel File Maintenance
Inventory, Warehouse & Printing Options
A1
PAGE 3
Work Station . . . . . : A1
Update

Prt_ID FormCode
Print Orders on . . . . . : P9 ? L
Print P/0s on . . . . . : P9 ? -
Print Invoices on . . . . . : P9 ? L
Print Credit Held on . . . . . : XX ? -
Print Packing Lists on . . . . . : P9 ? -
Print Checks on . . . . . : P9 ? L ?
Print Cash & Carry Labels on : - ?
Price On Pick/Pack Lists . . . : N Y/N/C
Auto-Print P0 Date Change Rpt: N Y/N
On Printer . . . . . : - ?

DFT Inventory Screen Type . . : - ?
Enabled for Barcode Scanning?: N Y/N
R/F Code for Work Station . . : - ?
Work Station Type . . . . . : - ?

Warehouse Order
Status Update Requires Scan Of:
Item # : N Y/N BadgeID : N Y/N
S/N # : N Y/N To Loc . : N Y/N
From Loc: N Y/N

F1=Next Record F2=Printer Overrides F6=Return F7=Exit F11=Page 1
    
```

**R/F Code for Work Station** - This code is used to identify the terminal as an RF device. RF indicates hand-held radio frequency devices. This code also specifies the type of RF terminal needed for programs to format screens correctly. Enter **Y** to identify the terminal as RF. Enter a specific code based only on instructions from Dancik International.

**Work Station Type** - Enter the work station type in order to define what the work station is used for.

- **C** - There is a cutting work station located near a cutting machine, on which orders are updated to the cut (X) status. This feature also allows the cutting station operator to override the default printer selection and choose a different printer. This can reduce the time it takes to retrieve labels, and gives you flexibility in printing labels.
- **V** - Vehicle Mounted RF (Wide screen). This workstation type is meant for vehicle mounted RF units in a warehouse environment. The "wide screen" mode displays system directed picking information (i.e. the next 10 picks) in addition to the normal RF menu. This workstation type is intended to work with the Build-A-Pallet application with the Integrated Warehouse Management System (IWMS).

*Note: To access a list of all the available work station types, enter a "?" in the field and press **ENTER**.*

**Warehouse Order Status Update Requires Scan of** - Enter **Y** beside each field that you require bar code scanner to scan, when scanning bar code pick or ship labels. The answers to this question require knowledge of the bar code labels and warehouse functions that you will use. These parameters are used by the Order Status Update program on the Warehouse Functions Menu.

2. press **ENTER**
3. press **F7** to **EXIT**

## Chapter 3 - **Understand Dancik Enterprise System Maintenance Functions**

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### **Dancik Menu (MNU) and Security System**

Users that have command line access can switch from the default menu system to the Dancik Menu System by entering **MNU** on any command line, or by using the **MNU** menu.

The Dancik menu and security system includes several features including:

- Quick and easy navigation
- "Point and Click" functionality on most PCs, assuming IBM's client access or compatible 5250 program is utilized and configured for this functionality.
- Users can create their own "personal menus"
- Complete system map that lists all the menus
- Scan Feature - search for all options by any subject or keyword
- User History - tracks the last 100 options a user accessed
- Menus only list the options a user is permitted to access.

The implementation of menu option security will enable system administrators to restrict access to the system at a lower level than what is currently available. With this feature, it is possible to restrict actual menu options by user without the need for most passwords. The feature also allows the system administrator to customize the menu system by user or user class. In addition, individual users, in accordance with access restraints managed by system administrators, may customize their menus based on job requirements.

The Menu and Security systems supersede the previous menu and security systems. However, the previous "default menu" systems will still be supported. Therefore you may choose to transition at your own pace. You will also be able to have some users in the "default menus", and others in the Dancik menu system simultaneously.

Individual program passwords are not affected by the activation of the menu and security features. However, they may not be needed after activation of the features. Because only the users that are authorized to an option can access that option, the passwords will often be an unnecessary extra step. If this is the case, it is recommended that you set those

program passwords to blanks. The only programs whose passwords may still be applicable are hotkey maintenance programs such as the Billto, Item, and Supplier Files.

The Dancik Menu and Security system can be used with a minimum of configuration. However, it is recommended that system administrators familiarize themselves with all aspects of the Dancik systems before making the features available to other users.

*Note: Hotkeys and Menu Bars are accessible with the Dancik Menu System.*

1. type **MNU** in the **ENTER DESIRED MENU** field
2. press **ENTER**

```
YOUR COMPANY NAME HERE : 1
Dancik International Performance Options

Opt Description
1 Work w/ Authority Classes
2 Work w/ User Authority
3 Work w/ User Menu Option History

** UNIVERSAL OPTIONS **
993 Display System Messages
994 Send System Messages
995 Your Printer Output
996 Output Distribution
997 Event Management
999 Signoff

Enter Desired Menu / Option# ==> MNU
Bottom

F1=Add F2=Select F5=Personal F9=Additional F10=Scan F11=Alt View
```

*Note: These options are meant for system administrators only.*

The Work with Dancik Menu Options program includes the following sections:

**Work w/ Authority Classes** - This option enables you to create classes of authority (such as "Customer Service", "Warehouse", "A/R". etc.) that relate to a list of menu options that are accessible by users in that class.

**Work w/ User Authority** - This option links specific users to an authority class, and can customize certain features by user.

**Work w/ User Menu Option History** - This option can display up to 100 of the last menu options accessed by each user.

## Working with Authority Classes- MNU 1

Authority classes are ways to group users together; they can be created based on system access restrictions or based on user's functional areas such as accounting for instance. They may also represent a combination of both of these psychologies, (new accounting user) or Cash Application/ Accounts Receivable person. In essence, an Authority Class allows you to establish a Model Menu System by choosing options from any Dancik menu. Since you may build these templates at the level of menu option it allows you to restrict specific menu options for certain classes of users without restricting the entire menu. The Authority Class option allows you to pick and choose options which will be available to specific classes of users.

1. type **MNU** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **1** in the **OPTION#** field
4. press **ENTER**

Dancik International, Ltd.				
Work w/ Authority Classes				
Opt	Authority Class	Description	Flag#	DANCIK Supplied
	*ALL	*ALL ACCESS	1	Y
	*GUEST	GUEST USERS, LIMITED ACCESS	7	Y
	*NONE	LOWEST LEVEL OF ACCESS	2	Y
	A/P	ACCOUNTS PAYABLES	3	Y
	A/R	ACCOUNTS RECEIVABLE	5	Y
	COU	COUNTER SALES	6	
	CRUS	DIAL-IN/TELNET CUSTOMERS	16	Y
	WAREHOUSE	WAREHOUSE AND DELIVERY	4	Y

Bottom

Options ==> D=Delete U=Update W=Work w/ Menus Y=Personal Menu Setup  
 F1=Create F7=Exit

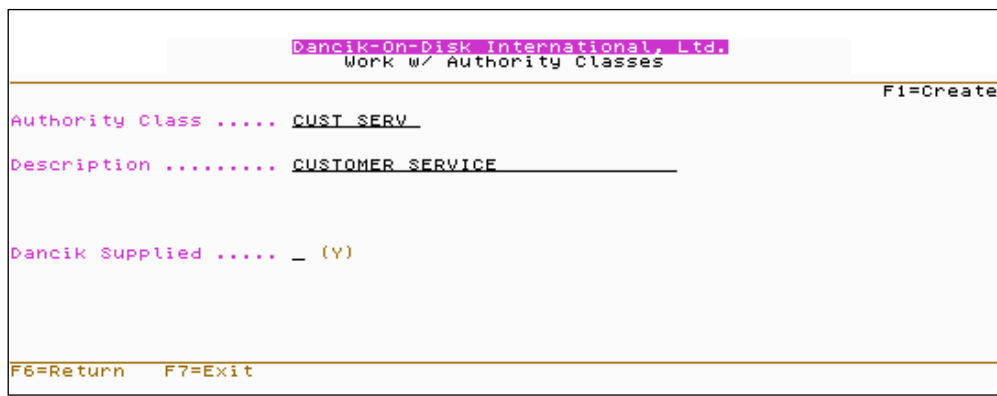
**Note:** Dancik has created default authority classes for your use. However they cannot be updated. You may create your own if the defaults do not work for you. Once you have the authority classes, the next step is to assign it to the individual users.



## Create a new Authority Class

For our example we will be creating a new Authority Class for our user **GBRANNEN**. **GBRANNEN** will require customer service options.

1. access **MNU 1**
2. press **F1** to create an **AUTHORITY CLASS**
3. type in **New Authority Class**
4. type in **Description**
5. **DANCIK SUPPLIED** must be left blank.



The screenshot shows a terminal window titled "Dancik-On-Disk International, Ltd. Work w/ Authority Classes". The screen displays the following text:

```
Dancik-On-Disk International, Ltd.  
Work w/ Authority Classes  
F1=Create  
Authority Class ..... CUST_SERV_  
Description ..... CUSTOMER SERVICE  
Dancik Supplied ..... _ (Y)  
F6=Return F7=Exit
```

6. press **ENTER**

## Grant Access to Authority Class and Work with Menus

For our example we are going to assign menus to the Customer Service Authority Class.

1. type **W** in the **OPT** field

Dancik International, Ltd.  
Work w/ Authority Classes

Opt	Authority Class	Description	Flag#	DANCIK Supplied
	*ALL	*ALL ACCESS	1	Y
	*GUEST	GUEST USERS, LIMITED ACCESS	7	Y
	*NONE	LOWEST LEVEL OF ACCESS	2	Y
	A/P	ACCOUNTS PAYABLES	3	Y
	A/R	ACCOUNTS RECEIVABLE	5	Y
	COU	COUNTER SALES	6	
	CRUS	DIAL-IN/TELNET CUSTOMERS	16	Y
W	CUST SERV	CUSTOMER SERVICE	17	
	WAREHOUSE	WAREHOUSE AND DELIVERY	4	Y

Bottom

Options ==> D=Delete    U=Update    W=Work w/ Menus    Y=Personal Menu Setup  
F1=Create    F7=Exit

2. press **ENTER**
3. type **G** in the **OPT** fields next to desired menus

Dancik-On-Disk International, Ltd.  
Work w/ Menu Authority

Authority Class . . . . : CUST SERV    CUSTOMER SERVICE

Opt	Usage Flag	Menu Key	Menu Description
		COU	
G	No	COU	THE COUNTER
	No	CRA	Armstrong Corporate Retail Accounts Menu
	No	CRS	Customer Remote User System (CRUS)
	No	CS	Customer Support Menu
G	No	CUS	Customer Service Menu
	No	CYC	Cycle Counts & Physical Inventory
	No	DEL	Delivery Functions Menu
	No	DP	Data Processing Menu
	No	D24	Decor 24 Setup Menu
	No	EB	EDI and Bar Code Functions Menu
	No	EOM	A/R End-Of-Month Close Menu

More...

Options ==> G=Grant    R=Revoke    W=Work w/ Options  
F6=Return    F7=Exit    F14=Copy From

4. press **ENTER**

The screenshot shows a terminal window with the following content:

```
Dancik-On-Disk International, Ltd.
Work w/ Menu Authority

Authority Class . . . . : CUST SERV  CUSTOMER SERVICE

  Usage  Menu
  Opt  Flag  Key  Menu Description
-----
  [ ]  Yes  COU  THE COUNTER
  [ ]  No   CRA  Armstrong Corporate Retail Accounts Menu
  [ ]  No   CRS  Customer Remote User System (CRUS)
  [ ]  No   CS   Customer Support Menu
  [ ]  Yes  CUS  Customer Service Menu
  [ ]  No   CYC  Cycle Counts & Physical Inventory
  [ ]  No   DEL  Delivery Functions Menu
  [ ]  No   DP   Data Processing Menu
  [ ]  No   D24  Decor 24 Setup Menu
  [ ]  No   EB   EDI and Bar Code Functions Menu
  [ ]  No   EOM  A/R End-Of-Month Close Menu

More...
```

Options ==> G=Grant R=Revoke W=Work w/ Options  
F6=Return F7=Exit F14=Copy From

Red boxes in the original image highlight the 'Usage Flag' column, the 'COU' menu entry, the 'CUS' menu entry, and the 'W=Work w/ Options' option.

*Note: USAGE FLAG will change from “No” to “Yes”*

5. type **W** next to menus just granted

6. press **ENTER**

7. select **MENU OPTIONS**

- press **F13 – Grant All**
- to deny access, use **R – Revoke**
- to allow individual options use **G – Grant**

```

Dancik-On-Disk International, Ltd.
Work w/ Menu Options Authority
-----
Authority Class . . . . . : CUST SERV  CUSTOMER SERVICE
Menu . . . . . : COU  THE COUNTER
-----
Use Mnu
Opt Flg Opt Short Description      Use Mnu
-----
[ ] Y   1 Order Entry
[ ] Y   2 Order Inquiry
[ ] Y   3 Unprocessed Orders Inquiry
[ ] Y   4 Inventory Inquiry
[ ] Y   5 Customer File & Search
[ ] Y   6 Quick Quoter
[ ] Y   7 Daily Cash Reports & Updat
-----
Bottom
-----
Options ==> G=Grant  R=Revoke
F6=Return  F7=Exit  F13=Grant All  F14=Copy From  F15=Revoke All
Record(s) have been modified successfully...
    
```

*Note:* All options were granted by pressing F13.

8. press **F6**
9. repeat **steps 7 through 9** until all menus are updated
10. press **F6**

## Personal Default Menu Setup

The next dimension of establishing a new authority class is to establish the content of authority classes' default menu. The real power of the Authority Class Default Menu is in its support for customizing the presentation of which menu options are grouped together on a single screen. By creating Authority Classes which are specific to job functions within your organization and then establishing the presentation of the menu options onto a single screen it is possible to "build" a custom screen for a class of users which displays only the most frequently used system features on one screen.

1. type **Y** in the **OPT** field next to the **AUTHORITY CLASS**

Dancik International, Ltd.  
Work w/ Authority Classes

Opt	Authority Class	Description	Flag#	DANCIK Supplied
	*ALL	*ALL ACCESS	1	Y
	*GUEST	GUEST USERS, LIMITED ACCESS	7	Y
	*NONE	LOWEST LEVEL OF ACCESS	2	Y
	A/P	ACCOUNTS PAYABLES	3	Y
	A/R	ACCOUNTS RECEIVABLE	5	Y
	COU	COUNTER SALES	6	
	CRUS	DIAL-IN/TELENET CUSTOMERS	16	Y
Y	CUST SERV	CUSTOMER SERVICE	17	
	WAREHOUSE	WAREHOUSE AND DELIVERY	4	Y

Bottom

Options ==> D=Delete U=Update W=Work w/ Menus Y=Personal Menu Setup  
F1=Create F7=Exit

2. press **ENTER**

YOUR COMPANY NAME HERE : 1  
AUTHORITY CLASS : CUST SERV - DEFAULT PERSONAL MENU SET

Menu / Option Descriptions                      Menu / Option Descriptions

Enter Desired Menu / Option# ==>>> █

F1=Add F2=Copy From F4=Remove F6=Return F7=Exit F11=Alt View  
No record(s) found...

3. type in the menu in **ENTER DESIRED MENU** and type the option number in the **OPTION#** field

4. press **F1**

```

YOUR COMPANY NAME HERE : 1
AUTHORITY CLASS : CUST SERV - DEFAULT PERSONAL MENU SET
Menu / Option Descriptions
COU THE COUNTER
1 Order Entry
Menu / Option Descriptions
Bottom
Enter Desired Menu / Option# ====> █ _ _
F1=Add F2=Copy From F4=Remove F6=Return F7=Exit F11=Alt View
Menu COU Option 1 has been added to user personal menu...
    
```

*Note: Only menu options that have been granted access may be added.*

5. Continue building the default personal menu by typing in the **DESIRED MENU** and **OPTION#** and pressing **F1** to add options.

```

YOUR COMPANY NAME HERE : 1
AUTHORITY CLASS : CUST SERV - DEFAULT PERSONAL MENU SET
Menu / Option Descriptions
COU THE COUNTER
1 Order Entry
2 Order Inquiry
3 Unprocessed Orders Inquiry
4 Inventory Inquiry
5 Customer File & Search
6 Quick Quoter
7 Daily Cash Reports & Update
Menu / Option Descriptions
6 Print Order Registers
7 Customer Service Bulletin Board
8 Quick Quoter
10 Open Order File Inquiry/Search
12 Print Copies &/or Pick Lists F..>
13 Update Order Status & Shipping..>
14 Update Direct Ship & Special O..>
16 Search Unprocessed Orders, Hol..>
CUS Customer Service Menu
1 Enter Orders
2 Print Order Edits
3 Print Order Quotations
4 Print Order Pick Lists & Ackno..>
5 Void and/or Reinstate Today's ..>
PUR Purchase Orders Menu
1 Enter Purchase Orders
3 Print Purchase Orders
4 Print Special Order Purchases
10 Open Order & P.O. File Inquiry..>
13 Update Order &/or P.O. Status ..>
More...
Enter Desired Menu / Option# ====> █ _ _
F1=Add F2=Copy From F4=Remove F6=Return F7=Exit F11=Alt View
Menu R00 Option 17 has been added to user personal menu...
    
```

6. press **F7**



## Work With User Authority – MNU 2

Once the Authority Classes have been established, the next step is to link specific users to the appropriate Authority Class. For this example we will be linking user **GBRANNEN** to the **CUST SERV** Authority Class.

1. access **MNU 2**
2. type **U** in the **OPT** field next to **GBRANNEN**

Dancik International, Ltd.										
Work w/ User Authority										
Opt	User	Authority Class	Init Menu	Cmd Lin	Unv Opt	No Main	Use R/E	Flag 05	User Init Menu	User Init Menu Lib
U	GBRANNEN								NEWDOD	*LIBL
	JADAMS								*SIGNOFF	
	JGULAS								*SIGNOFF	
	JOE	*ALL		Y	Y				US	*LIBL
	JPOLANIK								*SIGNOFF	
	JTHORNTON								*SIGNOFF	
	LIMITED								NEWDOD	*LIBL
	MIKEK								*SIGNOFF	
	MIKEKT								NEWDOD	*LIBL
	NIGHT								US	*LIBL
	NIGHTTEST								US	*LIBL
	PBLOOMER								*SIGNOFF	

Options ==> C=Copy D=Delete P=Personal Menu U=Update Z=CHGUSRPRF  
 F7=Exit  
 \*NOTE\* - Menu NEWDOD in library \*LIBL is the menu for the New Menu System.

3. press **ENTER**
4. select the **AUTHORITY CLASS** using the **?** function
5. select the **INITIAL MENU** using the **?** function

*Note:* A blank field causes the user's initial menu to be the default personal menu for that User's Authority Class.



6. Make the necessary entries (**Y** or **N**) in to the following fields:

- **Command Line Usage** - Can be used to restrict user's access to command line entries.
- **Load Universal Opt** - Loads all of the universal options that are available within each menu. Universal options include things like "Display Printer Output" and "Send Messages".
- **No Access to Main Menu** - If a **Y** is entered, the user will not have access to the Main Menu.

*Note: With proper configuration of the Dancik menu system, users will not need access to the "Main Menu". However, at first the "Main Menu" concept may be more comfortable. Other flags are for later use only.*

7. press **ENTER**

```
Dancik-On-Disk International, Ltd.
Work w/ User Authority

User . . . . . : GBRANNEN                                U=Update
Authority Class . . . : CUST_SERV ? CUSTOMER SERVICE
Initial Menu . . . . :      ?      ** PERSONAL MENU **
                               Blanks indicates to use Personal Menu

Command Line Usage . . . : _ (Y)      Flag #06 . . . . . : _ (Y)
Load Universal Opt . . . : Y (Y)      Flag #07 . . . . . : _ (Y)
No Access To Main Menu : Y (Y)      Flag #08 . . . . . : _ (Y)
Use R/F Style Menu . . . : _ (Y)      Flag #09 . . . . . : _ (Y)
Flag #05 . . . . . : _ (Y)      Flag #10 . . . . . : _ (Y)

F6=Return  F7=Exit
Record(s) have been modified successfully...
```

8. press **F6**

9. copy the user authority records by selecting the template user and placing a **C** in the **OPT** field and press Enter. For example, you can copy **GBRANNEN**'s authority record to other users by entering a **C** in the **OPT** field next to **GBRANNEN**

10. press **ENTER**

11. type an **X** next to the users that will have the same authority as **GBRANNEN**

```

Copy User Authority Record
Multiple Selection Mode

From User ..... GBRANNEN

  Opt User      Opt User      Opt User      Opt User
  --- ---      --- ---      --- ---      --- ---
  X AKAISAND    [ ] DPETERS    [ ] PBLOOMER
  [ ] ANDYW     [ ] JADAMS     [ ] QPGMR
  [ ] BOLIPHANT [ ] JGULAS     [ ] QSECOFR
  [ ] DANCIK    [ ] JOE        [ ] QUSER
  [ ] DANCIKDEMO [ ] JPOLANIK  [ ] REGULAR
  [ ] DANCIKP    [ ] JTHORNTON [ ] RF
  [ ] DANCIKPRD6 [ ] LIMITED   [ ] SUPPORT
  [ ] DANCIKPROD [ ] MIKEK     [ ] TBULLARD
  [ ] DANCIKT    [ ] MIKEKT    [ ] WH
  [ ] DANC1K     [ ] NIGHT     [ ] X12832
  [ ] DES1      [ ] NIGHTTEST [ ] X12832T

Bottom

Options ==> X>Select
F6=Return  F7=Exit
    
```

12. press **ENTER**

```

Dancik International, Ltd.
Work w/ User Authority

  Opt User      Authority  Init Cmd Unv No  Use  Flag  User Init  User Init
  --- ---      ---      Menu Lin Opt Main R/F  05  Menu      Menu Lib
  [ ] AKAISAND  CUST SERV [ ] [ ] Y  Y  [ ] [ ] NEWDOD    *LIBL
  [ ] ANDYW     [ ] [ ] [ ] [ ] [ ] [ ] US        *LIBL
  [ ] BOLIPHANT *ALL      Y  Y  [ ] [ ] *SIGNOFF
  [ ] DANCIK    *ALL      Y  Y  [ ] [ ] US        *LIBL
  [ ] DANCIKDEMO [ ] [ ] [ ] [ ] [ ] [ ] NEWDOD    *LIBL
  [ ] DANCIKP    [ ] [ ] [ ] [ ] [ ] [ ] NEWDOD    *LIBL
  [ ] DANCIKPRD6 [ ] [ ] [ ] [ ] [ ] [ ] *SIGNOFF
  [ ] DANCIKPROD [ ] [ ] [ ] [ ] [ ] [ ] *SIGNOFF
  [ ] DANCIKT    *ALL      Y  Y  [ ] [ ] NEWDOD    *LIBL
  [ ] DANC1K     *ALL      Y  Y  [ ] [ ] NEWDOD    *LIBL
  [ ] DES1      [ ] [ ] [ ] [ ] [ ] [ ] US        *LIBL
  [ ] DPETERS   [ ] [ ] [ ] [ ] [ ] [ ] *SIGNOFF

More...

Options ==> C=Copy D>Delete P=Personal Menu U=Update Z=CHGUSRPRF
F7=Exit
Record(s) have been copied successfully...
    
```

*Note: The following options are also available:*

*D - Allows you to delete the User Authority associated with a specific User Profile. The AS/400 user profile itself is not deleted; merely the configuration information for the Dancik Menu System is removed.*

*P - Allows a quick review the of user's personal menu.*

*Z - Accesses the User Profile screen.*

## **Work w/User Menu Option History - MNU 3**

The **Work w/User Menu Option History** option on the Dancik menu configuration function allows you to review all the menu options accessed by a user.

The menu option history log contains the last 100 options accessed by each user, showing the date and time accessed. You may position to a specific user, menu, option, or date by entering into the fields above the respective column. A similar screen is available to each user, showing only that user's log.

# System Settings Menu (SET)

The System Settings Menu contains the programs that are used to maintain system options and parameters. Many of the settings accessed from this menu must be made prior to the activation of the respective system functions. The System Settings Menu is accessed via menu SET.

```

YOUR COMPANY NAME HERE : 1
System Settings Menu
-----
Opt Description                               Opt Description
 1 Work Station Control Panel File           16 Warehouse Areas Table
 2 User ID Control Panel                     17 Warehouse Matrix File
 3 Company Settings                           18 Expected Customer Rebates Table
 4 System Wide Settings                       Menu D24(ShoppingCart) & F24(B2B)
 5 System Cross Reference Table              20 ISO (Inv Selection Optimizer)
 6 Label Cross Reference File                 21 Maintain PRTMSG Printer Table
 7 Order & Serial# Status Codes              22 Maintain PRTMSG Dept Table
 8 InterWarehouse Freight Cost File          23 Maintain Macro Message Manager
 9 Freight Cost Override Table               24 AutoTimer Maint For Print Xfers
10 Expected Supplier Rebates Table           25 Submit AutoTimer Job for Xfers
11 Currency Code/Exch Rate Table             26 Barcode Label Pool Default File
12 Supplier/Vendor Currency Code            27 Warehouse Capacity Planning Mode
13 Duty Rates Table                          28 Salesperson Relationships/Access
14 Warehouse Settings Table                  29 System Tables Maintenance
15 Warehouse Locations Table                 30 Auto B/O Fill Algorithm Matrix
                                           More...
Enter Desired Menu / Option# ==>> SET █
-----
F1=Add  F2=Select  F5=Personal  F9=Additional  F10=Scan  F11=Alt View  H
    
```

## Company Settings - SET 3

This program, accessed via SET 3, contains company level system settings on four screens labeled record type 1, 2, 3, and 4. When accessing this program, you are prompted to select a company number and then a record type. The following screen displays all the companies on the system and allows you to update settings by entering an option next to the company you want to update.

```

File Maintenance
Company File
-----
Type options, press Enter.                                Password : ██████████
1=System / Miscellaneous Options      2=A/R and Credit Options
3=Order / Invoice Print Options       4=Tax, G/L & Delivery/Route Options
-----
Opt Company# and Description          Opt Company# and Description
- 0 YOUR COMPANY NAME HERE : 1
-----
Bottom
F2=Position  F7=Exit                                Roll Up/Down [H]
    
```

You can change record types by entering 1, 2, 3, or 4 in the **Opt** field.

## Option 1 - System / Miscellaneous Options

```

File Maintenance
Company File
-----
Company# ..... 0 YOUR COMPANY NAME HERE : 1          * Update *
-----
System / Miscellaneous Options
System Title ..... [F] (?) Floor Vision
Delete / Inactivate Record ..... - (?) Record Active
Display System Names on Screen -- Multi-AS/400 ..... N Y/N
Display Shade On Order Rev Screen (w/ serial#) ..... Y Y/N
Use OPENPU File (On Water Tracking) ..... Y Y/N
Roll / Cut / Balance (3 Price Option) ..... N Y/N
Force B/O To The Stocking Matrix Warehouse ..... Y Y/N
Activate Manufacturer Rebate Matrix Table ..... Y Y/N
-----
#Months of A/P History ... 48          Flag 52 / AP Future Edit . N Y/N
#Months of A/R History ... 24          Flag 53 / AP Balance .... N Y/N
Exclude Misc$ From Slmn .. Y Y/N      Flag 54 / AP Reg Edit ... N Y/N
Exclude Misc$ From Other . Y Y/N      Flag 55 / AP EOM ..... N Y/N
Date Format ..... - (?) *MDY          UOM Weight ..... L (?) Lbs
-----
F6=Return  F7=Exit  F8=First Screen
    
```

## Option 2 - A/R and Credit Options

```

File Maintenance
Company File
-----
Company# ..... 0 YOUR COMPANY NAME HERE : 1          * Update *

A/R and Credit Options
-----
Include ADs in A/R ..... Y Y/N          Interest Option ..... B A/B/C
Print 0 and Cr Bal Stmt . N Y/N          Minimum Interest Inv$ .... 2.00
Roll Credits ..... Y Y/N          Credit Check Screen ..... N Y/N
Over Apply ADs in A/R..... N Y/N
Statement Format ..... 1 (?) Regular Statement Page Layout. No Due Date C
Aging Option ..... 1 (?) Age Invoice Date From Today's Date (1=default
Export / Import A/R ..... - (?) *NONE
Credit Hold Option ..... - (?) *NONE

#of Grace Days (for payment discounts) ..... 5
Release Transfer P/L, If Credit Held ..... N Y/N
Force Invoice Date = To Keyed Ship Date ..... Y Y/N
Show Current Paid AR Items on AR Ledger ..... Y Y/N
Automatically Take The Discount Available ..... Y Y/N
Allow Special Order POs To Print If On Credit Hold . N Y/N

F6=Return   F7=Exit   F8=First Screen
    
```

## Option 3 - Order / Invoice Print Options

```

File Maintenance
Company File
-----
Company# ..... 0 YOUR COMPANY NAME HERE : 1          * Update *

Order / Invoice Print Options
-----
Skip Line On Invoice ..... N Y/N          Print Acknowledgements S/I . Y Y/N
Skip Line On Order ..... N Y/N          Print Purchase Order S/I ... Y Y/N
Auto Fax Pick Lists ..... N Y/N          Print Pick Lists S/I ..... Y Y/N
Auto Fax Purchase Orders . N Y/N          Print Invoices S/I ..... Y Y/N

Adjustment Print Option .. 2 (?) Only Print Current Status

Print Supplier Item# On Pick Lists ..... N Y/N
Backorder Fill Print Option ..... 2 (?) Print ONLY lines no
Qty Break Group Option 0 (?) Minimum Charge Option.. S (?)
Show Balance For Serial# Items On Pick Lists ..... Y Y/N
Allow B/O Fill Pick Lists To Prt For H-Type Ord/Hld. N Y/N
Print SF Conversions For All SY Items On Invoices .. N Y/N

F6=Return   F7=Exit   F8=First Screen
    
```

## Option 4 - Tax, G/L & Delivery/Route Options

```
File Maintenance
Company File

Company# ..... 0 YOUR COMPANY NAME HERE : 1          * Update *

Tax Options
Apply Tax On Freight ..... Y Y/N
Apply Taxes to Fund Contributions / Over Bills . N Y/N

G/L Options
Ending Month Of Fiscal Yr. 12          Use GL Validation Tables . N Y/N
Ending Day Of Fiscal Yr .. 31          Double Space Option ..... N Y/N
Last Closed Fiscal Year .. 8           Valid GL# For F6 Charges.. Y (?) *YES

Delivery / Route Options
Maintain Delivery Ship Via in Classification Code File Maintenance
Delivery Charge On COD ..... N Y/N
Use Entire Truck Route / Stop Systems ..... Y Y/N

F6=Return  F7=Exit  F8=First Screen
```

## System-Wide Settings - SET 4

This program, accessed via option 4 on the SET menu, contains system-wide or global (all companies) settings. These settings pertain to many different functions throughout the system. The System Wide Settings affect everyone, regardless of company or branch.

```

2/14/10          Dancik International, Ltd.          SY0100R
13:38:07          System Wide Settings Maintenance    B6

                                     Password : .....

Opt  Setting Description
-----
[ ] Accounts Receivable Options
[ ] Auto-Fax Phone Number Prefix
[ ] Automatic Pick Lists for Items Backordered while Invoicing
[ ] Backup Options During NightJobs (Before or After)
[ ] Cash Register Environment Options
[ ] Cost Center Reconciliation W/I AP Manifest Reconciliation
[ ] Daily System Snapshots File Options
[ ] Delivery Charge Suppression Options
[ ] Enable/Disable use of F5 during Invoicing (Undelete)
[ ] Installation / Measurement Settings
[ ] Invoicing Pricing & Promotions Pricing ShipBy Analysis Rpt

                                     More...

Options ==> I=Inquire  U=Update
Enter      F5=Refresh   F7=E0J
Password valid to update all fields.

MB  a          MW          08/002
    
```

```

2/14/10          Dancik International, Ltd.          SY0100R
13:38:07          System Wide Settings Maintenance    B6

                                     Password : .....

Opt  Setting Description
-----
[ ] Item Policy NB Options (Control the NB Quantities Policy)
[ ] Laminate Automatic Cut settings and additional options
[ ] Light Manufacturing Options
[ ] Master File Update Log Options
[ ] Negative Inventory Control Settings
[ ] Option for Removal of Unprocessed Orders from the System
[ ] Options for "Must Ship Complete" Orders
[ ] Options for Accounts Payable
[ ] Options for Allocation Swapping
[ ] Options for Automatic Back Order Date Changes
[ ] Options for AR Cash Application Edits

                                     More...

Options ==> I=Inquire  U=Update
Enter      F5=Refresh   F7=E0J
    
```



Understand Dancik Enterprise System Maintenance Functions

```
2/14/10      Dancik International, Ltd.      SY0100R
13:38:07      System Wide Settings Maintenance      B6

                                           Password : .....

Opt  Setting Description
-----
[ ]  Options for Back Order Fill
[ ]  Options for Bill of Material
[ ]  Options for Bill Of Material Manufacturing
[ ]  Options for Build-A-Container
[ ]  Options for Cost Drivers
[ ]  Options for Credit Hold
[ ]  Options for Credit Hold Code Definitions
[ ]  Options for Credit Memos
[ ]  Options for Customer Order Contacts
[ ]  Options for Customer Search
[ ]  Options for Cutting Machine Counter

                                           More...

Options ==> I=Inquire  U=Update
Enter    F5=Refresh   F7=E0J
```

```
2/14/10      Dancik International, Ltd.      SY0100R
13:38:07      System Wide Settings Maintenance      B6

                                           Password : .....

Opt  Setting Description
-----
[ ]  Order Status Codes Changes in Order Entry
[ ]  Packing List Consolidation Level & Print Options
[ ]  Print Serial Number Tag Setting
[ ]  Retail Customer File Options
[ ]  Serial number assignment
[ ]  Serial# Status Codes to be omitted by Reorder Reports
[ ]  Ship Date Options in D24/CMS for Customer Orders
[ ]  Status codes to trigger Auto Transfer Process
[ ]  Stock Card Date Option for Back Orders
[ ]  Unavailable serial number ranges
[ ]  Validate Classification Codes & Cost Center in Item File

                                           Bottom

Options ==> I=Inquire  U=Update
Enter    F5=Refresh   F7=E0J
Already at bottom of area.
```

# Running Night and Morning Jobs

## Run Night Jobs - DP 4

Night jobs should be run after every business day. When requesting night jobs, you can specify the time night jobs should start. You can load night jobs during the day and they will start at the time you specify. Night Jobs are restricted to scheduling no later than 3:00 AM. Running night jobs after 3:00 AM can delay morning operations. If you specify a time after 3:00 AM, a message is displayed indicating your entry is not valid.

*Note:* Night jobs can close out your system for an extended period. However, the System Wide Setting Back-up Option during Night Jobs allows your warehouse personnel to utilize all features on the Warehouse Menu starting approximately half way through Night Jobs. This reduces down time for warehouse night shifts by approximately 50%.

Complete the following steps before running night jobs:

1. Ensure that no jobs are running from the system console. The system console is a specially designated terminal. It should be signed off before night jobs are run. The system console can be used to run night jobs, but you should first sign off and sign back on as the system operator without DODOPEN or DODOPEN2 in the user profile.
2. You should note that when creating user profiles using the IBM supplied WRKUSRPRF command, you can assign a default initial program to each user. All Dancik International users should be assigned DODOPEN or DODOPEN2 in library US as their initial program *EXCEPT* the system operator. The system operator should sign onto the system with a user ID that does not have any initial programs assigned. This ensures no files are opened while performing operational tasks.
3. Ensure that no user jobs are running under the QCTL subsystem by invoking the WRKACTJOB command. Search for jobs that do not begin with a Q running under QCTL and end them. If you do not *EVER* use the Dancik International software from the console, you will not see any jobs under QCTL that need to be cancelled.
4. Never sign onto the console as a user or with a user profile containing DODOPEN or DODOPEN2 as the start-up program.
5. Ensure the user profile running the night jobs has the proper system authorities, namely \*JOBCTL and \*IOSYSCFG, to run night jobs. If the user profile does not have \*JOBCTL and \*IOSYSCFG authority, night jobs is halted and a message is placed on QSYSOPR which is the message queue for night jobs.

Night jobs perform various important functions, but can be skipped (either accidentally or by design) without causing system problems. Night jobs officially delineate the end of a business day. In effect, not running night jobs keeps the current day open. For example, if you skip running night jobs on Monday, Tuesday's night jobs handles Monday and

Tuesday as a single day and processes them together. No data or functions are lost when night jobs is skipped. However, day-to-day statistics are more realistic when night jobs are run nightly.

Night jobs perform the following functions:

- Shuts down the interactive system (QINTER) so you cannot access the system while night jobs are running.
- Orders which are in the "Entered Today" status are moved to the "Entered Yesterday" status.
- All order statistics, such as Average Order Sizes and Average G.P. Dollars per Order, are updated with the new orders.
- A register of orders taken that day is printed and is labeled "Final Order Register".
- A register of all cancelled and adjusted orders is printed.
- Invoices processed during the day are updated into the Accounts Receivable and Invoice History Files. Orders displaying in the "Being Invoiced" status now show as closed or invoiced.
- All sales statistics are updated.
- A register of invoices processed that day prints and is labeled *FINAL INVOICE REGISTER*. A detailed list of inventory shipped is also printed.
- An Accounts Receivable sales edit is printed, proving all invoices were added to the AR system.
- Other small edit reports may print indicating invalid entries, if any.
- Temporary holds of inventory are examined. When the hold is one or more days past the order date, the hold is removed. The system takes into consideration whether or not night jobs run before or after midnight.
- The system recalculates inventory value for every warehouse, product, category, and so forth, in order to ensure up-to-date turns and GMROI statistics.
- Accounts receivable and accounts payable are balanced to ensure system integrity. Balance reports are printed.
- Price, cost, salesperson and other scheduled changes are performed. All changes are printed. Price, Cost, and Promotional File changes that were made, or will be made within a three day period, are listed.
- Transaction files are cleared and/or reset, and various non-critical system maintenance jobs are run.
- Optionally, a system backup is performed.
- Any jobs requested by users to run overnight, such as item number changes or reports, are processed.
- Automatic nightly EDI jobs are run if you use EDI

## Abbreviated Night Jobs - DP 6

Abbreviated night jobs are a shortened version of night jobs still containing all the important end-of-day processes. Abbreviated night jobs omit non-critical maintenance programs included in the regular night jobs. Use this option only when you need to post orders, invoices, adjustments, AR and AP entered since the last night job. Abbreviated night jobs are usually run on the last day of the month when you want to post all open activities into the current month prior to running End of Month activities. Do not use this option as a regular substitute for night jobs because many of the functions skipped in abbreviated night jobs are important even though they are not necessary on a nightly basis.

Ensure the user profile running the night jobs has the proper system authorities, namely \*JOBCTL and \*IOSYSCFG, to run night jobs. If the user profile does not have \*JOBCTL and \*IOSYSCFG authority, night jobs is halted and a message is placed on QSYSOPR which is the message queue for night jobs.

1. Select option **6** - Run Abbreviated Night Jobs from the Data Processing Menu (DP 6).
  - Enter **1** to load abbreviated night jobs, including some reports and functions that are not essential to end-of-day processing.
  - Enter **2** to load abbreviated night jobs, including only the essential end-of-day programs.

*Note: Dancik International recommends using Option 1 before closing AR End of Month.*

## Morning Jobs - DP 5

Morning jobs are entirely optional. Morning jobs allow you to perform a system backup and to perform an aging of the customer accounts receivable (AR) statistics. We recommend performing the system backup as part of night jobs. Night jobs also perform an aging of the AR. However, if your night jobs run on Friday night rather than Sunday, the AR on Monday morning is aged as of Friday night or Saturday rather than today. You should also note when using the AR ledger inquiry or the Cash Application screens, AR is aged instantly. Night and morning job aging affects only the aging statistics that display on various screens such as Credit Hold and Customer Master. None of this has any affect on your system if your night jobs run on Sunday night. Morning jobs only affect aging statistics on Monday mornings.



## Night Jobs Scheduler Maintenance - DP 7

You can schedule night jobs to be run from AS/400 Job Scheduler so you do not have to submit them manually each night. This ensures the process which keeps the stats files updated, and also performs backup runs on each day required. This helps relieve a burden from the operators who in the past have been responsible for submitting this step manually.

**Note:** This option checks to ensure the user profile scheduling the night jobs has the proper system authorities, namely \*JOBCTL and \*IOSYSCFG, to run night jobs. If the user profile does not have \*JOBCTL and \*IOSYSCFG authority, night jobs is halted and a message is placed on QSYSOPR which is the message queue for night jobs.

A user cannot schedule night jobs to run twice on the same day. Also, when determining what day to run night jobs, we must remember that the way users normally schedule night jobs is this: If they say they want to run night jobs on Friday they really want them to run Saturday morning (the day after the business day Friday). In using the scheduler, we would actually schedule this job for Saturday morning, not Friday.

- A job scheduler exception can only be created if there is a night job already scheduled for that date in the job scheduler.
- It is possible to schedule duplicate night jobs in QBATCH and the job scheduler for the same date/time. This could occur if you scheduled night jobs and you also ran it manually from the DP menu. Care should be taken to avoid this scenario. Once you have set the scheduler, you no longer need to submit night jobs manually.

A sample Night Jobs Scheduler screen is shown below, it is accessed via option 7 - **Night Jobs Scheduler Maintenance** on the Data Processing Menu (DP 7).

SAL AKAISAND		NIGHT JOBS RUN OPTIONS					2/14/10 13:55:27	
Run Night Jobs (Y/N)	Run Time	Job Ptu	Bckup (Y/N)	Backup Type *DANCIK or *SYSTEM	Backup Device or Interval	Run Night (Y/N)	Regular Jobs (Y/N)	Run Extra Maint Jobs (Y/N)
N	23:00:00	2	N	*SYSTEM	*DAILY	Y		N
Y	23:00:00	2	N	*DANCIK	T1	Y		N
Y	23:00:00	2	N	*DANCIK	T1	Y		N
Y	23:00:00	2	N	*DANCIK	T1	Y		N
Y	23:00:00	2	N	*DANCIK	T1	Y		N
Y	23:00:00	2	N	*SYSTEM	*WEEKLY	Y		Y
N	23:00:00	2	N	*DANCIK	T1	Y		N

Bottom

F4=Cancel.    F7=E0J.    F10=Exceptions.



## **Backup and Restore Menu (BCK)**

This option displays the Backup and Restore Menu, which should be accessed for initializing tapes and diskettes, and for performing manual backups and restores of libraries. Normally, a backup is done as part of your night jobs. Dancik International's program libraries are normally saved and restored as part of the release procedures. Therefore, you will rarely need to use this menu. Refer to the IBM Operator's Guide for the complete set of backup and restore commands.

## **Power Down and IPL**

This option issues the AS/400 command to power down the system and to optionally restart (IPL) the system. IPL (Initial Program Load) is the equivalent of re-booting a system. An AS/400 IPL is the equivalent to pressing CTRL + ALT + DEL on a personal computer to restart and reload from the operating system. There is no periodic requirement on the AS/400 for power down or IPL. However, during some hardware service and system software loading, you may need to power down and IPL. AN IPL does perform some system cleanup, and we recommend that a power down and IPL is performed at least twice annually.

## **Special System Maintenance Menu (SYS)**

These functions should be accessed only by administrators or operator level users.

These programs are designed to address special situations not usually encountered in the day-to-day operation of your system. They often pertain to initial installation of the system or periodic maintenance issues. Only MIS or system administrators should access these functions. In certain cases, you may want some of these utility programs available to non-MIS users. You can only accomplish this by:

- allowing those users command line access which enables them to directly call the function, or
- establishing the call of the function from a customized attention key program, or
- allowing those users direct access to these menus.



Understand Dancik Enterprise System Maintenance Functions

YOUR COMPANY NAME HERE : 1			
Special System Maintenance Functions Menu			
Opt	Description	Opt	Description
101	Organize Item Files	118	Run Inventory System Edit
102	Organize Customer Files	119	Run 2nd Inv System Edit
103	Organize Inventory Files	120	Run Inventory U/M Edit
104	Organize (Multiple Files) ..>	121	Purge Stray Special Instructions
106	Change Price,Cost,or Package Code		
107	Auto-Dup Items For New Color#	201	List/Delete Inactive Customers
108	Item File Mass Updates	202	List/Delete Inactive Shipto Ov..>
109	Duplicate Pricing Charts In Files	203	List Items Tagged "D" For Dele..>
110	Change Item#s (change all files)	204	Duplicate Chart Of Accounts Fo..>
112	Purge Open Order File	205	Insert Total Of Branch Budgets..>
113	Purge Inventory Files	206	Delete Unposted A/R Cash or Ma..>
114	Update Inventory Bal Fwd	207	Extract Item Records For Expor..>
115	Purge/List Inactive SKU/LOTS	208	Merge Item Records Exported Fr..>
116	Purge Invoice File	209	Delete Import/Export Item File..>
117	Fix Inventory Allocations	210	Switch From Method "A" to Meth..>
			More...
Enter Desired Menu / Option# ==>> SYS █			
F1=Add F2=Select F5=Personal F9=Additional F10=Scan F11=Alt View █			

# Electronic Customer Support Menu (CS)

This menu is used primarily by Dancik International to access user systems, and by users to allow Dancik International support personnel to access the user's systems. You can also use these functions in any multi AS/400 environment. These options will usually be set exclusively by Dancik International personnel in order to perform support activities. These include sending program updates, and accessing systems to resolve problems.

The Electronic Customer Support Menu is accessed via menu CS.

```

YOUR COMPANY NAME HERE : 1
Customer Support Menu

Opt Description                               Opt Description
CS Communications Functions:                  Communications Definitions
 1 Sign On to another system                 10 Create CS Communications Defini..
 2 Send a file to another system             11 Work w/ CS Line Configuration Sts
 3 Set your system to answer calls..        12 Work with CS Controller & Devic..
 4 Sign off from another system
 5 Set off answer mode

CS Profiles:
 6 Set CS Profile
 7 Work with all CS Profiles

CS Line Status Data Areas:
 8 Set CS Line Status Data Area
 9 Work w/ all CS Line Status Dtaara

Upgrades & Uploads:
13 Work w/ Processed Upgrades
14 Work w/ Available Upgrades

Night Support:
15 Night Support Operator Tasks

** UNIVERSAL OPTIONS **
993 Display System Messages

Enter Desired Menu / Option# ====> CS █

F1=Add  F2=Select  F5=Personal  F9=Additional  F10=Scan  F11=Alt View  H
    
```

## Work with Processed Upgrades - CS 13

This program displays all Dancik International updates that have been sent and parsed onto your system. Parsing refers to installing code changes into production.

When you enter option **13**, any update that is pending parsing or that has successfully parsed is listed.

## Work with Available Upgrades - CS 14

This option allows you to download and install software updates from Dancik into your production system.

## **Update Notification Message**

The process of implementing updates begins with receiving an Update Notification Message. If you are the system administrator and would like to receive email notifications contact Dancik International. Customers who automatically receive updates are sent an email notification of the download. The message subject will be Update Notification.

# Archive and Purge Files Menu (ARC)

The Archive and Purge Files Menu allows you to purge old data, and in certain cases, archive the data on disk or on tape. When data is purged, it is removed from the active files on your disk. Purging significant amounts of data can reduce the time it takes to perform the nightly backup, and improves system performance.

We recommend at least two years of data is kept on the system unless your current volume will not support that amount. When a file is archived, a copy of a portion of the active file is placed in library DODARC. The archived copy looks exactly like the original, but it is not backed up on a nightly basis.

We also recommend you backup the DODARC library after every new archive file is created. The backup tape should be stored until the next backup of the DODARC library.

```

YOUR COMPANY NAME HERE : 1
Archive & Purge Menu

Opt Description          Opt Description
1 Inquiry For Archived Orders An..>  994 Send System Messages
2 Inquiry For Archived Invoices      995 Your Printer Output
3 Inquiry for Archived Inventory     996 Output Distribution
5 Purge & Archive Orders And Pur..>  997 Event Management
6 Purge & Archive Orders And Pur..>  999 Signoff
10 Purge & Archive Invoices
11 Archive Inventory History
15 Purge/List Inactive Customers
16 Purge/List Inactive Shipto Ove..>
20 Purge Master File Updates Log
See Menu RSA for X by Y Archv Rpts

** UNIVERSAL OPTIONS **
993 Display System Messages

Enter Desired Menu / Option# ==>> ARC █

F1=Add  F2=Select  F5=Personal  F9=Additional  F10=Scan  F11=Alt View
    
```



# Output Distribution System Menu (ODS)

ODS is Dancik's own Output Distribution System. In a nutshell, ODS takes any ordinary spooled file and lets you extract it from your AS/400 and distribute it in one of the following ways:

- E-Mail
- Fax
- Network Folder
- Internet

These methods allow for easy access to information by users who do not have access to your system, such as suppliers, outside salespeople or customers. It also gives you the ability to take a report and pull it into a text document so the data can be manipulated in a spreadsheet program such as Microsoft Excel.

```

YOUR COMPANY NAME HERE : 1
Output Distribution Setup Menu

Opt Description
-----
SETUP OPTIONS :
 1 Authorization Maintenance
 2 Initial Distribution Options
 3 Program Options/User Authority
 4 User / Option Authority
 5 Work w/ Default Type & Values ..>
 6 Work w/ BCC E-Mail Addresses
 7 PC Document Types
 8 Reset Initial Files
 9 Work With Job Distribution Option
10 Settings and Layout Overrides

WEBSITE OPTIONS :
11 Work w/ Web Site Definitions
12 Work w/ Reports Posted to the Web

Opt Description
-----
13 Purge Reports Posted to the Web

OTHER RELATED OPTIONS :
21 Work w/ Spooled Files - O/D
22 User Request History Log
23 Purge History Log Files

IFS RELATED OPTIONS
30 Work w/ Data Extraction Files
31 E-Mail IFS File

Scheduled Distribution Options
40 Report Scheduler for Customers

More...

Enter Desired Menu / Option# ==> ODS █

F1=Add F2=Select F5=Personal F9=Additional F10=Scan F11=Alt View █
    
```



# Passwords

The Password File contains records for each program or menu that requires a password. The Password File is accessed by a command that is authorized only to personnel designated as system security officers. The system comes with all passwords preset to blanks and/or one other generic password. You should go through each record and either enter passwords or leave them blank if you do not require a password for that function. There are low-level and high-level passwords for every record. In some files, a low-level password allows you to perform limited changes, whereas the high-level password allows you to perform all changes. Also, in some instances, low-level and high-level passwords will allow the same functions.

All passwords have program or menu names. You can retrieve passwords by the program name and use the PageUp and PageDown keys to scroll through the passwords alphabetically.

*Note: This file is separate and in addition to the IBM system/sign on passwords. See IBM documentation or your system operator for more information about IBM system/sign-on password security.*

To access the password file, type **CTRLPASS** on the command line.

## Password Keywords

New password keywords are entered automatically into each system when you install the new release updates. Default passwords are assigned. It is important for system administrators to change the default passwords to values applicable to your installation.

There is now new password logic for the Promotion File:

- Low-level or high-level password is required to inquire. Have your system administrator set the low-level password field to blank if it is acceptable for anyone to inquire. When setting password requirements, remember that cost information may be included in the Promotion File.
- High-level password is required to add or update the file.
- These passwords are set using the PROM01 keyword.





## Specific Passwords

Following is a listing of all password records, including descriptions of the functions and what functions each password level will allow you to perform.

- 24STAT - FLOOR 24 and TILE LINE Statistics File - applicable only for FLOOR 24 and TILE LINE users.
- 99999 - Backup Libraries
- ABC01 - ABC Codes File - Password 1 and 2 will enable access to the ABC Rating Codes File for customers and items. This file is located on the second page of the File Maintenance Menu, More Files.
- APENTR - A/P Entry and A/P Transfer Open Payables
- APINQU - A/P Ledger and History Inquiry
- APPL01 - Application Codes File - This file is used only by Dancik International.
- APR001- AP Default Maintenance
- AR100R - AR/GL Interface
- AR2GL1 - G/L Interface Files - Password 1 or password 2 will enable access to the A/R, Invoice, and Inventory G/L Interface Files which are located on the Accounting File Maintenance Menu. Both passwords have the same level of authority.
- BACKLI - Backup Libraries - Password 1 or password 2 will enable access to the Backup Libraries option, if displayed on the Data Processing Department menus.
- BBMNO1 - Busy Accounts option (accounts in use on A/R)Promotion File
- BCLDEL - Delete Barcode Label
- BCLPCT - Bar Code Label Pool Control
- BCLP1P - Print Pick Labels
- BCLP4P - Barcode Label Pool
- BCLP6P - Request UCC128 Label
- BCLP7P - Pallet Sheet Reprint
- BCLP8P - Barcode Default File
- BCRD01 - Billto Credit Maintenance
- BBGP@01 - Budget PCT (%) Maintenance
- BILL01 - Billto/Customer File - Password 1 allows you to change only the following fields in the Billto File of the File Maintenance Menu.

- Name

- Address

- Phone#s

- Contact

- Doing Business As

- Mailing Lists

## *Understand Dancik Enterprise System Maintenance Functions*

- Branch
- Warehouse
- Shipto#
- Chain#
- Truck Routing
- Language Codes
- Comments
- AP3001 - Supp X-Ref Maintenance File
- AR100R - A/R to G/L Interface
- AR3005 - Payment Method Codes File
- CLAIMS - Claims Management System
- COMM02 - Aging Parameters within Base Commission File
- EF3007 - Retail Customer File - Allows you to establish low level and high level passwords
- EB4000 - E-pricing (Supplier Specific)
- SHIP01 - Shipto File Maintenance
- QL3000 - Cashier Code File

## Password 2 (high-level)

These passwords allow you to change all fields.

- BOFILL - Back Order Fill - Both passwords 1 and 2 will let you enter and update receipts in the Receipts and Back Order Fill Menu.
- BOMK01 - BOM/Kit File
- BRAN01 - Branch File - Both passwords 1 and 2 will let you inquire, enter and update the Branch File. You can not inquire without the low-level password. Set the passwords to blanks for unrestricted access.
- BRNMGR - Branch Manager Menu
- BSHP01 - Billto Delivery Maintenance
- BSHP02 - Billto Shipto Maintenance
- BUDG@1 - Budget File Maintenance
- BULL01 - Bulletin Board Maintenance - Both passwords 1 and 2 will let you enter and update the Bulletin Board in Customer Orders Menu.
- CASH01 - Order Desk Cash - Both passwords 1 and 2 will let you access the Order Desk Daily Cash & Sales Reports from the Order Desk Additional Functions Menu.
- CCTR01 - Cost Center File - Both passwords 1 and 2 will let you enter and update the Cost Center File.
- CHAR01 - Chart of Accounts File - Password 1 will let you inquire and change the description and budget fields in the Chart of Accounts File. Password 2 will let you change the description and the budget fields in the Chart of Accounts File. It will also let you enter and update the history and current columns of the Chart of Accounts File. Once you've set up the Chart of Accounts File, this password must be set so that only the system programmers can access. The current and history columns should not be altered once the system is activated. The system automatically maintains these fields. Your Controller and or Vice President of Finance must be advised if this high-level password is known by anyone in your company. It is best that only the system administrator is aware of this password.
- CHGORD - Cancel and Change Orders - Password 1 and 2 will enable you to cancel and change orders in Open Order File Inquiry and Search by pressing F6. For more information, see POCN password.
- CLAS01 - Class Codes File - Both passwords 1 and 2 will allow you to enter and update the Classification Codes File. Only password 2 (high-level) will allow you to see G.P\$ and G.P% on the Sales Analysis and **F4** Sales Statistics screens. Any user, regardless of password, can review the tables of classification codes.
- CLSTRK - Close A Truck
- COBA01 - Branch/Cost Center Combinations File
- CODREP - COD Reports (on Warehouse Functions Menu)
- COMM01 - Commission Rates - Both passwords 1 and 2 will allow you to enter and update the Commissions Files.
- COMP01 - Company File - Both passwords 1 and 2 will let you inquire, enter and update the Company File. Only password 2 (high-level) will allow update of the fiscal and EOM date fields. The high-level password should be known only to the

system administrator. You can not inquire without the low-level password. Set passwords to blanks to enable unrestricted access.

- COMSET - Company Settings
- COST01 - Cost File Maintenance - Password 1 will let you inquire the Cost File only. Password 2 will let you inquire and update the Cost File.
- CTRLUS - User Control Panel - Both passwords 1 and 2 will allow you to change the control panel for each user.
- CTRL01 - Control Panel - Both passwords 1 and 2 will allow you to change the control panel for each workstation.
- CTRL03 - Control Panel PRT Defaults
- CTRL04 - Control Panel Work Station Default
- CTRL06 - Control Passwords
- CTRL10 - Number Wheel Maintenance
- CUPR01 - Customer Special Price File - Both passwords 1 and 2 will allow you to access the Customer Special Price File, option 18 on the File Maintenance Menu,
- CUPT03 - Customer Preferences Table
- CURR01 - Currency Exchange Rate
- CUSR01 - Expect Customer Rate
- CUSR04 - EDI Customer X-Ref Table
- CUSR05 - RDC Warehouse X-Ref Table
- CUSR06 - EDI Item Exceptions
- DELINV - Void Today's Invoices - Both passwords 1 and 2 will allow access to the Void Today's Invoice program on the Order Desk Menu.
- DELI01 - Delivery Charges File
- DUTY01 - Duty Rate Maintenance
- EAUDUP - EDI Audit File Maintenance
- EDIX01 - EDI Xref File - Both passwords 1 and 2 allow you access to the EDI Cross Reference File in the EDI and Bar Code Menu.
- EUCX01 - EUC Matrix Maintenance
- FBALEY - Fund Balance Roll
- FBAL01 - Fund Balance Inquiry
- FLA551 - AP EOM
- FLR24S - Floor 24 Settings
- FRTC01 - Freight Cost Override Maintenance
- FUND01 - Fund File Maintenance - Both passwords 1 and 2 allow you to enter and update the Fund File.
- GOLIVE - Go Live Menu
- GOTOAC - Go to Accounting - Refer to GOTOGL.
- GOTOAL - Go to A/R Reports Menu from Listings and Reports - Both passwords 1 and 2 allow access to the A/R Reports Menu from the Listings and Reports Menu.
- GOTOAR - To AR Menu / Not Used
- GOTODF - D.F.U. - Used only by Dancik International, or system programmers. Make sure both passwords are set to secure this option from all users, except programming staff.

- GOTODP - Go to Menu DP (Data Processing) from Menu US - Both passwords 1 and 2 allow access to Menu DP from Menu US.
- GOTOEB - EDI & Bar Code Menu - Password 1 and 2 will let you access the EDI and Bar Code Menu from Menu DP.
- GOTOEC - ECS Menu - Password 1 and 2 allow access to the ECS Menu from Menu DP.
- GOTOFS - Go to Financial Statements - Both passwords 1 and 2 will allow access to the General Ledger Financial Statements Menu.
- GOTOGL - Go to Accounting from US - Passwords 1 and 2 will allow access to the Accounting Menu from Menu US.
- GOTOG2 - Go to General Ledger - Passwords 1 and 2 will allow access to the General Ledger Menu from the Accounting Menu.
- GOTOLI - Go to Listings and Reports - Both passwords will allow access to the Listings and Reports Menu from the Menu US.
- GOTOOS - Other System Inventory Menu
- GOTOOU - Output Distribution System Menu
- GOTOPU - Archive/Purge Menu
- GOTORE - Restart Menu - Used only by Dancik International during the initial system installation. Leave passwords set so that no user can access the system.
- GOTOSS - System Settings Menu
- GOTOSY - Special System Maintenance Functions - Both passwords allow access to the Special System Maintenance Menus from Menu DP. These menus contain many special functions which should be secured from most users.
- GVAL01 for GL Account Validation File
- ILEEX1 - ILE EX1
- ILEEX2 - ILE EX2
- IN3000 - Rebate Reconciliation, Detail Screen (with individual payments)
- INVALL - Allow Invoice All Workstations - Both passwords will allow you to invoice in batches for all workstations from the Invoicing Menu. All users can invoice batches entered at their own workstation. This password secures only the option to run invoices that were entered on any workstation.
- INVCOD - COD Invoicing (on Warehouse Functions Menu)
- INVENT - Inventory Receipts - Both passwords will allow you to enter receipts. This password is for immediate posting and pre-receipts screen.
- INVSTA - Invoice by Status CD
- INVTRK - Invoice Truck Route/Status
- INV001 - Invent GL DEF MNT
- IN010R - Rebate Reconciliation
- ISO01 - ISO Maintenance
- ISTK01 - SKU File Maintenance
- ITEM01 - Item and Price Files - Either password will let you enter and update the Price File. Password 1 will allow you to inquire in the Item File including costs, but no updates are allowed. Password 2 will allow you to inquire all fields, enter, and update in the Item File. A password is not necessary to inquire in the Item or Price File. However, without a password, no costs are displayed.

- ITMMAS - Item Mass Updates - Both passwords will enable you to access the Item File mass updates. Only the high-level password allows access to the Delete field. We recommend that you set the high-level password to a value that no one is likely to remember or use accidentally. Items should only have the delete position accessed during the initial set up stage of the system.
- IV1000 - Allocation Swapping
- IV1001 - Allocation Swapping Defaults Maintenance
- IVADJS - Slabs Adjustments - Both passwords will allow you to enter and update the Slabs Adjustment Program.
- AVADJ1 - Adjust Inventory - Password 1 will allow you to adjust inventory only. Password 2 will allow you to adjust inventory and change the base and freight cost.
- IVCC - Cycle Count Update - Both passwords will let you post (update) Cycle Counts, option 7 on Inventory Menu.
- IVCC01 - Enter Cycle Counts
- IVRECS - Slabs Receipts - Both passwords will allow you to enter and update the Slabs Receipts program.
- IVREC6 - Reassign Manifest
- IVR002 - Inventory to GL Report
- IVR101 - Inventory Adjustment by S/N <?
- IVR103 - Correction Cycle Counts
- IVTRFR - Inventory Transfers Immediate - Both passwords will allow you to transfer materials from one warehouse to another via option #3, Inventory Transfers Immediate Posting, from the Inventory Menu.
- LABS01 - Labels Styles File - This file is used only by Dancik International.
- LABX01 - Label Cross Reference File - Both passwords 1 and 2 will enable access to the Label Cross Reference File in the EDI and Bar Code Menu.
- LAMR01 - Label Xref File
- MENBPU - Bar CD Utility Menu
- MINO01 for the new Minimum Order Charges File
- MPCU01 for Mass Price/Cost Update
- MSCBCL for the Miscellaneous Bar Code Print Option
- OPENAR - Update Open A/R, Cash, Sales - Both passwords will allow you to enter and update using the Enter Cash, Enter Sales, and Update Open A/R programs.
- OR0000 - Order Ship Date and Routing Updates (on Warehouse Menu)
- ORST01 - ORD/SN Status CD File
- POCN - Cancel and Change Open Orders - Both passwords will allow you to cancel and change open orders, using option 11 on the Order Desk Additional Functions Menu. Also see CHGORD password.
- POCOPY - Order Copies on Order Desk - Both passwords will allow you to use Print Copies of Orders on the Order Desk Additional Functions Menu.
- POCOPY2 - Order Copies on Customer Service
- POCOPY - Order Copies via F10
- POCRL1 - Order Credit Release - Both passwords will allow you to release orders that are on credit hold.

- POOLDT - Set Pool Date
- POREGI - Order Register
- POSPCL - Print Special Orders Purchase Orders - Both passwords will allow you to print special order purchase orders from the Order Desk Menu.
- POTRFR- Transfer Pick Lists - Both passwords will allow you to print the transfer pick lists from the Order Desk Menu.
- PROB01 - System Event Management
- PROD01 - Product Line File - Both passwords will let you enter and update the Product Line File.
- PROD03 for Product Line Forecast File (for new Product Line Forecast Reports and Maintenance)
- PROM01 - Promo File - Both passwords will let you enter and update the Promotion File.
- PSTDRR - Clear Unvouchered
- PUR01 - Purchase Rules Maintenance and Supplier/Product/Warehouse Cross Reference Table and Supplier Reorder Parameters Table.
- PWRIPL - Power Down and IPL - Both passwords 1 and 2 will allow you to use the DP Menu option for powering down the system and running IPL.
- QCKDEP - Quick Deposit Entry
- QUAL01 - Qualification Codes File - This file is used only by Dancik International.
- QUOT01 - Quote Management
- RBAT01 - Suppliers Rebate Maintenance
- RDCC04 - CRA Customer Xref
- RDCI06 - CRA Item Except Table
- RD005R - RDC Warehouse Xref Table
- RD009R - RDC Zone Maintenance
- RD010R - RDC Item Xref Maintenance
- RD011R - Warehouse Overhead Fee Table
- RD041R - RD041R Program
- RFST02 - Subser Maintenance
- ROUTE1 - Routes Files - Both passwords 1 and 2 will allow access to the Truck Routes File in the Warehouse Menu under Order Desk Additional Functions.
- SAVDOD - Save Dancik International Libraries
- SCNDSK - Find Matching Files
- SEREYI - Non-serial to Serial
- SHIP02 - Trucking Analysis Report
- SLMG01- Sales Manger File
- SLMN01 - Salesperson File
- SLMN03 - Salesperson Assignment
- SLSREL - Salesperson Relationships
- SLTR01 - Sales Territory File
- STDORD - Standard Order File Maintenance
- STMX01 - Stock Matrix Maintenance
- STOP01 - Stops File - Both passwords 1 and 2 will allow access to the Truck Stops File in the Warehouse Menu under Additional Order Desk Functions Menu.



- STPSCH - Stop Schedule Maintenance - Both passwords 1 and 2 will allow access to the Truck Stop Schedule Maintenance in the Warehouse Menu under Additional Order Desk Functions.
- SUPP01 - Supplier File Maintenance
- SUPX01 - Supplier Currency Code M
- SYS001 - System Wide Settings File
- SYST01 - System Tables Maintenance
- SWR001 - Not Used
- SYSX01 - System Xref Table
- TAX01 - Tax File Maintenance
- TERM01 - Terms and Dispute Code - Both passwords will allow you to enter and update the Payment Terms File and the Dispute Codes File.
- TFRF01 - Interwarehouse Freight Costs
- TRACK1 - Run Track File - Both passwords will allow you to access information regarding truck runs in the Warehouse Menu under Additional Order Desk Functions Menu.
- TRAN01 - Transfer File - Both passwords will allow you to access the Transfer File in the Warehouse Menu under Additional Order Desk Menu.
- VEND01 - Vendor File Maintenance
- VHCL01 - Vehicle File - Both passwords will enable access to the Vehicle File in the Warehouse Menu under Additional Order Desk Menu.
- VOIDIN - Void Invoices
- VOIDOR - Void Orders
- VOIDRE - Void and Reinstate
- WALO01 for Warehouse Locations File
- WAMX01 - Warehouse Matrix - Both passwords will allow you to access the Warehouse Matrix File.
- WARA01 for Warehouse Areas File
- WAREOI - Warehouse File - Both passwords will let you enter and update the Warehouse File.
- WARE02 for the Warehouse Settings Program on System Settings Menu
- WHSR16 - Warehouse Capacity Planning
- WHSR19 - Master Pick List
- WHSR22 - Truck Mode Maintenance
- WRTD01 - Inventory Write Downs

# Menu Bars

Each AS/400 user can be assigned to a customized pull-down menu bar similar to those used in many PC-style programs. You can also customize menu bars to specific users or groups of users. These menu bars automatically adjust their features to the terminal or PC interface you are utilizing. These features include the ability to use a mouse, pointing device, or keyboard to scroll through options and to point and click, or position and enter. Menu bars can be configured to appear when you press the ATTN/ESC (attention/Escape) key. In effect, these menu bar programs replace the Operational Assistant Program, which is the IBM supplied default program for every user's Attention key.

## Standard Menu Bar Programs

Menu Bar	Description
MNUB01CL	For basic users. Offers very limited operational control.
MNUB02CL	For users who have system operator responsibilities.
MNUB03CL	For users with both operational and file maintenance responsibilities.
MNUB04CL	For users with both operational and file maintenance responsibilities.
MNUB05CL	This menu bar is designed for accounting personnel and should be used only from accounting programs. It contains files and inquiries commonly used by accounting personnel.
MNUB06CL	This menu bar is intended for customer service personnel who require a few limited operations and file options, event management, and some utility programs.
MNUB07CL	For Purchasing users.
MNUBWHCL	For Warehouse personnel



## Chapter 4 - **How to direct Reports to Printers**

### **WRKUSRPRF/ Print device**

If you wanted to run an X by Y report or an inventory report it would be looking at this print device to determine where it will print. We recommend setting the print device to a Phantom Printer. This will allow access to reports via the Spool File. Once reports are in the Spool File you can choose to direct them to a printer or just view them on the screen. Use the Control Panel or use the Warehouse File in order to determine where the Pick Lists and Acknowledgements will print.

For this example we will be checking our set up for our employee GBRANNEN.

1. from a command line type **WRKUSRPRF GBRANNEN**
2. press **ENTER**
3. **TAB** to the **OPT** field next to the user
4. type **2** in the **OPT** field
5. press **ENTER**
6. press **F10**
7. press **PAGEDOWN** twice

```

Change User Profile (CHGUSRPRF)

Type choices, press Enter.

Job description . . . . . DES12PRD   Name, *SAME
Library . . . . . FVUSER       Name, *LIBL, *CURLIB
Group profile . . . . . *NONE       Name, *SAME, *NONE
Owner . . . . . *USRPRF     *SAME, *USRPRF, *GRPPRF
Group authority . . . . . *NONE       *SAME, *NONE, *ALL...
Group authority type . . . . . *PRIVATE   *PRIVATE, *PGP, *SAME
Supplemental groups . . . . . *NONE       Name, *SAME, *NONE
+ for more values
Accounting code . . . . . *BLANK
Document password . . . . . *SAME       Name, *SAME, *NONE
Message queue . . . . . GBRANNEN   Name, *SAME, *USRPRF
Library . . . . . QUSRSYS     Name, *LIBL, *CURLIB
Delivery . . . . . *NOTIFY     *SAME, *NOTIFY, *BREAK...
Severity code filter . . . . . 0         0-99, *SAME
Print device . . . . . *WRKSTN   Name, *SAME, *WRKSTN, *SYSVAL

More...

F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys

```



# Workstation ID Control Panel - SET 1

Enter the Printer ID for Orders, POs, Invoices, Credit Held, Packing Lists, Checks and Cash & Carry Labels on page 3 of the Work Station ID Control Panel.

1. type **SET** in the **ENTER DESIRED MENU** field
2. type **1** in the **OPTION#** field
3. press **ENTER**
4. type in the high level password in the **PASSWORD** field
5. press **ENTER**
6. **TAB** to the **OPT** field next to the desired **WORK STATION**
7. type **U** in the **OPT** field
8. press **ENTER**
9. press **F11** twice

```

Control Panel File Maintenance
Inventory, Warehouse & Printing Options
A1
PAGE 3
Work Station . . . . . : A1
Update

Prt ID FormCode
Print Orders on . . . . . : P9 ? L
Print P/Os on . . . . . : P9 ? -
Print Invoices on . . . . . : P9 ? L
Print Credit Held on . . . . . : XX ? -
Print Packing Lists on . . . . . : P9 ? -
Print Checks on . . . . . : P9 ? L ?
Print Cash & Carry Labels on : - ?
Price On Pick/Pack Lists . . . : N Y/N/C
Auto-Print PO Date Change Rpt: N Y/N
On Printer . . . . . : - ?

Warehouse Order
DFT Inventory Screen Type . . : - ?
Enabled for Barcode Scanning?: N Y/N
R/F Code for Work Station . . : - ?
Work Station Type . . . . . : - ?
Status Update Requires Scan Of:
Item # : N Y/N BadgeID : N Y/N
S/N # : N Y/N To Loc . : N Y/N
From Loc: N Y/N

F1=Next Record F2=Printer Overrides F6=Return F7=Exit F11=Page 1
Press ENTER to accept modifications being made...
    
```

## Print Orders on

Enter the printer ID on which customer orders should print. This controls order acknowledgements, quotations, and point-of-sale invoices only. Pick lists and other warehouse documents are usually controlled in the Warehouse File program. Pick lists print only on the printer designated here if no pick list printer is designated in the Warehouse File.

```

Control Panel File Maintenance
Inventory, Warehouse & Printing Options
A1
PAGE 3
Work Station . . . . . : A1
Update

Print Orders on . . . . . : P9 ?      L
Print P/Os on . . . . . : P9 ?      -
Print Invoices on . . . . . : P9 ?      L
Print Credit Held on . . . . . : XX ?      -
Print Packing Lists on . . . . . : P9 ?      L ?
Print Checks on . . . . . : P9 ?      L ?
Print Cash & Carry Labels on : - ?
Price On Pick/Pack Lists . . : N Y/N/C
Auto-Print PO Date Change Rpt: N Y/N
On Printer . . . . . : - ?

Warehouse Order
DFT Inventory Screen Type . . : - ?      Status Update Requires Scan Of:
Enabled for Barcode Scanning?: N Y/N      Item # : N Y/N BadgeID : N Y/N
R/F Code for Work Station . . : - ?      S/N # : N Y/N To Loc .: N Y/N
Work Station Type . . . . . : - ?      From Loc: N Y/N

F1=Next Record  F2=Printer Overrides  F6=Return  F7=Exit  F11=Page 1
Press ENTER to accept modifications being made...
    
```

## Print P/Os on

Specify the printer ID for purchase orders.

## Print Invoices on

The printer ID here is used for regular batch invoices. The point-of-sale invoices (F9) print on the printer specified in the Print Orders option.

## Print Credit Held on

The printer ID entered here is used for printing an acknowledgement of a credit held order when orders are automatically diverted to a credit hold. You should ensure this printer is in the credit department. Enter XX if you do not have a printer in the credit department, or if your credit department works with the credit screens and does not require a printed acknowledgement that an order is on credit hold.

## Print Packing Lists on

Enter the printer ID for the printer on which you want the packing lists to print. Packing lists are a print option in the Warehouse Shipping Reports Program. They print on the same form as picking lists and are very similar to picking lists. This option pertains to packing lists that are generated using the Warehouse Shipping Reports option, as well as to individual packing lists printed via the F10 print option in Order Inquiry.

## Print Checks on

Enter the printer ID if you want to print checks on a specified printer. If this field is blank, checks print to your default system printer.

```

Control Panel File Maintenance
Inventory, Warehouse & Printing Options
A1
PAGE 3
Work Station . . . . . : A1
Update

Prt_ID FormCode
Print Orders on . . . . . : P9 ? L
Print P/Os on . . . . . : P9 ? -
Print Invoices on . . . . . : P9 ? L
Print Credit Held on . . . . . : XX ? -
Print Packing Lists on . . . . . : P9 ? -
Print Checks on . . . . . : P9 ? L ?
Print Cash & Carry Labels on : - ?
Price On Pick/Pack Lists . . . : N Y/N/C
Auto-Print P0 Date Change Rpt: N Y/N
On Printer . . . . . : - ?

Warehouse Order
Status Update Requires Scan Of:
Item # : N Y/N BadgeID : N Y/N
S/N # : N Y/N To Loc : N Y/N
From Loc: N Y/N

DFT Inventory Screen Type . . : - ?
Enabled for Barcode Scanning?: N Y/N
R/F Code for Work Station . . : - ?
Work Station Type . . . . . : - ?

F1=Next Record F2=Printer Overrides F6=Return F7=Exit F11=Page 1
Press ENTER to accept modifications being made...

```

### Form Code

This code is used to indicate special print instructions. Some of the available codes are:

- C - (for checks) Canadian Cheque Form on line printer
- D - (for checks) Canadian Cheque Form on laser printer

*Note: All checks used by customers of financial institutions operating in Canada must follow the standard format for checks.*

**M** - (for checks) This laser style code increases the font size making the checks easier to read. Form Code "M" can be used in the United States, Canada, and Australia. Do not change check form codes until you have performed a test run on plain laser paper, and then worked with your forms printer to adjust your pre-printed forms to match the new layout.

**L** - enables laser style "portrait" invoices to print on various laser printers.  
1 or blank - For 8.5" x 11" dot matrix forms in landscape mode.  
2 - For 8.5" x 11" dot-matrix forms in landscape mode, for PC-style printers that cannot print on the top line of the form, this code causes the print alignment to alter slightly.

**K** - This format uses the columns: (List) Price, U/M, Discount%, and Extended Amount. The use of forms code K requires a special pre-printed form with new column headings. Do not activate this feature before ordering a new form, with a new design, as approved Dancik International



```

Control Panel File Maintenance
Inventory, Warehouse & Printing Options
A1
PAGE 3
Work Station . . . . . : A1
Update

Print Orders on . . . . . : P9 ?      L
Print P/Os on . . . . . : P9 ?      -
Print Invoices on . . . . . : P9 ?      L
Print Credit Held on . . . . . : XX ?      -
Print Packing Lists on . . . . . : P9 ?      -
Print Checks on . . . . . : P9 ?      L ?
Print Cash & Carry Labels on : - ?
Price On Pick/Pack Lists . . : N Y/N/C
Auto-Print PO Date Change Rpt: N Y/N
On Printer . . . . . : - ?

Warehouse Order
DFT Inventory Screen Type . . : - ?      Status Update Requires Scan Of:
Enabled for Barcode Scanning?: N Y/N      Item # : N Y/N  BadgeID : N Y/N
R/F Code for Work Station . . : - ?      S/N #  : N Y/N  To Loc  : N Y/N
Work Station Type . . . . . : - ?      From Loc: N Y/N

F1=Next Record   F2=Printer Overrides   F6=Return   F7=Exit   F11=Page 1
Press ENTER to accept modifications being made...
    
```

## Print Cash & Carry Labels on

The setting sets a default printer for cash and carry labels. This feature allows a customer to buy inventory in a retail setting (such as items stored behind a counter) and carry it out instead of having to go through the warehouse. A label is printed at the counter to show that the customer has paid for the material. As soon as the order is processed, the system directs a label to be generated. These cash and carry labels automatically bypass the pick label pool.

# Warehouse File (FIL 8)

You will assign the Warehouse documents a Printer ID from within the Warehouse File.

1. type **FIL** in the **ENTER DESIRED MENU** field
2. type **8** in the **OPTION#** field
3. press **ENTER**
4. type in the warehouse code in the **ENTER WAREHOUSE#** field
5. type **U** in the **ENTER ACTION CODE** field
6. type the high level password in the **PASSWORD** field
7. press **ENTER**

WAREHOUSE# RAL	UPDATE	WAREHOUSE FILE
Name <u>DANCIK INT-RALEIGH</u> Addr1 <u>8101 BRIER CREEK PWKY</u> Addr2 <u>SUITE 501</u> City <u>RALEIGH</u> State <u>NC</u> Zip <u>27617 0000</u> Ctry <u>__</u> Phone# <u>919 356 7878</u> Fax# <u>919 356 7800</u> Auto-Fax# <u>_____</u>		
Company#.. <u>0</u> (leave blank if this warehouse is shared by multiple companies) Branch#... <u>__</u> (leave blank if this warehouse is shared by multiple branches)		
Designated Pick List Printer ID: <u>P1</u> Designated Will Call P/L Print ID: <u>P1</u> Designated Bar Code Printer ID.: <u>P2</u> Designated Serial# Tag Printer ID: <u>P2</u> Designated Transfers Printer ID: <u>P1</u> (must enter for stock transfers) Designated Slab Printer ID.....: <u>P9</u> Auto Print Bar Code Pick Labels? <u>N</u> (Y/N/O/T/P) Shipping Labels? <u>N</u> (Y/N/O/T) Allow Other Companies To Order From This Warehouse? <u>Y</u> (Y/N) Tax Codes For Will Call/Pick-Up...State: <u>__</u> Other: <u>__</u> (enter if applicable) Comments: <u>_____</u> D/del <u>__</u>		
<u>F4=Sales Analysis. F6=Search. F7=E0J. F8=Screen 1. F9=Inv Value.</u>		

## Designated Pick List Printer ID

The ID for the printer you want the pick lists to print to for this warehouse. Any pick list generated to this warehouse is automatically routed to this printer. This overrides the printer ID set up in the Control Panel. This permits printing order acknowledgements on a different printer than the pick lists are printed on, even if you press **F4** to print both documents at the same time. You can enter **XX**, or other code, that is not an actual printer. This indicates that Pick Lists, other than for will call orders, should not be printed.

## Designated Bar Code Printer ID

The ID of the printer on which the barcode pick labels print. If you activate any of the bar code print options, you must enter a valid printer ID for each warehouse. This printer ID must relate to a printer capable of printing bar code labels.

WAREHOUSE# RAL	UPDATE	WAREHOUSE FILE
Name <u>DANCIK INT-RALEIGH</u>		
Addr1 <u>8101 BRIER CREEK PWKY</u>		
Addr2 <u>SUITE 501</u>		
City <u>RALEIGH</u>		
State <u>NC</u> Zip <u>27617 0000</u> Ctry <u>__</u>		
Phone# <u>919 356 7878</u> Fax# <u>919 356 7800</u> Auto-Fax# <u>_____</u>		
Company#.. <u>0</u> (leave blank if this warehouse is shared by multiple companies)		
Branch#... <u>__</u> (leave blank if this warehouse is shared by multiple branches)		
Designated Pick List Printer ID: <u>P1</u> Designated Will Call P/L Print ID: <u>P1</u>		
Designated Bar Code Printer ID.: <u>P2</u> Designated Serial# Tag Printer ID: <u>P2</u>		
Designated Transfers Printer ID: <u>P1</u> (must enter for stock transfers)		
Designated Slab Printer ID.....: <u>P9</u>		
Auto Print Bar Code Pick Labels? <u>N</u> (Y/N/O/T/P) Shipping Labels? <u>N</u> (Y/N/O/T)		
Allow Other Companies To Order From This Warehouse? <u>Y</u> (Y/N)		
Tax Codes For Will Call/Pick-Up...State: <u>__</u> Other: <u>__</u> (enter if applicable)		
Comments: <u>_____</u> D/del <u>_</u>		
F4=Sales Analysis. F6=Search. F7=E0J. F8=Screen 1. F9=Inv Value.		

## Designated Transfers Printer ID

The ID of the printer on which you want the stock transfer Pick Lists to print. Any stock transfer pick lists generated to this warehouse will automatically be routed to this printer. It is essential for this field to be entered for each warehouse if you use the Stock Transfer system.

## Designated Will Call P/L Print ID

The ID for the printer you want the will call pick lists to print to. Any pick list generated to this warehouse is automatically routed to this printer. This overrides the printer ID set up in the Control Panel. This permits printing order acknowledgements to be printed on a different printer than the pick lists are printed on, even when you press **F4** to print both documents at the same time.

## Designated Serial # Tags Printer ID

The ID of the printer on which you want the serial number tags to print for this warehouse. This is an optional feature for rolled goods. During the receiving process, a serial number tag can be printed either on paper, card stock, or on a bar code label.

## Chapter 5 - Prevent Users from Accessing Cost or Adjusting Inventory

### Prevent User from Accessing Cost - SET 32

The User ID Control Panel grants the user application specific rights and assigns defaults. For our example we will be restricting GBRANNEN from accessing cost.

1. type **SET** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **32** in the **OPTION#** field
4. press **ENTER**
5. type the high level password in the **ENTER PASSWORD** field
6. press **ENTER**
7. **TAB** to the **OPT** field next to the **USER (GBRANNEN)**
8. type **U** in the **OPT** field

Control User File Maintenance				A1
Opt	User	Name	Dft Init	Navigator Auth Class
	ANGUYEN		AN	
	DANCIK	Dancik Support Profile	AN	
	DANCIK	Dancik International		*ALL
U	GBRANNEN	Gary Brannen	GB	

Bottom

Options ==> C=Cpy D=Del I=Inq U=Upd W=Web Access Y=Web Control Panel  
 F7=Exit F8=Password

Users that are **HIGHLIGHTED** indicate that the User profile does not exist.

9. press **ENTER**

Control User File Maintenance		A1
User .....	GBRANNEN	Change
Full Name .....	Gary Brannen	
ODS Dft - Email Address ...	gbrannen@dancik.com	
Default Initials .....	GB	Allow To Adjust Inv Locations : Y Y/N
Default Department.....		Allow To Adjust Inv Shades .... Y Y/N
Event Mgmt Security Level :	U	Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders .....	N Y/N	Allow To Adjust Inv Quantity : Y Y/N
Limit to Business Entity ..		Allow To Adjust Inv Cost ..... Y Y/N
Billto Notepad Option ....	I I/U/S/N	Allow To Enter Orders ..... Y Y/N/H
Update Salesperson in O/E :	Y Y/N/B/V	Allow To Enter Direct Ships ... Y Y/N
Limit To Salesperson# .....		Allow To Enter P.O.s ..... Y Y/N
Default Retail Acct# .....	000099	Allow Build-A-Truck Updates ... N Y/N
Limit Credit Release Screen To:		Default Order Inquiry Options:
Company# .....		Open Only .....
Branch .....		# Of Prior Months .....
Credit Manager Code .....		
F6=Return F7=Exit F11=Screen 2		

## Show Costs on Orders = N

Use this parameter to establish, by user, who can view product costs in certain programs. Enter **N** to indicate that costs or gross profit statistics should not be displayed to this user. Optionally, enter **Y** to allow costs to show. This option affects the Order Entry, Order Change, Order Inquiry, and Invoice Inquiry Screens. Furthermore, cost on POs and transfers will not display while performing searches.

*Note: If you enter an N in this field, the user is restricted to only running X by Y Reports in customer version.*

# Prevent User from Adjusting Inventory and Cost - SET 32

The User ID Control Panel grants the user application specific rights and assigns defaults. For our example we will be restricting GBRANNEN from adjusting inventory and cost.

1. remain in **CONTROL USER FILE MAINTENANCE** under **GBRANNEN**

Control User File Maintenance		A1
User .....	GBRANNEN	Change
Full Name .....	Gary Brannen	
ODS Dft - Email Address ...	gbrannen@dancik.com	
Default Initials .....	GB	Allow To Adjust Inv Locations : <input type="checkbox"/> Y/N
Default Department.....		Allow To Adjust Inv Shades ... : <input type="checkbox"/> Y/N
Event Mgmt Security Level :	U	Allow To Adjust Inv Sts Codes : <input type="checkbox"/> Y/N
Show Costs on Orders .....	N Y/N	Allow To Adjust Inv Quantity : <input type="checkbox"/> Y/N
Limit to Business Entity ..		Allow To Adjust Inv Cost .....
Billto Notepad Option .....	I I/U/S/N	Allow To Enter Orders .....
Update Salesperson in O/E :	Y Y/N/B/V	Allow To Enter Direct Ships ...
Limit To Salesperson# .....		Allow To Enter P.O.s .....
Default Retail Acct# .....	000099	Allow Build-A-Truck Updates ...
Limit Credit Release Screen To:		Default Order Inquiry Options:
Company# .....		Open Only .....
Branch .....		# Of Prior Months .....
Credit Manager Code .....		
F6=Return F7=Exit F11=Screen 2		

## Allow User to Adjust...

The following five options control the type of inventory adjustments the user can perform. These settings also apply to conventional terminals, PCs, and RF cycle count procedures.

*Note:* to prevent **GBRANNEN** from making Inventory Adjustments be sure to set each of the following fields to **N**.

## Inventory Locations = N

Enter **Y** or **N**. This field controls whether or not the user can adjust inventory locations.

## Inventory Shades = N

Enter **Y** or **N**. This field controls whether or not the user can adjust shades.

## Inventory Status Codes = N

Enter **Y** or **N**. This field controls whether or not the user can adjust serial number status codes.

```
Control User File Maintenance                                     A1
-----
User .....: GBRANNEN                                         Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...: gbrannen@dancik.com
-----
Default Initials .....: GB          Allow To Adjust Inv Locations : N Y/N
Default Department.....:          Allow To Adjust Inv Shades ...: N Y/N
Event Mgmt Security Level : U          Allow To Adjust Inv Sts Codes : N Y/N
Show Costs on Orders .....: N Y/N    Allow To Adjust Inv Quantity  : N Y/N
Limit to Business Entity ..:          Allow To Adjust Inv Cost .....: N Y/N
Billto Notepad Option ....: I I/U/S/N  Allow To Enter Orders .....: Y Y/N/H
Update Salesperson in O/E : Y Y/N/B/V  Allow To Enter Direct Ships ...: Y Y/N
Limit To Salesperson# .....:          Allow To Enter P.O.s .....: Y Y/N
Default Retail Acct# .....: 000099  Allow Build-A-Truck Updates ..: N Y/N

Limit Credit Release Screen To:      Default Order Inquiry Options:
Company# .....:          ?      Open Only .....: Y Y/N
Branch .....:          ?      # Of Prior Months .....: 1 1-12
Credit Manager Code .....:

F6=Return  F7=Exit  F11=Screen 2                                     H
```

## Inventory Quantity = N

Enter Y or N. This field controls whether or not the user can adjust quantities.

## Inventory Cost = N

Enter Y or N. This field controls whether or not the user can adjust costs.

## Chapter 6 - **Provide Customer Service Representatives at counters with Cash Register Features**

---

There are three areas of the system that contain settings to activate the Retail Cash Register screen.

- Work Station Control Panel.
- System Wide Settings
- Accounting Settings

### **Work Station Control Panel- SET 1**

For our example we are going to access GBRANNEN's Work Station ID Control Panel (A1) to activate the Cash Register screen.

1. type **SET** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **1** in the **OPTION#** field
4. press **ENTER**
5. type in the high level password in the **PASSWORD** field
6. press **ENTER**
7. **TAB** to the **OPT** field next to the desired **WORK STATION**
8. type a **U** in the **OPT** field
9. press **ENTER**



Control Panel File Maintenance		General Default & Restriction Options		A1 PAGE 1	
Work Station . . . . .	A1			Update	
DFT Company# . . . . .	0 ?	DFT F.O.B. . . . .	— ?		
DFT Warehouse . . . . .	WAR ?	DFT Restocking Charge% . . . . .	25		
DFT Search Warehouse . . . . .	*MX ?+	DFT Price List . . . . .	— ?		
DFT Branch# . . . . .	C* ?+	DFT Manufacturer . . . . .	— ?+		
DFT Cash Branch# . . . . .	— ?	DFT Roll U/M . . . . .	— ?		
DFT Initials . . . . .	GB	DFT Serial#/Roll Search View . . . . .	1 ?		
DFT Ship Via . . . . .	— ?	DFT Days-Old to Highlight . . . . .	360		
Auto-Search Phone#	File From Customer Search Program . . . . .		Y Y/N		
Restrict This Work Station To	DFT Company# . . . . .		N Y/N		
Restrict This Work Station To	DFT Warehouse . . . . .		N Y/N		
Restrict This Work Station To	DFT Manufacturer . . . . .		N Y/N		
Restrict This Work Station To	Selected Branch# . . . . .		N Y/N		
	Selected Branch# . . . . .		— ?		
Restrict This Work Station To	Mfgrs Assigned to DFT Company# . . . . .		N Y/N		
Restrict This Work Station From	Updating Orders At Status "S" . . . . .		Y Y/N		
F1=Next Record F6=Return F7=Exit F11=Page 2					
Press ENTER to accept modifications being made...					

## DFT Branch#

This is the branch where the sale is recorded. You may enter the branch code or use **C\*** to use the branch that is set in the Customer BillTo File (**FIL 1**).

## DFT Cash Branch#

If the order was taken in under branch RAL but the physical cash is taken in branch DUR. The default cash branch should be listed as branch DUR. If you have selected **C\*** as the **DFT BRANCH#**, then you would leave this field blank.

10. make any necessary changes to **PAGE 1**
11. press **ENTER**
12. press **F11**

```

Control Panel File Maintenance
Order Entry & Invoicing Options
A1
PAGE 2
Work Station . . . . . : A1
Update
Allow Order If Qty Not Avail :  Y/N/X Invoicing Default B/O Code . . : 2 1/2
Allow Order Desk To Invoice :  N Y/N Invoicing Status Codes . . . : S
Retail Environment . . . . . :  Y Y/N Make JobName Mandatory on O/E :  N Y/N
Cash Register Screen . . . . . :  Y Y/N Charge Tax On Freight . . . . :  Y Y/N
Variable Charge Field . . . . . :  ? Auto-Transfer . . . . . :  Y Y/N
Tax Variable Charge . . . . . :  N Y/N/C Length Control, in Inches . . : 00
General Ledger# . . . . . : _____ Min Deposit on Cash Reg Scrn : 50 %

Auto-ISO Option . . . . . :  Y Y/N/M
ISO Border Color . . . . . :  R B/G/P/R/T/W/Y
Line or Window . . . . . :  W L/W

Mandatory To Key Description/Reason For Order Change Or Cancellation :  Y Y/N
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . :  N Y/N
Allow A Price Override To Bypass Error Message On "Locked Out" Items :  N Y/N
Auto-Display Bill-Of-Material Windows on Order Entry . . . . . :  Y Y/N

F1=Next Record F6=Return F7=Exit F11=Page 3
Press ENTER to accept modifications being made...
    
```

## Retail Environment

Enter **Y** to grant access to various retail features and screens. The retail environment protects and drops certain fields that are primarily applicable in a wholesale environment. It also assumes that each order has an entry in the **Salesperson#** field of the **Order Header** screen, and that the salesperson name prints on the point-of-sale invoices generated.

The Retail Environment parameter only needs to be activated at the workstations that require the retail-oriented features. You can operate with some control panels having the retail environment activated and other not activated (**Retail Environment = N**).

The retail environment option fine-tunes certain aspects of the system including the following:

- Activates the display of "balance due" for all orders on the Order Inquiry program
- Activates printing salesperson names on invoices and acknowledgements

```

Control Panel File Maintenance
Order Entry & Invoicing Options
A1
PAGE 2
Work Station . . . . . : A1
Update
Allow Order If Qty Not Avail :  Y/N/X Invoicing Default B/O Code . . : 2 1/2
Allow Order Desk To Invoice :  N Y/N Invoicing Status Codes . . . : S
Retail Environment . . . . . :  Y Y/N Make JobName Mandatory on O/E :  N Y/N
Cash Register Screen . . . . . :  Y Y/N Charge Tax On Freight . . . . . :  Y Y/N
Variable Charge Field . . . . . : ? Auto-Transfer . . . . . :  Y Y/N
Tax Variable Charge . . . . . :  N Y/N/C Length Control, in Inches . . : 00
General Ledger# . . . . . : Min Deposit on Cash Reg Scrn : 50 %
Auto-ISO Option . . . . . :  Y Y/N/M
ISO Border Color . . . . . :  R B/G/P/R/T/W/Y
Line or Window . . . . . :  W L/W
Mandatory To Key Description/Reason For Order Change Or Cancellation :  Y Y/N
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . . :  N Y/N
Allow A Price Override To Bypass Error Message On "Locked Out" Items :  N Y/N
Auto-Display Bill-Of-Material Windows on Order Entry . . . . . :  Y Y/N
F1=Next Record F6=Return F7=Exit F11=Page 3
Press ENTER to accept modifications being made...
    
```

## Cash Register Screen

Enter **Y** to activate the **Cash Register Screen**. The **Cash Register Screen** appears instead of the Print Selection Screen when an order is completed. It includes all of the print selection options, in addition to fields for the entry of cash, check, and/or credit card payments. It can display change amounts and balance due for cash transactions. Enter **Y** if this work station is operating in retail or cash counter environment.

## Min Deposit on Cash Reg Scrn

If you use the **Cash Register Screen**, you can use this field to specify a minimum deposit percentage to collect for all COD or cash orders. This is primarily for goods that are shipped or picked up at a later date or for special orders. For example, entering **50** in this field causes the system to suggest a collection of **50 percent** of the order total. On the Order Desk Invoicing screen, when goods are partially shipped, the program always suggests the amount to collect that will pay for all invoiced material and ensure that a 50 percent deposit remains on all back ordered non-stock material. This is a powerful tool for regulating complex, multiple shipments, or multiple payment orders.

13. make any necessary changes to **PAGE 1**

14. press **ENTER**

# System Wide Settings - SET 4

This program, accessed via option 4 on the SET menu, contains system-wide or global (all companies) settings. These settings pertain to many different functions throughout the system. The System Wide Settings affect everyone, regardless of company or branch.

## Cash Register Environment Options

1. type **SET** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **4** in the **OPTION#** field
4. press **ENTER**
5. type in the high level password in the **PASSWORD** field
6. press **ENTER**
7. **TAB** to the **OPT** field next to **CASH REGISTER ENVIRONMENTOPTIONS**
8. type a **U** in the **OPT** field
9. press **ENTER**

```
CHANGE                               System Wide Settings Maintenance

Cash Register Payment Screen Method.....: 2 (1/2)
Method 1 = Single Payment Method
Method 2 = Multiple Payment Method (recommended for retail environments)

Method 2 Report Defaults / Include cash receipts already posted today? N (Y/N)
Method 2 Report Defaults / Report Format.....: 2 (1/2)
Display taxes as separate fields on the cash register screen?.....: Y (Y/N)
Display the amount that is ready to ship? (total less back orders)...: N (Y/N)
Enforce the Min Deposit % from Control Panel on Cash Register Screen? N (Y/N)

For COD & CASH Orders:
(a)Suggest collection N (Y/N) of all lines at status
(b)If user changes order status to , display cash reg scrn
(c)If option a=Y, show & enforce Min Pymt (if > Min Dep) N (Y/N)
(d)If option a=Y, show Rdy to Pay, instead of Rdy to Shp N (Y/N)

Enter      F7=E0J      F8=Previous Screen
```

```
CHANGE                               System Wide Settings Maintenance

Cash Register Payment Screen Method.....: 2 (1/2)

Method 1 = Single Payment Method
Method 2 = Multiple Payment Method (recommended for retail environments)

Method 2 Report Defaults / Include cash receipts already posted today? N (Y/N)
Method 2 Report Defaults / Report Format.....: 2 (1/2)
Display taxes as separate fields on the cash register screen?.....: Y (Y/N)
Display the amount that is ready to ship? (total less back orders)..: N (Y/N)
Enforce the Min Deposit % from Control Panel on Cash Register Screen? N (Y/N)

For COD & CASH Orders:
(a)Suggest collection N (Y/N) of all lines at status
(b)If user changes order status to , display cash reg scrn
(c)If option a=Y, show & enforce Min Pymt (if > Min Dep) N (Y/N)
(d)If option a=Y, show Rdy to Pay, instead of Rdy to Shp N (Y/N)

Enter      F7=E0J      F8=Previous Screen
```

## Cash Register Payment Screen Method

Enter **1** to allow only a single method of payment per order to complete transactions.  
Enter **2** to allow multiple methods of payment per order, plus the extended features.

## Method 2 Report Defaults / Include cash receipts already posted today?

The default is **N**; to not include cash post posted during the current day. This default allows you to take a consistent snapshot of your receipts for an established time frame. You should also leave this at **N** if there is a cashier change during the day or other event that could affect the accountability of cash receipts.

## Method 2 Report Defaults / Report Format

**1-** 198 column format. To print in a 198 column format you have to have the correct printer. If you are unsure if your system is configured to run a 198 column format report, try a test page. If you experience problems (i.e., unreadable data, report doesn't print at all) go back to option **2** - 132 column format.

**2-** 132 column format. The default is 2.

```
CHANGE                               System Wide Settings Maintenance

Cash Register Payment Screen Method.....: 2 (1/2)

Method 1 = Single Payment Method
Method 2 = Multiple Payment Method (recommended for retail environments)

Method 2 Report Defaults / Include cash receipts already posted today? N (Y/N)
Method 2 Report Defaults / Report Format.....: 2 (1/2)
Display taxes as separate fields on the cash register screen?.....: Y (Y/N)
Display the amount that is ready to ship? (total less back orders)...: N (Y/N)
Enforce the Min Deposit % from Control Panel on Cash Register Screen? N (Y/N)

For COD & CASH Orders:
(a)Suggest collection N (Y/N) of all lines at status _ _ _ _ _
(b)If user changes order status to _ _ _ _ _ , display cash reg scrn
(c)If option a=Y, show & enforce Min Pymt (if > Min Dep) N (Y/N)
(d)If option a=Y, show Rdy to Pay, instead of Rdy to Shp N (Y/N)

Enter      F7=E0J      F8=Previous Screen
```

### Display taxes as separate fields on the cash register screen?

This controls the display of taxes on the cash register screen.

For example, if both state & local taxes were charges, it could show:

- NY State Tax - 18.85
- Queens County - 2.85

In Canada it could show:

- Ontario PST - 8.00
- GST - 7.00

### Display the amount that is ready to ship? (total less back orders)

Shows the user which materials on an order are "ready to ship", in case your policy for COD orders is to collect only what can be taken. The "ready to ship" amount is "total order charges less back ordered items".

### Enforce the Min Deposit % from Control Panel on Cash Register Screen?

Enter a Y to adhere to the setting made in the Min Deposit % on Cash Reg Scrn on the Control Panel (menu SET option 1). Enter an N to suggest but not enforce the entry in the Min Deposit on Cash Reg Scrn. The default for this setting is Y. This forces a payment to be made on a cash or COD order.

When set to N, the minimum payment message still displays at the bottom of the Cash Register screen, but instead of being mandatory it is a simply a payment suggestion.

The % deposit set in the control panel, via the Min Deposit On Cash Reg Scrn field, is based on the total order amount (including any BOs) and not a percentage of the "Ready to Ship" amount. The concept of deposit is always related to a future pickup.

*Provide Customer Service Representatives at counters with Cash Register Features*

```

CHANGE                               System Wide Settings Maintenance

Cash Register Payment Screen Method.....: 2 (1/2)
Method 1 = Single Payment Method
Method 2 = Multiple Payment Method (recommended for retail environments)

Method 2 Report Defaults / Include cash receipts already posted today? N (Y/N)
Method 2 Report Defaults / Report Format.....: 2 (1/2)
Display taxes as separate fields on the cash register screen?.....: Y (Y/N)
Display the amount that is ready to ship? (total less back orders)...: N (Y/N)
Enforce the Min Deposit % from Control Panel on Cash Register Screen? N (Y/N)

For COD & CASH Orders:
(a) Suggest collection N (Y/N) of all lines at status ___
(b) If user changes order status to __ __, display cash reg scrn
(c) If option a=Y, show & enforce Min Pymt (if > Min Dep) N (Y/N)
(d) If option a=Y, show Rdy to Pay, instead of Rdy to Shp N (Y/N)

Enter      F7=E0J      F8=Previous Screen
    
```

### For COD & CASH Orders:

These system-wide setting options ensure that warehouse personnel remember to collect COD orders not paid in advance. The idea of these options is to show the user how much of an order must be paid at any point that the cash register screen is accessed. These options do not apply to Order Entry (since the status codes are not yet established), although the Min Dep% can apply as usual.

#### (a) Suggest collection N (Y/N) of all lines at status \_\_\_

Enter the status codes that direct the system to request immediate collection.

#### (b) If user changes order status to \_\_ \_\_, display cash reg scrn

Enter the status codes that when changed to, cause the cash register screen to automatically display. This ensures that the cash register screen appears to enforce collection of all lines based on status codes. Therefore, even if the Min Deposit% is only set to 50%, if 80% of the order is set to a status entered here (i.e. status “S”), the system automatically asks for payment of the 80%. This option relates to status change, using the “Update Order Status Program”.

#### (c) If option a=Y, show & enforce Min Pymt (if > Min Dep) N (Y/N)

If option (a) has been activated, this option enforces a minimum payment policy. The minimum payment policy is enforced when an order is changed or when status codes are changed indicating that more items have been shipped. The cash register screen asks for either the minimum percentage, or the amount shipped, whichever is higher.

#### (d) If option a=Y, show Rdy to Pay, instead of Rdy to Shp N (Y/N)

Changes the text on the cash register screen from the standard **Rdy to Shp** to **Rdy to Pay**.



*Provide Customer Service Representatives at counters with Cash Register Features*

10. make any necessary changes

11. press **ENTER**

12. press **F7**

## Accounts Receivable Options

These options will allow you to post payments to **AR** after the invoicing process and directs night jobs to automatically match refunds and payments.

1. type **SET** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **4** in the **OPTION#** field
4. press **ENTER**
5. type in the high level password in the **PASSWORD** field
6. press **ENTER**
7. **TAB** to the **OPT** field next to **ACCOUNTS RECEIVABLE OPTIONS**
8. type a **U** in the **OPT** field
9. press **ENTER**

<b>UPDATE</b>	System Wide Settings Maintenance
<b>Accounts Receivable Options</b>	
Enter allowable A/R shortage to automatically post to discount amount\$	<u>  4</u>
Enter allowable A/R overage to automatically post to discount amount \$	<u> 10</u>
<b>Options for Service Fees Method A and Method B:</b>	
Charge Service Fees on Past Due Service Fees? . . . . .	(Y/N) <u> Y</u>
<b>Options for Method C Interest/Service Fees:</b>	
Date to activate Nightly Method C updates (blank = do not activate)	<u> 0/00/00</u>
Interest Rate Option: 1=Payment Terms File Rate, 2=Billto File Rate . (1/2)	<u> 1</u>
<b>Matching of Advance Deposits during Night Jobs:</b>	
Match refunds against credit orders? . . . . .	(Y/N) <u> Y</u>
Match Advance Deposits against invoices? . . . . .	(Y/N) <u> Y</u>
Bank Code for entries created during matching? . . . . . <u> I</u>	
Enter	F7=E0J    F8=Previous Screen

### Match refunds against credit orders?

If flagged **Y**, directs the system to apply refunds against credits for the same order during night jobs. The recommended entry is **Y**. The default is **N**.

### Match Advance Deposits against invoices?

A **Y** entry directs the system to apply deposits against invoices during night jobs if they apply to the same order number. The recommended entry is **Y**. The default is **N**.

```
UPDATE                               System Wide Settings Maintenance
Accounts Receivable Options
Enter allowable A/R shortage to automatically post to discount amount$  _4
Enter allowable A/R overage to automatically post to discount amount $  _10
Options for Service Fees Method A and Method B:
Charge Service Fees on Past Due Service Fees? . . . . . (Y/N) Y
Options for Method C Interest/Service Fees:
Date to activate Nightly Method C updates (blank = do not activate)  0/00/00
Interest Rate Option: 1=Payment Terms File Rate, 2=Billto File Rate . (1/2) 1
Matching of Advance Deposits during Night Jobs:
Match refunds against credit orders?. . . . . (Y/N) Y
Match Advance Deposits against invoices?. . . . . (Y/N) Y
Bank Code for entries created during matching? . . . . . I
Enter      F7=E0J      F8=Previous Screen
```

## Bank Code for entries created during matching?

Enter the bank code that you want Auto-Matching entries to use. This bank code will be used for all transactions created by the nightly auto-match process. Ensure bank codes are defined for all the companies on your system.

*Note: Auto-Match never adds to or subtracts from a bank balance, because the debits and credits are always equal. These transactions will sort under this bank code on any reports or interfaces that use the bank code. Creating a separate bank code for the Auto-Match feature keeps cash receipts cleaner and easier to follow.*

10. make any necessary changes

11. press **ENTER**

12. press **F7**

# Accounting Settings

The following settings are found in the Accounting File Maintenance Menu (**ACT**).

## Payment Method Code Maintenance - ACT 115

You can define your own payment method codes to control how payments are entered on the Cash Register screen and reported at the end of the day.

*Note: This file only pertains to Cash Register option 2 in the System-Wide Settings.*

Some examples of payment method codes you might define are:

• <b>CA</b> - Cash	• <b>DI</b> - Discover
• <b>CR</b> - Check Refund	• <b>VI</b> - Visa
• <b>SC</b> - Store Credit	• <b>MC</b> - Mastercard

### Update Payment Codes

1. type **ACT** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **115** in the **OPTION#** field
4. press **ENTER**

5. type in the high level password in the **PASSWORD** field
6. press **ENTER**

Payment Method Code Table Maintenance		
		Password...
<b>Opt</b>	<b>Payment Code</b>	<b>Description</b>
█	AX	American Express
▾	CA	Cash
▾	CK	Check
▾	DI	Discover
▾	MC	Master Card
▾	NP	Non-Payment
▾	VI	Visa

I=Inquire   U=Update   D=Delete  
F1=Create   F7=E0J   Roll Up/Down

***Note:** Dancik will create common payment codes for you. We recommend that you go into each code and update it to match your operating procedures. If you require additional codes, use **F1** to create them. If you do not use a particular code you may delete it using the **D** option.*

7. **TAB** to the **OPT** field next to the desired **PAYMENT CODE**
8. type **U** in the **OPT** field
9. press **ENTER**

## Cashier Code Maintenance -ACT 116

This is used to assign codes to your cashiers entering cash transactions. This code is different than the sign on profile used to begin using the system. The cashier code is hidden on cash reports and when the user enters their code to enter payment information on the cash register screen. For our example we will create a **Cashier Code** for our user GBRANNEN.

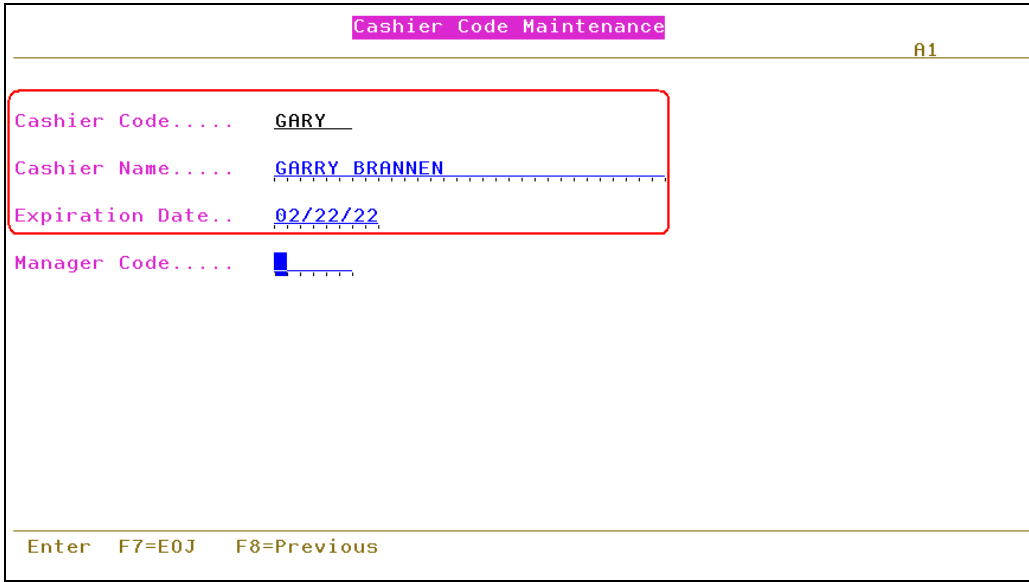
1. type **ACT** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **116** in the **OPTION#** field
4. press **ENTER**
5. type the high level password in the **PASSWORD** field
6. press **ENTER**

Opt	Name
	TRAINING CASHIER

I=Inquire    U=Update    D=Delete  
F1=Create    F7=E0J    Roll Up/Down

7. press **F1**

8. fill out the **CASHIER CODE MAINTENANCE** screen
  - **CASHIER CODE**
  - **CASHIER NAME**
  - **EXPIRATION DATE**
  - **MANAGER CODE (optional)**



Cashier Code Maintenance A1

---

Cashier Code..... GARY

Cashier Name..... GARRY BRANNEN

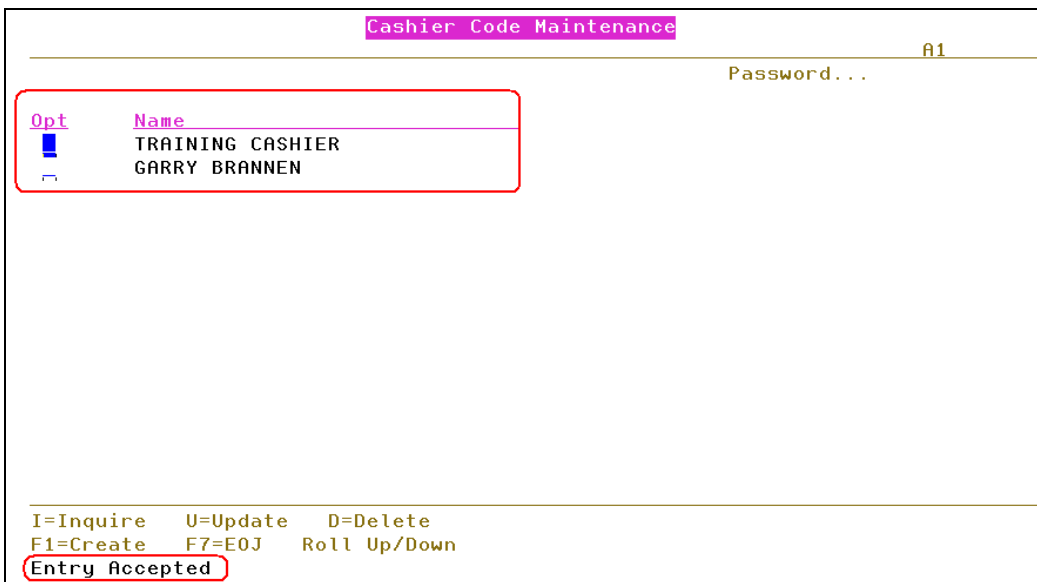
Expiration Date.. 02/22/22

Manager Code.....

---

Enter F7=E0J F8=Previous

9. press **ENTER**



Cashier Code Maintenance A1

---

Opt Name

<input type="checkbox"/>	TRAINING CASHIER
<input type="checkbox"/>	GARRY BRANNEN

Password...

---

I=Inquire U=Update D=Delete  
F1=Create F7=E0J Roll Up/Down

**Entry Accepted**

*Note: GBRANNEN's Cashier Code has been created.*

## Bank Code Maintenance -ACT 113

This defines the different bank codes for posting cash from counter sales to AR to apply against invoices.

1. type **ACT** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **113** in the **OPTION#** field
4. press **ENTER**
5. type the high level password in the **PASSWORD** field
6. press **ENTER**

Bank Code Table Maintenance				AR3002R
<u>Opt</u>	<u>Company</u>	<u>Bank Code</u>	<u>Description</u>	<u>Bank Code</u>
█	0	T	TEST BANK	Y

D=Delete U=Update Password... Default

F1=Create F7=E0J Roll Up/Down

*Note: your system will come preconfigured with a **Test Bank**. You will need to remove the Y flag that sets this as the default bank by using the Update function.*

7. press **F1**



8. fill out the **BANK CODE TABLE MAINTENANCE** screen
  - **COMPANY**
  - **BANK CODE**
  - **BANK NAME**
  - **DEFAULT BANK = Y**
  - **DEFAULT CASH ACCOUNT**

Bank Code Table Maintenance

Company..... 0

Bank Code..... W

Bank Name..... WACHOVIA

Default Bank.. Y (Y=Yes)

Default cash account used in creating JE for Misc Cash. 00099

Enter F7=E0J F8=Previous

9. press **ENTER**

## Chapter 7 - **Extract Sales Data and Establish Searchable Description Field on Items**

---

### **Extracting Sales Information into Spreadsheet and XML Files - SYS 813**

This feature enables you to select the fields you want and output to CSV or XML files, thereby enabling you to import sales data into spreadsheets and other third party tools.

*Note: The results for the two formats will vary (i.e. some invoices might be on the .CSV report and not on the XML report). The .CSV version is tied into the ROLLS file whereas the XML version is not.*

You can select to extract from the following files/fields:

- Invoice Header
- Invoice Detail
- Item File
- Customer File
- Pricing Method
- Price List#
- Pricing Promo#
- Rebate Promo#
- Fund Promo#
- fields from the Inventory File



## Run a First Quarter Sales Report

1. type **SYS** in **ENTER DESIRED MENU** field
2. press **ENTER**
3. press **PAGEDOWN** to locate option **813**

DANC1K INTERNATIONAL CO# 2	
Special System Maintenance Functions Menu	
Opt Description	Opt Description
703 Clear Manifests/Receipts From ...	805 Convert Non-Serialized Items T...
704 Download Item & Price File To ...	806 List/Update Inventory Balances...
705 Stock Status List For Inventor...	808 Change Price Exceptions File D...
706 Control Panel Printer Assignme...	809 Inventory Summary Data Extract
707 Control Panel Default Assignme...	810 Posted Journal Entry Reversal ...
708 User Control Panel Assignments...	811 Hold/Release/Update Open Payables
709 Reprint Transfer Pick Lists Fo...	812 Slab Balance Analysis & Update
710 Reset Billto File Status Flag ...	813 Sales Data Extraction (XML,CSV)
711 Utility Menu for Checks and B ...	
712 Utility Menu for Barcode Pool ...	901 Inventory System Edit 10 (IVAUD10
	902 Inventory System Edit 11 (IVAUD11
801 Reverse A Cycle Count (reverse...	903 Import Item Attr from the IFS
802 Phone Number File Maintenance ...	904 Warehouse Price List Cross Ref
803 Automatic Load Of Billto File ...	905 Warehouse Will Call Tax Table
804 Check Order, Invoice, & Refere...	906 Purge Quote Mngmnt System Quotes
	More...
Enter Desired Menu / Option# ==> SYS <input type="text"/>	
F1=Add F2=Select F5=Personal F9=Additional F10=Scan F11=Alt View <input type="text"/>	

4. type **813** in the **OPTION#** field
5. press **ENTER**

*Note: The Invoice Detail with Item File screen appears. This screen includes the basic extraction criteria. Once you have loaded the data into a spreadsheet or other program, you may further refine the data. You can press F11 to view and select from your previous data extractions, or you may enter a new set of parameters.*

6. fill out **INVOICE DETAIL WITH ITEM/CUST FILE** screen

- **Invoice# Range** or **Invoice Date Range**
- **Company**
- **Branch**
- **Salesperson**
- **Type of Extraction**
- **Destination Filename**
- **Destination Folder**

```
Output Distribution
Invoice Detail with Item/Cust File
-----
From          To
Invoice# Range .....: 0 - 0
Invoice Date Range ....: 1/01/10 - 03/18/10
Company .....: 2 ?
Branch .....: _____ ?
Salesperson .....: _____ ?
Type of Extraction ....: CSV "CSV" or "XML"
Destination Filename ...: First Quarter Sales Company 2
Destination Folder ....: ? Ex. /home/www/reports/
/home/www/reports/
-----
Fields Used During Extraction
Invoice Header .....: *ALL fields selected.
Invoice Detail .....: *ALL fields selected.
Item Info .....: *ALL fields selected.
Customer Info .....: *ALL fields selected.
Inventory Fields ....: *ALL fields selected.
-----
F6=Return F7=Exit F10=View Field Selections F11=Previous Parameters
Press [ENTER] to continue processing.
```

*Note: Date can be misleading because the invoice date may not capture all invoices in a period. Run for CSV if you want to be able to edit it in excel. XML is used for word docs.*

7. Determine which fields to extract data for by pressing **F10**

*Note: For this example we will run the report with \*ALL fields selected.*

8. press **F6** to return

- 9. press **ENTER**
- 10. type **Y** in **SAVE PARAMETERS** field
- 11. type the report name in the **BRIEF DESCRIPTION** field

```
Output Distribution
Invoice Detail with Item/Cust File
From          To
Invoice# Range .....: 0 - 0
Invoice Date Range .....: 1/01/10 - 3/18/10

Save Parameters Request

Save Parameters : Y (Y)
Brief Description : FIRST QUARTER SALES COMPANY 2

Fields Used During Extraction
Invoice Header .....: *ALL fields selected.
Invoice Detail .....: *ALL fields selected.
Item Info .....: *ALL fields selected.
Customer Info .....: *ALL fields selected.
Inventory Fields .....: *ALL fields selected.

F6=Return F7=Exit F10=View Field Selections F11=Previous Parameters
```

- 12. press **ENTER**

```
Output Distribution
Invoice Detail with Item/Cust File
From          To
Invoice# Range .....: 0 - 0
Invoice Date Range .....: 0/00/00 - 0/00/00

Company .....: ?
Branch .....: ?
Salesperson .....: ?

Type of Extraction .....: "CSV" or "XML"
Destination Filename .....:
Destination Folder .....: ? Ex. /home/www/reports/

Fields Used During Extraction
Invoice Header .....: *ALL fields selected.
Invoice Detail .....: *ALL fields selected.
Item Info .....: *ALL fields selected.
Customer Info .....: *ALL fields selected.
Inventory Fields .....: *ALL fields selected.

F6=Return F7=Exit F10=View Field Selections F11=Previous Parameters
File : /home/www/reports/First Quarter Sales Company 2.CSV has been submitte
```

*Note: A message containing the reports path appears.*



## Locate the Report

If you have never mapped to the IFS, you will need to contact Dancik's Client Services department.

If you are currently mapped to the IFS:

1. Open **Excel**
2. Locate the **home** folder
3. Locate the **www** folder
4. Locate the **reports** folder
5. Open the **report**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	InvoiceNbr	Branch	SalesPers	CompanyN	AccountNt	SupplierFo	CustomerF	FOBCode	TermsDay	TermsCod	JobName	OrderType	OrderHand	Initials	ReferenceSh
2	419125	CHA	901	2	54321	1	TEST	W	0					GM	1045759
3	419126	RAL		2	67000	AMT	GORDON	W	0	K					1045439
4	419127	RAL		2	67000		LDI	W	0	K			2		1045582
5	419127	RAL		2	67000		LDI	W	0	K			2		1045582
6	419128	HOU	CRA	2	55215	1	TEST3	W	0					GM	1045760
7	419130	RAL	BOB	2	11133	1	FOB ON EW		0	W	T				LM
8	419131	RAL	BOB	2	11133	1	FOB ON EW		0	W					LM
9	419132	RDC	DMH	2	19730	1	TEST1		0	D		C		2	DH
10	419135	RAL	BOB	2	11122	1	TEST	W	5	Y				5	DA
11	419136	RAL	BOB	2	11122	1	705119	W	5	K				2	
12	419137	RAL		2	11122	1	TEST	W	3	E				AH	1044859
13	419138	RAL		2	11122	1	BO AND FW		0	E				LM	1045101
14	419139	RAL		2	11122	1	BO AND FW		0	E				5	LM
15	419139	RAL		2	11122	1	BO AND FW		0	E				5	LM
16	419140	RAL		2	11122	1	EXP838TDW		0	F				1	LM
17	419172	RAL		2	11177	1	ANDERSCW		0					LM	1045814
18	419173	RDC	DMH	2	19730	1	TEST1		0	D		C		2	DH
19	419177	RAL		2	11155	1	AUTO BO W		0		1			5	LM
20	419177	RAL		2	11155	1	AUTO BO W		0		1			5	LM
21	419178	RAL	BOB	2	11155	1	CHG ACC W		0					LM	1045571
22	419179	RAL		2	11166	1	FOB 2		2	0				LM	1045722
23	419180	RAL		2	11177	1	FOB 1B		1	0				LM	1045723
24	419181	RDC	DMH	2	19730	1	TEST1		0	D		C		2	DH
25	419183	RAL	336	2	25019	1	STANDAR C		0	B	STANDAR			5	XX
26	419183	RAL	336	2	25019	1	STANDAR C		0	B	STANDAR			5	XX
27	419183	RAL	336	2	25019	1	STANDAR C		0	B	STANDAR			5	XX
28	419184	RAL	BOB	2	33333	1	919-555-12W		0	Q				AH	1044633
29	419186	RAL	BOB	2	11122	1	705061 F		5	K				2	
30	419187	RAL		2	11122	1	BO FILL	W	0	E				2	LM
31	419188	RAL		2	11122	1	COST		0	E				1	LM

**Note:** The location of your report will depend on the Destination Folder (/home/www/reports/) that you selected in option **SYS 813**.



*Extract Sales Data and Establish Searchable Description Field on Items*

## Run a 1 Month Sales Report for a Salesperson

1. type **SYS** in **ENTER DESIRED MENU** field
2. press **ENTER**
3. press **PAGEDOWN** to locate option **813**

DANC1K INTERNATIONAL CO# 2	
Special System Maintenance Functions Menu	
Opt Description	Opt Description
703 Clear Manifests/Receipts From ...	805 Convert Non-Serialized Items T...
704 Download Item & Price File To ...	806 List/Update Inventory Balances...
705 Stock Status List For Inventor...	808 Change Price Exceptions File D...
706 Control Panel Printer Assignme...	809 Inventory Summary Data Extract
707 Control Panel Default Assignme...	810 Posted Journal Entry Reversal ...
708 User Control Panel Assignments...	811 Hold/Release/Update Open Payables
709 Reprint Transfer Pick Lists Fo...	812 Slab Balance Analysis & Update
710 Reset Billto File Status Flag ...	813 Sales Data Extraction (XML,CSV)
711 Utility Menu for Checks and B ...	
712 Utility Menu for Barcode Pool ...	901 Inventory System Edit 10 (IVAUD10
	902 Inventory System Edit 11 (IVAUD11
801 Reverse A Cycle Count (reverse...	903 Import Item Attr from the IFS
802 Phone Number File Maintenance ...	904 Warehouse Price List Cross Ref
803 Automatic Load Of Billto File ...	905 Warehouse Will Call Tax Table
804 Check Order, Invoice, & Refere...	906 Purge Quote Mngmnt System Quotes
	More...
Enter Desired Menu / Option# ==> SYS	
F1=Add F2=Select F5=Personal F9=Additional F10=Scan F11=Alt View	

4. type **813** in the **OPTION#** field
5. press **ENTER**

*Note: The Invoice Detail with Item File screen appears. This screen includes the basic extraction criteria. Once you have loaded the data into a spreadsheet or other program, you may further refine the data. You can press F11 to view and select from your previous data extractions, or you may enter a new set of parameters.*

6. fill out **INVOICE DETAIL WITH ITEM/CUST FILE** screen

- **Invoice# Range** or **Invoice Date Range**
- **Company**
- **Branch**
- **Salesperson**
- **Type of Extraction**
- **Destination Filename**
- **Destination Folder**

```
Output Distribution
Invoice Detail with Item/Cust File
-----
Invoice# Range .....: 0 - 0
Invoice Date Range ...: 03/01/10 - 03/31/10
-----
Company .....: 2 ?
Branch .....: RAL ?
Salesperson .....: ALK ?
-----
Type of Extraction ...: CSV "CSV" or "XML"
Destination Filename ...: Angela King Sales March 2010
Destination Folder ...: ? Ex. /home/www/reports/
/home/www/reports/
-----
Fields Used During Extraction
Invoice Header .....: *ALL fields selected.
Invoice Detail .....: *ALL fields selected.
Item Info .....: *ALL fields selected.
Customer Info .....: *ALL fields selected.
Inventory Fields .....: *ALL fields selected.
-----
F6=Return F7=Exit F10=View Field Selections F11=Previous Parameters
Press [ENTER] to continue processing.
```

*Note: Date can be misleading because the invoice date may not capture all invoices in a period. Run for CSV if you want to be able to edit it in excel. XML is used for word docs.*

7. Determine which fields to extract data for by pressing **F10**

*Note: For this example we will run the report with \*ALL fields selected.*

8. press **F6** to return

9. press **ENTER**
10. type **Y** in **SAVE PARAMETERS** field
11. type the report name in the **BRIEF DESCRIPTION** field

```

Output Distribution
Invoice Detail with Item/Cust File
-----
From          To
Invoice# Range .....: 0 - 0
Invoice Date Range ..: 3/01/10 - 3/31/10

Save Parameters Request

Save Parameters   : Y (Y)
Brief Description : ANGELA KING SALES MARCH 2010

Fields Used During Extraction
Invoice Header .....: *ALL fields selected.
Invoice Detail .....: *ALL fields selected.
Item Info .....: *ALL fields selected.
Customer Info .....: *ALL fields selected.
Inventory Fields .....: *ALL fields selected.

F6=Return  F7=Exit  F10=View Field Selections  F11=Previous Parameters
    
```

12. press **ENTER**

```

Output Distribution
Invoice Detail with Item/Cust File
-----
From          To
Invoice# Range .....: 0 - 0
Invoice Date Range ..: 0/00/00 - 0/00/00

Company .....: ?
Branch .....: ?
Salesperson .....: ?

Type of Extraction ....: "CSV" or "XML"
Destination Filename ...:
Destination Folder .....: ? Ex. /home/www/reports/

Fields Used During Extraction
Invoice Header .....: *ALL fields selected.
Invoice Detail .....: *ALL fields selected.
Item Info .....: *ALL fields selected.
Customer Info .....: *ALL fields selected.
Inventory Fields .....: *ALL fields selected.

F6=Return  F7=Exit  F10=View Field Selections  F11=Previous Parameters
File : /home/www/reports/Angela King Sales March 2010.CSV has been submitted
    
```

*Note: A message containing the report's path appears.*

*Extract Sales Data and Establish Searchable Description Field on Items*

## Locate the Report

If you have never mapped to the IFS, you will need to contact Dancik's Client Services department.

If you are currently mapped to the IFS:

1. Open **Excel**
2. Locate the **home** folder
3. Locate the **www** folder
4. Locate the **reports** folder
5. Open the **report**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	InvoiceNbr	Branch	SalesPers	Company	AccountNt	SupplierFo	CustomerF	FOBCode	TermsDay	TermsCod	JobName	OrderType	OrderHand	Initials	Reference
2	419624	RAL	ALK	2	101	1	105-555-17W		0	2				2 AK	1046752 OT
3	419624	RAL	ALK	2	101	1	105-555-17W		0	2				2 AK	1046752 OT
4	419624	RAL	ALK	2	101	1	105-555-17W		0	2				2 AK	1046752 OT
5	419625	RAL	ALK	2	1000	1	HC11236 W		0	B				1 AK	1046751 OT
6	419625	RAL	ALK	2	1000	1	HC11236 W		0	B				1 AK	1046751 OT
7	419625	RAL	ALK	2	1000	1	HC11236 W		0	B				1 AK	1046751 OT
8	419626	RAL	ALK	2	98989	1	FIR 236 W		0	S				AK	1046753 OT
9	419626	RAL	ALK	2	98989	1	FIR 236 W		0	S				AK	1046753 OT
10	419626	RAL	ALK	2	98989	1	FIR 236 W		0	S				AK	1046753 OT
11	419626	RAL	ALK	2	98989	1	FIR 236 W		0	S				AK	1046753 OT
12	419629	RAL	ALK	2	1111	1	JACKIE W		0					2 AK	1046771 OT
13	419629	RAL	ALK	2	1111	1	JACKIE W		0					2 AK	1046771 OT
14	419629	RAL	ALK	2	1111	1	JACKIE W		0					2 AK	1046771 OT
15	419630	RAL	ALK	2	7000	1	AMY W		0	B				AK	1046770 OT
16	419630	RAL	ALK	2	7000	1	AMY W		0	B				AK	1046770 OT
17	419630	RAL	ALK	2	7000	1	AMY W		0	B				AK	1046770 OT
18	419631	RAL	ALK	2	25252	1	JEFF W		0	1				AK	1046772 OT
19	419631	RAL	ALK	2	25252	1	JEFF W		0	1				AK	1046772 OT
20	419631	RAL	ALK	2	25252	1	JEFF W		0	1				AK	1046772 OT
21	419632	RAL	ALK	2	55220	1	123-456-7EW		0	3				AK	1046767 OT
22	419632	RAL	ALK	2	55220	1	123-456-7EW		0	3				AK	1046767 OT
23	419632	RAL	ALK	2	55220	1	123-456-7EW		0	3				AK	1046767 OT
24															
25															
26															
27															
28															
29															
30															
31															

**Note:** The location of your report will depend on the Destination Folder (/home/www/reports/) that you selected in option **SYS 813**.

*Extract Sales Data and Establish Searchable Description Field on Items*

# Establish Searchable Description Field on Items

## Options to Enable Item Keyword Search - SET 4

This ensures that users, in both Decor 24 and the Dancik Enterprise System (DES), can find products based on generic descriptions.

The Keyword search searches on/for:

- Item description (both lines)
- Item number
- Color name
- Pattern name
- Product line file name
- Manufacturer name

1. type **SET** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **4** in the **OPTION#** field
4. press **ENTER**
5. type the high level password in the **PASSWORD** field
6. press **ENTER**
7. **TAB** to the **SETTING DESCRIPTION** field
8. type **KEY** in the **SETTING DESCRIPTION** field
9. press **ENTER**
10. type **U** in the **OPT** field next to **OPTIONS TO ENABLE ITEM KEYWORD SEARCH**
11. press **ENTER**



```
CHANGE                               System Wide Settings Maintenance

Options to Enable Item Keyword Search

Enable Item Keyword Search..... Y (Y/N)

  Creates a new item search file and activates the "keyword search" option
  on the Item Search program.

Default Option for Discontinued Items in Item Search..... Y (Y/N)
  (Y or blank = Include Disc, N=Omit Disc)

Display total available inventory on main search..... W (Y/N/W)
  (Y=display global available inventory, N=do not display, and W=display
  available at user default warehouse.)
  (Note: this may shorten the amount of the item description that can be
  displayed)

Activate multiple item selection from Order Entry & Order Change. Y (Y/N)
  (Note: multiple selections are loaded into the multi-line order entry Window)

Enter      F7=E0J      F8=Previous Screen
```

**Enable Item Keyword Search** - Entering a Y in this field activates the keyword search option. Furthermore, it enables night jobs to rebuild the search file every night.

*Note: Rebuilding the item search file should be done during night jobs. The amount of time needed to rebuild the file varies depending on the amount of items in your system, but it can take several minutes. By rebuilding the item search file every night, you are assured that any new items are included as well as any updates.*

**Default Option for Discontinued Items in Item Search** - Enter a Y if you want to include discontinued items in the search. When a keyword search is performed, and discontinued items are included, those items are shown in reverse image. Discontinued Items are defined as items that have a date entered in the Date Discontinued field of the Item File (FIL 2).

**Display total available inventory on main search** - This setting gives you three options concerning showing total available inventory. Enter an N to not display the total inventory, entering a Y shows the total available inventory from all warehouses regardless of business entity, stocking matrix, or company number, and a W only shows inventory from the users default warehouse as established on the Control Panel. Examples searches are shown below.

**Activate multiple item selection from Order Entry & Order Change** - This option, if activated, gives you the ability to insert multiple inventory selections into multi-line order entry by selecting the items from the keyword search results. If you enter N, then the keyword search remains in the existing "single selection mode", where you can only enter "X" next to a single item, and that single item is returned into the order entry (or order change) program. Enter a Y to activate "multiple selection mode", where you can enter "X" next to as many as 30 items on the search screen, and all of the selected items are returned into the order entry (or order change) program. The items appear on the Multi-Line Order Entry Screen (which is the same screen that is used for Bills of Material, Related Items, and Kits). Quantities can then be assigned to the items as needed.

## Master Attributes File - SET 31

Use the Master Attributes File to create item attributes. By creating item attributes you can expand the Advanced Search function to search for additional attributes such as wear codes. For our example we have items set up in our system with the following wear codes:

- 1 - LIGHT RESIDENTIAL USE
- 2 - HEAVY RESIDENTIAL USE
- 3 - LIGHT COMMERCIAL USE
- 4 - HEAVY COMMERCIAL USE
- 5 - ALL WEATHER

### Step 1- Create Item Attribute

1. type **SET** in the **ENTER DESIRED MENU** field
2. press **ENTER**
3. type **31** in the **OPTION#** field
4. press **ENTER**
5. type **IT** in the **REFERENCE TYPE** field
6. type the high level password in the **PASSWORD** field
7. press **ENTER**

The screenshot shows a terminal window titled "Master Attributes" with the subtitle "Work w/ Master Attributes File". A cyan button labeled "UPD MODE" is in the top right. The "Reference Type" field is highlighted with a red box and contains "IT - ITEM". Below it, "Short Description" and "Sequence#" are listed with a "0" next to the latter. A table with columns "Opt", "Short Desc", "Long Description", "Display", "Valid", "Keywr", and "Advncd" is visible, with "Display" and "Valid" sub-columns labeled "Sequence#", "Flag", "Search", and "Search". At the bottom, a red box highlights the "Options" section: "Options ==> U=Update D=Delete I=Inquiry", "F1=Create F2=Position F7=Exit F8=Password", and "Roll Up/Down H". A message at the bottom reads "No record(s) found. Press F1=Create to create/add new records..."

8. press **F1**
9. fill out **MASTER ATTRIBUTES** screen
  - Short Description
  - Long Description
  - Display Sequence#
  - Use Validation Checking
  - Use in Keyword Search
  - Use in Advanced Search
  - Add To Favorites

```

                                Master Attributes
                                Work w/ Master Attributes File
                                UPD MODE
                                F1=Create
Reference Type ..... IT - ITEM
Attribute# ..... 000000025

Short Description ..... WEAR CODE
Long Description ..... SEARCHABLE WEAR CODE

Display Sequence# ..... 0

Use Validation Checking. N Y
Use in Keyword Search .. Y Y
Use in Advanced Search . Y Y
Add To Favorites ... Y Y

F6=Return  F7=Exit

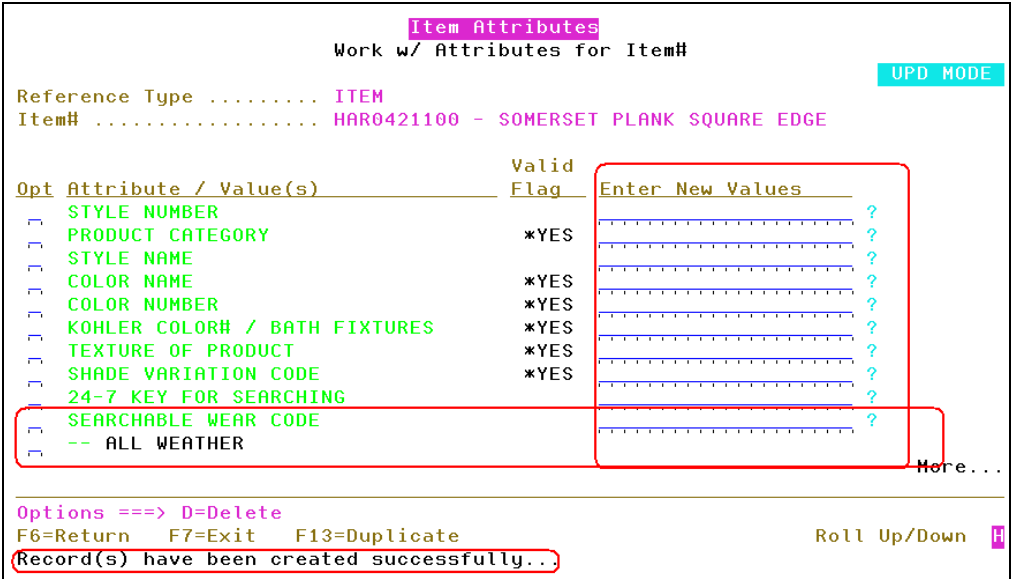
```

10. press **ENTER**

11. press **F7**

### Step 2- Create Link to Item Attribute

- 1. type **FIL** in the **ENTER DESIRED MENU** field
- 2. press **ENTER**
- 3. type **2** in the **OPTION#** field
- 4. press **ENTER**
- 5. access a desired item in **UPDATE** mode
- 6. press **F16**
- 7. **TAB** to **ENTER NEW VALUES** field next to **SEARCHABLE WEAR CODE**
- 8. type **ALL WEATHER** in **ENTER NEW VALUES** field
- 9. press **ENTER** twice



- 10. press **F7**

*Extract Sales Data and Establish Searchable Description Field on Items*

### Step 3- Perform an Item Search using the Advance Search – F13

1. access an **ITEM SEARCH** screen
2. press **F15** to access **KEYWORD & ADVANCE SEARCH** screen
3. press **F13**
4. **TAB** to the **SEARCH VALUES** field next to the **SEARCHABLE WEAR CODE** field
5. type **ALL WEATHER** in the **SEARCH VALUES** field

Advanced Item Search

Reference Type : ITEM

Attribute Description	Search Values
STYLE NAME	_____ ?
COLOR NAME	_____ ?
KOHLER COLOR# / BATH FIXTURES	_____ ?
DMH BLUE BUBBLE	_____ ?
TEXTURE OF PRODUCT	_____ ?
VINYL PRODUCTS	_____ ?
SHADE VARIATION CODE	_____ ?
24-7 KEY FOR SEARCHING	_____ ?
<b>SEARCHABLE WEAR CODE</b>	<b>ALL WEATHER</b> ?
ARMSTRONG SELLING CATEGORY	_____ ?

More...

---

F6=Return F7=Exit F13=Create Search H

6. press **ENTER**

Advanced Item Search Results

POSITION TO:

A) Item# ..... █

B) Description ...

Opt	Item#	Item Description	Color Name	Pattern Name
▢	HAR0421100	SOMERSET PLANK SQUARE EDGE	BUFF	PLANK
▢	PERP169	PERGO CLASSIC COLLECTION	OAK	6169
▢	SAI10900	TASTIERA ALMOND 6X8	ALMOND	6X8

Bottom

---

Options ==> X=Select A=Attribute Values  
 F6=Return F7=Exit F11=Fold/Unfold H

Note: The results will list all items that have the **ALL WEATHER** Wear Code.

*Extract Sales Data and Establish Searchable Description Field on Items*