



ACTIVANT™

Vision™ Release Notes

Release 7.4
EP9001 Rev. L
May 2006

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Introduction

Activant Vision™ 7.4 is the latest version of the popular comprehensive business management system. Activant Vision™ was designed specifically for multi-tiered distributors in the automotive aftermarket by TSH software engineers and seasoned aftermarket pros.

Activant Vision™ releases occur every three months, delivering new improvements to our users as fast as possible. Activant Vision™ 7.4 includes several interesting new features and hundreds of bug fixes. These release notes demonstrate the changes in 7.4.

If you'd like to learn more about Activant Vision™ in general, please contact your Activant sales representative. Activant Vision™ has many uniquely advantageous features that distinguish it from other products.

Activant Vision™ 7.4 includes all of the improvements made in Activant Vision™ 7.1. If you'd like to learn more about those, please read the Activant Vision™ 7.1 release notes.

- [Who Should Use This Guide](#)
- [Typographical Conventions](#)
- [Where To Get Help](#)

Who Should Use This Guide

Managers should review the new features and enhancements before loading the upgrade.

This guide is useful for introducing personnel to the new features of Activant Vision™ 7.4.

This guide also assumes knowledge of startup and shutdown procedures.

Typographical Conventions

Convention	Description
Entries and Keystrokes	<p>Entries that you make and keys that you press to perform a function at the terminal appear in boldface type inside angle brackets or single quotes. Consider these examples:</p> <p style="text-align: center;">Press <CR>. Type LOC<CR>. Type 'N'.</p>
Messages	<p>The messages and prompts received from the system are presented in special type. For example:</p> <p style="text-align: center;">this record has been added</p>
Notes	<p>Notes call attention to information that is especially important. Notes look like this:</p> <p>Note: This is a note.</p>

Where To Get Help

For Questions About...	Do the Following...
An error message or solving a problem	Check the online help or other system manuals. If you can't find the answer, call the Advice Line at 1 (847) 768-3100 or contact support at: http://isupport.activant.com
On-Site Training and Upgrade Services	Contact your account manager or sales representative.
Using the new features and enhancements of Activant Vision™ 7.4	Check this guide. If you cannot find the answer, call the Advice Line at 1 (847) 768-3100 or e-mail support at: http://isupport.activant.com

Customer Relationship Management

CRM Follow-up Messages

Customer Relationship Management (CRM) messages can be lost in the shuffle. In previous versions, users were only notified of new CRM messages when they were on the home page, leading to infrequent updates. In Activant Vision™ 7.4, urgent CRM messages are more prominent and notify the user immediately, whichever screen they happen to be using on the computer. Also, Vision can now show you that unread messages exist even after the initial notification.

When a CRM message is received by Vision, a small message will be displayed on the lower right hand corner of the user's screen. This message will display for a few seconds and then fade out.

Notification Message:



Clicking on the message link will bring up Vision and show the home page.

An icon will also be displayed in the system tray when a message has arrived. Double clicking, or right clicking and choosing 'Open Vision Home Page', will bring the Vision application to the front and change to the Home Page view.

Activation

Each user will have the ability to turn on or off desktop alerts for different message priorities. To configure your desktop alerts, press the "Display Options" button on the home page.

The new Desktop Alerts box allows you to check next to the CRM message priorities for which you want to receive desktop alerts:

The screenshot shows the Vision Enterprise 7.4.18 CRM interface. The top navigation bar includes tabs for Home Page, Customer Maintenance, Customer Service, Retail / POS, CRM, and Parts. Below this is a breadcrumb trail: Home Page | Customer Profile | Part | Vision Back Office | Preferences.

The main content area is divided into several sections:

- My Links:** A vertical sidebar on the left with a link to "Vision Back Office".
- Calendar:** A calendar for April 2006. The date 4/12 is circled in red, and the text "Today: 4/12/2006" is displayed below it.
- Company News:** A section with a title "Company News" and a text area containing a message about training discount cards.
- Special Alerts:** A section with a title "Special Alerts" and a text input field containing "All M".
- Configuration Panels:**
 - Sources:** A panel with a checked checkbox for "All Sources".
 - Event:** A panel with a checked checkbox for "All Events" and several unchecked checkboxes for specific events like "1MonOrdCh", "2MonOrdCh", etc.
 - Priority:** A panel with a checked checkbox for "All Priorities" and unchecked checkboxes for "Urgent", "High", "Medium", and "Low".
 - Follow-up Dates:** A panel with radio buttons for "All Dates" and "Through Current Date", and date pickers for "From" and "To" both set to 4/12/2006.
 - Desk-Top Alerts:** A panel with a checked checkbox for "All Priorities" and unchecked checkboxes for "Urgent", "High", "Medium", and "Low". This panel is circled in red.
- My Follow-up:** A table showing follow-up activities. The table has columns for Start Date, Event, Customer, Status, Details, Contact Name, Phone, and Contact Email. It shows three rows of data for 4/12/2006.

The Activant logo is visible in the bottom left corner of the interface.




Customer Service

New Automotive Invoice Form

The laser-printed automotive invoice form has been updated. Activant Vision™ 7.4 now:

- Prints the web site address,
- Prints the Customer Service Rep. instead of the Salesperson,
- Prints order date and time,
- Adds a space between the manufacturer code and the part number,
- Prints only the Part Description (instead of the long description),
- Single-spaces the part listing,
- and Prints the core unit price if it exists for the part.

Here is a sample copy of the new invoice:



Store 308 Ft. Myers
 8th Street Northwest
 Ft Myers, FL 38224
 www.activant.com


**Invoice
 No. 08II0300**

Page 1

CUSTOMER NUMBER	Invoice NUMBER	Invoice DATE	PACKING SLIP	TERMS	WHSE
883	08II0300	03/02/06	08AB1754001	Net 10	080

BILL TO:
 Vision PD (883)
 2250 E Devon Ave
 Suite 149
 Des Plaines, IL 60018

SHIPPED TO:
 Vision PD (883)
 2250 E Devon Ave
 Suite 149
 Des Plaines, IL 60018



Dept: 001 Vision PD (883) Contact/Phone: /847-390-6300

YOUR P.O. NUMBER	ORDER DATE	CSR	SHIPPED VIA	CARTONS	OPER
	03/02/06, 10:47:29	000001 House Account	000080 A	1	CSR

ITEM	DESCRIPTION	UNT	ORDER QTY	BACK ORDERED	INV QTY	NET PRICE	NET CORE	EXT PRICE
ACD 15-2883	12356978 COMPRESSOR	EA	1	0	1	518.160	0.000	518.16
ACD 15-3883	22545191 FITTING W/	EA	2	0	2	110.240	0.000	220.48
ACD 15-8883	52499881 BLOWER MOT	EA	3	0	3	79.780	0.000	239.34
	EXCISE TAX						48.90	
	DELIVERY CHARGE						24.45	

TOTAL PURCHASE	FREIGHT	TAX PCT	TAX AMT	INVOICE TOTAL	PAYMENTS	BALANCE DUE
1051.33	0.00	7.000%	68.46	1119.79	0.00	1119.79


You may deduct \$19.56 if you pay by 04/10/06.

<p>CUSTOMER NAME</p> <p>Vision PD (883)</p>	<p>PLEASE RETURN THIS PORTION FOR PROPER PROCESSING</p>
--	---

CUSTOMER NUMBER	PACKING SLIP	Invoice NUMBER	DATE	TOTAL PURCHASE	FREIGHT	TAX	PAYMENTS
883	08AB1754001	08II0300	03/02/06	1051.33	0.00	68.46	0.00

Vision Enterprise
 2250 East Devon Avenue
 Des Plaines, IL 60018

Invoice BALANCE DUE: 1119.79

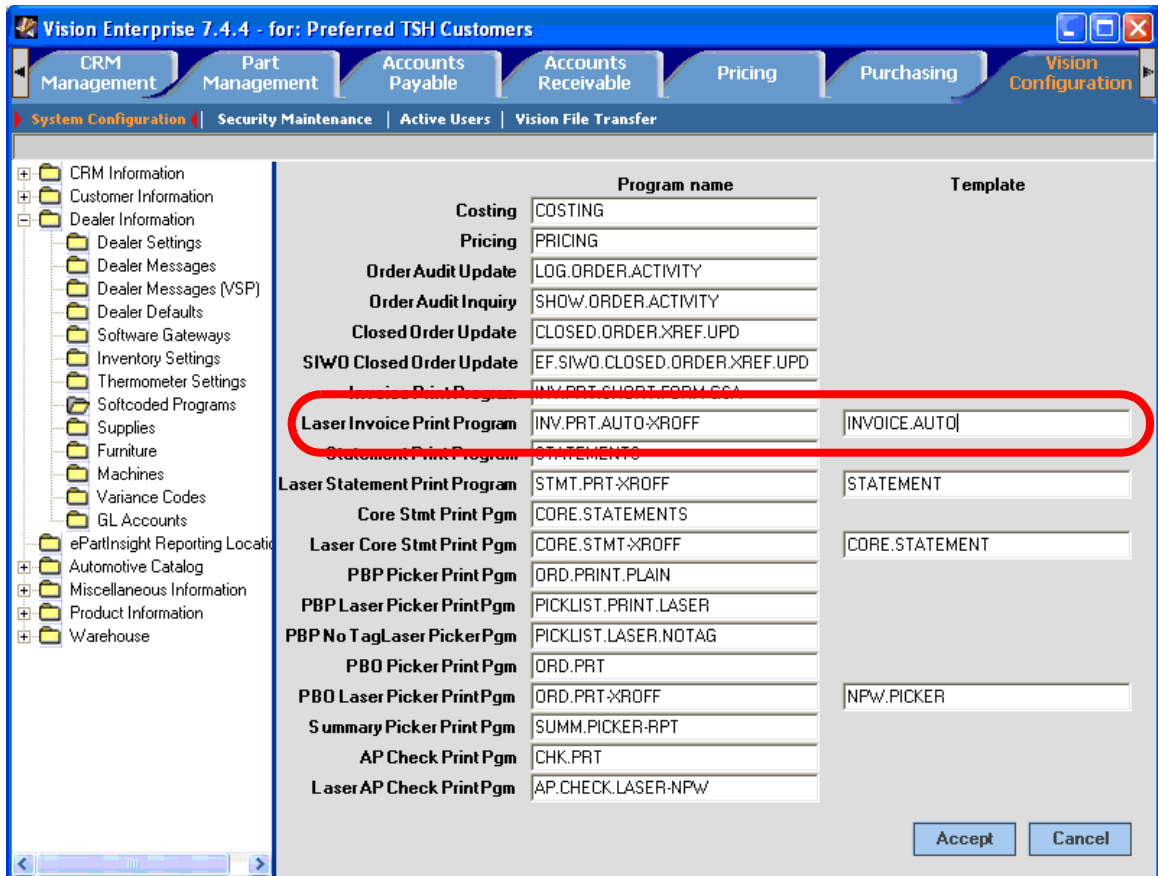


Setup

If you have a custom invoice set up, nothing needs to be changed.

If you do not have a custom invoice, follow this procedure:

- 1 Go to the Vision Configuration tab, System Configuration form, Dealer Information folder, Softcoded Programs sub-folder:**



- 2 Enter “INV.PRT.AUTO-XROFF” in the Program name field.**
- 3 Enter “INVOICE.AUTO” in the Template field.**
- 4 Click the “Accept” button.**

5 Enter the desired website in Company Maintenance, screen 4:

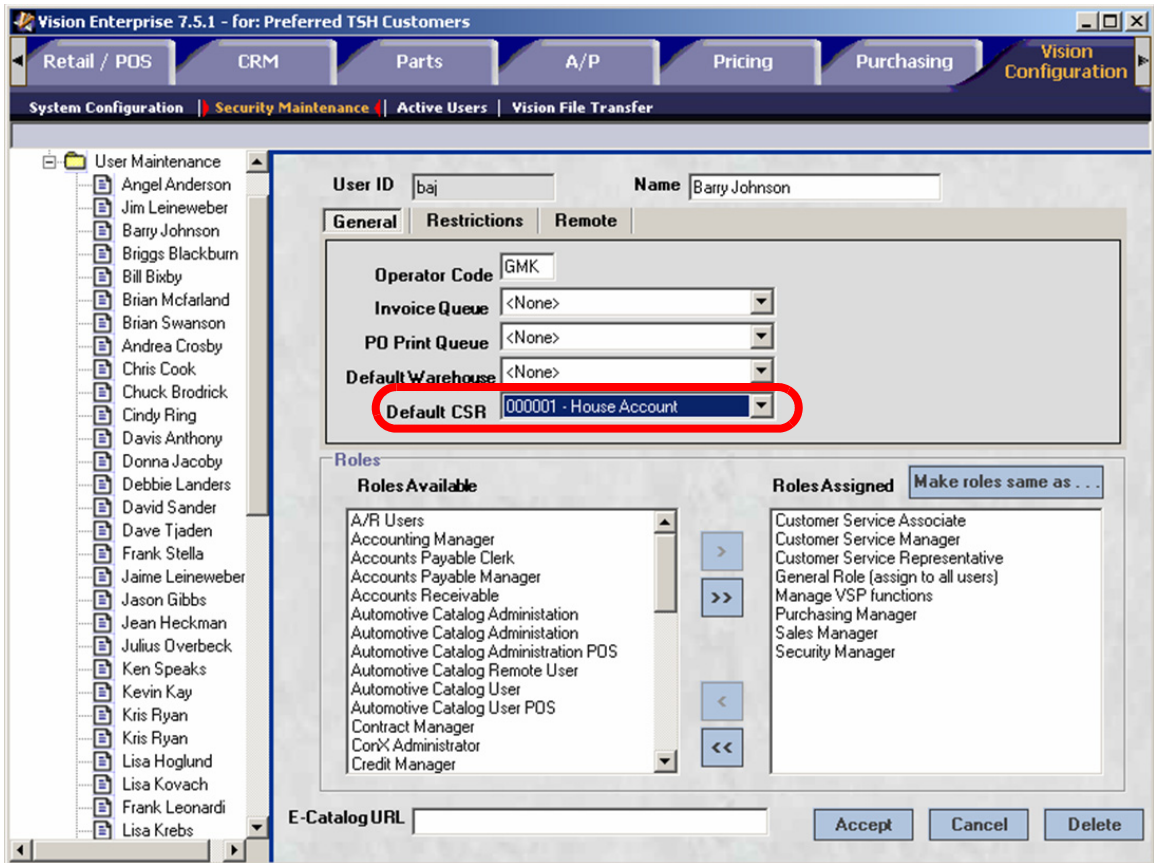
COMPANY.HDR3	02/06/06 12:46:08
Company Master File Maintenance Four	
Company # : 01	
1. Curr GL Sls Fisc Mo.: 200411	
2. Curr AR Fiscal Mo...: 200511	
3. Curr AP Fiscal Mo...: 200410	
4. Last AR Fiscal Mo...: 200501	
5. Last AP Fiscal Mo...: 200409	
6. First GL Period :	
7. Web Site...: www.aktivant.com	

Default Customer Service Representative

Automotive users can now track orders by CSR (for commissions and other purposes). Activant Vision™ 7.4 allows a user to have a default CSR. The first order placed when the user logs in will default to the CSR on the user record. Subsequent orders will default to whatever the previous CSR was. To make it easier to change, the CSR field will be moved from the order details area to the header area.

Office Supply users have this feature already, by defaulting the CSR from the customer record.

The Default CSR drop-down has been added to the Vision Configuration tab, Security Maintenance form, on the General sub-tab for Automotive:



On the Current Order form for automotive, the CSR field defaults to the user's default CSR:

The screenshot shows the 'Current Order' form in Vision Enterprise 7.5.1. The form is for customer '200510 Precision Auto Repair'. The CSR field is highlighted with a red circle and contains the value '000250 - LA House Account'. The form includes fields for Customer, Ship To Name, Address, City State Zip, Map Location, Delivery Method, Contact, Phone / Ext, Special Instr, Billing Code, Order Source, Customer PO, Operator Hold, Order Number, Order Type (Standard, One Step, C/M Pickup, C/M One Step, Rebill, Quote), and a table for Product, Part Number, Ord, UOM, Unit Price, Unit Cost, Disc %, Core Price, Core Cost, List Price, Price Source, Vendor, Direct Ship, Return Tag, and Dt. The status bar at the bottom shows 'Ord Num: New Order', 'Ord Date: 4/12/2006', 'Ord Lines: 0', 'Mdse: 0.00', 'Tax: 0.00', 'Margin Pct: 0.0', and 'Ord Total: \$0.00'.

Interchange for Alternate

In Activant Vision™ 7.4, the Manufacturer Popularity Code, ABC code, Price and Gross Profit % have been added to the alternates tab control on the Part form in the Customer Service tab and to the product search results list view at the bottom.

Customer: 7388 DAVE MCINNIS GARAGE > ShipTo: 001 - DAVE MCINNIS GARAGE > Company: 07 - Part Shop Express - Largo > Warehouse: 070 - Part Shop

Part # ACD15-5151
Description 3033879 EXPANSION

Order Message
Manufacturer AC Delco (ACD)
Part Class 015 - Delco A/C Parts
Part Type 001 - Compressors
Minimum Sell UOM EA - 1 Cust Total 1.450
Cores Sold / Loan 0 / 0 Per Car Qty 0

Part Number	Description	ABC Code	M.	Price	GP %
ACD15-512	5914631 FILTER SCR		W	1.590	48.43 %
ACD15-5251	12327691 EXPANSION	B - B Classification	X	43.070	48.60 %
ACD580-222	22400247 ABSORBER F			215.820	48.60 %

Whse	Part Number	Description	Stock Type	Available	List Price	UOM	Price Class
(R)050	ACD15-5151	3033879 EXPANSION	Stock	85	120.340	EA,CS,PL	Delco A/C Parts

Non-Returnable Items

Activant Vision™ 7.4 can disallow customer returns on certain items and by certain customers. The part record now has three new check boxes that prohibit new inventory returns, defect (warranty) returns, and core returns.

The screenshot displays the 'Part Management' screen in Vision Enterprise 7.4.8. The part number is ACDPK002 and the description is 88985570 ATTACHMENS. The 'Prohibit Returns' section, highlighted with a red circle, contains the following options:

- Inventory
- Warranty
- Core

Other visible options include 'Discontinued', 'Drop Ship', 'Inventory Update', 'Backorder', 'Recycled', 'Partial Ship', and 'Mark for Deletion'. The 'Aliases' section shows the alias name 88985570 PK002.

The customer record has a new check box to prohibit returns.

The screenshot shows the 'Vision Enterprise 7.4.24 - for: Preferred TSH Customers' window. The 'Customer: 200154 Bob's Paint and Body' record is open, and the 'Preferences' tab is selected. The 'Order Processing' section contains several checkboxes, with 'Prohibit Returns' circled in red. Other visible options include 'Accepts Partial Shipments', 'Accepts Backorders', 'Purchase Stockouts from Wholesaler', 'Desktop Delivery', 'Qty Break Price Eligible', and 'Complete Ship'. The 'PO Requirements' section includes 'PO Required', 'PO Match Pattern', 'Blanket PO Match Pattern', and 'Blanket PO'. The 'Document Prints' section has 'Invoice Discount Print', 'Invoice Delivery Method', 'Invoice Message', and 'Core Statement'. The 'Monthly Reports' section includes 'Monthly Invoice Reports', 'Usage Report Day Heading', 'Monthly Billing Sort', 'Usage Report', 'Usage Report Frequency', 'Consolidated Usage Cust #', and 'Display Report Subtotals'. The 'Department By Location Within Ship To Number' section includes 'Delimiter', 'Usage By Page', 'Billing By Page', and 'Sales Qty Report'. 'Accept' and 'Cancel' buttons are at the bottom right.

The “OE RETURNABLE OVERRIDE” job function is allowed to return items even if the item is not returnable or the customer cannot return items. This job function is assigned to the CSRMgr Vision Role.

If the customer is configured not to allow returned items, the “C/M Pickup” and “C/M One Step” order types will not be available. Also, they will not be able to enter return lines on Standard Orders or Retail Orders.

If this customer ordinarily prohibits returns, there will be a red "Prohibit Returns" text box on the current order and the customer profile forms to warn the operator. It will be yellow if the user has the job function to override this.

The screenshot displays the Vision Enterprise 7.4.24 interface for a customer order. The top navigation bar includes tabs for Home Page, Customer Maintenance, Customer Service, Retail / POS, CRM, Parts, A/P, and A/R. The main window shows a customer profile for 'Bob's Paint and Body' with various address and contact details. A 'PROHIBIT RETURNS' warning box is visible near the Order Number field. Below the form is a table for line items with columns for Line, Part Number, Ord, UOM, Unit Price, Unit Cost, Disc %, and Override Price. The status bar at the bottom shows 'Ord Num: New Order', 'Ord Date: 4/12/2006', 'Ord Lines: 0', 'Mdse: 0.00', 'Tax: 0.00', 'Margin Pct: 0.0', and 'Ord Total: \$0.00'.

During line entry, a red "Prohibit Returns" text box will appear near the Action group box if any return types are prohibited for the product entered. If you hover your mouse over the warning box, Vision will list which return types are prohibited.

The returns warning text box will be yellow if the user has the ability to override.

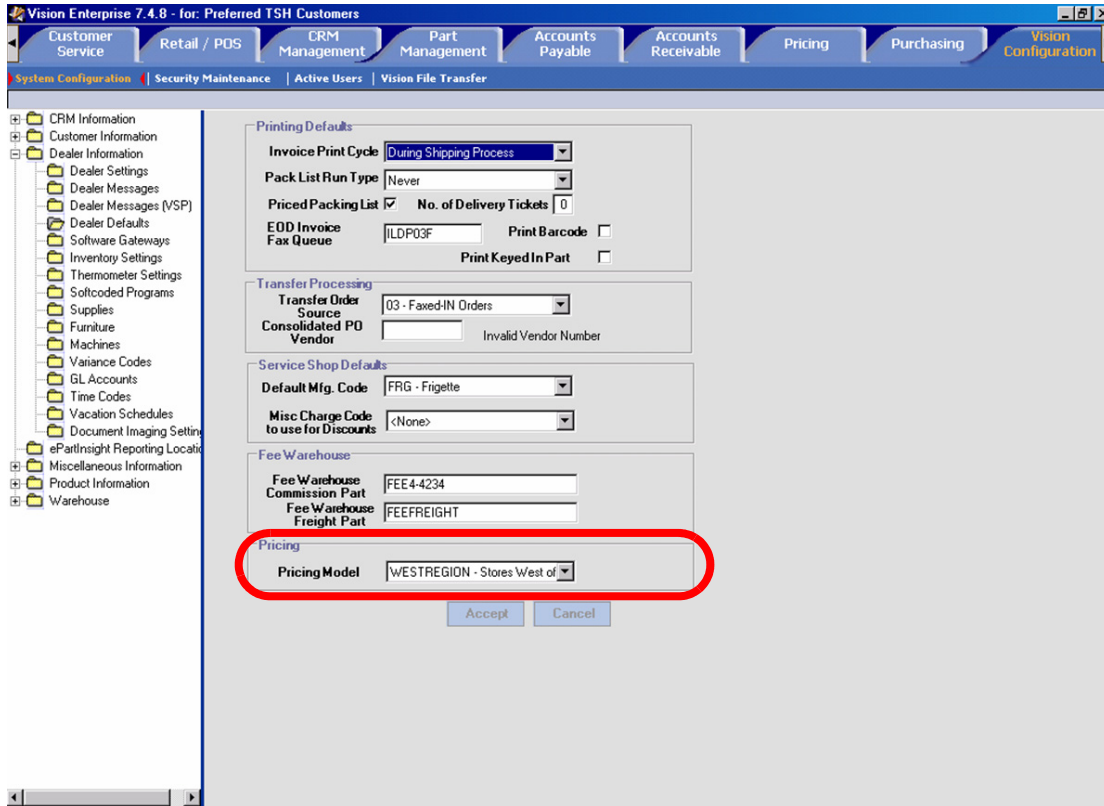
The screenshot shows the Vision Enterprise 7.4.24 interface for a 'Preferred TSH Customer'. The main window displays customer information for 'Bob's Paint and Body' and order details. A yellow warning box labeled 'PROHIBIT RETURNS' is visible next to the 'Core' option in the 'Action' menu. The order summary at the bottom shows 'Ord Num: New Order', 'Ord Date: 4/12/2006', and 'Ord Total: \$0.00'.

Line	Action	Part Number	Description	Order Qty	UOM	Unit Price	Core Price	Ext Price	Ship Qty	B/O Qty	Inv Qty	Cncl Qty
001	ACD41-932				EA	13.690	3.627					
		89017883 SPARKPLUG				0.000	0.000	13.690				

Global Pricing

Activant Vision™ 7.4 provides a method to update global pricing so that parts that are not carried at each location can still have valid prices. Global pricing adds the ability to have a part only at the global level and the ability to update pricing at the global level only.

On the dealer defaults form under dealer information, a new “Pricing” field is available where the user can select the pricing model for which to update the global product master file. The field is not required, thus “<None>” is a valid choice.



The end-of-day process now updates the pricing at the product master global level if a model name is specified in the dealer information.

Limit Gross Profit and Margin Display

Your gross profit, costs, and gross margin are not things that you want everyone to know. With Activant Vision™ 7.4, we have added two Job Functions and a Job Role to help you control who sees this important information.

These new job functions are OE SHOW GP/COST and OE SHOW GP/COST (POS) and the new job role is POSMGR.

Unless a user has these job functions, Vision will not show gross profit, cost, and gross margin information on the Home Page tab, Retail/POS tab or the Customer Service tab.

A new standard Vision role, POSMGR, has been created to limit display of these fields for Retail/POS users. This new role has all of the job functions as the POS role, with the addition of the “OE SHOW GP/COST (POS)” job function.

When a user without the new job role or functions accesses a screen with gross profit, cost, and gross margin information, the display containing the information is absent. When the information is displayed in a list, such as the order information line, that column is simply blank.

Activation

When you install Activant Vision™ 7.4, users with the POS job role will not be able to view gross profit, cost, and gross margin information. To enable a user to view this information, set their job role to POSMGR.

Activant has added the OE SHOW GP/COST function to the following job roles:

- CSRIII
- CSRMGR
- CSRSUPER
- CREDITMGR

To enable other users to view gross profit, cost, and gross margin information, add the OE SHOW GP/COST function to their job roles.

Affected Screens/Fields

When a user doesn't have the OE SHOW GP/COST or OE SHOW GP/COST (POS) job function in their job role, the following items on the following pages are unavailable to them.

On the customer profile form (both in Customer Service and in Retail/POS):

- Avg. GP
- Sls Tgt/Mo.
- Customer Comparison thermometer

On the part lookup form:

- Vendors tab

On the current order form:

- Unit cost, core cost, ext. cost, and margin % in the Line edit panel
- Unit cost, core cost, ext. cost, and margin % in the Line item list view
- Margin Pct. in the Order status bar

Note: In the Retail/POS tab, the margin percentage is not shown in the status bar if the order type is "Retail". This is existing Vision functionality.

On the order inquiry form (both in Customer Service and in Retail/POS):

- Unit Cost
- Core Cost
- Extended Cost

- GP%

On the home page tab under the “Monthly Order Pattern” group box:

- Avg GP
- Sls Tgt/Mo.

On the Sales History tab, the GP% option button is unavailable.

New Screen Layouts

When a user doesn't have the OE SHOW GP/COST or OE SHOW GP/COST (POS) job function in their job role, some items are absent from the screen, as discussed above.

Here are examples of the full access layout of several screens, and the restricted access layout of those same screens:

Customer Service Current Order Screen with all fields:

Customer Service Current Order Screen, restricted access:

The screenshot displays the Vision Enterprise 7.3.12 software interface for a Customer Service Current Order Screen. The window title is "Vision Enterprise 7.3.12 - for: Preferred TSH Customers". The interface includes a navigation bar with tabs for Home Page, Customer Maintenance, Customer Service (active), Retail / POS, CRM Management, and Part Management. Below the navigation bar, there are menu options for Customer Profile (F2), Ship Tos (F3), Current Order (F4) (active), Part (F5), Catalog Parts (F6), Customer History (F7), Part History (F8), and Order. The main content area is divided into several sections:

- Customer Information:** Fields for Customer, Ship To Name, Address 1, Address 2, Address 3, City State Zip, and Map Location.
- Contact Information:** Fields for Contact, Phone / Ext, Special Instr, Billing Code, Order Source, Customer PO, Operator Hold, and Delivery Method.
- Order Information:** Fields for Order Number, Order Type (Standard, One Step, C/M Pickup, C/M One Step, Rebill, Quote), and buttons for New Order, Accept Order, Payments, and Order Details.
- Product and Pricing Section:** Includes a "Discount Calculator" tab and a table with columns: Line, Part Number, Ord, UOM, Unit Price, Disc %, Override Price, Price Hold, Ship, B/O, Core Price, List Price, Price Source, Inv, Cncl, Ext Price, Vendor, Direct Ship, Return Tag, Dt, and Mo. A red box highlights the "Unit Cost", "Core Cost", "Ext Cost", and "Margin %" columns, with the text "Fields are Blank" overlaid on them.
- Footer:** Displays order summary information: Ord Num: New Order, Ord Date: 10/25/2005, Ord Lines: 0, Mdse: 0.00, Tax: 0.00, and Ord Total: \$0.00.

Customer Profile Screen, with all fields:

Customer Profile (F2) | Ship Tos (F3) | Current Order (F4) | Part (F5) | Catalog Parts (F6) | Customer History (F7) | Part History (F8) | Order

> Warehouse: 050 - FAD - WD

Customer [Search] [Options]

Customer Bill To

Phone Fax

Contact Telephone Fax Number

Recent CRM Notes Customer Notes

Customer Since

Sales Rep

Open Bal - AR

Avg Sales/Mo.

Avg Ords/Mo.

Last Order

Order

Avg GP

Sl's Tgt/Mo.

Credit Core Warranty

Customer Compare

Sales Profit

12 Mo. Returns

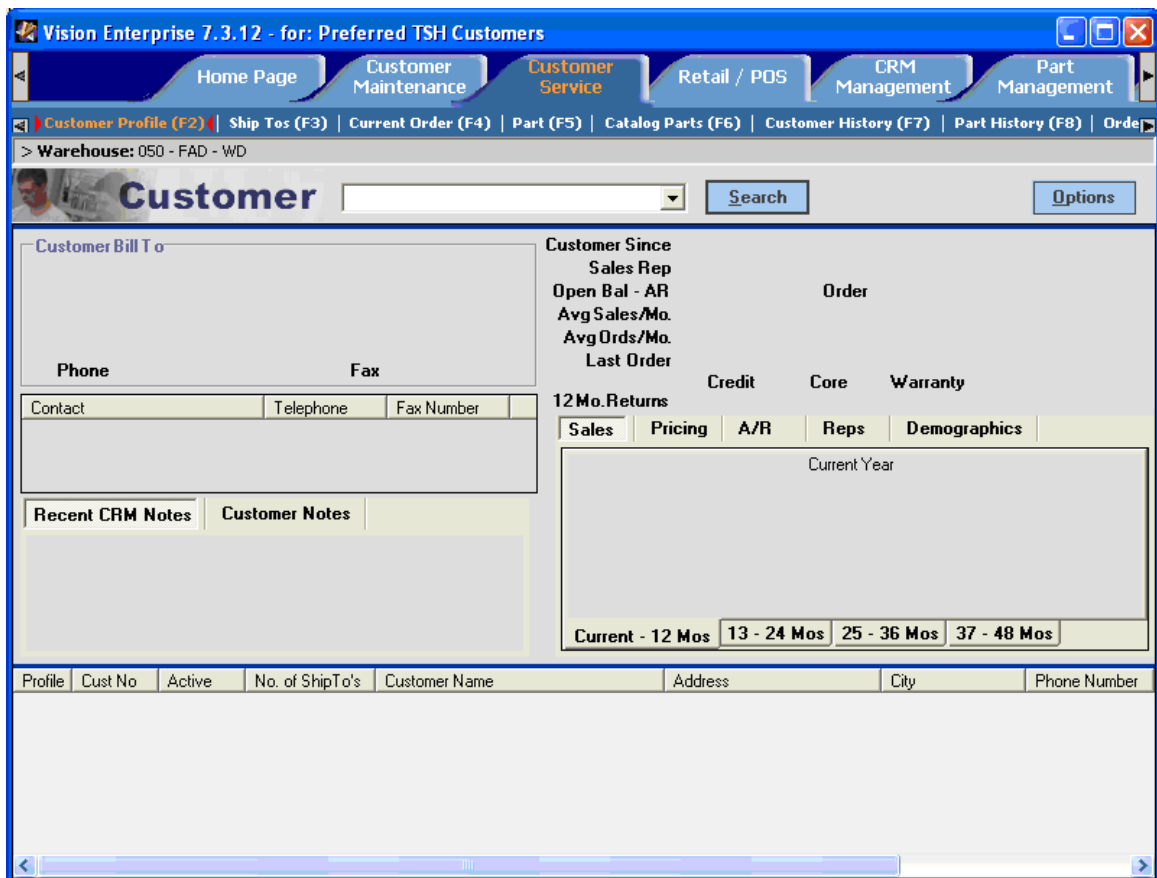
Sales Pricing A/R Reps Demographics

Current Year

Current - 12 Mos 13 - 24 Mos 25 - 36 Mos 37 - 48 Mos

Profile	Cust No	Active	No. of ShipTo's	Customer Name	Address	City	Phone Number

Customer Profile Screen, restricted access:



Line Entry Credit Warning

Activant Vision™ 7.4 now provides a warning to the user when a line is accepted if an “on-account” customer is on credit hold. When possible, the amount by which the credit limit has been exceeded will be included as part of the indication.

This information is shown by use of a warning box in the Current Order form and Customer Profile form on the Customer Service tab

Previously, Vision Order Entry waited until the order was accepted before determining whether or not the order might need to be placed on credit hold.

Here is the new Customer Profile form with the credit-hold indicator shown:

Customer Profile (F2) | Ship Tos (F3) | Current Order (F4) | Part (F5) | Catalog Parts (F6) | Customer History (F7) | Part History (F8) | Order

Customer: BRIANCO Brian Co Manufacturing > ShipTo: 005 - Ship From WD > Company: 05 - Storage Central WD > Warehouse: 050 - FAD - WD

Customer BRIANCO Search 1 Record(s) Found. Options

Customer Bill To
 Brian Co Manufacturing
 2930 Kentshire Circle
 Naperville, IL 60564
 Phone (630) 904-8756 Fax (847) 768-3139

Customer Since 12/8/2003 **CREDIT HOLD** **Customer Compare**

Sales Rep 001 - Sue Adelman **Order** \$515,970.52

Open Bal - AR \$2,225.78 **Avg GP** 60.8%

Avg Sales/Mo. \$55.17 **Sls Tgt/Mo.** \$3234

Avg Ords/Mo. 659 **Last Order** 05AB7337 12/30/200 \$31.92

12 Mo. Returns **Credit** \$0.00 **Core** \$0.00 **Warranty** \$0.00

Recent CRM Notes **Customer Notes**

CRM Note 1 of 5
 11/04/05 11:55 bswanson
 test

CRM Note 2 of 5
 11/04/05 11:54 bswanson

Monthly Sales History (\$) - Current - 12 Mos Ago

Month	Sales (\$)
Feb	0
Mar	72
Apr	0
May	6
Jun	0
Jul	0
Aug	0
Sep	0
Oct	166
Nov	0
Dec	0
Jan	343

Current - 12 Mos | 13 - 24 Mos | 25 - 36 Mos | 37 - 48 Mos

Profile	Cust No	Active	No. of ShipTo's	Customer Name	Address	City	Phone Number
A	BRIANCO	Yes	7	Brian Co Manufacturing	2930 Kentshire Circle	Naperville	(630) 904-8756

Here is the new Current Order form with the credit hold indicator shown:

The yellow box shows the amount by which the customer is over their limit. To access this box, hover your mouse over the red credit hold indicator. This information is available on both the Current Order and the Customer Profile forms.

Receipts for ROA Payments

Activant Vision™ 7.4 now has the capability to print receipts for Received-on-account payments.

Once the payment is validated and accepted by the backend, the receipt is directed to the printer defined via the Printer Settings dialog, which is accessed via right-clicking the Vision logo on the Home Page and choosing “Printers...” from the context menu.

Quick Drop-ship Orders

Activant Vision™ 7.4 allows you to use the sourcing form to source items from another location for a customer order, then indicate that items should be drop-shipped to customer or picked up by customer at the store location

The sourcing form generates both the transfer order to the source warehouse and the customer order for the delivery, and allows you to specify delivery method: drop-ship, or pickup (will-call).

There are now 4 possible sourcing methods:

- Transfer - This will be the default and will create a transfer order. This is what happened previously.
- Quick Drop - Ship from the sourced warehouse. This will create a customer order, not a transfer order.
- Quick Drop Pickup - Ship from the sourced warehouse. Create a customer order that is flagged as a will call/pick up order.
- Quick Drop Rush - Ship from the sourced warehouse. Create a customer order that is flagged as a rush order.

To use the new sourcing methods, a new set of fields has been added to the sourcing form:

The screenshot shows the 'Source Line' window with the following sections:

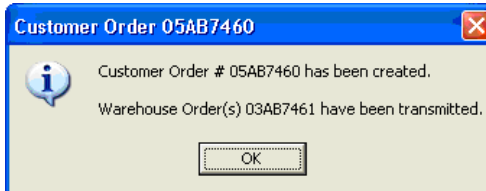
- Order Line Information:** Line Number 001, Part Number ACD15-3883, Description 22545191 FITTING W/, Superseded By. UOM EA, Order Qty 5, Ship Qty 0, BO Qty 5, Cancel Qty 0. Sourced Qty 0, Remaining To Source Qty 5.
- Part Purchase Order Information:** Table with columns: PO Number - Line, Vendor, Vendor Name, Scheduled.
- Warehouse Availability:** Table with columns: Whse, Name, Available To Source. Rows: 050 MAIN PBP WD 050 (500), 080 STORE #08 FOR WD 050 (162).
- Warehouse Sourcing:** (Highlighted with a red circle) Includes a dropdown for '050 - MAIN PBP WD 050' with quantity '5'. A dropdown menu is open showing options: 'Quick Drop', 'Quick Drop Pickup', 'Quick Drop Rush', and 'Transfer'. 'Auto Verify Incoming Transfer' is checked.
- Warehouse Sourcing History:** Table with columns: Whse, Name, Requested, Verified, Canceled.
- Purchase Order History:** Table with columns: PO Number - Line, Direct Ship, Vendor, UOM, PO Qty, F.
- Force To Ship:** Checkboxes for 'Force To Ship' and 'Generate BO Transfer From Replenishment Warehouse'.
- Vendor Source for Purchase Order:** 'Auto Rcv' and 'Direct Ship' checkboxes, 'Vendor' dropdown set to '<None>'.
- Buttons:** Supersede, Remove Line, Accept Line, Exit.

Select a warehouse from the drop-down list, enter a quantity, and select a sourcing method, as shown above.

Once a method is selected the customer order will not generate a transfer order. Instead, a separate customer order will be created for the warehouse selected in sourcing. The original order will reference the customer order in the line item message and the original order line will be marked with the sourcing type.

The sourcing type is noted on the order detail line in the Current Order form.

Once the sourcing is selected and the order is released, Vision shows the order numbers created:



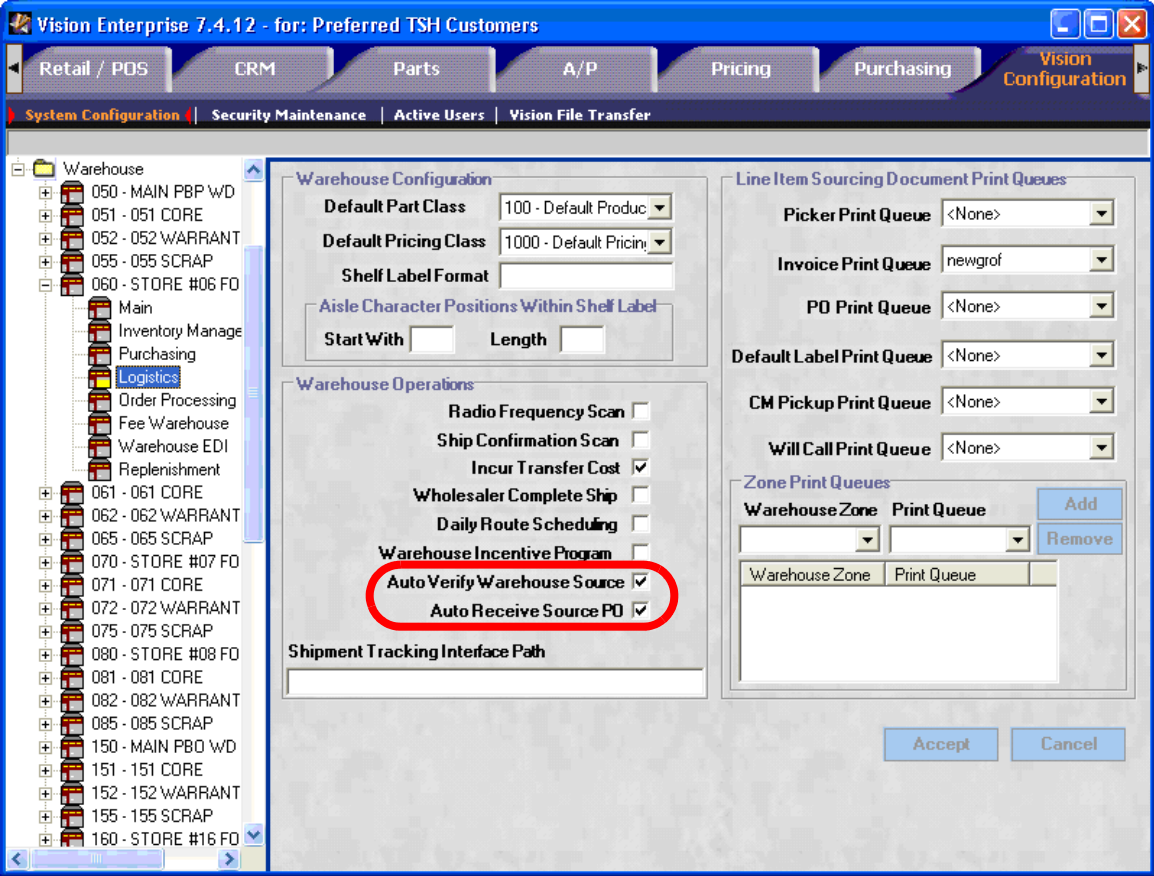
Auto-Receive for Buyout POs

There is a new check box on the sourcing form “Vendor Source for Purchase Order” to indicate that a PO should be automatically received at order entry time - for buyouts. To quickly verify receipt, the sourcing form “Warehouse Sourcing for Transfer Orders” has a new check box to indicate whether a transfer should be auto-verified. This allows more flexibility in the transfer process.

Configuration

Whether these checkboxes default to checked or un-checked is controlled in the Logistics form of each warehouse under the Vision Configuration tab. When checked, the boxes on the Source Line form default to checked. All warehouses will be default flagged to 'Auto

Verify Incoming Transfer'. These check-boxes can be un-checked for more intense scrutiny in shipping and receipt.



Use

The new Auto Receive Source PO check-box is in the Source line box.

The screenshot shows the 'Source Line' window with the following details:

- Order Line Information:** Line Number 001, Part Number ACD15-3883, Description 22545191 FITTING W/, Superseded By.
- UOM:** EA, **Order Qty:** 5, **Ship Qty:** 0, **BO Qty:** 5, **Cancel Qty:** 0.
- Sourced Qty:** 0, **Remaining To Source Qty:** 5.
- Part Purchase Order Information:** Table with columns: PO Number - Line, Vendor, Vendor Name, Scheduled T.
- Warehouse Availability:** Table with columns: Whse, Name, Available To Source.

050	MAIN PBP WD 050	500
080	STORE #08 FOR WD 050	162
- Warehouse Sourcing History:** Table with columns: Whse, Name, Requested, Verified, Canceled.
- Purchase Order History:** Table with columns: PO Number - Line, Direct Ship, Vendor, UOM, PO Qty, F.
- Warehouse Sourcing:** Includes 'Auto Verify Incoming Transfer' (unchecked), 'Add', 'Remove' buttons, and a table with columns: Whse, Name, Qty, Deliv.
- Vendor Source for Purchase Order:** 'Auto Rcv' (checked), 'Direct Ship' (unchecked), 'Vendor' dropdown set to 'ACDELCO (5104)'. Other options: 'Force To Ship' (unchecked), 'Generate BO Transfer From Replenishment Warehouse' (unchecked).
- Buttons:** Supersede, Remove Line, Accept Line, Exit.

This new check-boxes default to “not checked”.

Overselling Inventory

There are several situations where inventory may be present in the store, or otherwise available for sale, but not be available for sale in Activant Vision™.

Three of the most common reasons are:

- Inventory is sitting on the dock but is not yet checked in.
- Inventory is incorrect and shows zero.
- When the warehouse has a transfer in transit, the in-transit inventory is sold against before receipt.

Activant Vision™ 7.4 has the ability to “Oversell” inventory for both retail and “standard” (two-step) orders.

When entering a line for a standard order, if the part is not available in sufficient quantity, the counterperson can check the "Force to Ship" check box on the sourcing form.

Vision tracks the "forced to ship" items for a report similar to the "Retail Problems" report for oversold retail transactions. This report, the Force Ship report is printed every night during the end-of-day process. The report can also be run from the inventory reports menu (3.2.18) in the back office. It can be run for a specific date range and for a single warehouse at a time.

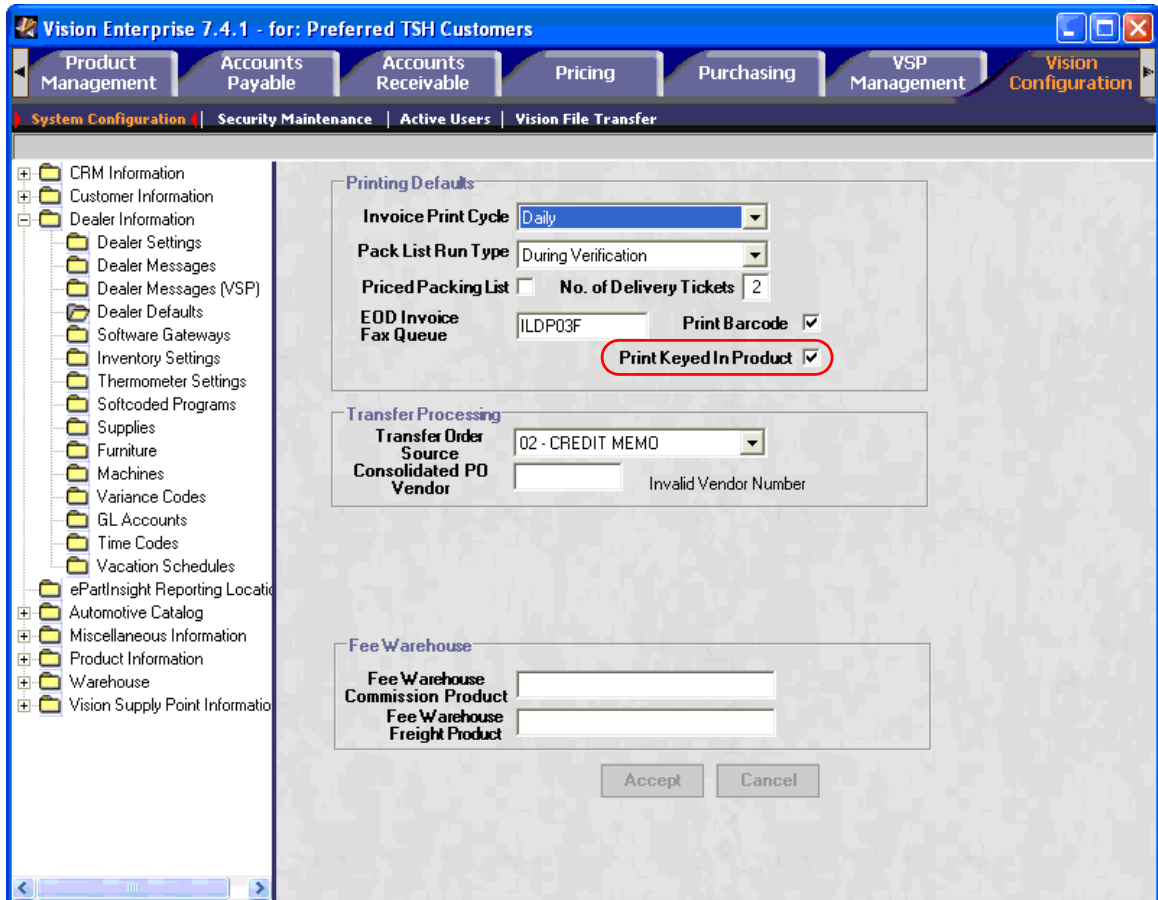
The overselling capability is optional, and can be activated by checking the "Oversell Inventory" check box in the dealer settings "Processing Options" group box.

Keyed Part Number on Invoice

Sometimes customers only recognize products that they ordered by their own product ID, which Vision stores. The difference in the ID isn't enough to qualify as a "Customer Product ID", but it is enough to differ from the product ID as it is stored in the product master record.

If selected, the Keyed-in Part Number is printed on the packing list, delivery ticket, and invoice.

To activate this capability for a customer, select the “Print Keyed in Product” check-box on the Vision Configuration Tab, System configuration form, Dealer information set, Dealer defaults subset, as shown below:





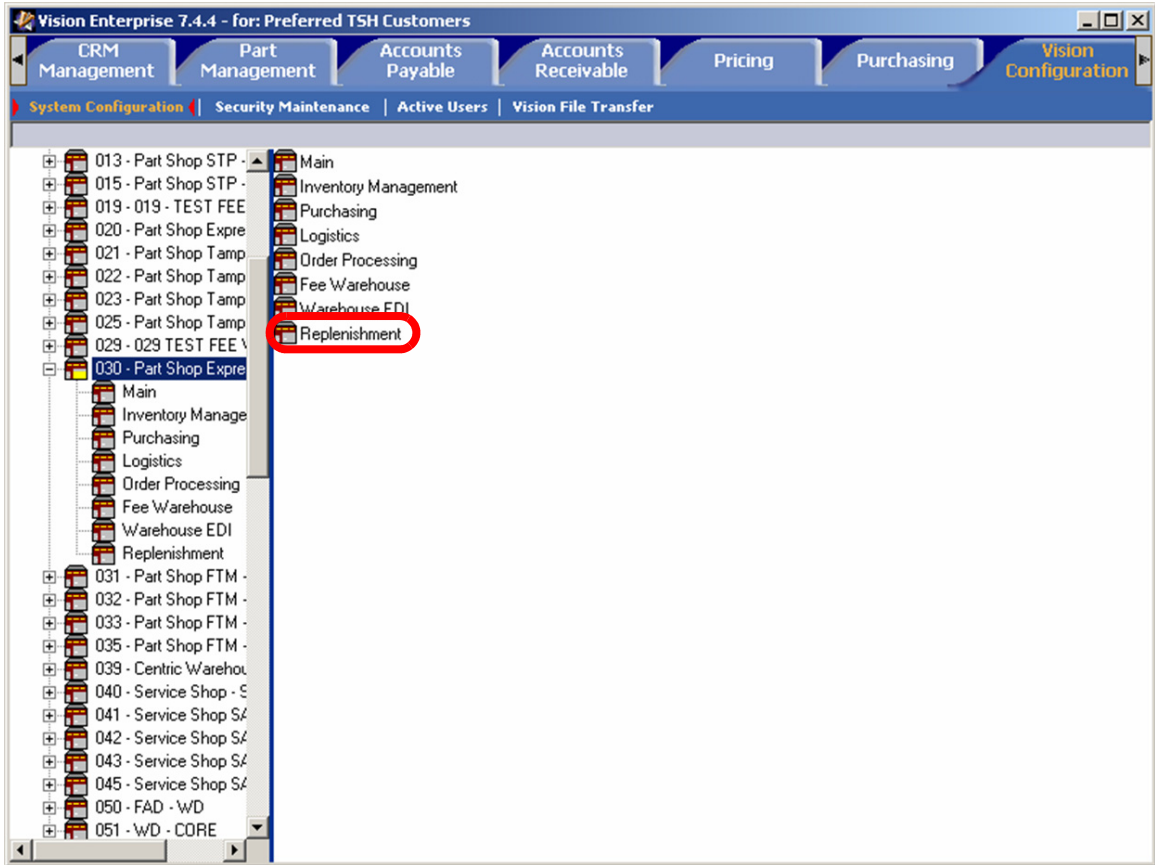
Purchasing

Direct Store Re-Order

The End-of-Day Replenishment process evaluates stocking levels for replenished warehouses and automatically generates the appropriate transfer orders. Activant Vision™ 7.4 has the capability to exclude specified warehouses from automatic end-of-day replenishment. Such warehouses can still be replenished with manually generated transfers. This exclusion process only applies to Replenishment Transfers.

Additionally, some warehouses purchase certain product classes directly from the vendor. These classes will now be excluded from replenishment transfer generation. Activant Vision™ 7.4 allows specific product classes, by replenished warehouse, to be permanently excluded from replenishment from the warehouse and to be replenished directly from the primary vendor.

To exclude warehouses or product classes from automatic replenishment transfer, the replenishment form for each warehouse in Warehouse EDI under the System Configuration tab has been modified:



Below is the new Replenishment form with the two new controls (Part Classes to exclude and Create Replenishment at End of Day) and the two existing controls that were moved to it from the Main and Purchasing forms:

This form allows you to:

- set the replenishment warehouse for the location,
- exclude any part classes from automatic replenishment,
- and set the location to use the end-of-day replenishment process.

Note: The Excluded product classes will continue to be replenished via a vendor PO.

Replenishment Reserve Stock

To prevent depletion of inventory at distribution warehouses, a replenishment stock reserve has been added to the ROP Factors form for Product Maintenance and Purchasing Management. This new field will only be enabled for Distribution Warehouses (warehouses that replenish other warehouses).

The reserve will reduce available quantity at the Distribution Warehouse by this reserved amount.

Each part now has a new attribute in Product Detail for Replenishment Reserve Stock
 In Product Maintenance, the “Main” form will has a new field for replenishment reserve stock.

The following is the modified Part Maintenance form. Notice that the Replenishment Reserve Stock field has been added and the other text boxes shifted down with AMU Calc Factor moving to the right.

Part Number: ACD15-5151
Description: 3033879 EXPANSION
Warehouse: 050 - FAD - WD

Superseded: By Number [] Interchangeable

Part Class: 015 - Delco A/C Parts
Part Type: 001 - Compressors

Country of Origin: []
OE Message Code: <None>
Margin Indicator: <None>
Catalog Page: []
Stocking Indicator: <Stock>
ABC Code: M - Manual Entry
My Code: <None>
Deposit Part Number: []
Industry Code: []

Reorder Point: 1200
Economic Order Qty: 0
Safety Stock Multiple: 2.00
Safety Stock Qty: []
Linepoint: 1816
Replenish Reserve Stock: 53
Delay Days: []
Per Car Qty: []
Avg Monthly Usage: 0

Manufacturer: Code: ACD - AC Delco
Avg Lead Time: 0
Popularity Code: A
Create Date: 06/18/2004
Last Sold Date: 01/09/2006
Last Rcpt Date: []
Sales Qty Rpt ID: []
AMU Calc Factor: 0.1667

Aliases	ADI eFulfillment
Alias Name	
3033879	
15-5151	

Discontinued: **Drop Ship:**
Inventory Update: **Backorder:**
Recycled: **Partial Ship:**
Mark for Deletion:

Buttons: Accept, Cancel, Warehouse Part Updates

The new ROP Factors form from the Part Management and Purchasing Management tabs. Note that the Reserve Stock was inserted into the grid and the ABC code size was reduced.

Vision Enterprise 7.4.4 - for: Preferred TSH Customers
 Home Page Customer Maintenance Customer Service Retail / POS CRM Management Part Management
 Part Lookup Main UOM Costs / Prices Locations Vendors Contracts Alternates Usage ROP Factors Kit
 Product: (ACD15-5151) 3033879 EXPANSION (891441) > Warehouse: 050 - FAD - WD

ROP Factors

Warehouse	Stock Type	Safety Stock	ROP	Line Point	Reserve Stock	ABC Code	Delay Days	Freeze Date
001 - Service Central (YES W	Stock					<None>		2/ 9/2006
010 - Part Shop Express - STP	Stock					C - C Classification	3	2/ 9/2006
020 - Part Shop Express - Tam	Stock	0	1	0		C - C Classification		2/ 9/2006
029 - 029 TEST FEE WHSE	Stock					<None>		2/ 9/2006
030 - Part Shop Express - FT	Stock					C - C Classification		2/ 9/2006
040 - Service Shop - Sarasota	Stock			22		<None>		2/ 9/2006
050 - FAD - WD	Stock		1200	1816	53	M - Manual Entry		2/ 9/2006
070 - Part Shop Express - Larg	Stock					C - C Classification		2/ 9/2006

Accept Cancel

Line Changeover

On occasion a manufacturer line or product inventory is replaced or changed out with new line/product inventory. The analytical and historical tracking information associated with the old line/product may still be useful and might be applicable to the new line/product.

When you wish to move the information from one line to a new line, use the Line Changeover application. From the "Main System Selector" Menu, select option 12 - File Maintenance. From here, Automotive systems should select menu option 3 - Product Related Files followed by menu option 9 - Line Changeover. Office Supplies systems should select menu option 12 - File Maintenance, menu option 3 - Product Related Files, followed by menu option 24 - Line Changeover.

1 Vision prompts for the OLD and NEW Manufacturer (Mfg.) Code.

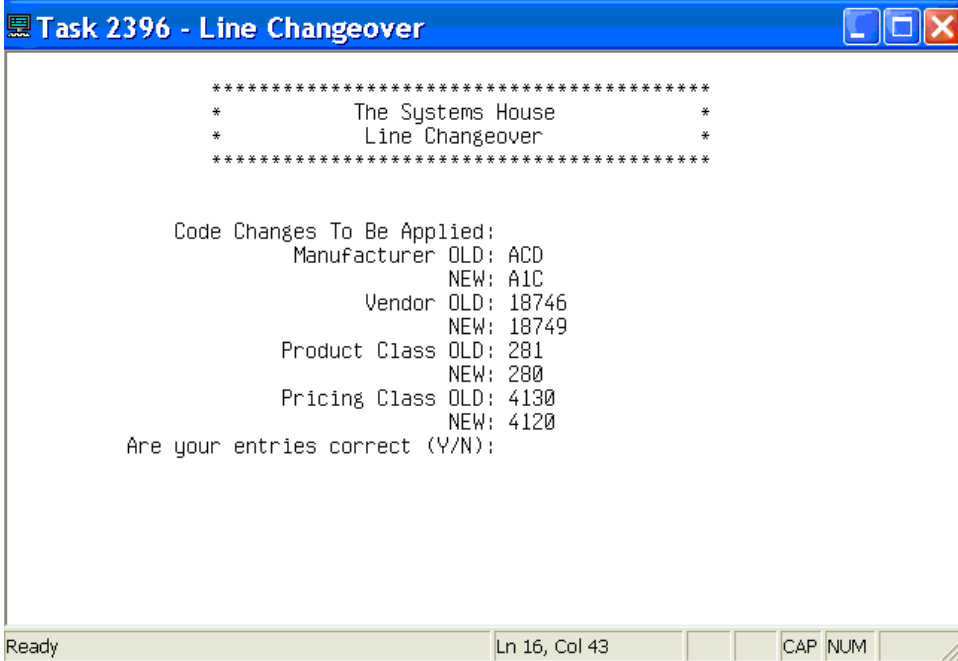
2 Then, you will be prompted for yes or no responses to the following:

1. Change Vendor Code
2. Change Product Class
3. Change Pricing Class

3 If you chose to change one of the above for the subject manufacturer, Vision prompts you for following optional entries:

- OLD and NEW Vendor Code
- OLD and NEW Product Class Code
- OLD and NEW Pricing Class Code

4 Vision asks you to confirm your entries



```

Task 2396 - Line Changeover
*****
*           The Systems House           *
*           Line Changeover             *
*****

Code Changes To Be Applied:
  Manufacturer OLD: ACD
                NEW: A1C
  Vendor       OLD: 18746
                NEW: 18749
  Product Class OLD: 281
                NEW: 280
  Pricing Class OLD: 4130
                NEW: 4120
Are your entries correct (Y/N):
  
```

Press “Y” and <Enter> if the entries are correct. If you enter “N”, Vision starts the program over at step 1.

5 Finally, Vision asks you to enter the time to start the conversion process.

Enter a time in HH:MM format, or press <Enter> to start the process immediately.

However, choosing to run this process during normal business hours will have an impact on the system resources available to others. For this reason, we suggest having the process run during the night.

Once the process completes, it is possible for an exception report to be generated. The user should check the printer destination or the hold file. The following is an example of what the exception report looks like:

```
16:16:19 02-21-06          LINE  CHANGE OVER  EXCEPTIONS
Page      1

      Product Number
Whse ----- V.ON.ORD INTRAN.IN C.ON.ORD BACKORD IN.PICK B.ON.ORD INTRAN.OUT
050 VRYSTOCK                                     100
1 record listed
```

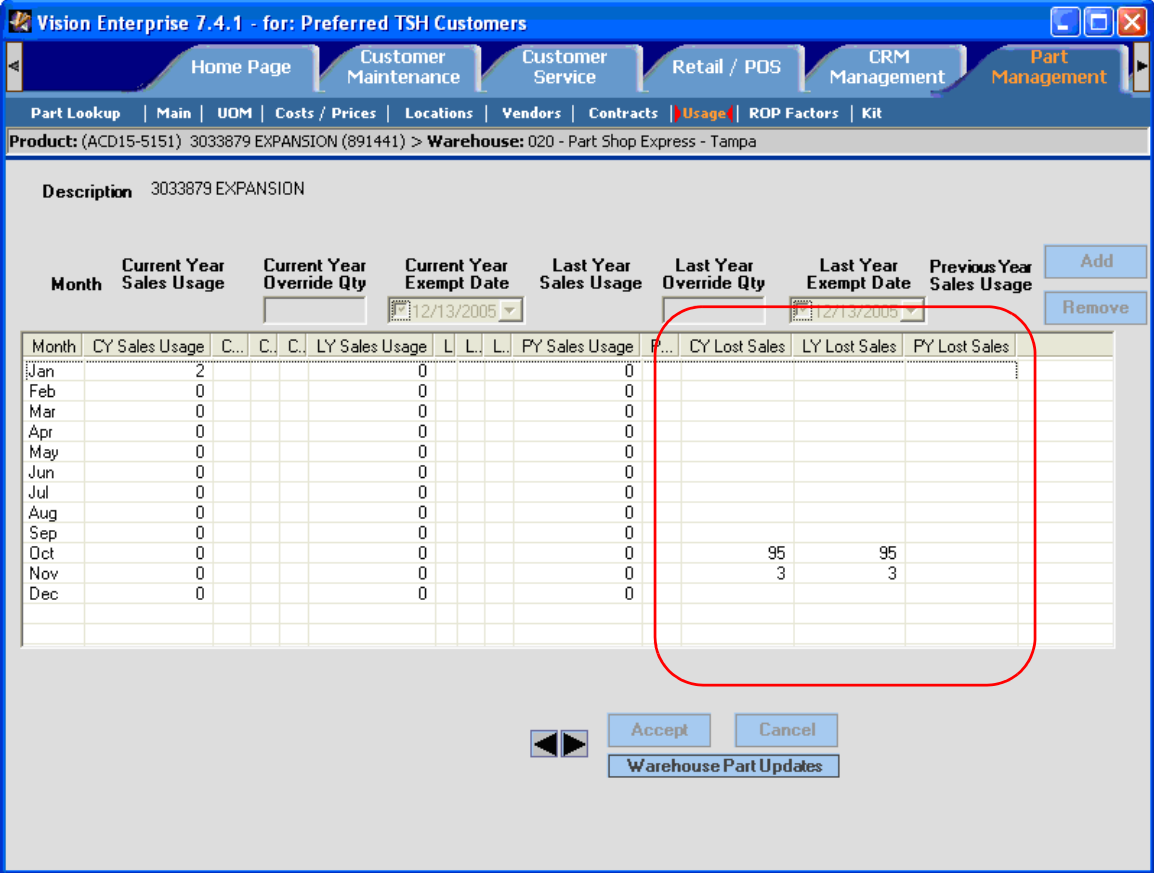
Lost Sales Improvements

The lost sales system has several improvements in Activant Vision™ 7.4:

- Lost Sales are now recorded in the same detail as all other sales history; with a rolling 3 years worth of data.
- The Lost Sale information is now displayed on the usage form in the Part Management tab.
- Activant Vision™ 7.4 has the ability to factor a percentage of lost sales into re-order point calculation by product class.
- The lost sales report now indicates whether a lost sale part is a stocked item.
- The lost sales report is run during the end-of-day process, and therefore the report has been removed from the Purchasing reports menu in Vision Back Office
- When an Order Entry part search fails, or any order or line item is canceled, Vision offers to help you record the failure or canceled item as a lost sale.

Usage Form Display

Here is an example of the new lost sales display on the usage form:



The columns are: Current Year (CY), Last Year (LY), and Previous Year (PY).

Lost Sales Re-order Factor

Re-order Calculations can now include a portion of average lost sales. To do this, enter the percentage of lost sales to be included in the re-order calculations for each product class:

The screenshot shows the 'Vision Enterprise 7.4.1' interface for 'Preferred TSH Customers'. The 'Part Management' tab is active, and the 'Product Class' configuration window is open. On the left, a tree view lists product classes from 001 to 041. The main configuration area shows details for 'Part Class 001', 'Description Delco Electrical Parts', 'Class Type T - Automotive', 'Business Type 001 - AUTOMOTIVE', 'Tax Category 010 - AUTOMOTIVE', 'Requisition Category <None>', and 'Excess Inventory Processing Consider and Transfer'. A 'Machines / Field Service' section includes 'Warranty Days', 'Metered Machine', and 'Warranty Clicks'. Below that, the 'Automotive' section has 'General' and 'Price Levels' tabs. The 'Price Levels' tab is active, showing fields for 'Job Code', 'Follow Up', 'Warranty Code', 'Invoice Total', 'Comm. Dept.', 'Disposal Fee', 'Excise Tax %', and 'Shop Supplies %'. The 'Lost Sales Factor' field, located in the top right of the configuration area, is circled in red and contains the value '5.000'. 'Accept' and 'Cancel' buttons are at the bottom right.

Order Entry Lost Sales Updating

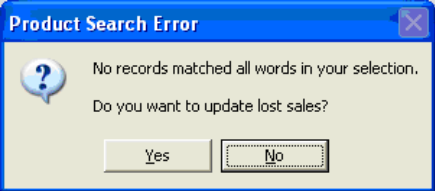
On the current order form in both the Customer Service tab and the Retail/POS tab, if a line is canceled in any way (I.E. The system cancels the line because the customer does not accept backorders, or the user chooses the “kill” option from the sourcing form), you can now right-click on the line item list view to enter the lost sales form.

On the current order form in both the Customer Service tab and the Retail/POS tab, if the user cancels the entire order, a message box is displayed asking if they want to update lost sales for all of the lines being canceled. The form will keep track of that answer and if the answer is yes, lost sales will record the canceled lines (stored as: “Canceled Order”).

In the verification process (both scan and manual), lost sales is updated if a line is canceled.

On the part form and the current order form in the Customer Service tab and the Retail/ POS tab, if a part search (either at the Global level, or at the Warehouse level) does not

match any items, ensure that the “No records matched all words in your selection” message is expanded to ask if you want to update lost sales:



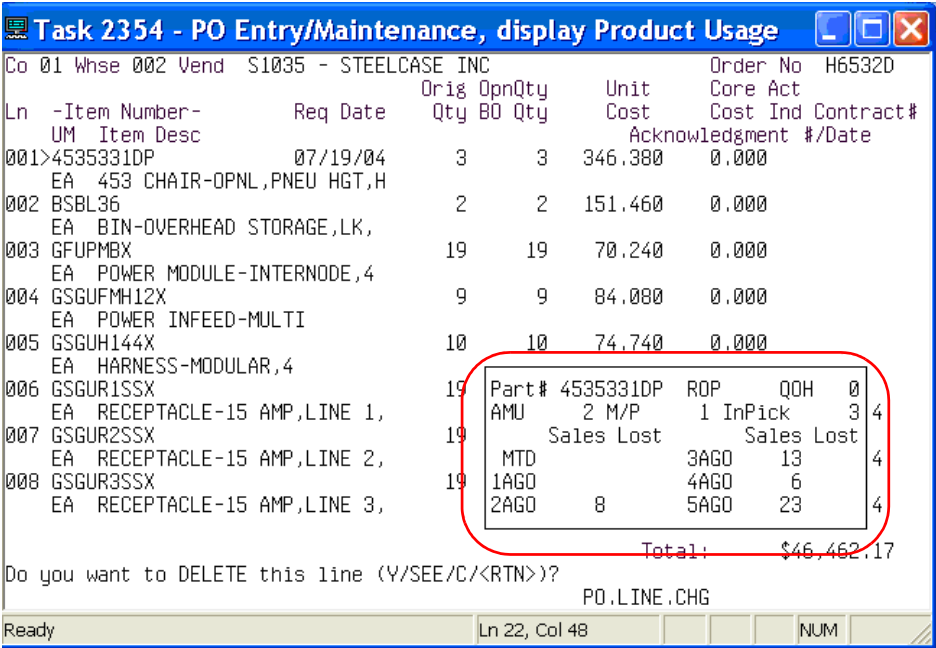
The default is **No**. If you click the **Yes** button, Vision displays the lost sales form

Product Usage Display

The Activant Vision™ 7.4 Purchasing function now includes a display of:

- Quantity on Hand
- Re-order Quantity
- In Pick Quantity
- AMU (average monthly usage over the course of a 12 month period)
- Master Pack Quantity
- 6 months of buckets for Sales Qty and Lost Qty

This display is available in PO Line Entry, in the Vision back office, and can be toggled on and off by entering **T** at the command prompt. Here is a sample screen with the display activated:



This display moves to avoid covering the active line.

Part Lookup by Vendor Part Number

Activant Vision™ 7.4 allows part lookup by vendor part number.

Build-to-Shelf Kit Enhancements

Build-to-shelf Kits are combinations of parts that are taken out of inventory with a negative purchase order, packaged, and then put on the shelf as a kit with a purchase order. They speed up and simplify re-ordering and inventory planning, and make it easier for the store to supply commonly ordered sets of parts.

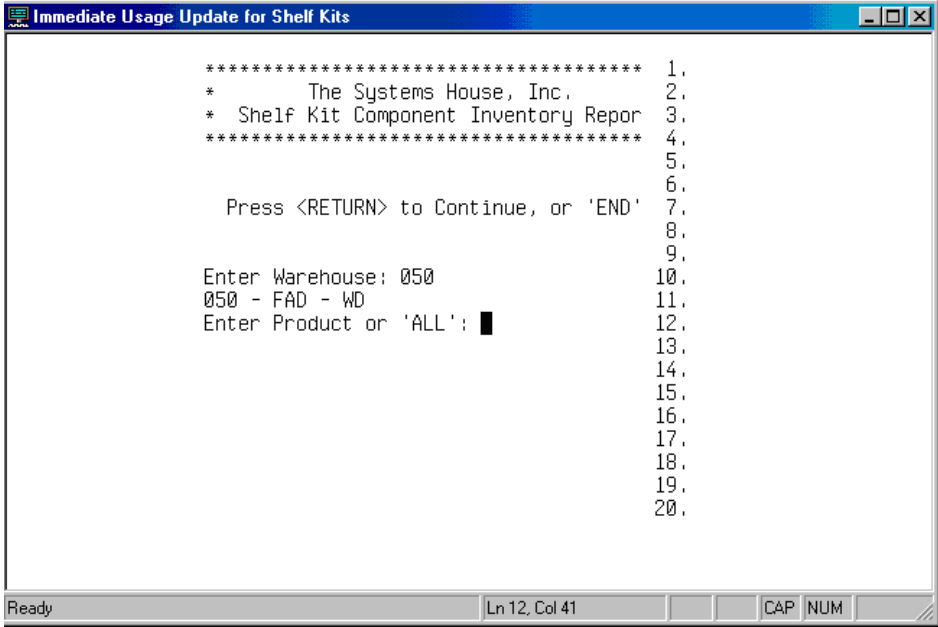
Activant Vision™ 7.4 has two enhancements for the build-to-shelf kits feature:

- A [Shelf Kit Component Report](#) that shows all of the parts needed to make up a kit from inventory.
- [Immediate Usage Update](#) capability, to make sure that inventory is allocated to the kits immediately after they're built.

Shelf Kit Component Report

The new Shelf Kit Component Report is available as a back office report via a new option on menu 12.3.12, Part File List Menu. It is report number 14, Shelf Kit Component Inventory Report.

After selecting the Shelf Kit Component Report, Vision requires you to enter the warehouse number and the Product ID of the kit to report on. You may report on all kits at the same time.



The report is generated and printed. It looks like this:

Kit Master	Kit Component	Required Qty	Available Cmpnt Qty
10:02:10 Dec 22 2005 SHELF KIT COMPONENT INVENTORY REPORT Page: 1			
Whse: 050 - FAD - WD			
ACDKITAC	ACD1243133	3	0
	ACD1022A	3	0
	ACDMP2153	2	0
BJSKITOA	ACD172-1361	2	496
	ACD172-2113	3	494
CARKITCLUTCH	ACD15-21140	15	4
	ACD15-32181	5	0
	ACD6261130	10	0

Immediate Usage Update

The Immediate Usage Update feature for build-to-shelf kits lets Vision update the inventory usage for the kits upon receiving the PO for them. This makes the inventory true and correct at all times.

To activate this feature, go to the Kit form on the Part Management tab, and click the new Immediate Usage Update check box:

The screenshot shows the 'Part Management' form for 'BJS Shelf Kit 03'. The 'Kit Type' is set to 'Build to shelf'. The 'Immediate Usage Update' checkbox is checked and circled in red. The 'Components' table lists two parts: ACD8-322 with a quantity of 2, and ACD10-5031 with a quantity of 1. The 'Kit Pricing' section has 'Price based on components cost' unchecked and 'Default GP' set to an empty field. The 'Component Alternates' section is empty. The 'Warehouse Part Updates' button is visible at the bottom.

Part	Quantity
ACD8-322	2
ACD10-5031	1

Part	Description
------	-------------

Vendor Backorder

The ability to mark a PO line as On Vendor Backorder is available in Activant Vision™ 7.4. This feature is available in both Purchase Order Maintenance and Purchase Order Receiving. As quantities are received that move the open purchase order quantity below the backorder quantity, the backorder quantity will be automatically reduced accordingly.

Display

The On Vendor Backorder quantity is displayed in all part inquiry screens, for example, the Home Page tab, Part form:

The screenshot shows the 'Parts' inquiry screen for part ACD79-6YR. The 'Whse Stock' table is displayed with the following data:

Whse	Stock Type	On Hand	In Pick	BackOrd	Available	Vend Order	Vend Backorder
001	Stock	0	0	0	0	270	108
030	Stock	1	1	0	0	0	0
050	Stock	15	1	0	14	270	54
511	Stock	0	0	0	0	0	0

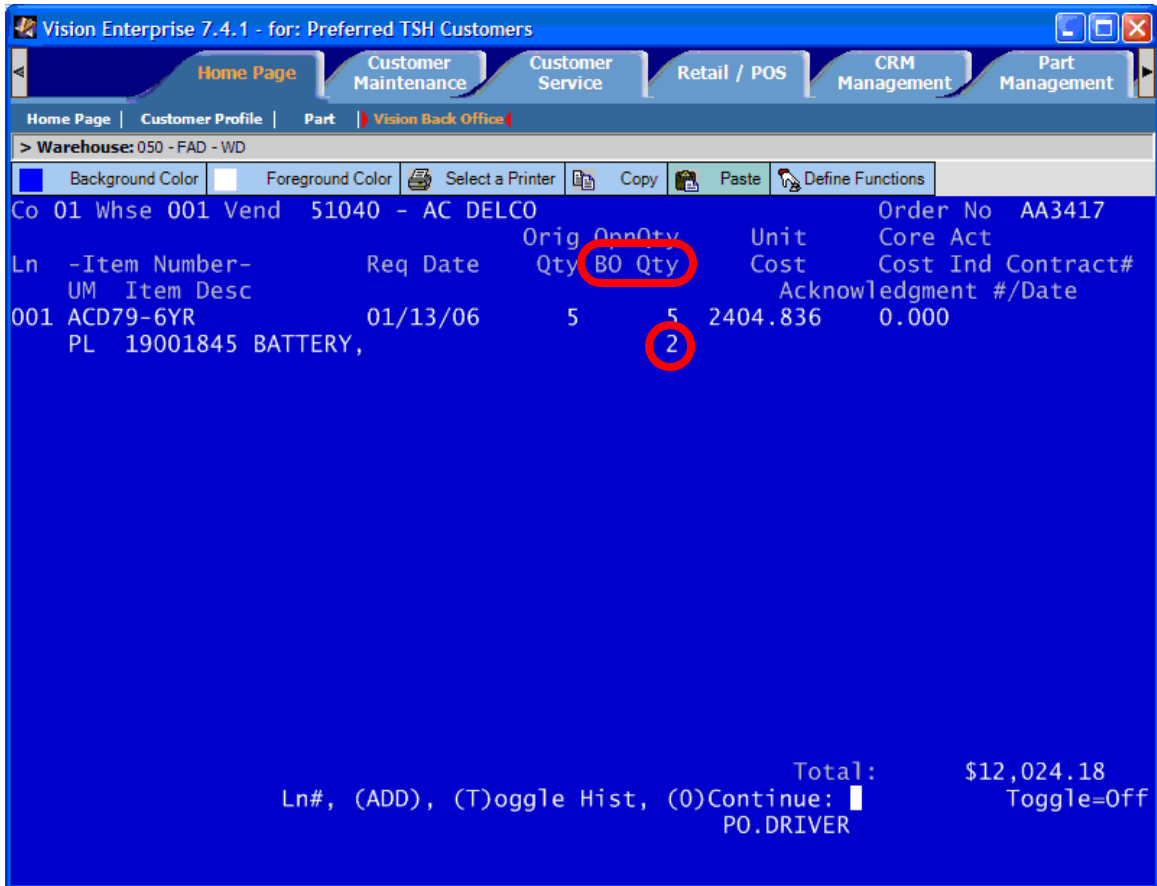
The 'Vend Backorder' column header and the value '54' for warehouse 050 are circled in red in the original image.

You may sort by vendor backorder quantity by clicking on the column heading. Click once to sort ascending, and double click to sort descending.

Operation

If you are notified of backorders by the vendor prior to receiving the shipment, the On Vendor Backorder quantity can be entered for any line items on the purchase order in Purchase Order Maintenance. Note that the Vendor Backorder field is only accessible after the Purchase Order has been activated.

To enter the On Vendor Backorder quantity, use the Back-Office Purchase Order Entry and Maintenance screen.

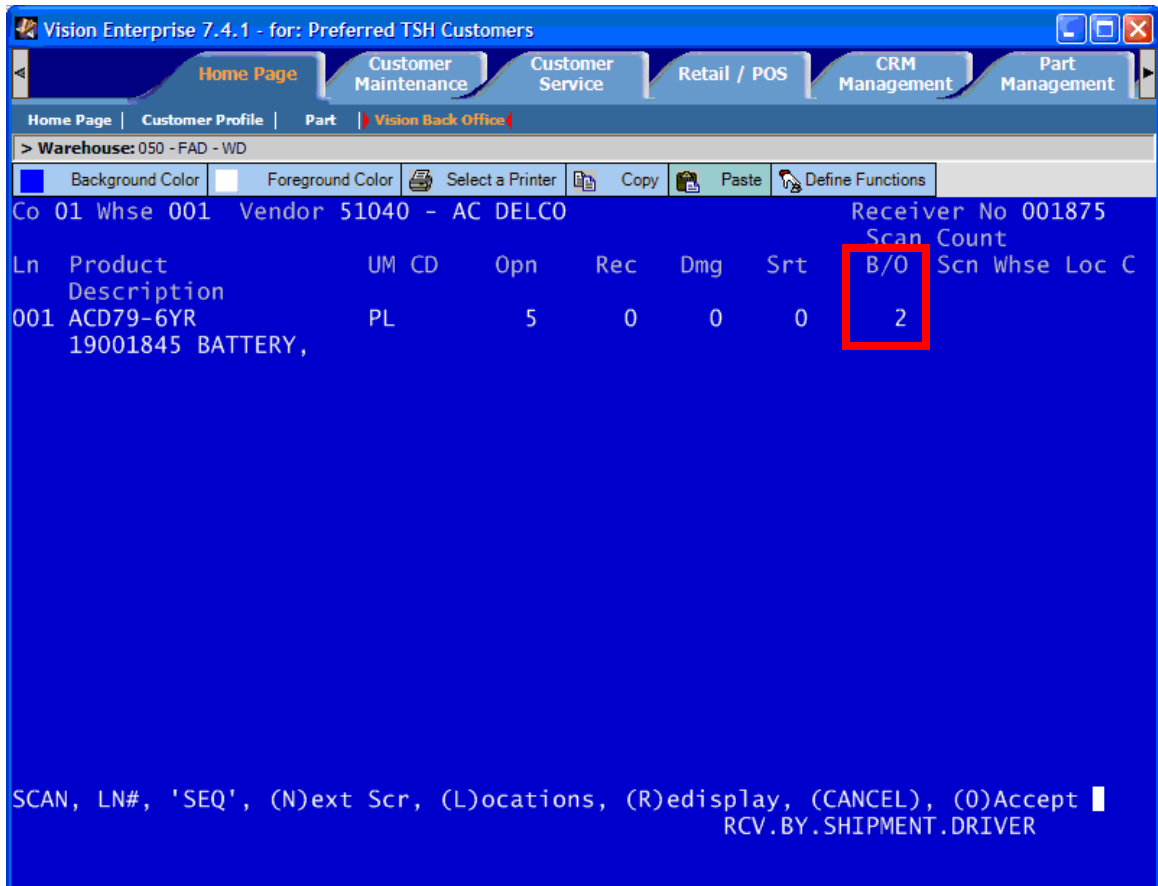


Open Quantity and Backorder Quantity Columns are stacked, and displayed as “OpnQty” and “BO Qty”.

Enter the On Vendor Backorder quantity on the line below the Open Qty.

Entering Backordered Items In Receiving

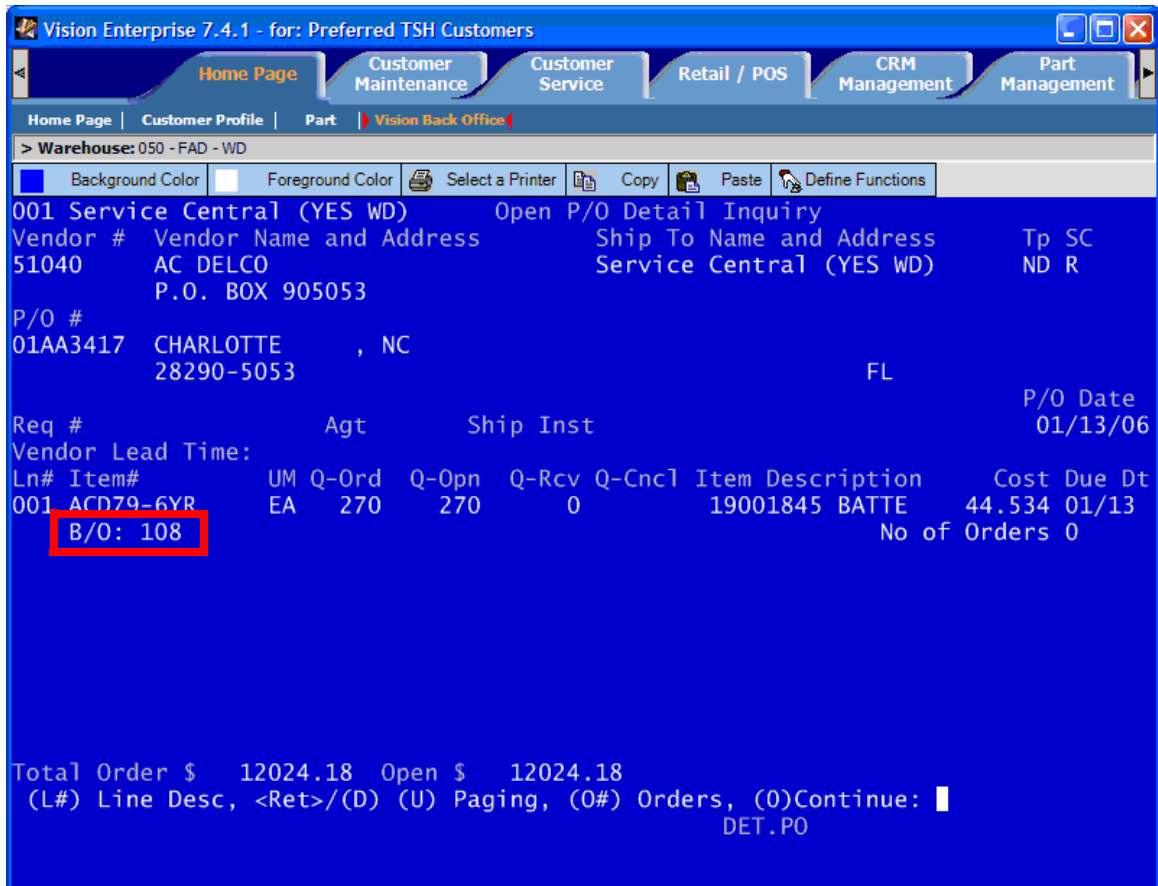
The receiving clerk may enter the On Vendor Backorder quantity when receiving the shipment by using the Back-Office Receive By Shipment line item screen:



When a PO line is received or canceled, the On Vendor Backorder quantity is reduced accordingly.

Checking Backordered Line Items and Quantities

To look at backordered line items on specific purchase orders, you can use the Detail Open PO Inquiry, shown below:

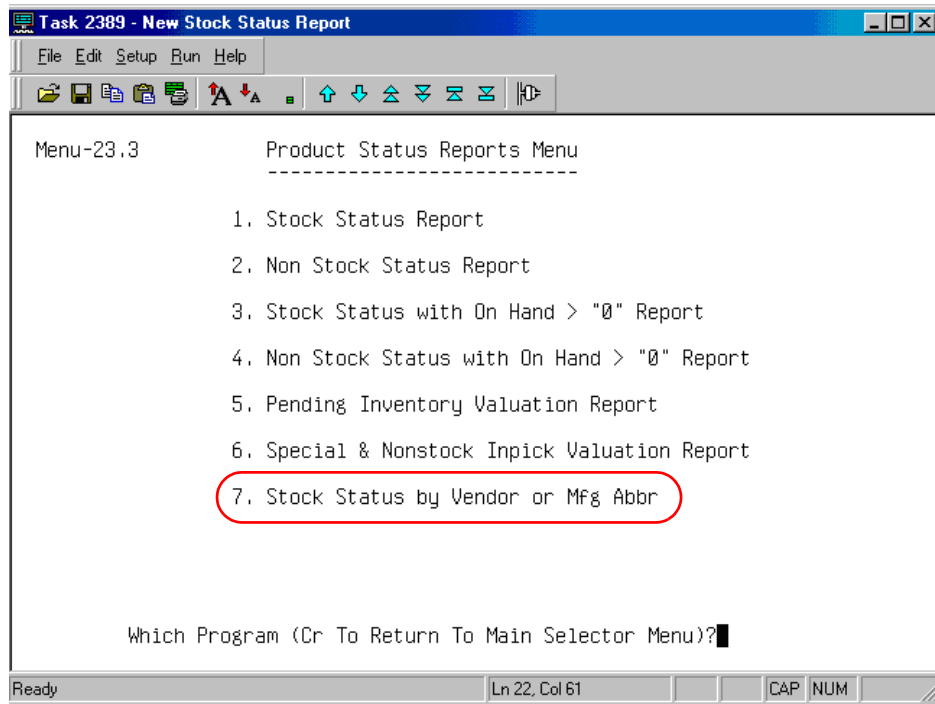


The backordered quantity is shown just below the item number in the line display.

Stock Status Report

A new Stock Status Report has been added to Activant Vision™ 7.4 in addition to the current Stock Status Report. The new report organizes the stock status by Vendor or Manufacturer.

To print the new report use Back Office Menu-23.3, and select menu item 7 - Stock Status by Vendor or Mfg. Abbr.



This report can be printed for multiple warehouses, and sorted by Vendor or Manufacturer code.

When you generate this report, the database select operation is shown on screen to reassure you that Vision is working and has not stalled, as the operation may take some time.

Here is an example of the new stock status report:

Mfg	ACD	AC	Delco	COUNT	A	PRICE	MASTR	LINE	QTY	QTY ON	ON	B/O	DESCRIPTION	CURR	LAST	PREV	LAST	L/YR	LST	LAST
WHSE	PART	NUMBER	DATE	C	UM	C	PACK	ROP	PNT	AVAIL	INPK	ORDR		MO	3 MO	3 MO	12	SLS	SLS	SOLD
050	ACD171-540				EA	28.914	1	0	0	500		0	18024916 PAD,	0	0	0	0	0	0	0
020	ACD171-541				EA	27.725	1	0	0	642	0	6	18024917 PAD,	-60	0	0	0	0	0	100605
030	ACD171-541				EA	29.351	1	0	0	354	0	0	18024917 PAD,	0	0	0	0	0	0	090705
050	ACD171-541				EA	29.351	1	0	0	1067	251	0	18024917 PAD,	0	0	0	0	0	0	100305
050	ACD171-542				EA	29.351	1	0	0	500		0	18024919 PAD,	0	0	0	0	0	0	0
050	ACD171-543				EA	28.914	1	0	0	500		0	18024741 PAD,	0	0	0	0	0	0	0

This report prints in 132-column mode.

Replenishment Summary Report

When purchase orders are processed to replenish the inventory, a report called the "Replenishment Action Report" is generated. This report is packed with information plus it generates many pages of information. Activant has created a summary report based on the detail information found on the Replenishment Action Report.

To print this report, choose the summary report when printing the Replenishment Action Report.

Here is a sample of the report:

13:15:44 Jan 13 2006 R E P L E N I S H M E N T S U M M A R Y R E P O R T - No Customer Owned Goods Page: 1

Miscellaneous Data: This is the miscellaneous section of replenish rpt	PO#:	05AA2420
Current Line Review Cycle: 1 week	Total Unit Cost:	\$168,673.03
	Total Core Cost:	\$1.00
Minimum PO Amount: \$1,238.99	Total PO Amount:	\$168,674.03
Minimum PO Units : 2300	Total PO Units :	12151
Minimum PO Weight: 980100	Total PO Weight:	16565100

Miscellaneous Data: This is the miscellaneous section of replenish rpt	PO#:	05AA2764
Current Line Review Cycle: 1 week	Total Unit Cost:	\$25.85
	Total Core Cost:	\$0.00
Minimum PO Amount: \$1,238.99	Total PO Amount:	\$25.85
Minimum PO Units : 2300	Total PO Units :	1
Minimum PO Weight: 980100	Total PO Weight:	0

Miscellaneous Data: This is the miscellaneous section of replenish rpt	PO#:	05AA2780
Current Line Review Cycle: 1 week	Total Unit Cost:	\$1,431.50
	Total Core Cost:	\$0.00
Minimum PO Amount: \$1,238.99	Total PO Amount:	\$1,431.50
Minimum PO Units : 2300	Total PO Units :	49
Minimum PO Weight: 980100	Total PO Weight:	188400



Pricing

Quick Pricing Maintenance

Maintaining a large amount of pricing information on the Product Maintenance Costs/ Prices form can be cumbersome because this form does not display a large number of price levels simultaneously. Activant Vision™ 7.4 includes a new pricing form in the pricing tab, to enable efficient updating of large numbers of parts with multiple price levels.

The pricing interface has been improved to accommodate the new feature. The new pricing tab, replacing the Pricing Inquiry tab, has been divided into two forms, Pricing and Inquiry. The Inquiry sub-tab includes new usage information:

Parts Warehouse: 050 - FAD - WD 2 Record(s) Found.
acd8-322 Search Options
All Words Any Word

Inquiry Pricing

Part Information
Part/Part # ACD8-322
Description 89001035 BLADE W
Manufacturer AC Delco (ACD)
Part Class 008 - Delco Wiper Products
Part Type 001 - Compressors

Warehouse Information (050)
ABC Code
Stock Type Stock

Current Pricing Whse Stock UOMs Future Pricing Vendors

Price Level	Price
113 - List 3	16.262
115 - LIST 5	14.784
142 - JOBBER 2	10.563
144 - JOBBER 4	10.764
145 - JOBBER 5	10.060
155 - JOBBER 5A	18.770
173 - WD 3	7.181

Replacement Cost 5.533 / EA

Usage Last 12 Months

Jul	Jun	May	Apr	Mar	Feb	Jan	Dec	Nov	Oct	Sep	Aug	Prior Yr
0	0	0	0	0	0	0	0	0	0	0	0	0

Whse	Part Number	Description	Manufacturer	Part Class	Part Type	ABC Code	Stock
050	ACD8-322	89001035 BLADE W	AC Delco	Delco Wiper...	Compressors		Stock
050	ACD8-3225	89001036 BLADE W	AC Delco	Delco Wiper...	Compressors		Non-St

The new Pricing form contains a sorted listing of all of the price levels that are already assigned to the product and their effective dates.

Warehouse: 050 - FAD - WD
acd8-322
2 Record(s) Found.

Search Options
All Words Any Word

Part
Part No. ACD8-322
Description 89001035 BLADE W
ABC Code
Qty On Hand 0 PO Cost 5.533
Qty In Pick 0 Last Cost 0.000
Qty Backordered 0 Avg Cost 6.547
Qty On Order 0
PO UM EA
On Order Arrival Date 12/28/05
Last Receipt Date

Price Calculation Bypass
Price Hold Bypass

Price Level	Price	Effective Date
115 - LIST 5	14.784	1/16/2006
175 - WD 5	7.040	1/16/2006
903 - ACDELCO WD	7.040	1/16/2006
902 - ACDELCO JOBBER	10.060	1/16/2006
901 - ACDELCO RETAIL	14.080	1/16/2006
907 - ACDELCO WDPKG	70.400	1/16/2006
906 - ACDELCO NFPP	7.880	1/16/2006
155 - JOBBER 5A	18.770	/2006

Whse	Part Number	Description	Manufacturer	Part Class	Part Type	ABC Code	Stock
050	ACD8-322	89001035 BLADE W	AC Delco	Delco Wiper...	Compressors		Stock
050	ACD8-3225	89001036 BLADE W	AC Delco	Delco Wiper...	Compressors		Non-St

The Prices and their Effective Dates may be altered, but Pricing Levels cannot be added or removed. To use the pricing form:

- 1** Search for a part or set of parts in the search form at the top of the tab.
- 2** Type a new price in the “Price” column.
- 3** Enter the effective date for the change in the “Effective Date” column.

Note: The Effective Date defaults to the current date.

- 4** Click the “Accept” button.
- 5** Go to the next part.

To bring up the next part, either:

- a. double click on the part in the list at the bottom, or
- b. click on the left or right arrow buttons next to the “Accept” button.

Master Installer Rebate

A Master Installer Rebate is a pricing program established by a manufacturer to provide a Parts Supplier a rebate against selected parts when sold to a designated Master Installer. The Master Installer can be any business as defined by the manufacturer.

Generally the rebate is given to the Parts Supplier as a percentage off of a price sheet published by the Manufacturer, for example the Jobber price sheet. The rebate is only realized for parts sold by the Parts Supplier to the Master Installer below a target price point. This target price point is usually a percentage of the pricing from the same Manufacturers Price Sheet that the rebate is based on.

The rebate levels and target selling price points may be different for different categories of parts sold by the manufacturer, may be volume based, and may be different for different business types.

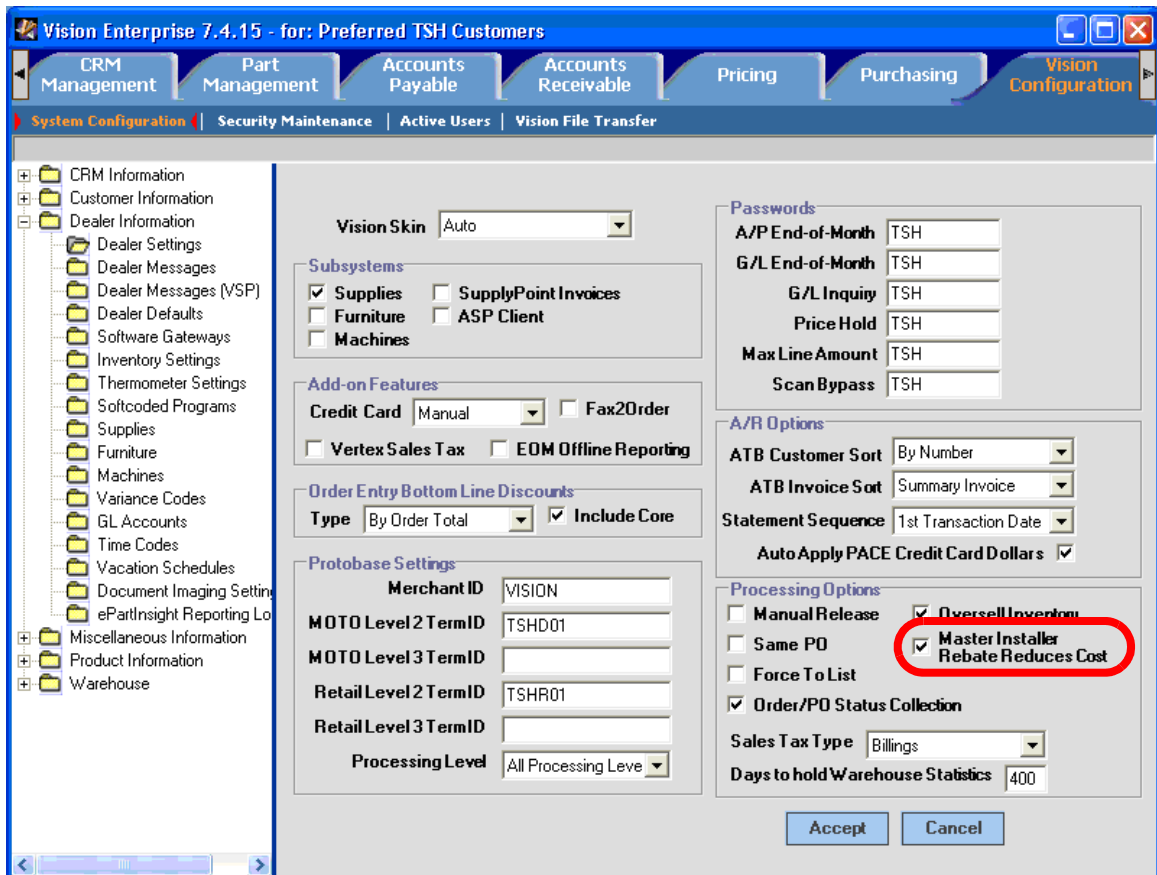
The most common rebate programs have been related to oil and air filters. Using filters as an example, a manufacturer may establish a program where you will get 10% off Jobber Price for all filters sold to a designated Master Installers at a price lower than jobber plus 20%.

A key point to be aware of in evaluating the Master Installer Rebate program is that the selling price to the customer is not affected by the rebate, but rather the rebate should be seen as an adjustment to Manufacturer's cost.

Setup

Rebate Cost Processing

Before setting up any rebates, enable rebate cost processing. Do this by going to the Vision Configuration tab, System Configuration form, Dealer Information folder, Dealer Settings sub folder. “Click the Master Installer Rebate Reduces Cost” check box.



Rebate Program Setup

Rebate programs are set up for each eligible customer.

To set up a rebate program for a customer:

- 1** Have available the rebate description sent to you by the manufacturer.
- 2** Select the customer.
- 3** Go to the Customer Maintenance tab, select the Pricing form, and select “Master Installer Rebate” tab from the Pricing Overrides subform

The new Master Installer Rebate sub-form looks like this

The screenshot shows the 'Master Installer Rebate' sub-form within the Vision Enterprise 7.4.15 software. The form is titled 'Customer: 5853 New Test' and is part of the 'Pricing' module. The 'Master Installer Rebate' section is highlighted with a red circle and contains the following fields and table:

Mfg	Part Type	Part Class	Rebate Price Level	Rebate Type	Rebate %
WIX - Wix Fil	<All Product	<All Product	141 - JOBBER 1	Discount	92.00
141 - JOBBER 1			141 - JOBBER 1	Discount	0.00

Below the table is a list of rebate programs with columns for Mfg, Part Type, and Part Class:

Mfg	Part Type	Part Class
Bill Heard Chevrolet	<All Product Types>	007 - Delco Batterie
Wix Filters	<All Product Types>	<All Product Classes
Purolator	<All Product Types>	148 - Purolator H.D.

Note: All Rebate programs that have been defined for this customer are shown in the list display at the bottom of the sub-form. To edit a previously defined rebate program, double-click it in this list display. To delete a previously defined rebate program, double-click it in this list display, and click the "Delete" button.

4 Select the Manufacturer, Part Type, and Part Class.

This is available on the Rebate Description

5 Select the Rebate Price Level, Rebate Type and enter the Rebate %.

The Rebate Price Level is the existing price level to base the rebate on

The Rebate Type is discount, load, or gross profit percent.

The Rebate % is the percentage of Rebate price level given as rebate

6 Select the Target Price Level, Target Type and enter the Target %.

The Target Price Level is the existing base selling price level the rebate will be qualified against.

Target Type is discount, load, or gross profit percent.

Target % is used to discount or markup the base selling price to the rebate qualifying level

Example:

Going back to our example: a manufacturer establishes a rebate program where you will get 10% off Jobber Price for all filters sold to a designated Master Installers at a price lower than Jobber plus 20%.

For this rebate program:

- The Rebate Price Level is Jobber pricing.
- The Rebate Type is Discount.
- The Rebate % is 10.

and

- The Target Price Level is Jobber pricing.
- The Target Type is Load.
- The Target % is 20.

7 Click the “Add” button.

8 Add the customer to the Manufacturer - Account Number Cross Reference form.

Note: This step is only necessary if the rebate program requires you to report sales by account number.

Go to the Customer Maintenance tab, Cross References form:

Customer: 5853 New Test

Customer Line Code - Dealer Line Code Cross Reference

Customer Line Code:
 Dealer Line Code:

Customer Line Code	Dealer Line Code
AAA	AAC - AMPERE A...
BBB	AAD - Auto Acces...

Manufacturer - Account Number Cross Reference

Manufacturer:
 Manufacturer Account:

Manufacturer	Account
A1C - A1 CARDONE	A1458B
AAC - AMPERE AU...	1111
AEC - ASSOCIATE...	22554884
WIX - Wix Filters	9430596

Customer UM - Dealer UM Cross Reference

Customer UM:
 Dealer UM:

Customer UM	Dealer UM
-------------	-----------

1. Select the Manufacturer in the “Manufacturer” field.
2. Enter this customer’s account number at this manufacturer in the “Manufacturer Account” field.
3. Click the “Add” button.
4. Click the “Accept” button in the lower right corner of the screen.

Rebate Reporting

For each rebate program that you participate in, you will need to print out a rebate report. Usually, this should be printed each month. The rebate description should say how often to submit your rebate documentation.

Run this report using Menu option 2.15.17 in the Vision Back Office. You can generate the report for all rebate programs or just a limited subset. Ideally, you would run this report once each week and month for all rebate programs.

You will need to know the following information for this report:

- Warehouse
- Manufacturer

- Product Type
- Product Class
- Customer
- Date Range for which to run the report.
- Whether to Include Returns transactions on the report.
- Whether to use the customer or manufacturer account number.

The customer account number reports using the account number you use for the customer, and the manufacturer account number is the account number that the manufacturer gives the customer, if you know it. Remember, some rebates require you to use the manufacturer account number.

The report is organized by manufacturer, to make it easier to split up and mail or fax to the individual manufacturers.

Here is a sample of the report's output:

18:11:06 03-13-06 M A S T E R I N S T A L L E R R E B A T E R E P O R T - W A R E H O U S E 050 Page: 2												
WHSE	MFG	PART NO.	CUST NO.	CUST NAME	RELEASE NO.	INV DATE	QTY.	PRICE	COST	GP%	REBATE AMT.	EXT REBATE AMT.
050	CAR	19-724	5853	General Installer	05AB7757001	03/13/06	1	47.30	24.37	48.5	2.25	2.25
	***											-----
	CAR											2.25
050	JLL	FT3	5853	General Installer	05AB7757001	03/13/06	2	9.27	7.01	24.4	0.49	0.98
	***											-----
	JLL											0.98
050	PUR	A64440	5853	General Installer	05AB7755001	03/13/06	1	26.57	11.64	56.2	2.36	2.36
	***											-----
	PUR											2.36
050	WIX	S1515	5853	General Installer	05AB7731001	03/09/06	1	5.18	2.62	49.4	0.38	0.38
050	WIX	S1515	5853	General Installer	05AB7732001	03/09/06	1	5.18	2.62	49.4	0.38	0.38
050	WIX	S1515	5853	General Installer	05AB7733001	03/09/06	1	5.18	2.62	49.4	0.38	0.38
050	WIX	S1515	5853	General Installer	05AB7741001	03/10/06	1	5.18	2.62	49.4	0.38	0.38
050	WIX	S1515	5853	General Installer	05AB7743001	03/10/06	-1	-5.18	-2.62	49.4	-0.38	-0.38
050	WIX	S1515	5853	General Installer	05AB7749001	03/10/06	-1	-5.18	-2.62	49.4	-0.38	-0.38
18:11:06 03-13-06 M A S T E R I N S T A L L E R R E B A T E R E P O R T - W A R E H O U S E 050 Page: 3												
	***											-----
	WIX											0.76
	****											-----
	050											6.35
	TOTAL											=====
												7.49
12 records listed												

Alternate Item Substitution

Activant Vision™ 7.4 and VSP+ now have simpler ways to force product substitutions without navigating complex substitution rules.

The new Substitution function allows the CSR using Vision or customer using VSP+ to pick from equivalent products.

Vision previously supported alternate item substitution through substitution maintenance in the back-office function. The existing rules which drive alternate item substitution are complex and difficult, however, if you need to continue using it, this substitution maintenance function remains available.

Alternate Products are maintained on the Product Management form, and they appear in the Product search result window, available to be added to an order when a search retrieves an item with alternates. This allows the Vision user to have the choice of picking an alternate or their original item.

Vision Setup

To set up an alternate part for Vision, use the following procedure:

- 1 Select a product to set up alternates for in Product Lookup.**

2 Go to the Product Management tab, Alternates screen:

Product: (PIL-32260) PEN,BPT,EYTH,RT,MD,BK,2PK (276006)

Description PEN,BPT,EYTH,RT,MD,BK,2PK

Alternate Product: PIL-32220
 Force Substitution:
 Preserve Sub From Price:
 Permit Sub To Different GP\$: Lower Gross Profit
 Threshold GP %: 5.00

Pen,BP,ESYTCH,RETR,MED,BK

Add Remove

Product Number	Description	Force Sub	Preserve Sub From Price	Permit Sub to Diff GP	Threshold GP %
PIL-32250	PEN,BPT,EYTCH,RT,F...	False			
PIL-32261	PEN,BPT,EYTH,RT,MD...	False			
PIL-32220	PEN,BP,ESYTCH,RETR...	True	True	Lower GP	5.00

Accept Cancel

Warehouse Product Updates

3 Type the Alternate Product number in the Alternate Product field.

4 Check the “Force Substitution” check box if this Alternate Product should automatically be substituted.

Note: Only one alternate part may be designated as the “forced substitution” part.

5 Check the “Preserve Sub-From Price” check box if you want to use the original item's price and the substitute item's cost.

6 Select the Gross Profit criteria for the substitute part

- Select “Any Gross Profit” to take the substitution regardless of the gross profit dollar amount of the substituted item.
- Select “Lower Gross Profit” to allow substituting to an item with a lower gross profit dollar amount than the original item but within a specified limit.

To set the limit of how much lower the gross profit dollar amount of the substitute item can be, as compared to the original item gross profit dollar amount, type a percentage in the “Threshold GP%” field.

- Select “Higher GP Only” to only take the substitution if the substituted item’s gross profit dollar amount is greater than the original item’s gross profit dollar amount.

Substitution Rules:

Substituting to an item with a higher gross profit dollar amount is always allowed.

Substituting to an item with a gross profit dollar amount equal to the original item’s gross profit dollar amount is always allowed, as long as there are no irreconcilable unit of measure mismatch issues between the two items.

Substituting to an item with a higher price than the original item is not allowed.

7 Click the “Accept” button.

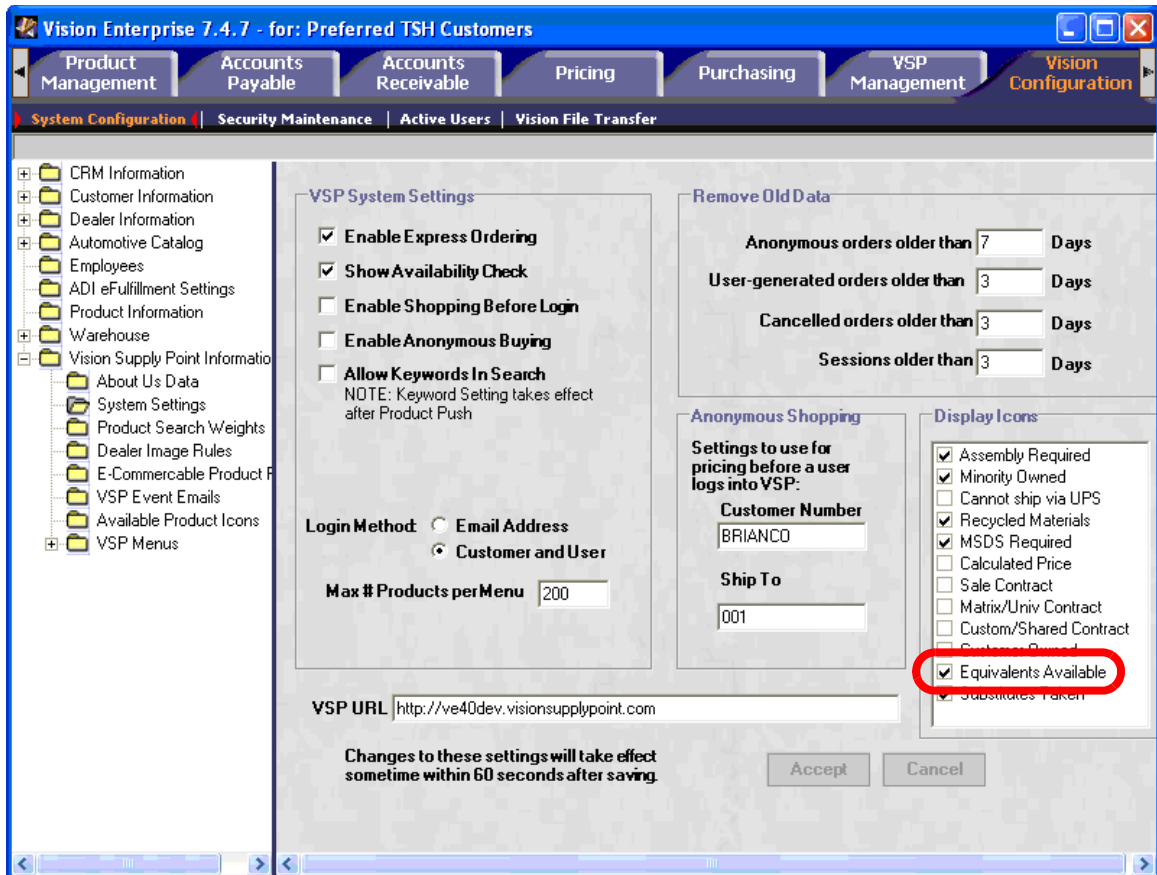
New Vision Behavior

If a product is added to the Current Order, if an alternate exists for an item and the item is noted as a “Forced Substitution”, and the Customer is noted as “Always” substitute, and the search product is not noted as a customer substitute product exclusion, automatically substitute and display the alternate product ID and description.

When an automatic substitution is made, if “Preserve Sub-From Price” is checked in Alternates setup, the original item's price and the substitute item’s cost are used.

VSP+ Setup

To show part substitution icons on the VSP+ search results page, go to the Vision Configuration tab, system configuration screen, Vision Supply Point information folder, System Settings sub-folder

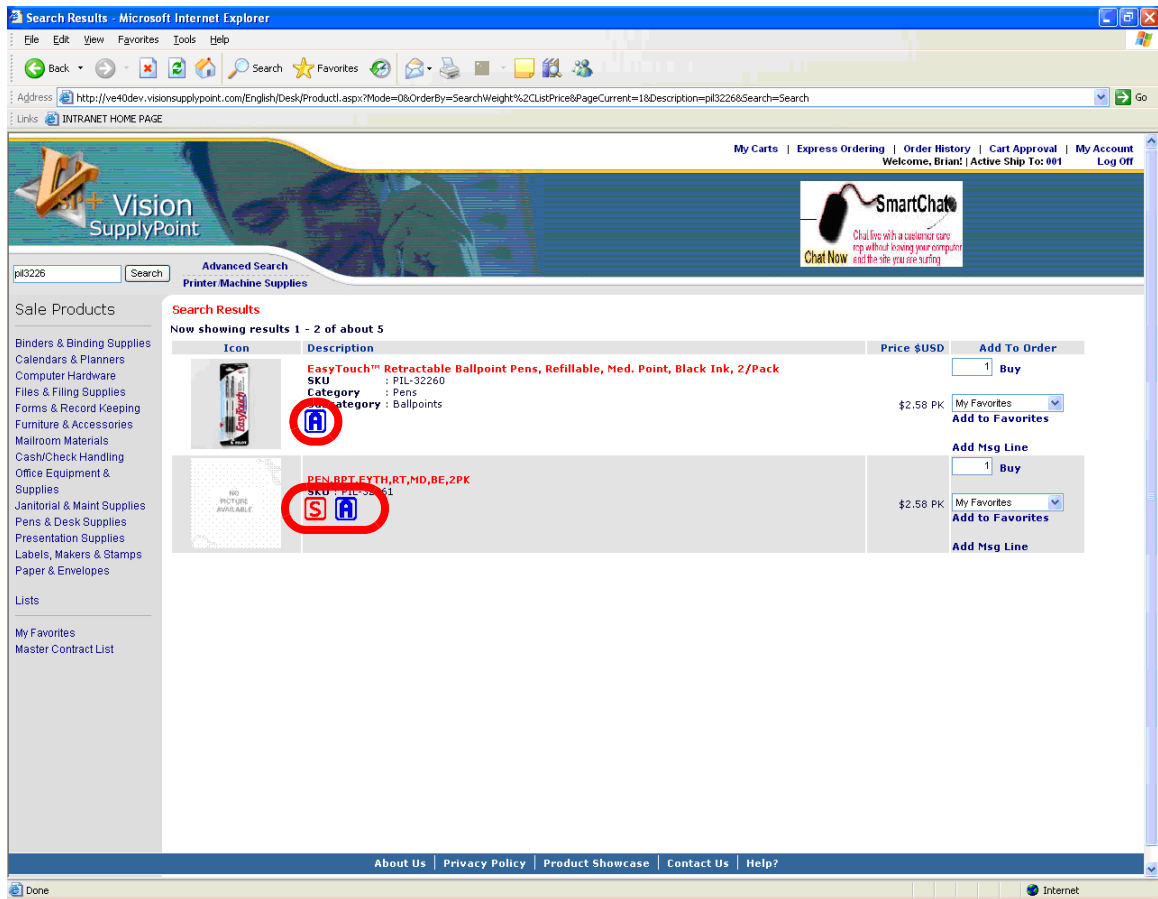


Check the “Equivalents Available” check box.

VSP+ Behavior

If A forced substitution is available in VSP+, the substitution icon shows that the product will be substituted when the user either goes into the details page or when they purchase the product. The price shown is the price of the substitute product, unless the substitute

product is configured to preserve the substituted-from price, then the price of the original, “substituted from” product will be used.



If equivalent products are available, the alternate icon is shown. You may turn off the display of these icons on the VSP System setting under the Vision Configuration tab, as described in the VSP+ Setup section.

In the above screen, the top part has alternate parts, and the bottom part has a forced substitute and alternate parts.

If an alternate part is taken, the details page and the confirmation page show a message stating that a substitution was made:

Order Details - Microsoft Internet Explorer
http://localhost/NSPWeb22/English/Desk/OrderQuotation.aspx?SalesOrder=01A10899

msn Search Web 57°F Favorites Spaces My MSN

Order Details

My Carts | Express Ordering | Order History | Cart Approval | My Account
Welcome, Brian! | Active Ship To: 001 | Log Off

Quotation - 01A10899 -
2 Item(s) in Cart
Subtotal: \$56.64 USD
< Details > < Checkout >

Advanced Search
Printer/Machine Supplies

Sale Products
Binders & Binding Supplies
Calendars & Planners
Computer Hardware
Files & Filing Supplies
Forms & Record Keeping
Furniture & Accessories
Mailroom Materials
Cash/Check Handling
Office Equipment & Supplies
Janitorial & Maint Supplies
Pens & Desk Supplies
Presentation Supplies
Labels, Makers & Stamps
Paper & Envelopes

Lists
My Favorites

Review Cart List Help?

Your Order Name: New Cart

Picture	Description	Price	Qty.	Extended Price	Add Msg	Delete
	Pressboard Hanging Data Binder for 14-7/8 x 11 Unburst Sheets, Light Green SKU : ACC-54075 Category : Binders Subcategory : Data Line Message: Federal law required us to substitute this item in place of ACC-53075...	\$8.56 EA	3	\$25.68		<input type="button" value="X"/>
	EasyTouch Retractable Ballpoint Pens, Refillable, Med. Point, Black Ink, 2/ Pack SKU : PIL-32260 Category : Pens Subcategory : Ballpoints Line Message: Your product PIL-32261 substituted with an equivalent item for better quality or...	\$2.58 PK	12	\$30.96		<input type="button" value="X"/>

Done Local intranet 100%

When a substitution is made, a line message is added to the cart and the invoice to indicate that the substitution was made:

Cart Confirmation - Microsoft Internet Explorer

http://localhost/VSPWeb22/English/Desk/OrderConfirmation.aspx?Time=110243

msn Search Web 57°F Favorites Spaces My MSN

Cart Confirmation

My Carts | Express Ordering | Order History | Cart Approval | My Account
Welcome, Brian! Active Ship To: 001 Log Off

Quotation - 01A10899 -
2 Item(s) in Cart
Subtotal: \$56.64 USD
< Details > < Checkout >

Advanced Search
Printer/Machine Supplies

Sale Products

- Binders & Binding Supplies
- Calendars & Planners
- Computer Hardware
- Files & Filing Supplies
- Forms & Record Keeping
- Furniture & Accessories
- Mailroom Materials
- Cash/Check Handling
- Office Equipment & Supplies
- Janitorial & Maint Supplies
- Pens & Desk Supplies
- Presentation Supplies
- Labels, Makers & Stamps
- Paper & Envelopes

Lists

My Favorites

Cart Confirmation > Receipt

Shipping and Billing Addresses [Help?](#)

[Change Ship To](#)

Ship To 001 B35 Office Supplies 239 North St. Chicago, Illinois 63393	Bill To 239 North St. Chicago, Illinois 63393
--	--

Additional Information

Your Purchase Order:

Your Billing Code:

Special Instructions:

Items

Item	Product	Description	Qty	Unit Price	Ext Price
1	ACC-54075	Pressboard Hanging Data Binder for 14-7/8 x 11 Unburst Sheets, Light Green	3 EA	8.56	25.68
Line Message: Federal law required us to substitute this item in place of ACC-53075.					
2	PIL-32260	Easy Touch - Retractable Ballpoint Pen, Refillable, Med. Point, Black Ink, 2/Pack	12 PK	2.58	30.96
Line Message: Your product PIL-32261 substituted with an equivalent item for better quality or value.					

Payment [Help?](#)

Payment Method:

Sub total: 56.64

State Tax: 2.83

Total amount \$USD: 59.47

[Buy](#)

About Us | Privacy Policy | Product Showcase | Contact Us | Help?

Done Local intranet 100%

Cost for Kits on Future Pricing Report

In Activant Vision™ 7.4, Build-to-Shelf Kits costs are calculated by summing the costs of the individual components. This cost is now included in the Future Pricing report, both on

the printed version and on the comma separated value export file. Here is a sample of the updated report:

19:01:07 Dec 21 2005		Future Pricing Analysis Report										Page 1
		Warehouse: 053 FAD - GM ACCESSORIES										
		Vendor: 56530 GMSPO										
Part #	Product Cls Typ	ABC	onHand	Last Sold	12 Mos Usage	PO	%Chg	Cost Core	%Chg	Extended	Change	
GEN17800578MB	532 901		3	12/05/05	18							
						Average:	1127.200	0.000		3381.60		
						Last:	1127.200	0.000		3381.60		
						Current:	1204.000	0.000		3612.00		
						Future:	0.000 100.00	0.000		0.00	-3612.00	

Real-time Price Update

With Activant Vision™ 7.4, Prices are updated in real time.

When updating a price level in parts management, if you select an effective date of today's date, Vision updates the price level when you save the change, rather than waiting until EOD.

If you select an effective date in the future, the system still waits until that date's EOD to update the pricing.

Quantity Pricing Breaks

Activant Vision™ 7.4 provides the ability for dealers and distributors to offer their customers price discounts for purchasing larger quantities of products. Discount price breaks are defined at the product level, and pricing logic has been modified to consider price break discounts. The calculated price will be a discount off of the customer price (not list price).

You may define up to 6 levels of quantity break discounts for each product.

Configuration

A new checkbox has been added to the customer maintenance tab, preferences form to enable quantity break pricing. By default, this box is checked.

The screenshot shows the 'Customer Maintenance' preferences form for 'Customer: 200152 Bakers Auto Parts'. The form is divided into several sections:

- Order Processing:** Includes checkboxes for 'Accepts Partial Shipments', 'Accepts Backorders', 'Invoice Complete', 'Purchase Stockouts from Wholesaler', 'Desktop Delivery', and 'Prohibit Returns'. A new checkbox, 'Qty Break Price Eligible', is checked and circled in red. The 'Complete Ship' dropdown is set to 'Normal Shipping'.
- PO Requirements:** Includes checkboxes for 'PO Required' and 'Blanket PO', along with text input fields for 'PO Match Pattern', 'Blanket PO Match Pattern', and 'Blanket PO'.
- Document Prints:** Includes dropdowns for 'Invoice Discount Print' (Show Only Net Price), 'Invoice Delivery Method' (Print), and 'Invoice Message' (Customer 200152 Invoice Message). It also has a 'Core Statement' checkbox.
- Order Acknowledgments:** Includes dropdowns for 'Order Acknowledgments' (Never), 'Backorder Acknowledgments' (Never), and 'Report Card Group' (<None>). It also has a 'Freight Manifest Customer Link' field.
- Monthly Reports:** Includes checkboxes for 'Monthly Invoice Reports' and 'Display Report Subtotals'. It also has dropdowns for 'Usage Report Day Heading', 'Monthly Billing Sort' (<None>), 'Usage Report' (Company), 'Usage Report Frequency' (Monthly), and 'Current Fiscal Month' (04).
- Department By Location Within Ship To Number:** Includes a 'Delimiter' field, checkboxes for 'Usage By Page', 'Billing By Page', and 'Sales Qty Report', and a 'Sales Qty Report' checkbox.

Buttons for 'Accept' and 'Cancel' are located at the bottom right of the form.

To set up the quantity price discounts for a product, use the Part Management tab, Costs/Prices form. There is a new tab on the lower right part of the form for entering quantity price breaks:

The screenshot shows the 'Costs / Prices' form for product 3033879 EXPANSION. The 'Qty Break Pricing' tab is highlighted with a red box. The table below shows the current configuration for quantity breaks:

Level	Qty	Discount %
Level 1	10	5.00
Level 2	20	12.00
Level 3		
Level 4		
Level 5		
Level 6		

Enter the quantity and discount percentages for up to six levels. Break levels must be entered in sequence (i.e. you cannot have break level 3 defined if break levels 1 and 2 are not defined)

Use

When you have set up pricing and eligibility, the discount is automatic. During order entry, if a customer is set up as “eligible” for quantity pricing and the order quantity falls within the range of quantity break discount parameters, Vision adjusts the customer's price by the discount percent on the quantity pricing table. These lines are marked with a price source of “Q”.

Quantity breaks will not be evaluated on lines where the price was already overridden.

The part form has a new sub-tab added to show the quantity break parameters:

Customer: 200152 Bakers Auto Parts > ShipTo: 001 - Bakers Auto Parts > Company: 15 - Chicago Central WD > Warehouse: 150 - MAIN PBO WD 150

Part # ACD15-5151
Description 3033879 EXPANSION

Order Message

Manufacturer AC Delco (ACD)
Part Class 015 - Delco A/C Parts
Part Type

Minimum Sell UOM EA - 1 Cust Total 3.470
Cores Sold / Loan 0 / 0 Per Car Qty 0

Break Level	Quantity	Discount %
Level 1	10	5.00
Level 2	20	12.00

Quick Order
Quantity UOM
1 EA -
Add To Order

Whse	Part Number	Description	Stock Type	Available	List Price	UOM	Price Class
150	ACD15-5151	3033879 EXPANSION	Stock	-1	3.470	EA,CS,PL	Delco A/C Parts

When a quantity pricing break is used, the current order form will have an icon added to denote the quantity break, and show the break levels when you hover the mouse pointer over the icon:

The screenshot displays the Vision Enterprise 7.4.24 interface for a customer order. The top navigation bar includes tabs for Home Page, Customer Maintenance, Customer Service, Retail / POS, CRM, and Parts. The main window shows customer details for '200152 Bakers Auto Parts' and order information. A red box highlights a blue icon with a white 'Q' in a circle, which is a quantity pricing break indicator. A tooltip is visible over this icon, showing two pricing levels: 'Level 1: 10 or more @ 5.00% off' and 'Level 2: 20 or more @ 12.00% off'. The order table below shows a single line item for 'ACD15-5151' with a unit price of 3.470 and a unit cost of 1.190. The status bar at the bottom indicates 'Ord Num: New Order', 'Ord Date: 4/12/2006', and 'Ord Total: \$0.00'.

VSP+ Use

In VSP+, Product Search results indicate Quantity Break pricing with a “Q” icon. Hovering over the icon displays the available quantity breaks:

The screenshot shows a search results page for 'Printer/Machine Supplies'. The page features a navigation menu on the left with categories like 'Binders & Binding Supplies', 'Calendars & Planners', etc. The main content area displays a table of search results. The first product is 'DayMinder® 14-Month Planner, Unruled 1 Month/Spread, 3-5/8 x 6-3/16, Black'. A 'Q' icon is present next to the product name, and a tooltip is displayed over it, showing the following quantity breaks:

- Level 1: 5 or more @ 10.00% off
- Level 2: 10 or more @ 25.00% off
- Level 3: 50 or more @ 30.00% off

The table below summarizes the visible search results:

Icon	Description	Price \$USD	Add To Order
	DayMinder® 14-Month Planner, Unruled 1 Month/Spread, 3-5/8 x 6-3/16, Black SKU : AAG-SK53-00 Category : Appointment Books Subcategory : Monthly	\$6.19 EA	1 Buy My Favorites Add to Favorites Add Msg Line
	DayMinder® Monthly Planner, Unruled, 1 Mo./Spread, 6-7/8 x 8-3/4, Black SKU : AAG-G40000 Category : Appointment Books Subcategory : Monthly	\$14.19 EA	1 Buy My Favorites Add to Favorites Add Msg Line
	CoilPRO™ Monthly Planner, 14-Month, Ruled, 7-1/8 x 8-7/8, Black SKU : RED-CB1200CBLK Category : Appointment Books Subcategory : Monthly	\$15.19 EA	1 Buy My Favorites Add to Favorites Add Msg Line
	Monthly Planner, Unruled, 1 Month/Spread, Phone Pages, 6-7/8 x 8-3/4, Black SKU : AAG-7012005 Category : Appointment Books Subcategory : Monthly	\$15.59 EA	1 Buy My Favorites Add to Favorites Add Msg Line

The Product Details Page displays a Quantity Breaks table depicting the available quantity breaks:





The screenshot shows the product details for 'AAG-SK53-00 DayMinder® 14-Month Planner, Unruled 1 Month/Spread, 3-5/8 x 6-3/16, Black'. The quantity breaks table is highlighted with a red circle. Below the table is a 'Purchase quantity' input field with the value '1' and 'In Stock?' and 'Buy' buttons.

Qty	Discount
5 or more	10.00% off
10 or more	25.00% off
50 or more	30.00% off

Purchase quantity:

The Order Quotation page displays the “Q” icon on items with Quantity Price Breaks. This particular example shows how different line quantities can affect the unit price for a given product:

The screenshot shows a web browser window titled "Order Details - Microsoft Internet Explorer" displaying the Vision SupplyPoint website. The page is titled "Review Cart" and shows a shopping cart with two items. Both items are "DayMinder® 14-Month Planner, Unruled 1 Month/Spread, 3-5/8 x 6-3/16, Black". The first item has a quantity of 5 and a unit price of \$5.57 EA, resulting in an extended price of \$27.85. The second item has a quantity of 12 and a unit price of \$4.64 EA, resulting in an extended price of \$55.68. Both items have a blue "Q" icon in the description column, indicating quantity pricing breaks. The cart subtotal is \$83.53 USD. The page also includes a navigation menu, a search bar, and a sidebar with product categories.

Picture	Description	Price	Qty.	Extended Price	Update	Delete
	DayMinder® 14-Month Planner, Unruled 1 Month/Spread, 3-5/8 x 6-3/16, Black SKU : AAG-SK53-00 Category : Appointment Books Subcategory : Monthly	\$5.57 EA	5	\$27.85	Update Qty Add Msg Line	
	DayMinder® 14-Month Planner, Unruled 1 Month/Spread, 3-5/8 x 6-3/16, Black SKU : AAG-SK53-00 Category : Appointment Books Subcategory : Monthly	\$4.64 EA	12	\$55.68	Update Qty Add Msg Line	



Warehouse

Re-Print Packing List

A new selection for Shipping Documents is available. You can now select “Print” when you right click on a transaction in the Customer History.

Accounts Payable

Add Multiple Receivers to a Voucher

On the receiving form, users can now select a single receiver, hold down <CTRL> and select multiple receivers, or hold down <SHIFT> and select a range of receivers. These receivers can then be added or removed from the current voucher all at once. Multiple worksheets may also be selected and printed at once.

Vendor Account Number

Sometimes, you may be known to your vendor by several different names. For example, a company name and a warehouse name, or a DBA name and a corporation name. This may confuse vendors if you don't have an absolute way to refer to yourself.

Activant Vision™ 7.4 has a new Vendor Master Maintenance field, Vendor Account Number. This is the account number assigned to you by the vendor, and can be set by editing field 29 in Vendor Master Maintenance. This field is optional, but recommended.

```

Task 5317 - A/P Check vendor number
VEND.MAST.HDR0      The Systems House, Inc.      11/22/05 13:16:40
                    AP - Vendor Master Maintenance
Vendor No.: EMCO          *** Correspondent Bank Address ***
1. Vendor Name.: EMCO          6.
2. Address 1...:          7.
3. Address 2...:          8.
4. City State...: GRAND RAPIDS MI 9.
5. Zip Code...: 60031        10.

11. Contact...:          *** Standard G/L Numbers ***
12. Telephone...:        21.
13. Fed Id/Ss#...:      22.
14. 1099 Req...: N       23.
15. Temp Vendor...:     24.
16. Pay Status...: P
17. Master Vend#:      25. Std Vend No:
18. Duns #...:
19. Buyer...: 001 Mindy Braithwaite
20. Nonstk Whses: 001
29. Account #...: 1250392887
26. Always Discount...: Y
27. Annual Return Allow.:
28. Inventory Vendor...: Y

Ln#, (S#), (R), (DELETE), (F#), (?), (0)Accept: █
Ready Ln 22, Col 62 CAP NUM

```

Vision prints the vendor account number on all accounts payable checks, whether laser or non-laser.

The vendor account number also appears on the vendor profile form in the Accounts Payable tab

Vendor: EMCO EMCO

Vendors EMCO Search 2 Record(s) Found. Options

Vendor Remit To
EMCO
GRAND RAPIDS, MI 60031

PO Address

Phone **Fax**

Company	Bank	Buyer
01 - INTERSTA...	001	

Contact

Payment Terms

Master Vendor

Account Number 1250392887

Vendor Since 11/14/2005 **Open Balance** \$0.00

	MTD	YTD	Last Year
Purchases	\$0.00	\$0.00	\$0.00
Vouchered	\$0.00	\$0.00	\$0.00
Paid	\$0.00	\$0.00	\$0.00

Last PO

Vend No	Vendor Name	Address	City	Phone Number	Primary Contact	Tempo
D1005	DEMCO,INC.	2120 FORDEM AVE	MADISON	(608) 241-1201		No
EMCO	EMCO		GRAND RAPIDS			No



Communications

Computer/Telephony Interface

In order to support more rapid customer service, Activant Vision™ 7.4 has the ability to identify an incoming call from a TAPI-capable phone system after the handset is picked up. This is called the Computer/Telephony Interface, or CTI.

If a customer can be identified by cross-referenced phone number, Vision displays the customer information on the customer profile form or the current order form. If no phone number is recognized, the user has the ability to quickly attach the incoming phone number to an existing customer record.

A new button will be visible on the Customer Profile forms on the Customer Service, POS, Customer Maintenance, A/R Inquiry and Home Page tabs.

Setup

There are two things to set up in the CTI interface. First, entering customer's phone numbers, so that the correct customer record comes up when they call. Second, setting up the CTI behavior.

Entering Phone Numbers

To enter phone numbers for a customer, select the customer, then go to the new CTI Phone Numbers form in the Customer Maintenance tab:

Customer: 901320 AVERA MCKENNAN HOSPITAL

Starting Number Add One Number

Ending Number Add Range of Numbers

Comment AVERA MCKENNA Accept Cancel

Telephone	Comment
✓ 4057578	AVERA MCKENNAN HOSPITAL
✓ 4057579	AVERA MCKENNAN HOSPITAL
✓ 4057576	AVERA MCKENNAN HOSPITAL
✓ 4057577	AVERA MCKENNAN HOSPITAL
✓ 4057574	AVERA MCKENNAN HOSPITAL
✓ 4057575	AVERA MCKENNAN HOSPITAL
✓ 4057572	AVERA MCKENNAN HOSPITAL
✓ 4057573	AVERA MCKENNAN HOSPITAL
✓ 4057570	AVERA MCKENNAN HOSPITAL
✓ 4057516	AVERA MCKENNAN HOSPITAL

If entering one number for this customer, enter it in the “Starting Number” field and click the “Add One Number” button.

If entering a range of consecutive numbers, Enter the first number in the “Starting Number” field, and the last number in the “Ending Number” field. Click the “Add Range of Numbers” button to generate the list of entries.

Note: Do not use dashes in the number. For example, to use the number 321-4567, enter “3124567”.

When you are finished entering numbers, click the “Accept” button.

CTI Behavior Setup

To set up the CTI behavior, go to the new Preferences form in the Home Page tab:

The screenshot shows the 'CTI Preferences' form in a web browser window titled 'Vision Enterprise 7.4.23 - for: Preferred TSH Customers'. The browser's address bar shows 'Customer: 901320 AVERA MCKENNAN HOSPITAL > Warehouse: 001 - INTERMETRO OFFICE PROD.'. The form is divided into several sections:

- Enable the interface with my telephone:** A checkbox that is currently unchecked.
- Automatic Search Options:**
 - Search when my phone rings
 - Search when I answer my phone
 - Don't search, just enter the phone number for me
 - Display alerts for phone calls
- When the phone number matches a customer, switch to this display:** A dropdown menu.
- When the phone number does not match, switch to this display:** A dropdown menu.
- Tab Creation Options:**
 - Always use an existing tab
 - Create a new tab for every search
 - Use an existing tab if not busy, otherwise create a new tab
 - Change the name of a new tab to the customer number
- Tab Removal Options:**
 - Remove an automatically created tab
 - A transaction is completed
 - When I hang up the phone
- Telephone Integration:**
 - Change these settings only when so advised by your system administrator.
 - Use TAPI Drive
 - Use Data File
 - Use External Service

An 'Apply Now' button is located at the bottom right of the form.

To enable the CTI feature, check the “Enable the interface with my telephone” check box.

Automatic Search

This set of options controls what is automatically displayed when the phone rings or is picked up.

You can select one of the following behaviors:

- Search when my phone rings
- Search when I answer my phone
- Don't search, just enter the phone number for me

The “Don't search...” behavior brings up the customer search form, and enters the telephone number of the caller in it.

To Display a dialog box with the phone number of the caller when the phone rings, check the “Display alerts for phone calls” check box.

Tab Creation/Removal Options

Creation

When the phone rings or is picked up, Vision can create a tab or allow you to work in an existing tab. Choose one of the following behaviors by clicking the radio button:

- Always use an existing tab
This behavior switches the active tab to the existing Customer Service tab.
- Create a new tab for every search
This behavior always creates a new Customer Service tab.
- Use an existing tab if not busy, otherwise create a new tab
This behavior switches the active tab to the first Customer Service tab that doesn't have an active customer. If there is no such tab, Vision creates a new Customer Service tab.

If you wish to have a newly created tab used for CTI re-labeled with the phone number of the incoming call, check the "Change the name of a new tab to the customer number" check box.

Removal

When the call or transaction ends, you can have Vision remove newly created tabs. Check one or both of the check boxes in the Tab Removal Options box.

Telephone Integration

Only change the options in this box when directed to do so by Activant Customer Support.

Remote Order Entry

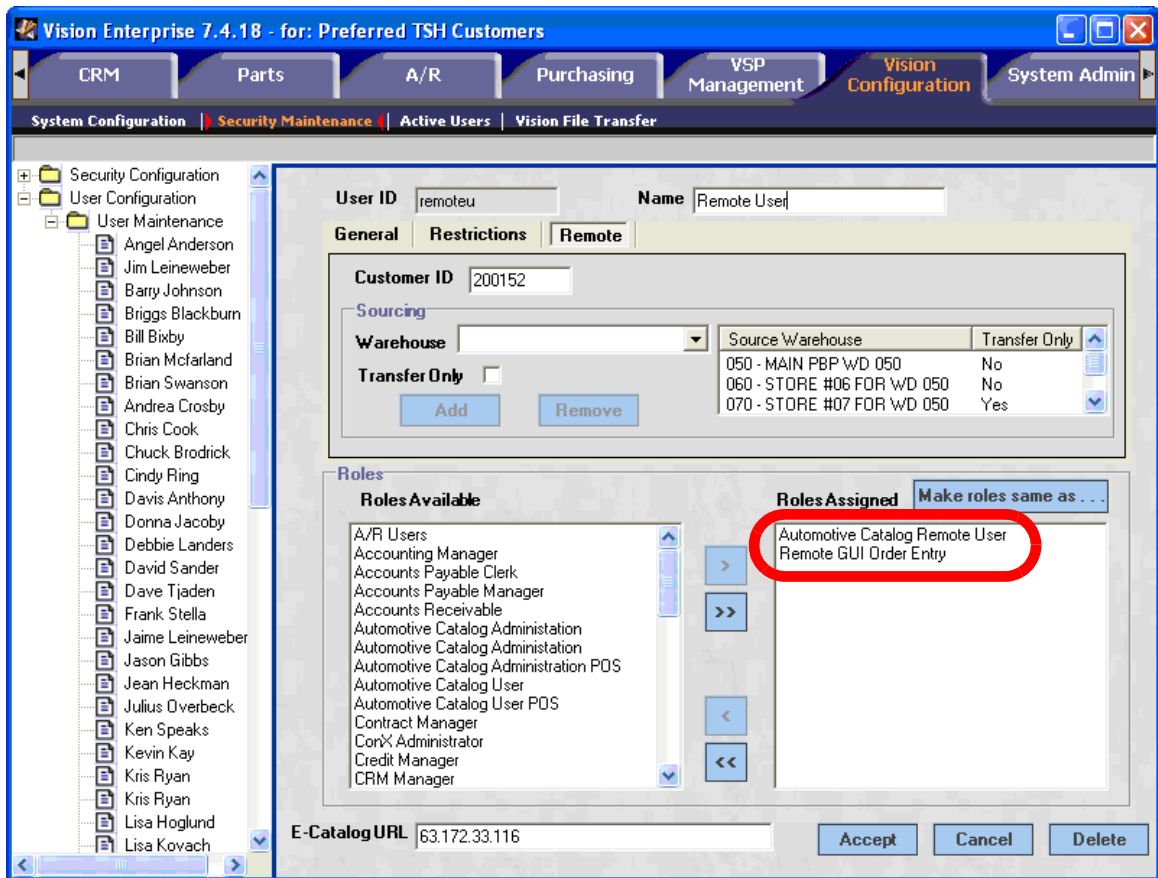
Activant Vision™ 7.4 provides the ability for a customer to enter an order into Vision GUI remotely. With a restricted login, the customer can enter orders and use the catalog, but not change any part of the system or see proprietary information.

This functionality is accomplished with two new job roles: Remote GUI Order Entry and Automotive Catalog Remote User.

Setup

To enable a remote user, create the user in Vision Configuration.

Assign them only the job roles Remote GUI Order Entry and Automotive Catalog Remote User.



Also, you need to assign the available sourcing warehouses. Do this by selecting a warehouse in the Sourcing drop down and clicking the “Add” button.

Use

After setting up the remote user, as above, they will be able to log in to your Vision computer. They will only be able to see the Order Entry tab, and a limited subset of forms from that tab:

The Sourcing form has been heavily restricted for remote users.

The controls that are invisible to the remote user are:

- Purchase Order History Group Box
- Product Purchase Order Information Group Box
- Vendor Source for Purchase Order Group Box
- Force to ship check box

Note: Sourcing warehouses to be displayed are restricted to the source warehouses for the remote user which are setup in User Maintenance.

Bisync XT Electronic Data Interchange

Activant Vision™ 7.4 supports bisync dial-up communications to receive XT orders from customers. XT is the format used by Activant to receive and process EDI Orders from customers. These orders can be small online jobber POs or large End of Day stock orders.

If you wish to use this feature, call your Activant sales representative to schedule an installation.

Use

To use this feature, a customer will create a purchase order and transmit this purchase order to the Vision system using a bisync modem. This modem will automatically answer the call and accept the file. Vision will process the file, validate the data, and create a Vision order.

If Vision detects errors, the order will be put on hold awaiting manual EDI error correction and a CRM event will notify an operator. When errors occur, the EDI Administrator will want to resolve them using the EDI Manual Error Corrections maintenance. This is accessible in Back Office, through the main menu, Order Processing, EDI Processing, Error Correction Entry.

Setup

To set this feature up, Activant will need to install some communications software on your Vision system. If you are required to install this software, the instructions will be included with the CD.

You will need the following equipment and services to use Bisync XT EDI:

- At least one line dedicated to a bisync modem. This modem should be capable of using the Bell 201C protocol. The UDS2140 modem currently in use by customers can be used.
- A CLEO SYNCcable+. This is used to convert synchronous communications to asynchronous communications.
- A Windows PC which will run the CLEO software and the XTInbound Gateway service to watch for incoming file. This PC will require the Microsoft .Net Framework 2.0



VSP+

VSP+ Custom Startup Page

VSP+ now includes the ability for you to create your own startup page using HTML which will display when your customers first log on instead of the product showcase. The header, footer and left side navigation areas of VSP+ will remain unchanged.

To enter HTML page data, go to the Vision Configuration tab, System Configuration form, Vision Supply Point Information folder, About Us Data sub folder. You may make a custom startup page for each VSP+ company.

The screenshot shows the 'Vision Enterprise 7.4.7' interface. The top navigation bar includes tabs for Home Page, Customer Maintenance, Customer Service, Retail / POS, CRM Management, Product Management, Product Management, Accounts Payable, Accounts Receivable, Pricing, and P... Below this is a sub-navigation bar with System Configuration, Security Maintenance, Active Users, and Vision File Transfer. The main window is divided into a left sidebar with a tree view (including About Us Data) and a main content area. The 'About Us' form is active, showing details for 'The Systems House, Inc.' with fields for Company ID, Name, Address Block, Email Address, Support E-Mail, Support Phone, and Website URL. An 'About Us' image preview shows a modern office building. Below the form are tabs for Header Image, Custom Banner Image, Custom Startup HTML, and Custom Startup Images. The 'Custom Startup HTML' tab is selected, showing a text area with HTML code. A 'Test Startup' button and a 'Bring Custom Startup Live' checkbox are also visible.

Enter your HTML in the Custom Startup HTML field, of the Custom Startup HTML tab.

To test your HTML without going live, click the “Test Startup” button. This brings up a web browser with the rendered startup page in it. Close the browser to go back to editing.

When you are ready to publish your new custom startup page, Check the “Bring Custom Startup Live” check box, and click the “Accept” button.

Upload any pictures to the Custom Startup Images tab:

To upload an image, Right click on the Image space.

Right clicking will bring up a menu, click “Load Image From File”.

Navigate the file selection dialog box to the image you would like to upload.



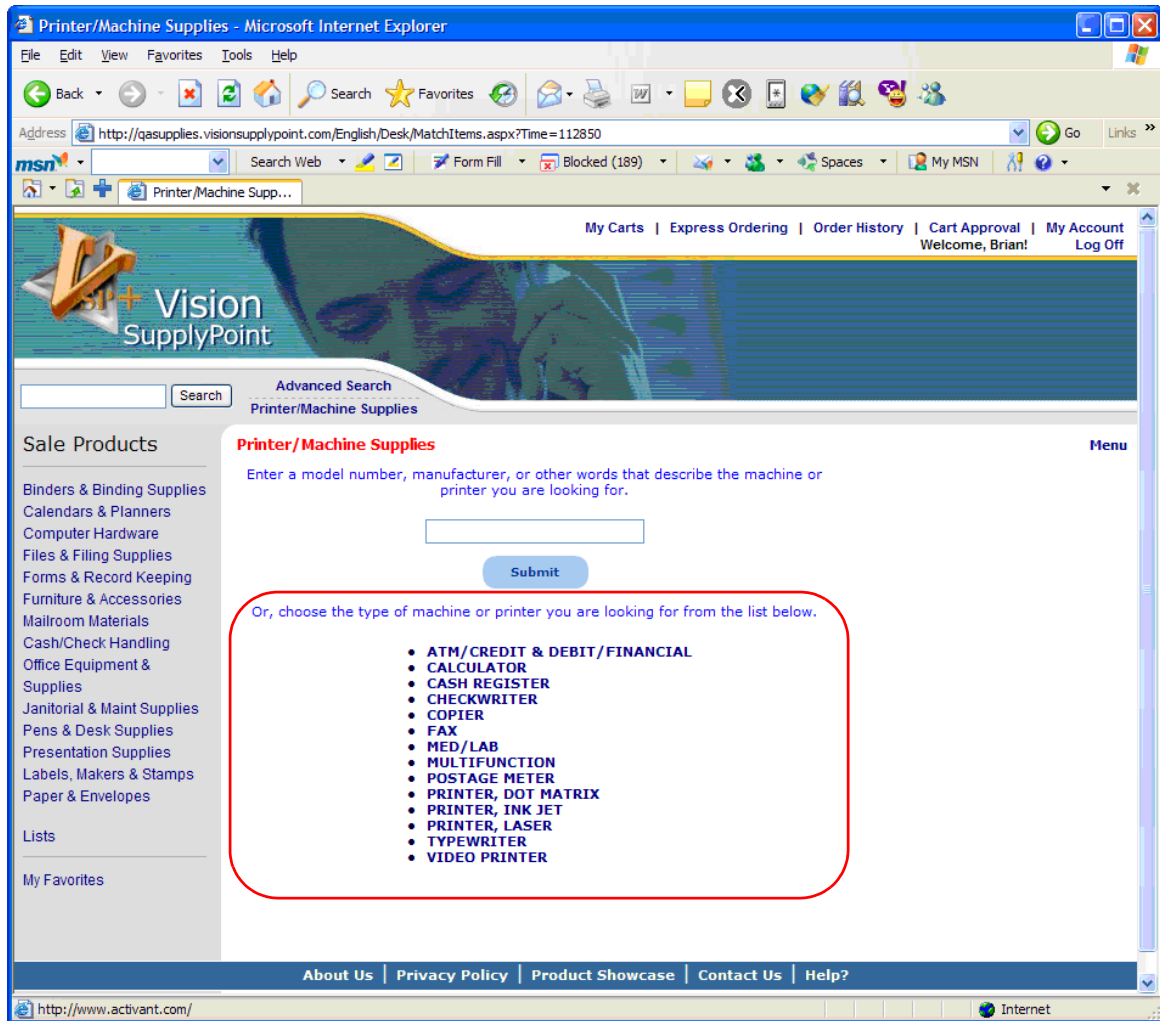
Note: Only BMP, JPG, and GIF files may be uploaded. Each image must reside in a subdirectory called “startupimages”. Any HTML that references these images must refer to them using the general format “startupimages/imagename.ext”.

VSP+ Hierarchical Searching

VSP+ now includes an “alphabetical, hierarchical listing” of all manufacturers, products, and models, as an alternative to using the existing “targeted search” machine matching feature. Instead of keying in a portion of the manufacturer name or the product model number, you can now instead locate a product in a list view.

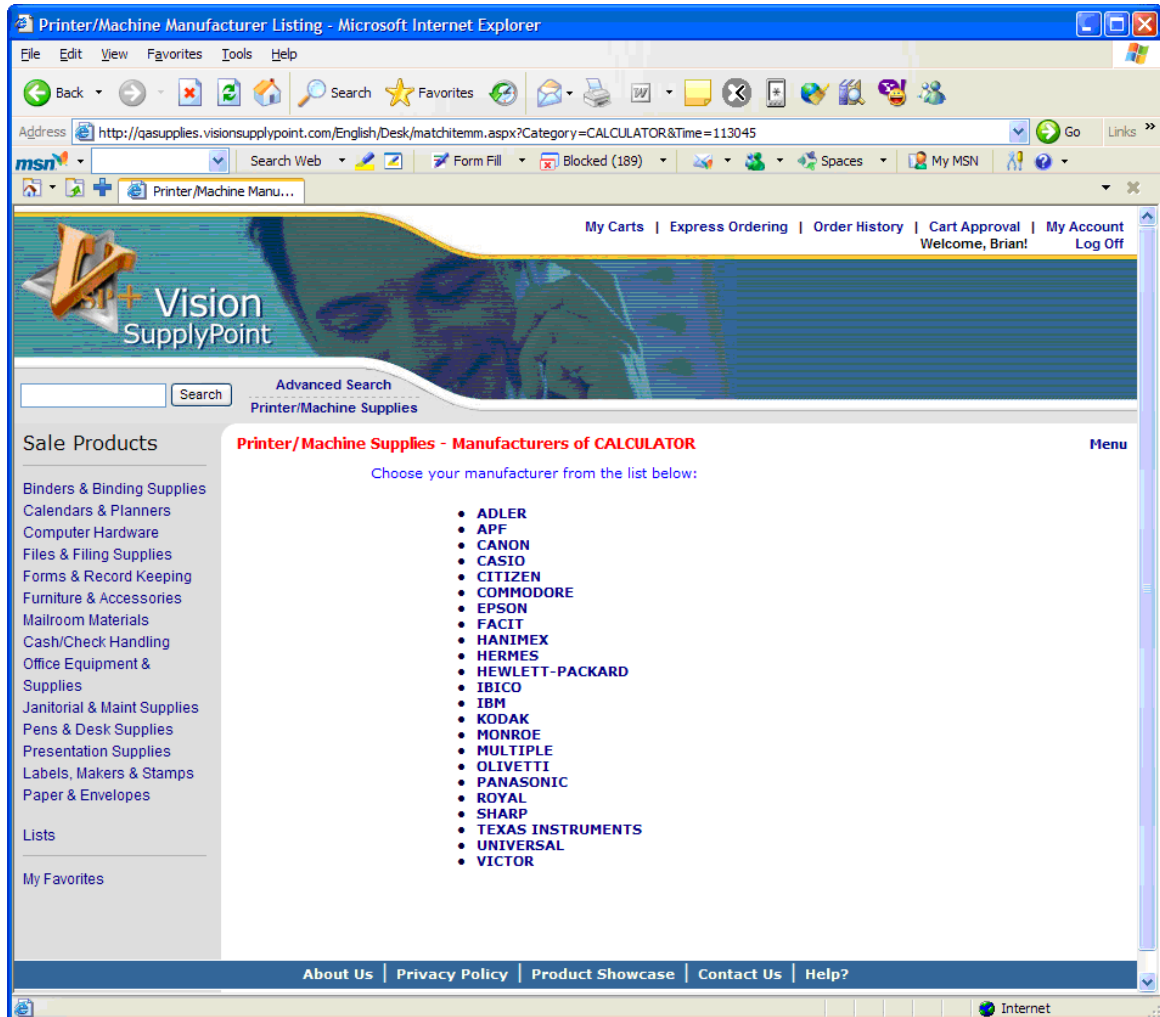
A new section has been added to the existing machine matching page that provides the list of possible machine categories. For example, PRINTER DOT MATRIX, PRINTER LASER, FAX, CALCULATORS, etc. When you click on one of these links, a new web page is displayed, allowing you to further drill down into the machine matching database. This section appears immediately below the existing “targeted search” input field.

Here is an example of the new search feature:



To start searching hierarchically, click on one of the machine categories.

After clicking on a category, VSP+ shows a list of manufacturers of machines in that category:



The screenshot shows a Microsoft Internet Explorer browser window displaying the Vision SupplyPoint website. The address bar shows the URL: <http://qasupplies.visionsupplypoint.com/English/Desk/matchitemm.aspx?Category=CALCULATOR&Time=113045>. The page title is "Printer/Machine Manufacturer Listing - Microsoft Internet Explorer".

The website header includes the Vision SupplyPoint logo and navigation links: "My Carts", "Express Ordering", "Order History", "Cart Approval", "My Account", "Welcome, Brian!", and "Log Off".

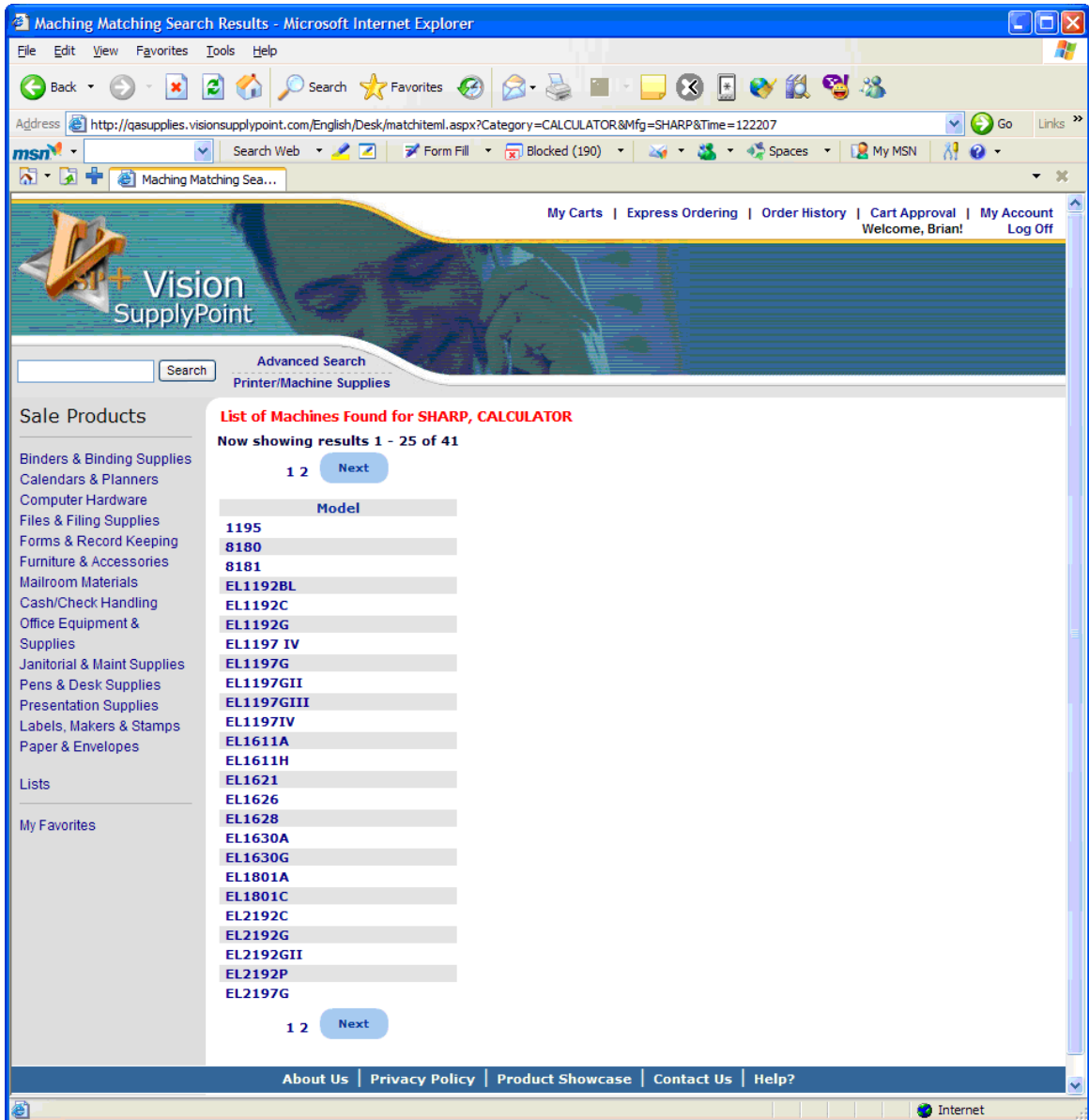
The main content area is titled "Printer/Machine Supplies - Manufacturers of CALCULATOR". Below this title, it says "Choose your manufacturer from the list below:" followed by a bulleted list of manufacturers:

- ADLER
- APF
- CANON
- CASIO
- CITIZEN
- COMMODORE
- EPSON
- FACIT
- HANIMEX
- HERMES
- HEWLETT-PACKARD
- IBICO
- IBM
- KODAK
- MONROE
- MULTIPLE
- OLIVETTI
- PANASONIC
- ROYAL
- SHARP
- TEXAS INSTRUMENTS
- UNIVERSAL
- VICTOR

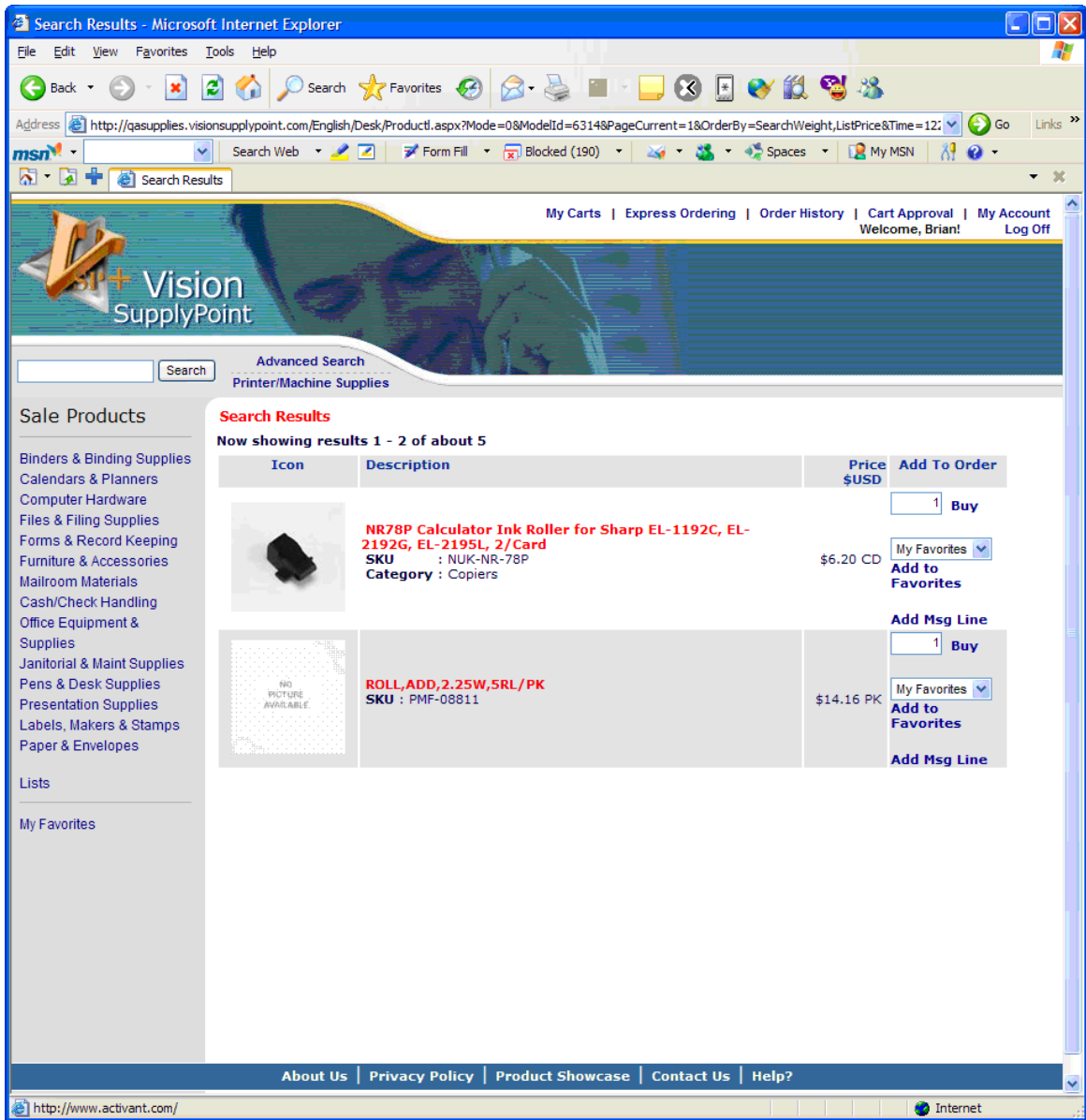
The left sidebar contains a "Sale Products" menu with categories such as "Binders & Binding Supplies", "Calendars & Planners", "Computer Hardware", "Files & Filing Supplies", "Forms & Record Keeping", "Furniture & Accessories", "Mailroom Materials", "Cash/Check Handling", "Office Equipment & Supplies", "Janitorial & Maint Supplies", "Pens & Desk Supplies", "Presentation Supplies", "Labels, Makers & Stamps", "Paper & Envelopes", "Lists", and "My Favorites".

The footer contains navigation links: "About Us", "Privacy Policy", "Product Showcase", "Contact Us", and "Help?".

Click on a manufacturer to get a list of the machines in that category made by that manufacturer:



Click on the product name to get a list of the supplies for that model:



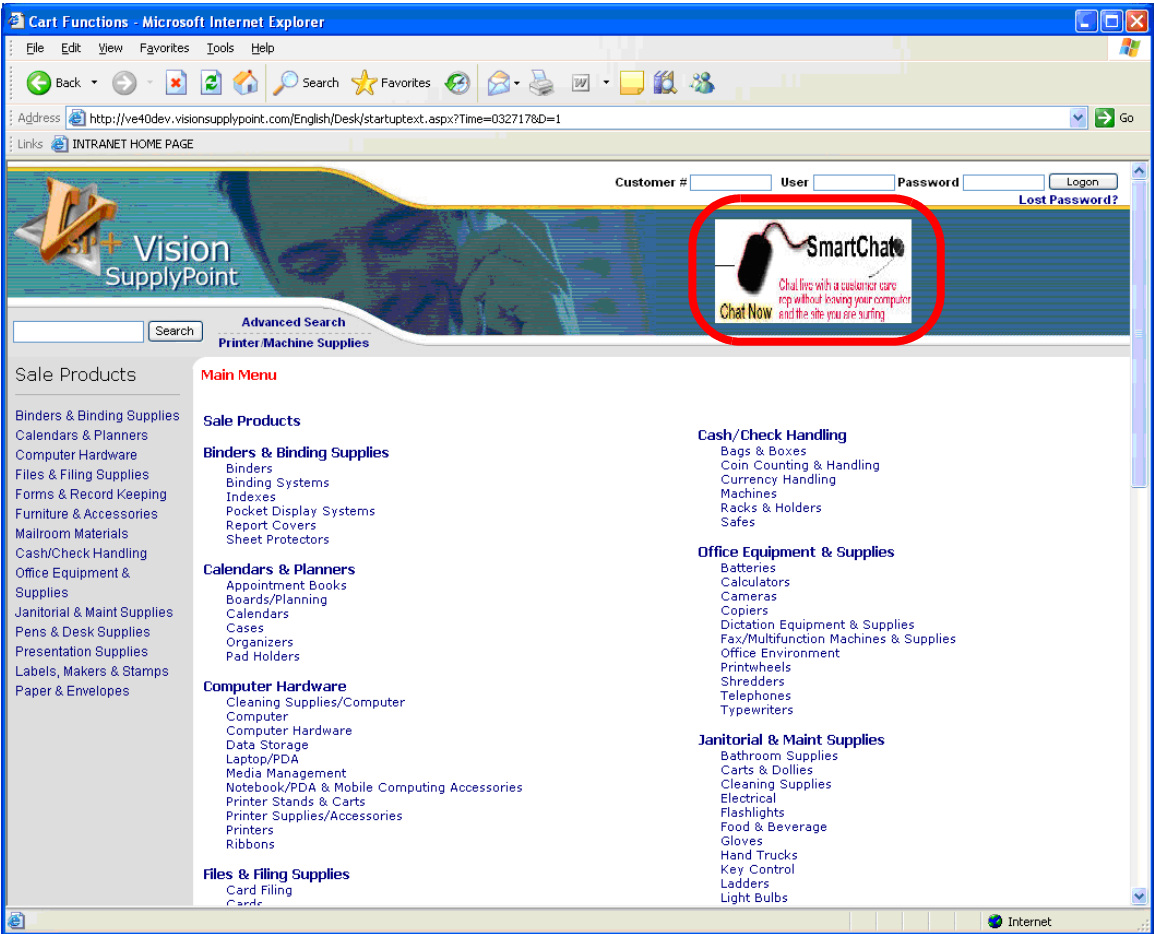
VSP+ Search Enhancements

VSP+ Product Search now allows searching with or without the manufacturer prefix. The search will also return parts when either the butted number (for example: ACC3545A) or the un-butted number (for example: ACC-3545A) is entered.

VSP+ Custom Banner Image/Link

There have been requests to add the ability to have VSP+ link to a third party “Chat” tool. The link to the tool should be visible all the time and clicking on the image will bring up the tool. Rather than limit this to a specific third party chat tool or even any chat tool, an area of the header will be reserved for a custom banner image with an associated custom Internet link.

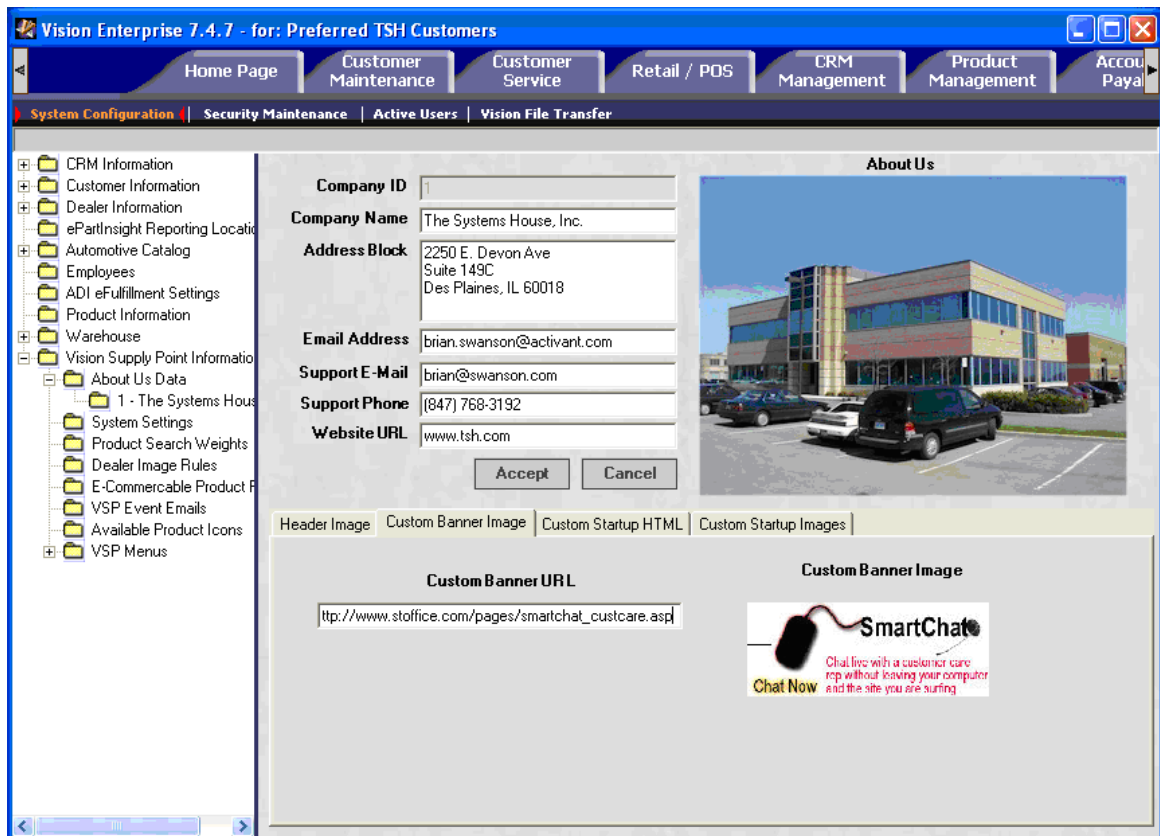
The new image and link displays in the header section, to the left of the user's shopping cart:



To set up the link and the displayed image, follow the following instructions:

- 1 Go to System Configuration, Vision Supply Point Information, About Us Data.**

- 2** From there, click on the folder for the the instance of VSP+ to which you would like to add the link and image:



- 3** Click on the “Custom Banner Image” sub-tab.
- 4** Type the Link URL into the Custom Banner URL field.
This is the web page to bring up when the banner is clicked.
- 5** Right click on the Image to upload a new image to display in the VSP+ Banner.
Right clicking will bring up a menu, click “Load Image From File”.
- 6** Navigate the file selection dialog box to the image you would like to upload.
This image should be 200 pixels wide by 79 pixels tall, or less.

Note: You may set a separate link and image for each of your VSP+ companies.

VSP+ Exception Message

Instead of an unfriendly technical error message, a new error message has been developed that displays a unique error number and contact information so that the user can request assistance.

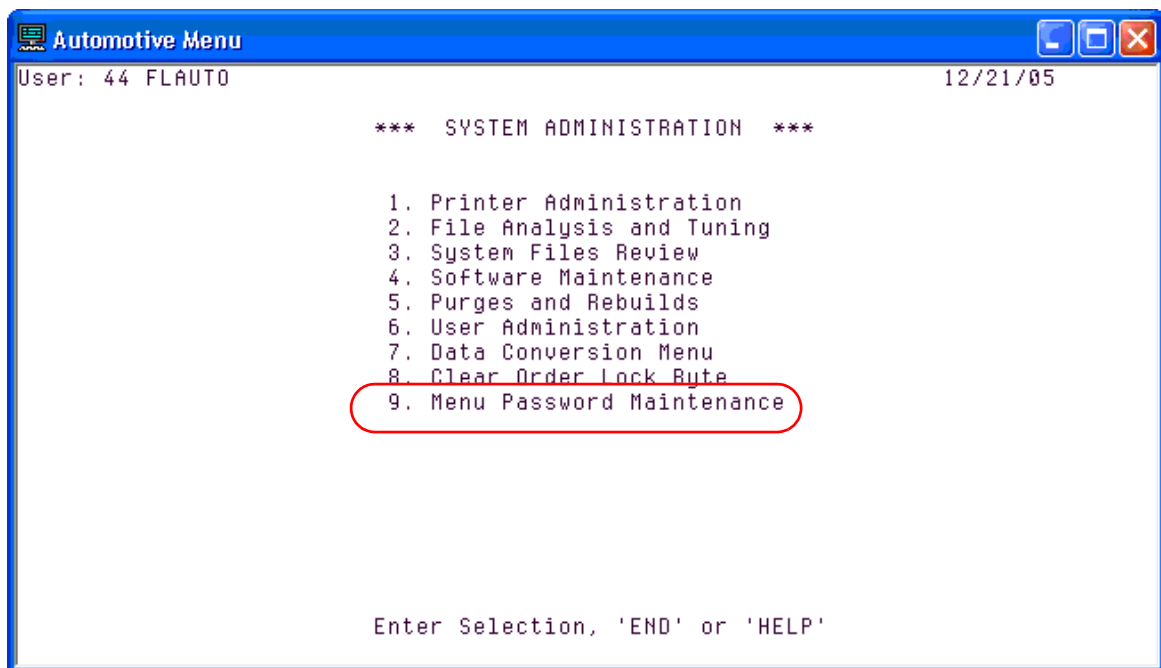
To configure this error message, go to VSP Management, “Vision SupplyPoint Information”, “About Us” maintenance to enter values for the “Support Phone Number” and “Support E-Mail Address” fields.

System Administration

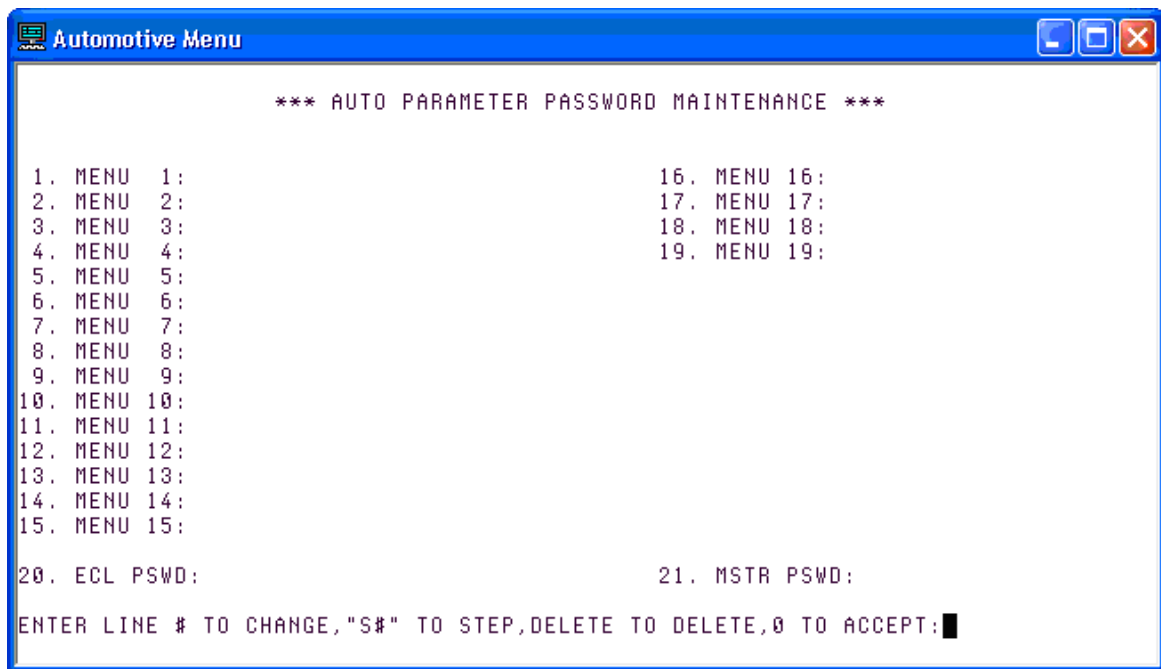
Backoffice Password

The Automotive Backoffice can now be secured by password. Each menu can have a different password. In addition, ECL has its own password, and there is a master password.

To activate this feature, set the passwords in Automotive Backoffice, menu 12.6.9.



The password maintenance menu looks like this:



ePartInsight

The PartInsight data warehouse provides Activant's large-scale data repository to consolidate data across Parts Distributor Operations and across Program Group members. This data warehouse platform provides a foundation to Activant's web enabled eBusiness Intelligence solutions support advanced analytical applications by customer, product, inventory and operations management topic areas.

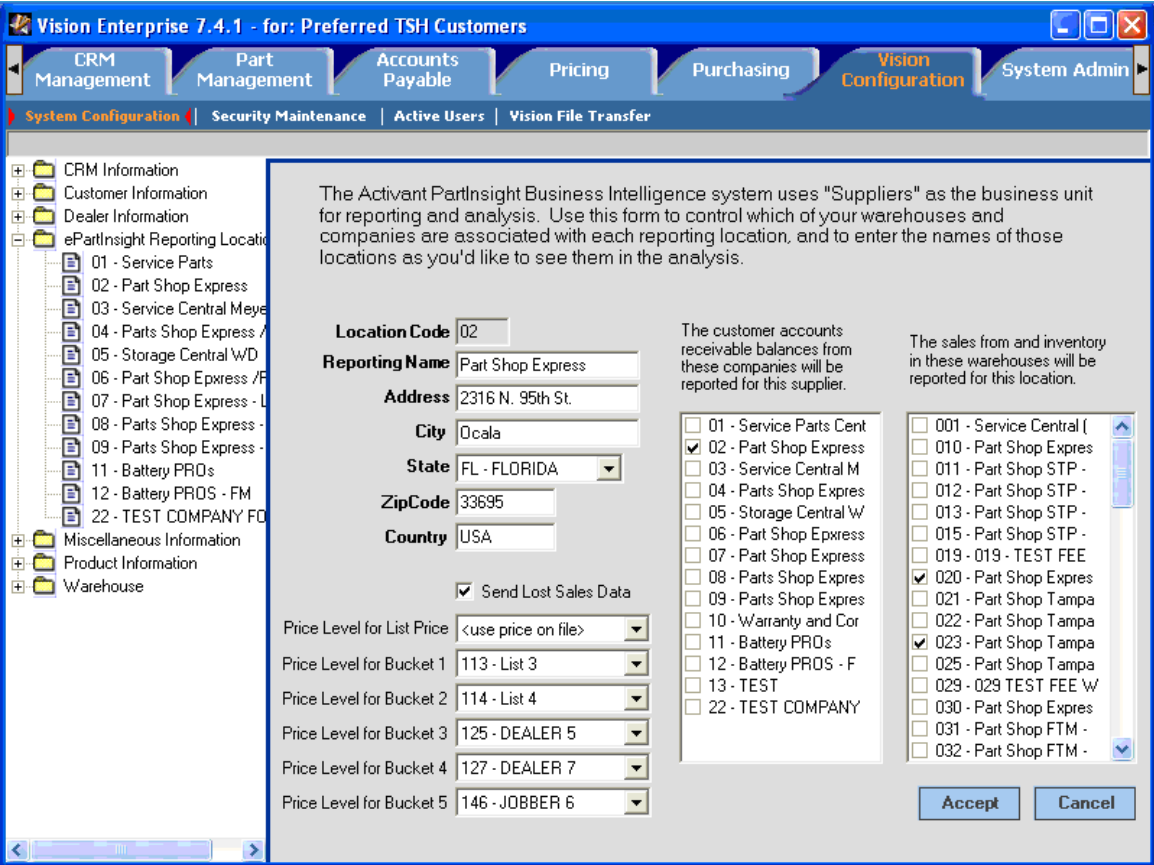
The Activant Vision™ 7.4 interface to ePartInsight has the following features:

- System configuration support for PartInsight "supplier numbers" and "locations".
- Tools to allow the Data Warehouse Communications Server to connect to the Vision server.
- A mechanism for automatically creating two files (inventory changes and sales transactions) named and formatted appropriately on a daily basis.
- A mechanism for creating "inventory refresh" files (in virtually the same format as the daily inventory files) for specified locations upon request.
- A mechanism for creating sales transactions files for past dates upon request.
- A mechanism for removing old files after a number of days have passed.

Configuration

The configuration of PartInsight reporting locations is integrated to the Vision Configuration form as a node within the configuration tree. It is only available to users with the FILE MAINTENANCE ADMIN job function.

A sample screen shot

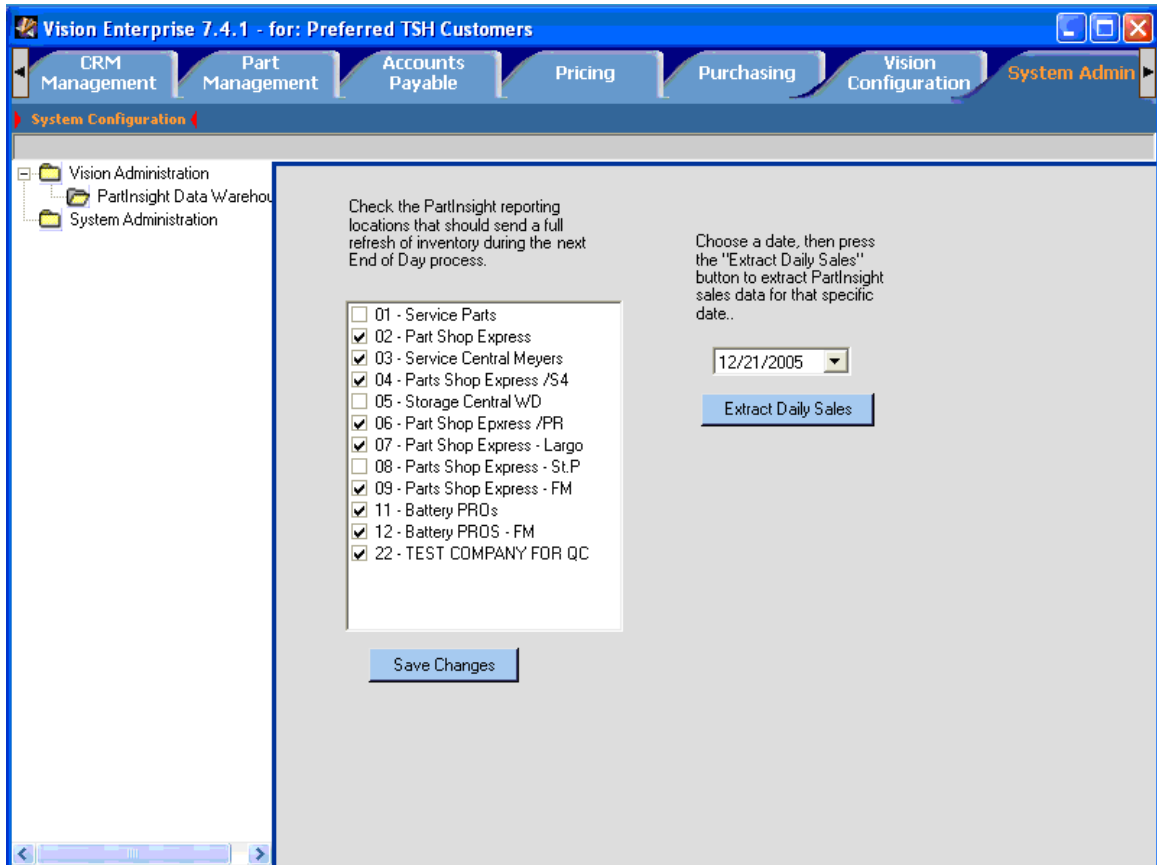


To properly configure your DataWarehouse feed using ePartInsight, contact your DataWarehouse/ePartInsight administrator or the Activant help desk.

ePartInsight requires a permanent connection to the Internet for the Vision server and correct configuration of that connection. When you set up ePartInsight, Activant Support will help you configure your Internet connection.

Manual Data Extraction

Under the System Administration tab, a new form has been added to allow manual data extraction.



Normally, a single full inventory extraction is performed at the start of the ePartInsight service, and only “partial” extractions are needed on successive days, to report changes.

From time to time, ePartInsight data warehouse administrators may request a full inventory refresh. Check the locations for which a full refresh is requested and press the “Save Changes” button. The full refresh will be performed during the next end of day process.

It is also possible that extracting sales data for specific days in the past is desired. Choose the desired date and press the “Extract Daily Sales” button. The extraction for that day will be immediately performed, and will be available the next time the ePartInsight data warehouse downloads from the server.

Automatic Processing

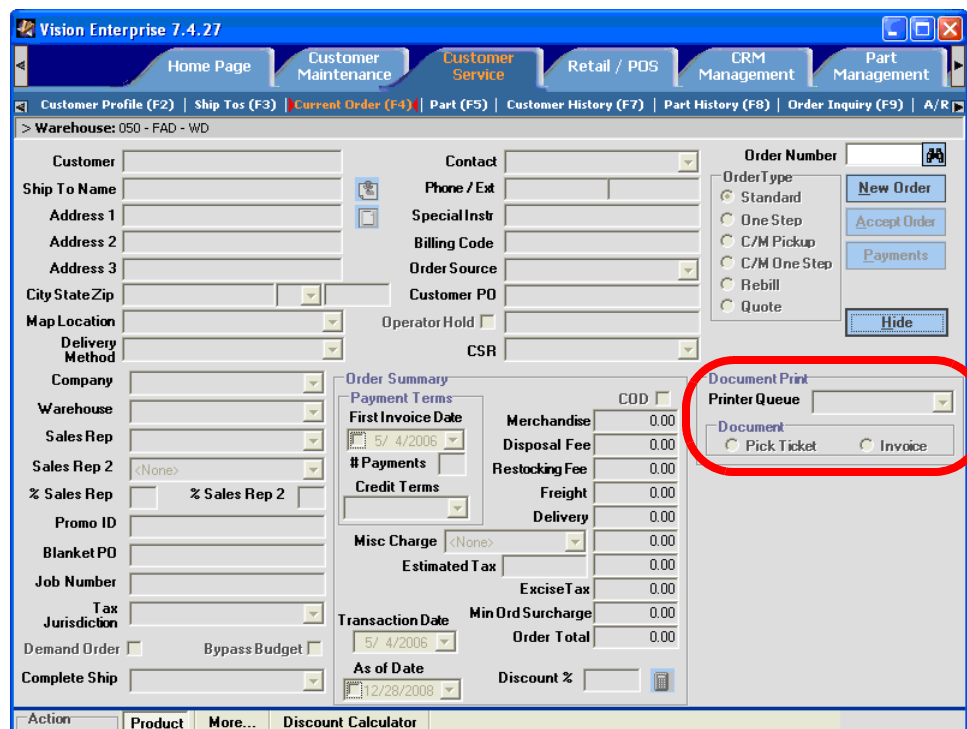
Two new programs will be added to the end of day process - one for inventory extraction, and the other for sales transaction extractions. Files older than two weeks are deleted by the end-of week process.

Supplementary Enhancements

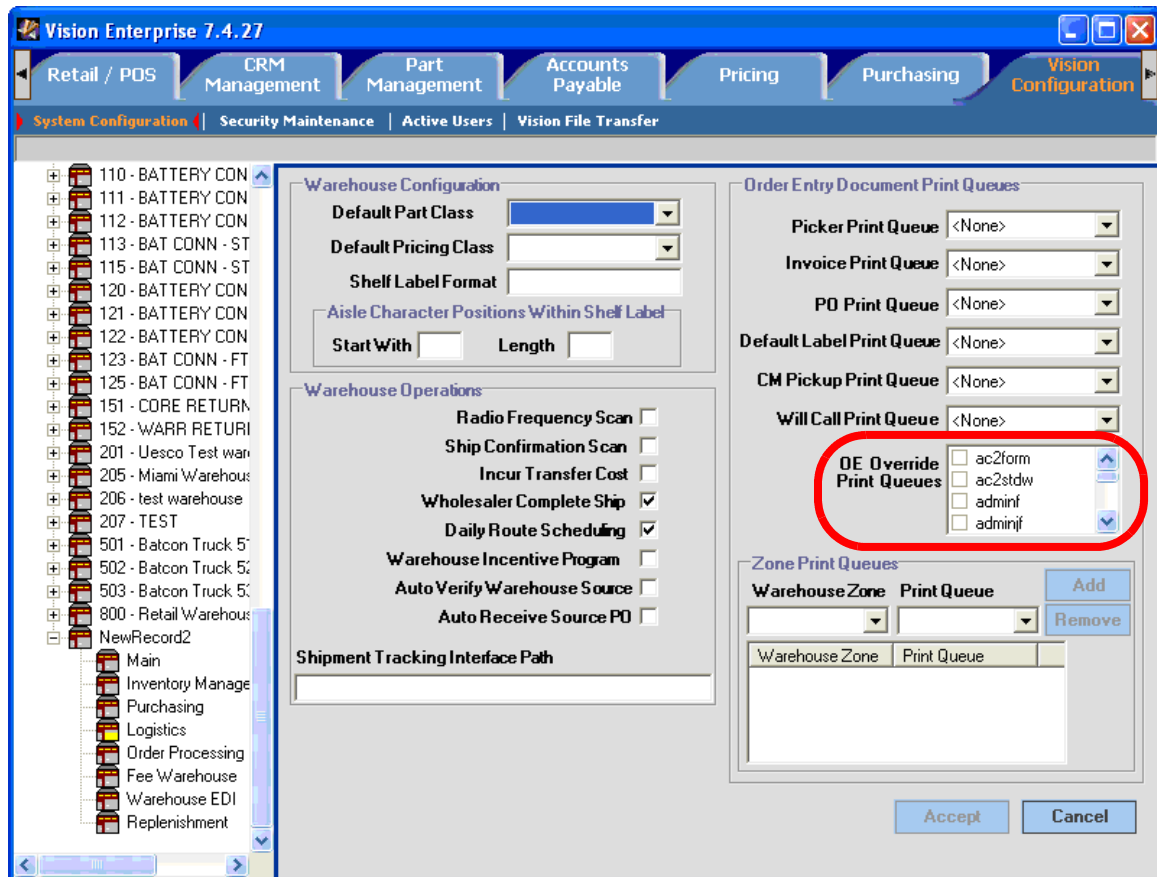
Printer Selection in Order Entry

With Activant Vision™ 7.4, you can select which printer to use from the Order Entry screen.

There is a new box on the Current Order forms that lets you select the printer and document to print:



To set up the Document Print box, go to the Vision Configuration tab, System Configuration form. The printer information can be set for each warehouse. Go to the Logistics sub-folder for the warehouse:



In the OE Override Print Queues box, indicated above, select the print queues that the documents should be able to print to.

Printer selection in Order Entry is only available for Automotive customers.

Kit Inventory Update

Vision supports two kinds of kits; Build-to-Shelf Kits and Demand Kits. A Demand Kit is not assembled until the pick ticket is processed. A Build-to-Shelf Kit is pre-assembled and appears as only a single line on the order.

With a Demand Kit, the components remain available for individual sale up until the point that they are sold.

With a Build-to-Shelf Kit, because the components have already been packaged up with the kit, they sit on the shelf in a "kitted" condition and are not available for individual sale.

If the kit type is Build-to-Shelf, Vision updates usage of kit components either at EOD, or immediately (based on an indicator on the "kit" form in parts maintenance). Demand kit usage statistics for kit components are updated during end of day.

If you would like to not update the inventory for Build-to-Shelf kits, go to the Vision Configuration tab, System Configuration form, warehouse folder. The update setting can be set for each warehouse. Go to the Purchasing sub-folder to set the check-box:

The screenshot shows the Vision Enterprise 7.4.27 System Configuration window. The 'Purchasing Options' section is expanded, and the checkbox 'Update Component Usage for Build to Shelf Kits' is highlighted with a red circle. Other options include 'Allow Over Receiving', 'Track Lost Sales', 'Purchase Stockouts from Wholesaler', 'Create Individual Purchase Orders By Customer Order', 'Activate Furniture Purchase Orders Upon Generation', and 'Activate Wholesaler Stock Purchase Orders Upon Generation'. The 'Additional Warehouses to Combine for Classification' list includes '002 - CHICAGO SUPPLIER', '003 - BUSINESS INTERIOR', '004 - RETAIL / SO WAREH', '005 - BUSINESS INTERIOR', and '006 - TEST'. The 'Pricing' section shows 'Model' and 'Price Level' set to '<None>', with 'Update Load' and 'Update Global' checkboxes. The 'Purchase Order Print Options' section includes 'Print Contact on PO', 'PO Fax Logo', and 'PO Laser Logo'. The 'Mfg Avg Lead Time Calc' section has radio buttons for 'Upon PO Receipt' and 'Monthly', with '# of POs to Include' set to 10. The 'Vendor Transmission Sequence' table is also visible.

Vendor	VendorName	Facility Code	Description	Account	Order T.
SPR1	SP RICHARDS	01	SPR Atlanta		
SPR2	SP RICHARDS	02	SPR Charlotte		
UNIT1	UNITED STATIONE...	CHI	UNI Chicago-Carol S...	753432	RFP
UNIT2	UNITED STATIONE...	SLK	UNI Salt Lake City	753432	RFP
UNIT2	UNITED STATIONE...	CLV	UNI Cleveland	753432	RFP

If the box is checked, the component usage is updated during PO acceptance. If the box is not checked, usage is not updated at the warehouse level.

Multi-store Sales

A customer can purchase from multiple stores. When a customer orders from a location other than his normal serving location, the identity on the invoice and taxation is drawn from the selling location, not from the customer defaults. If a customer receives parts from an alternate location, he wants to see the name and address of that location on the invoice.

To do this, Activant Vision™ 7.4 allows you to select a Company ID for the customer, at the warehouse level. If a Company ID is selected at the Warehouse level, it will be used

to determine what address prints on the invoice, otherwise the customer's Company ID will be used.

To set up the Company ID, go to the Vision Configuration tab, System Configuration form, warehouse folder. The Company ID setting can be set for each warehouse. Go to the main sub-folder to set the Company ID:

The screenshot shows the Vision Enterprise 7.4.27 System Configuration form for Warehouse # 050. The form is divided into several sections:

- Warehouse #**: 050
- Inventory Class**: Sellable Inventory
- Warehouse Address Information**:
 - Name: MAIN PBP WD 050
 - Abbreviation: 050
 - Address Line 1: 500 WATERBURG PARK
 - Address Line 2:
 - Address Line 3:
 - City: ST. PETERSBURGH
 - State: FL - FLC
 - Zip Code: 33712
 - Phone Number: 800-252-3673
 - County: <None>
- Warehouse Defaults** (highlighted with a red circle):
 - Company: 05 - St. Petes Central WD
 - Bank: 05001 - BANK
 - Company ID: VISN - Vision Enterprise
 - Tax: <None>
 - Jurisdiction: TSHV - TSH Vision Demo
 - Company ID (dropdown): VISN - Vision Enterprise
- Supporting Warehouses**:
 - Core Whse: 051 - 051 CORE
 - Warranty Whse: 052 - 052 WARRANTY
 - Scrap Whse: 055 - 055 SCRAP

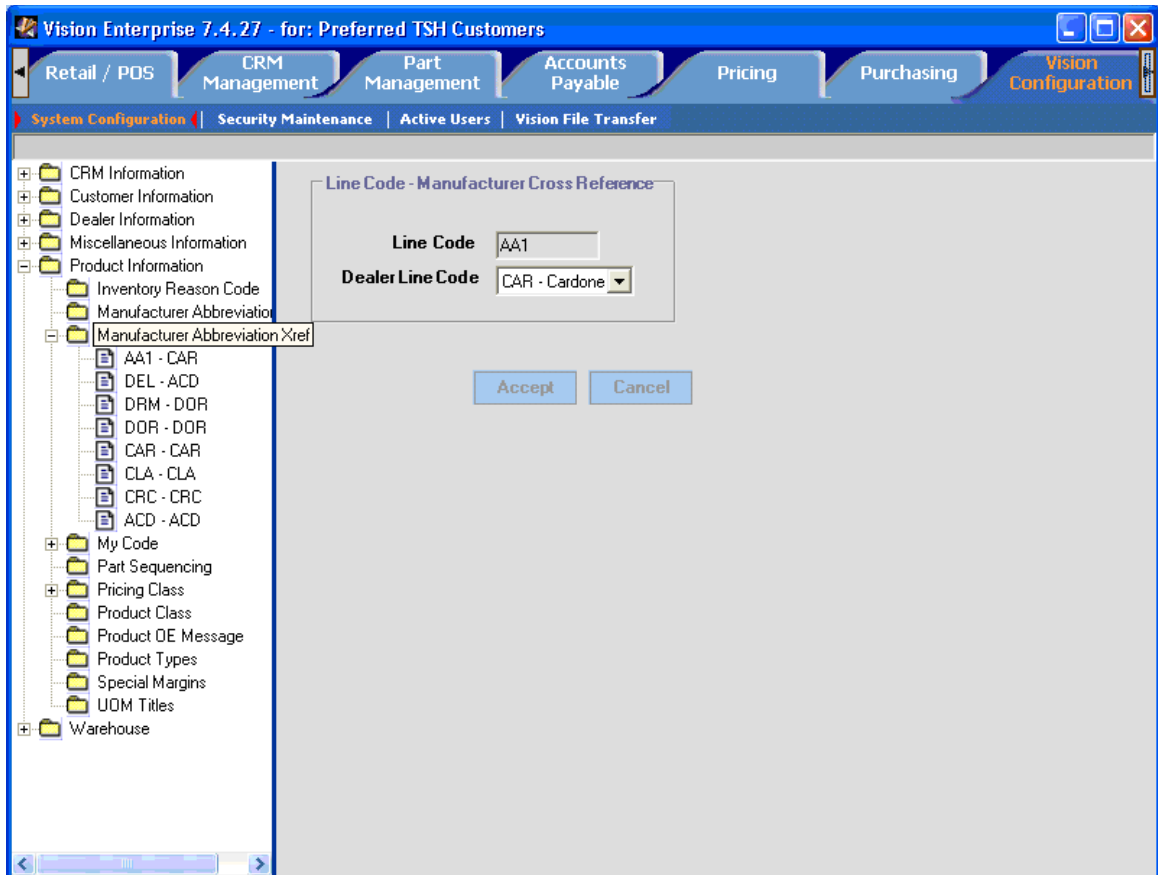
Buttons for 'Accept' and 'Cancel' are located at the bottom right of the form.

Barcode Expert Import

Barcode Expert now allows the import of barcodes to Vision. To do this, you need to set up the manufacturer code cross references and import the barcodes from the distribution file.

Set-up

To set up the manufacturer code cross references, go to the Vision Configuration tab, System Configuration form, Product Information folder, Manufacturer Abbreviation Xref sub-folder:



Enter the manufacturer abbreviation from the barcode file in the Line Code box, and select the abbreviation it corresponds to in the Dealer Line Code selection box. Click the "Accept" button to create the record.

You need to do this for each Manufacturer Abbreviation, even if the abbreviation matches the Line Code in the barcode file.

Import

The Barcode Expert import process is similar to the Import UPC process.

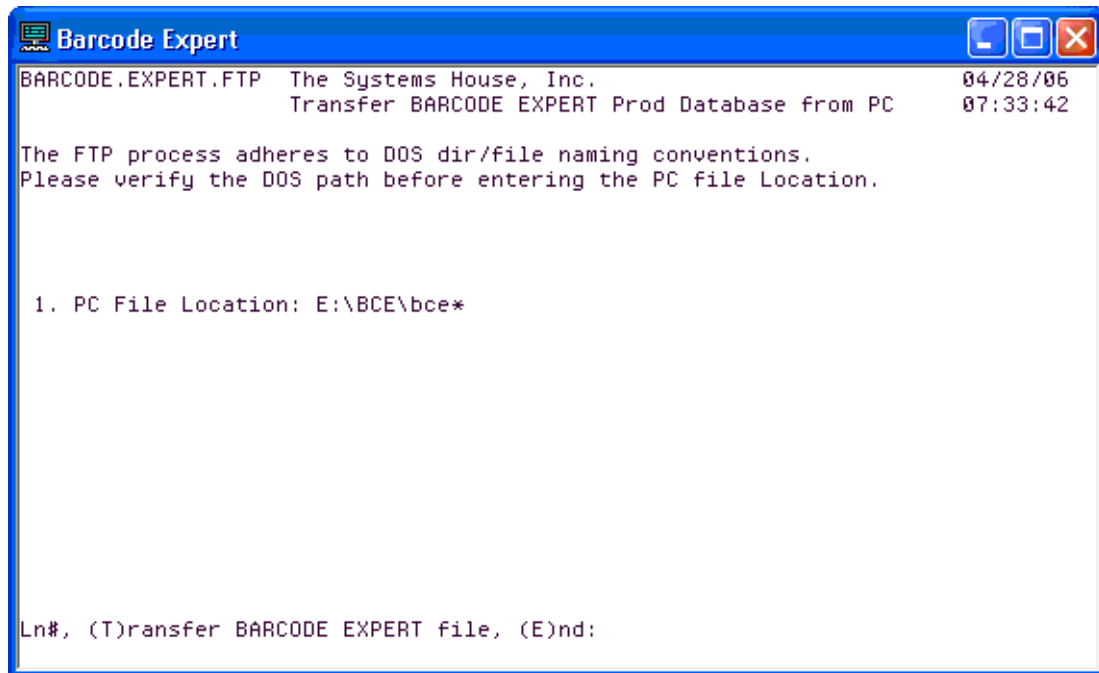
To import the file:

1 Go to menu 2.11.8 in the Vision Back Office.



2 Select item 1, Convert Barcode Expert file.

3 Enter 'T' at the prompt.



The program returns you to the 2.11.8 menu.

4 Select menu item 2, Barcode Expert Update.

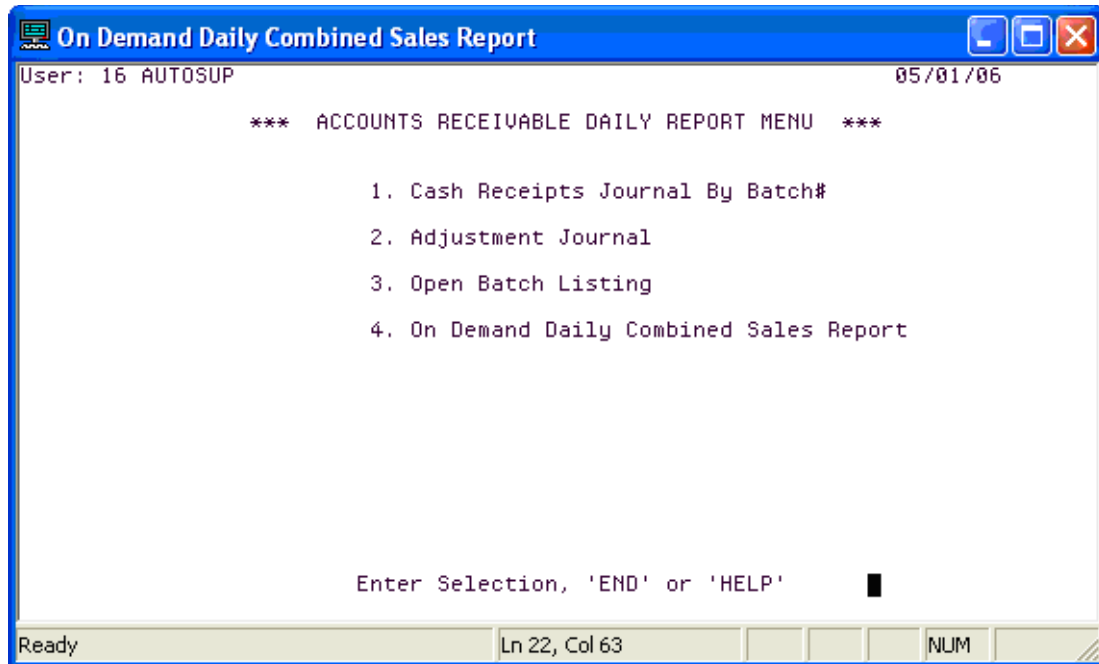
Vision updates the Barcode Expert file. This can take quite a long time. You may want to do it over the weekend, or at night.

On Demand Daily Combined Sales Report

A new report has been added to help you reconcile cash and check receipts at each location.

This new report is similar to the existing EOD cash balancing report, but it also includes transactions from Customer Service Current Order form in addition to POS

To run this report, go to Vision Back Office, Menu 14.1.3. Select menu item 4, On Demand Daily Combined Sales Report.



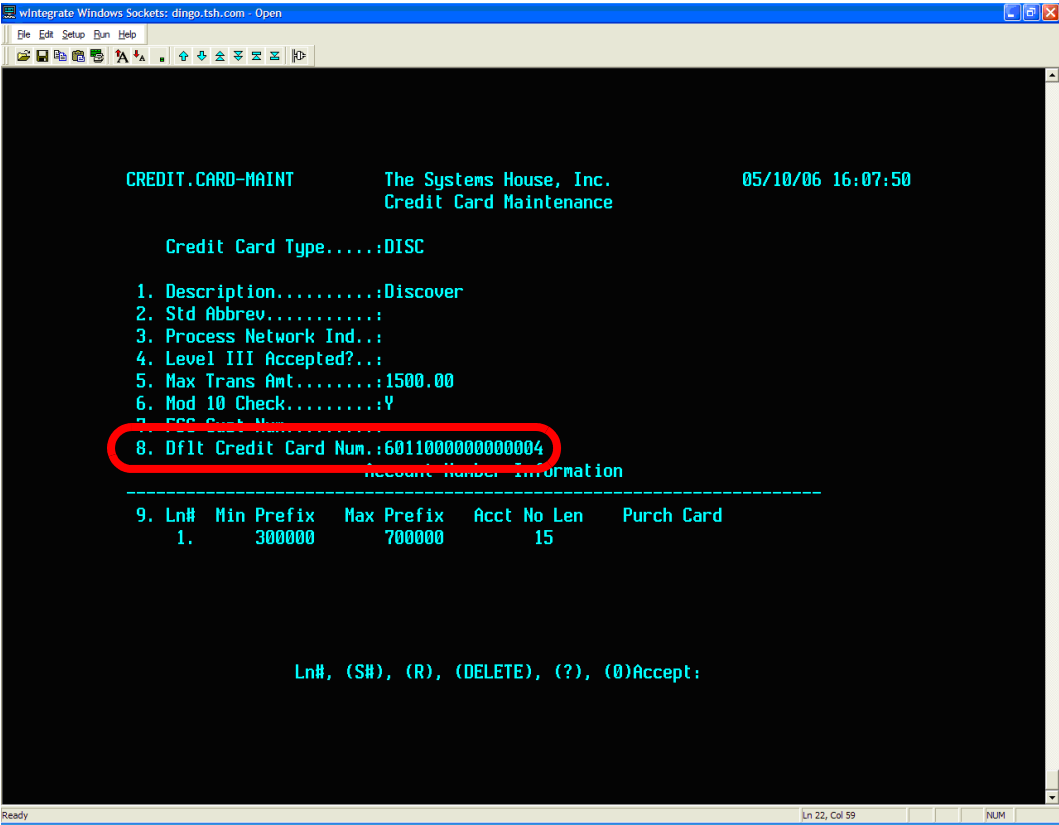
When the program asks, enter the location for which to run the report.

Default Credit Card Number

You can now set up a default credit card number for each credit card type. If the default credit card number is set up and if the dealer is configured to process credit cards

manually, the order entry payment form (both in Customer Service and Retail/POS) will default the credit card number from the credit card file.

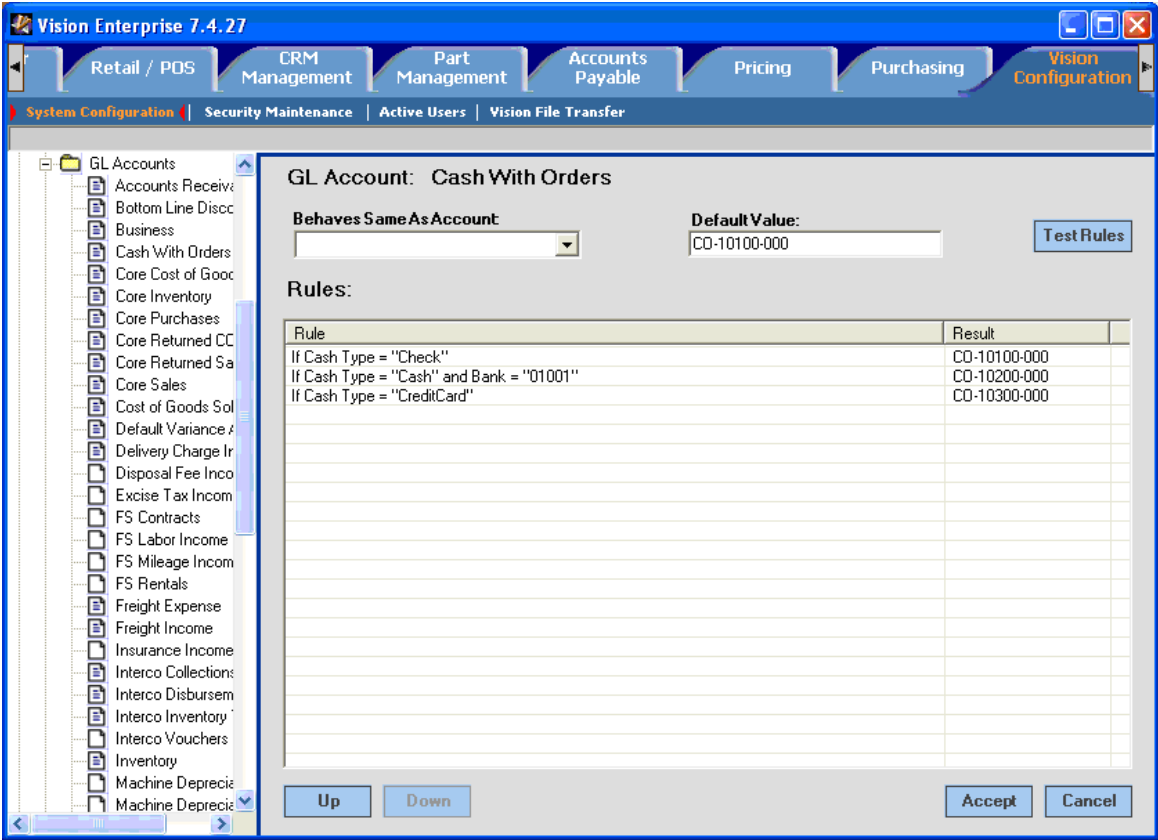
To set up the default credit card number, enter a credit card number in item 8 of Credit Card maintenance:



Cash Type in General Ledger

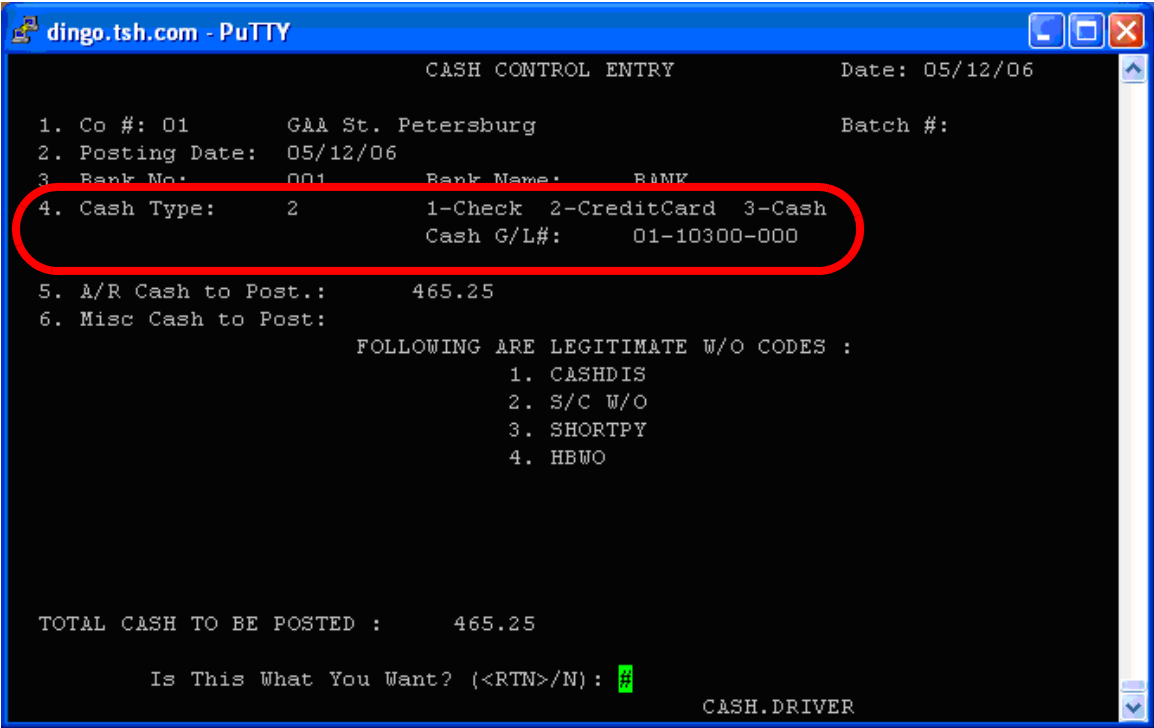
Vision previously used the Bank record to determine the cash general ledger number. Orders are allowed to have only one bank but may have multiple payment types. You may now use the GL Rules to determine the general ledger number. The GL Rule “Cash With Orders” is available for this purpose, and has variables of Company and Cash Type (Cash, Check and Credit card).

To set up the rule, go to the Vision Configuration tab, System Configuration form, GL Accounts folder, Cash With Orders rule:



The variables available are Cash Type and Bank Number. Cash Type can have the values: Cash, Check and CreditCard. The bank number must be entered in full, for example: 01001.

When the rule is in place, the Cash Control Entry screen offers a choice of cash types, and generates the Cash G/L# according to the Cash with Orders rule



Do Not Display Zero Balance Invoices

Some businesses have a large number of paid (zero-balance) AR records. These records stay on file for some time, which can result in a lot of paging when doing payment entry. The Cash Receipts entry program has been modified to not display zero balance records on the “manual” and “summary” screen for cash entry. The “simple” screen for cash entry (input type “1” – Manual) will continue to display zero balance AR records.

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