Vision™ Release Notes

Release 7.4
EP9001 Rev. L
May 2006

This guide contains information pertaining to Activant Vision™ 7.4.

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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	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: Press **<CR>**. Type **LOC<CR>**. Type **'N'**.
Messages	The messages and prompts received from the system are presented in special type. For example: `this record has been added`
Notes	Notes call attention to information that is especially important. Notes look like this: ***Note:*** This is a note.

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

ACTIVANT

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:

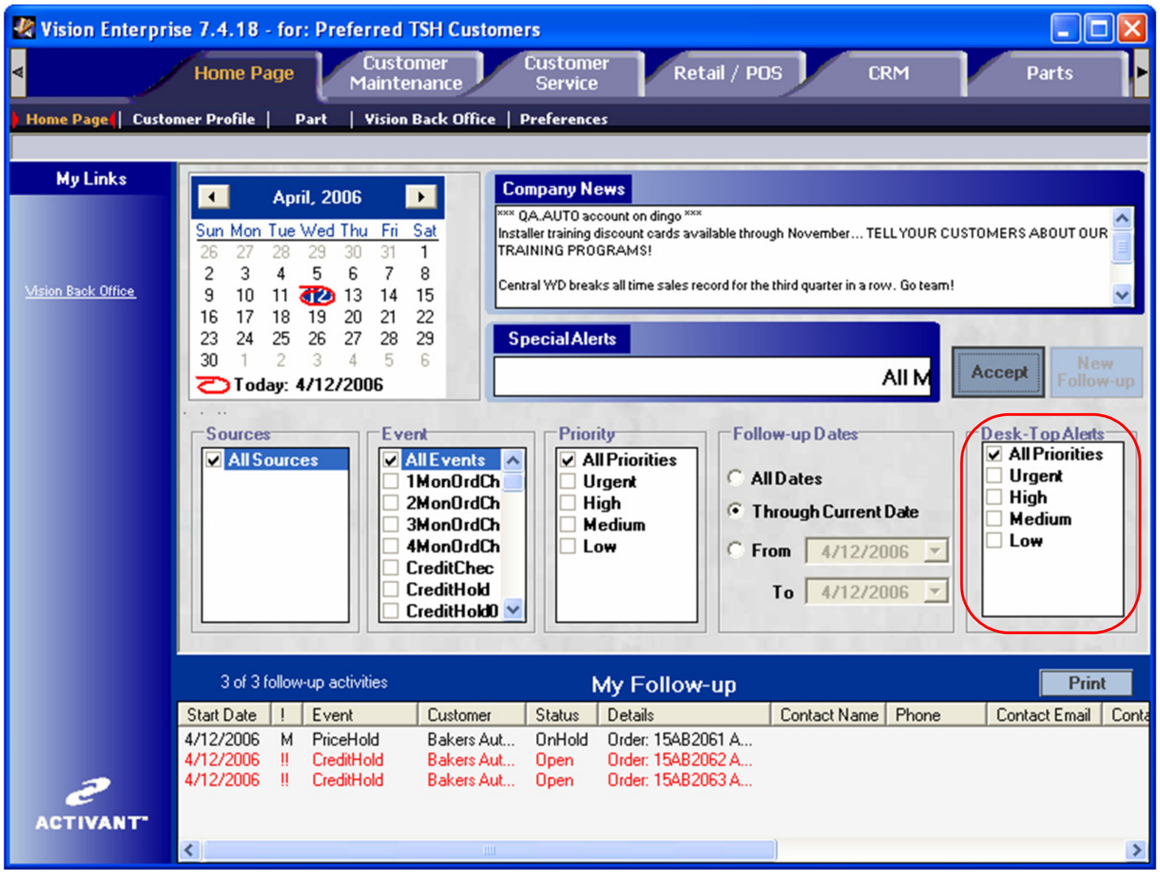
Clicking on the message link will bring up Vision and show the home page.

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:



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:

the systems house

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	UNIT	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.

CUSTOMER NAME	**PLEASE RETURN THIS PORTION FOR PROPER PROCESSING**
Vision PD (883)	

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

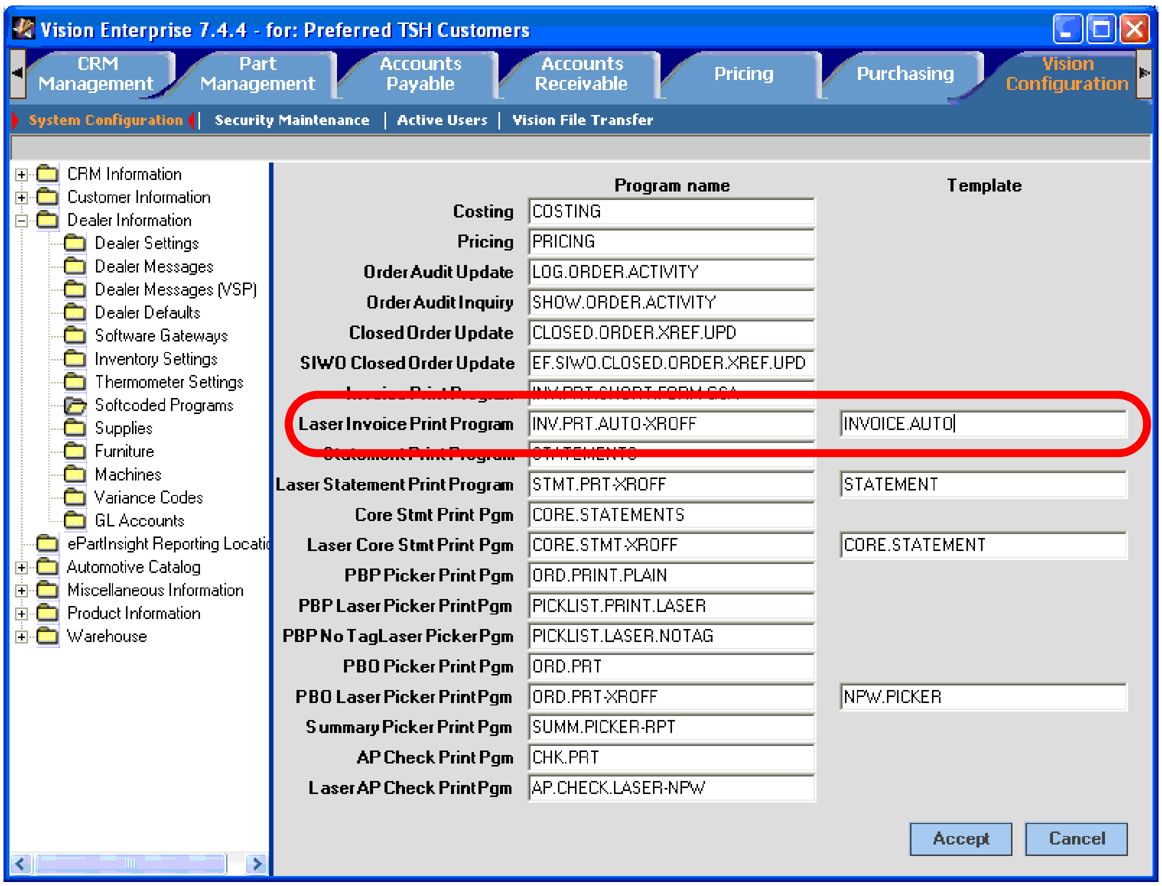
Invoice BALANCE DUE: 1119.79

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:

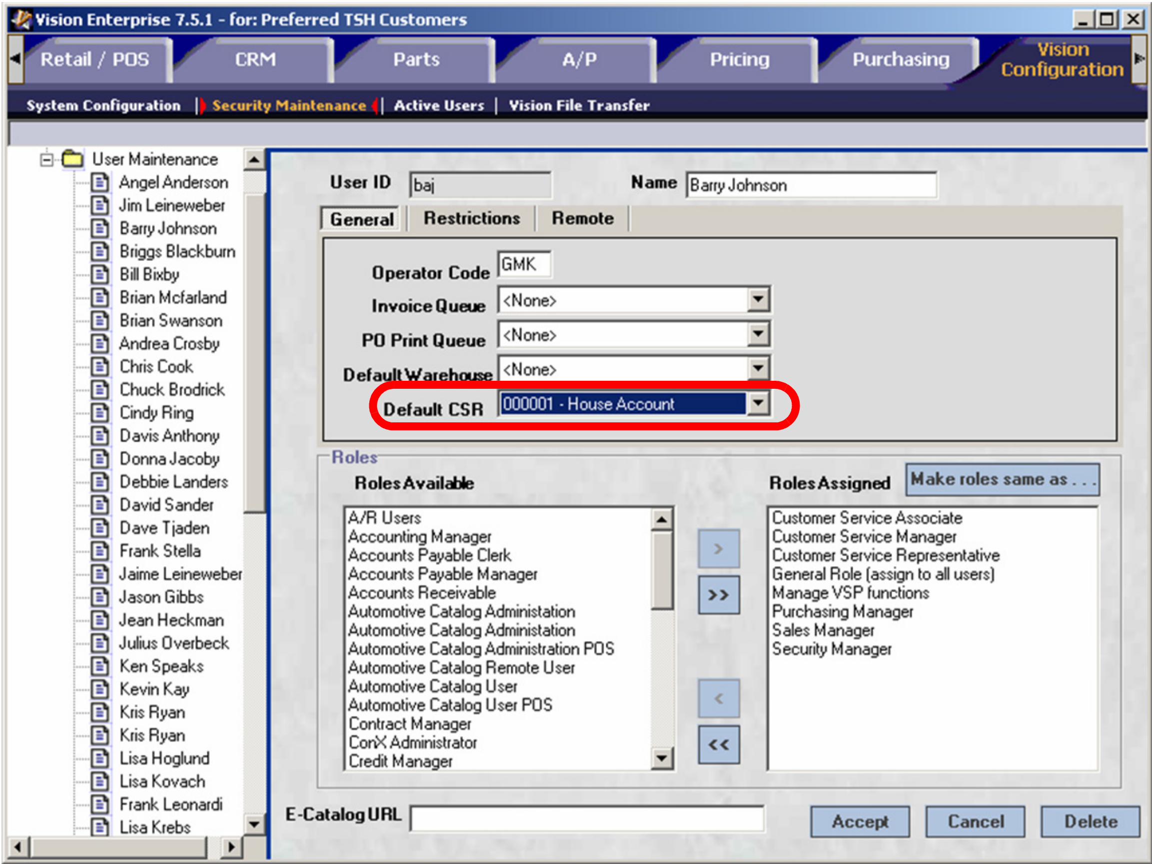
```
COMPANY.HDR3                                   02/06/06 12:46:08
            Company Master File Maintenance Four
   Company # : 01


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.activant.com
```

Default Customer Service Representative

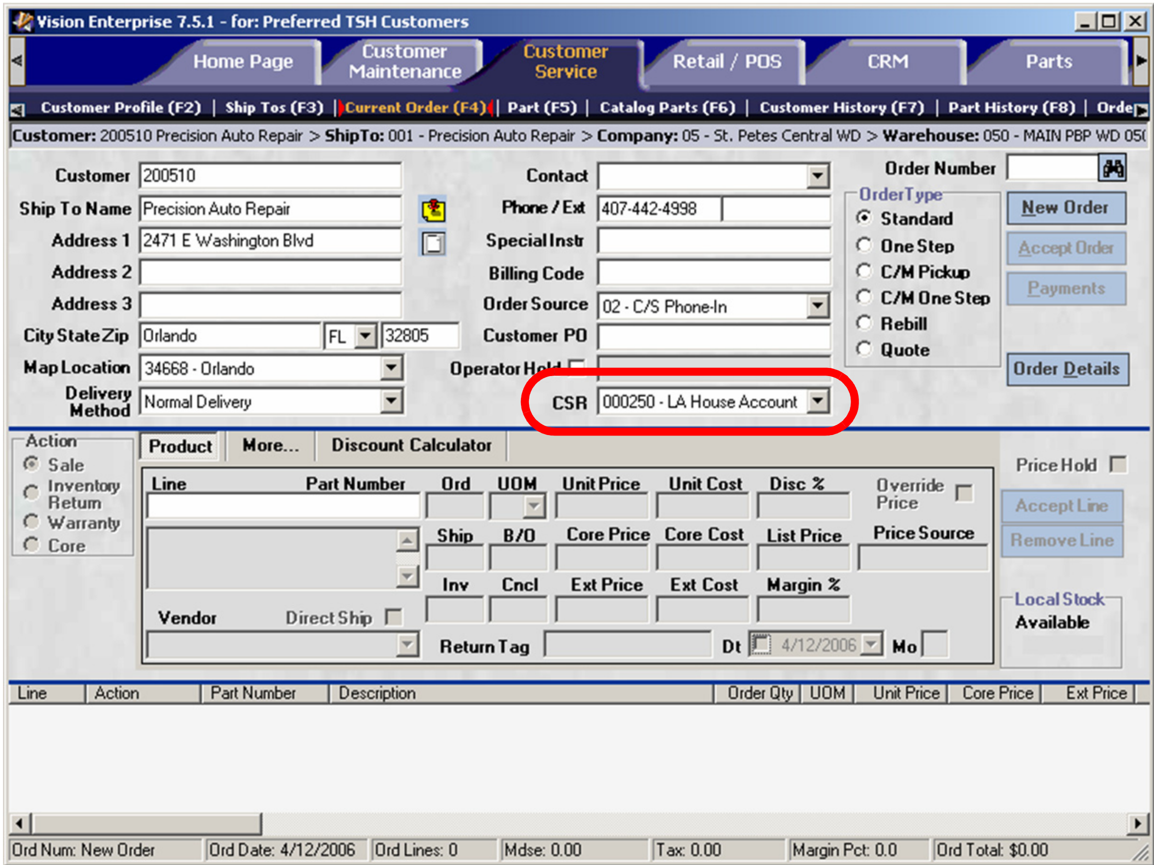
Automotive users can now track orders by CSR (for commissions and other purposes). Activant Vision™ 7.4 allows a user to have a default CSR. The first order placed when the user logs in will default to the CSR on the user record. Subsequent orders will default to whatever the previous CSR was. To make 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:

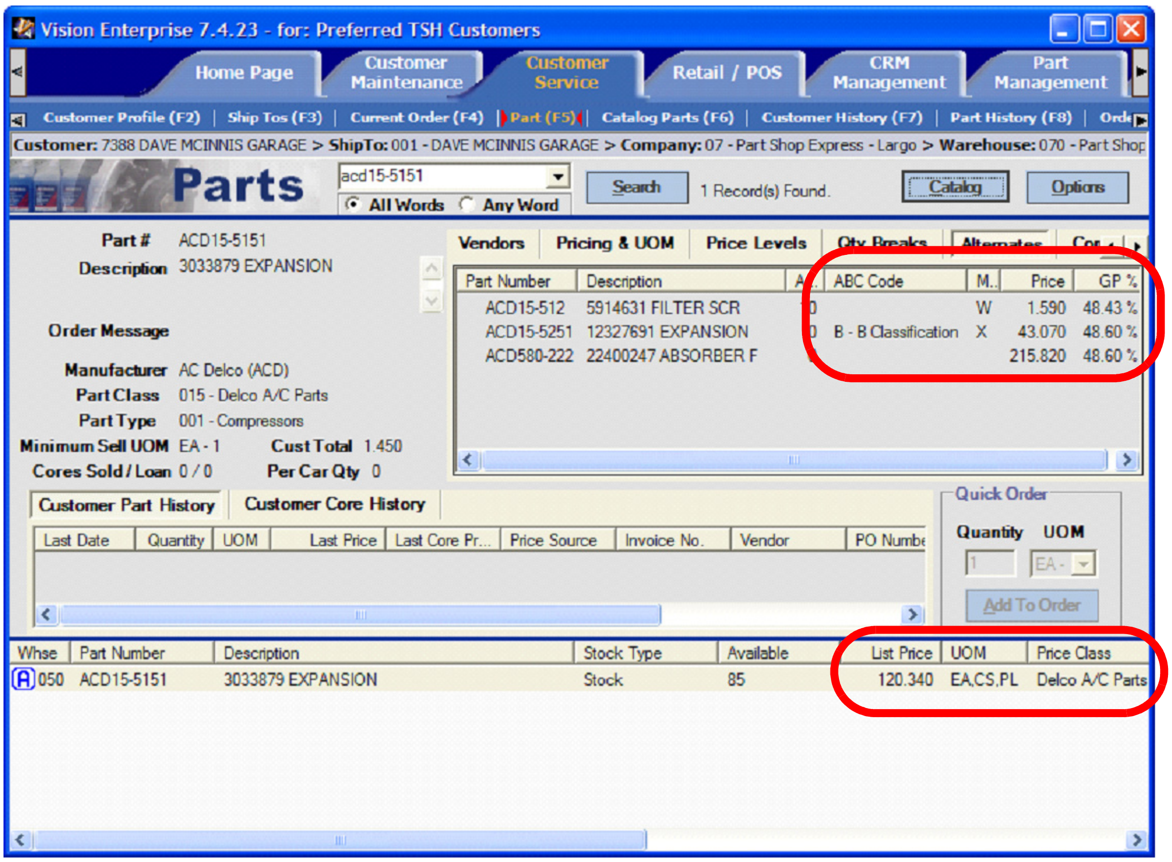


On the Current Order form for automotive, the CSR field defaults to the user's default CSR:



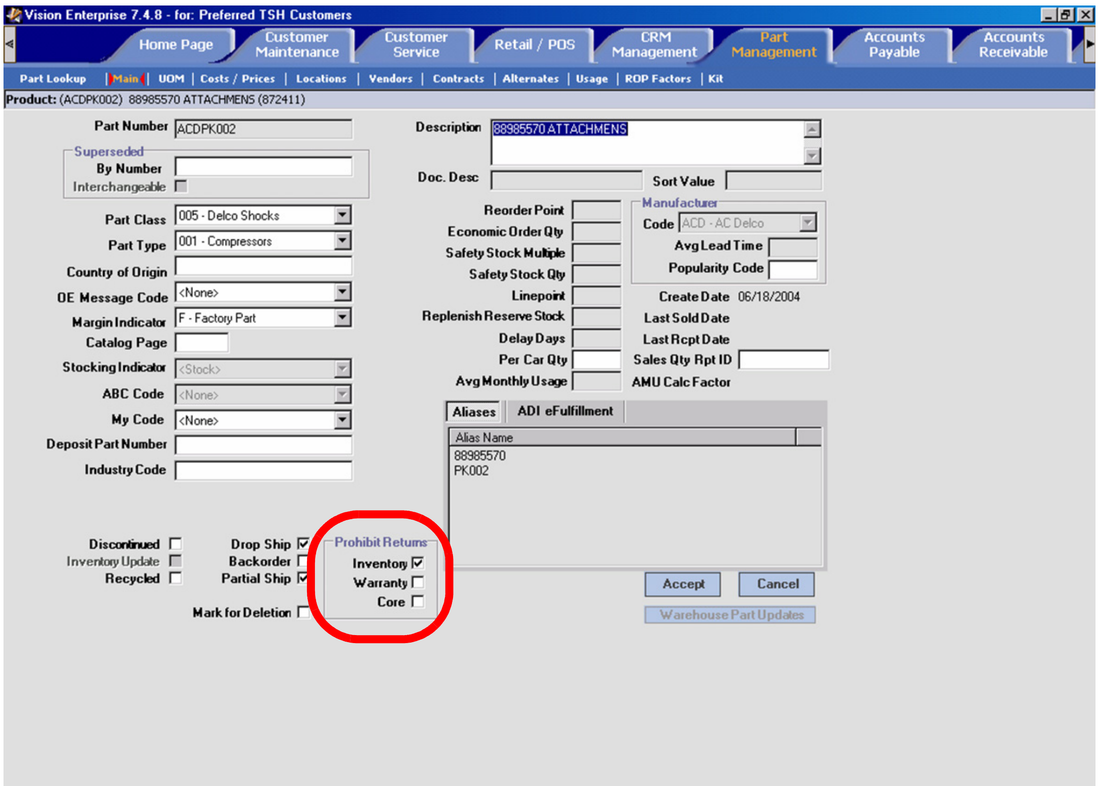
Interchange for Alternate

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.

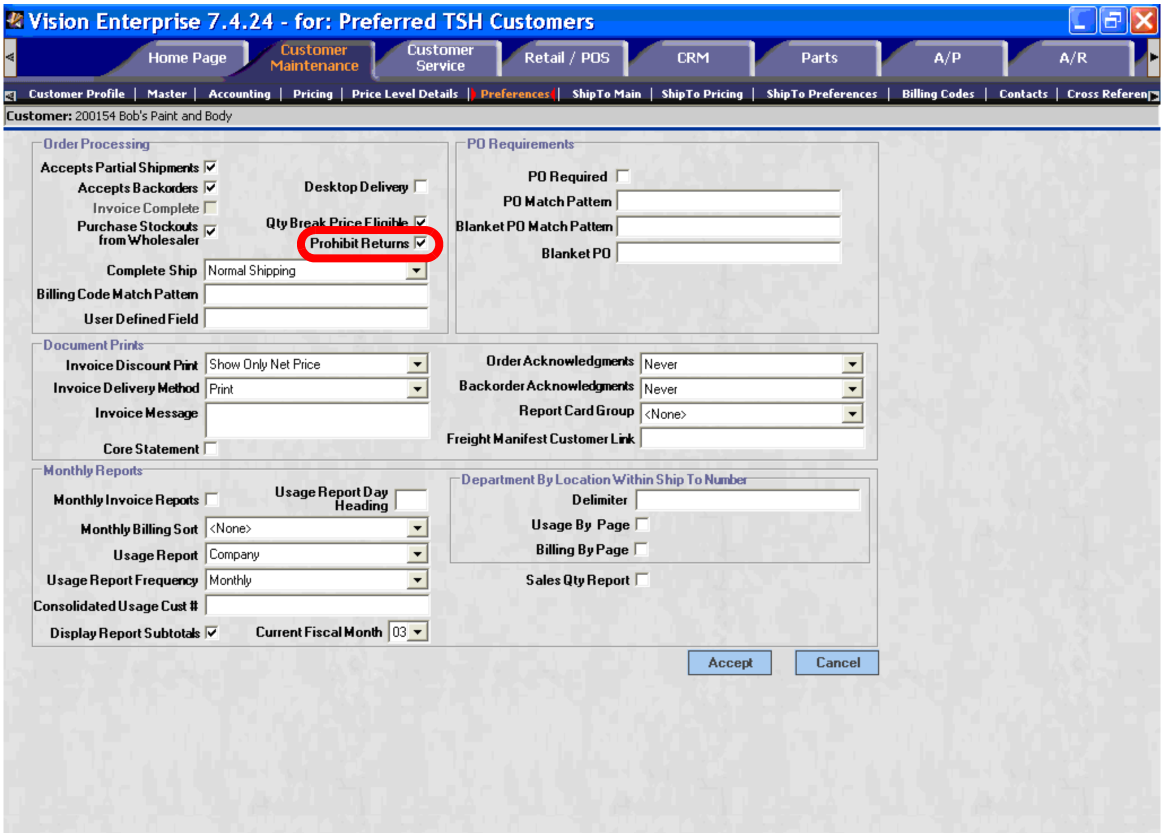


Non-Returnable Items

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.



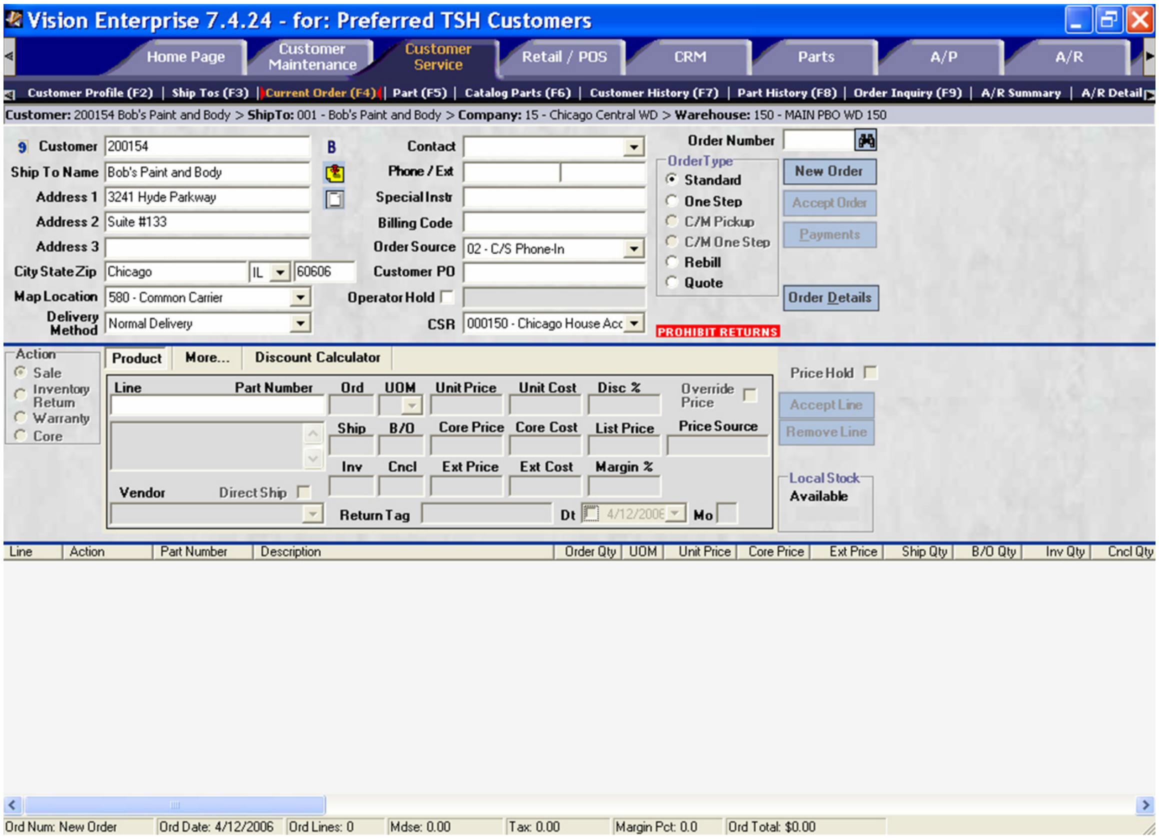
The customer record has a new check box to prohibit returns.



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.

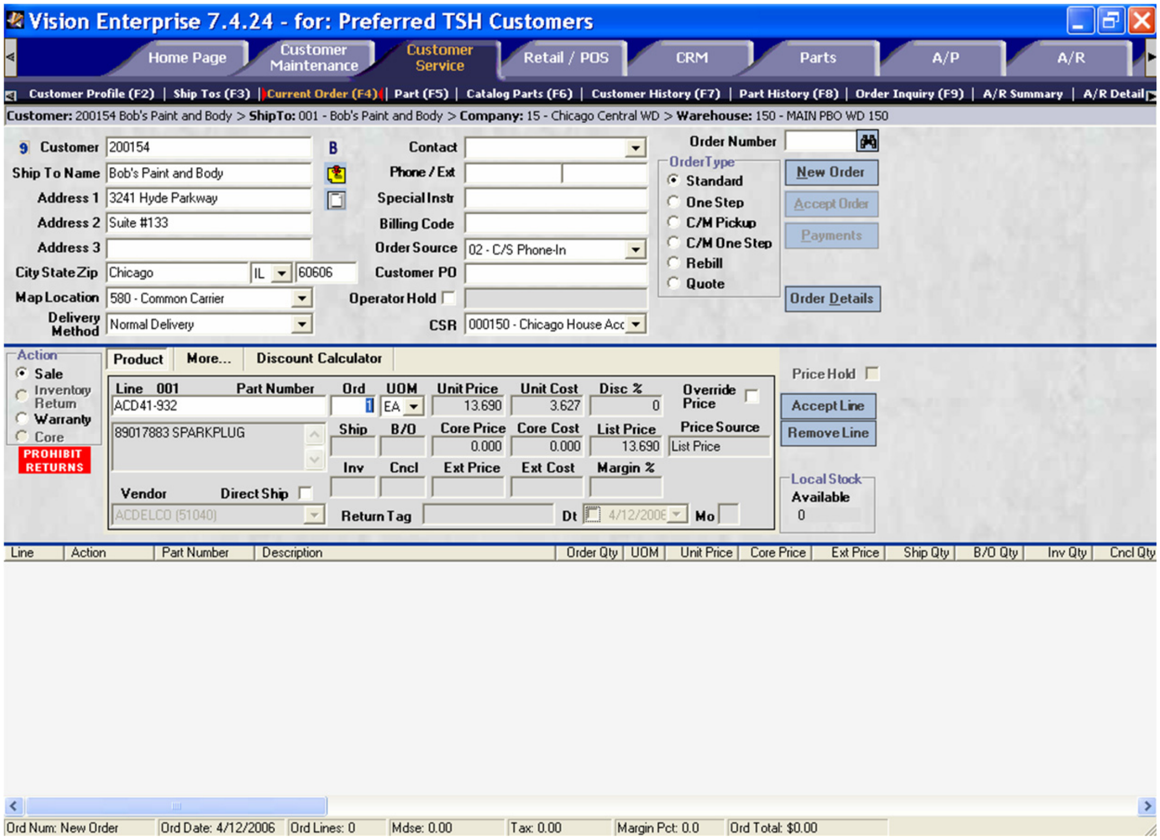
If the customer is configured not to allow returned items, the “C/M Pickup” and “C/M One Step” order types will not be available. Also, they will not be able to enter return lines on Standard Orders or Retail Orders.

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.



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.

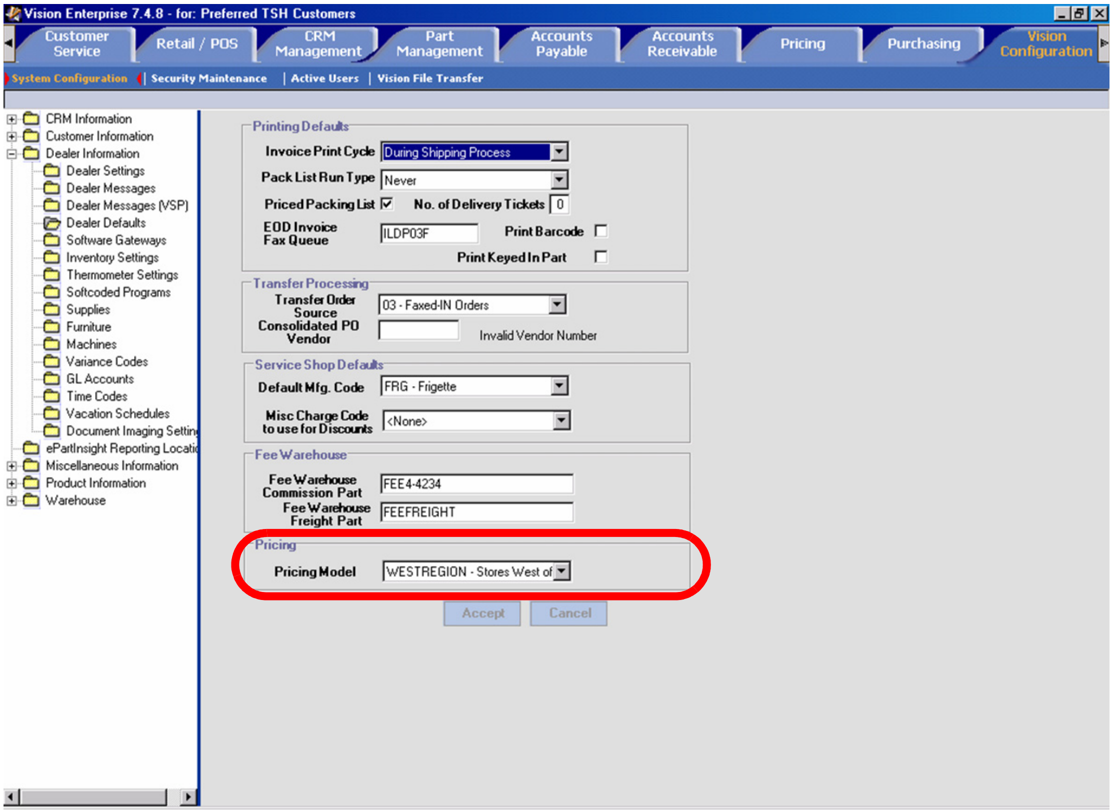
The returns warning text box will be yellow if the user has the ability to override.



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.

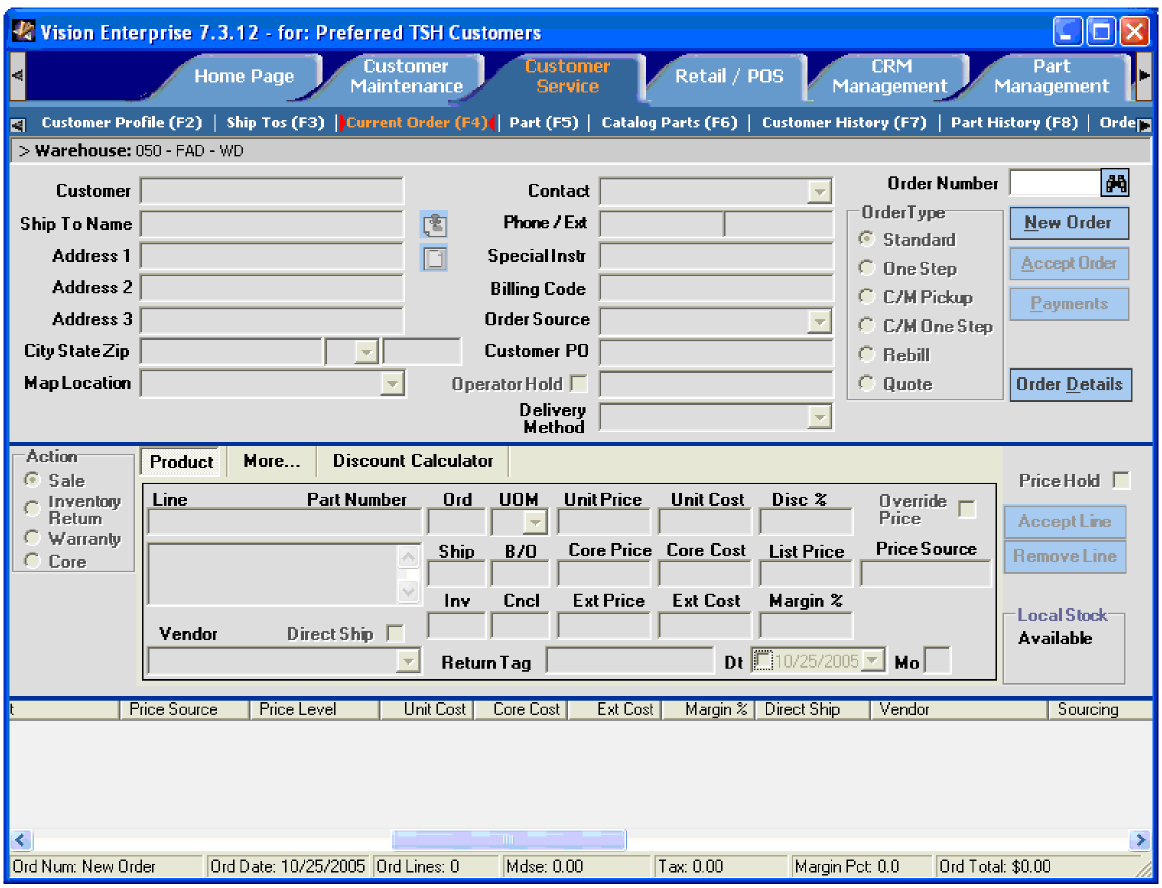
On the Sales History tab, the GP% option button is unavailable.

New Screen Layouts

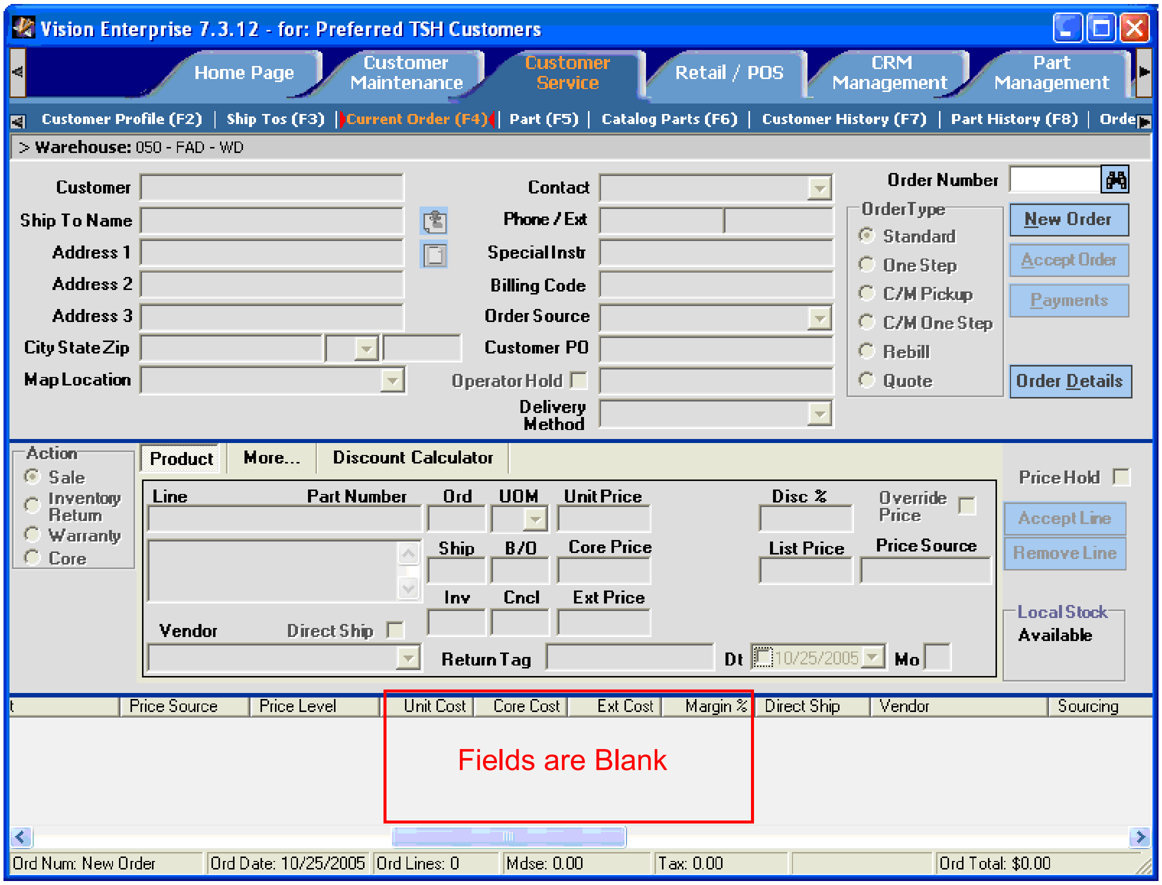
When a user doesn't have the OE SHOW GP/COST or OE SHOW GP/COST (POS) job function in their job role, some items are absent from the screen, as discussed above.

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

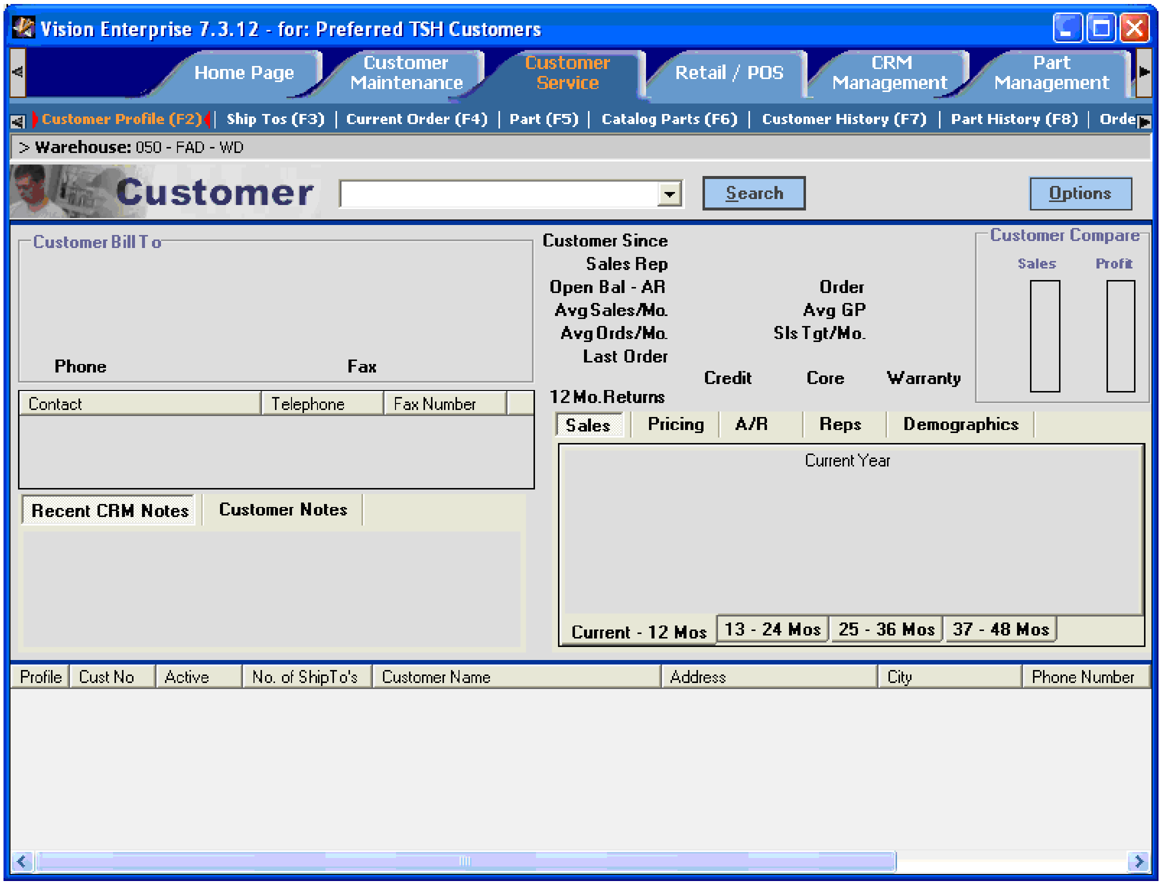
Customer Service Current Order Screen with all fields:



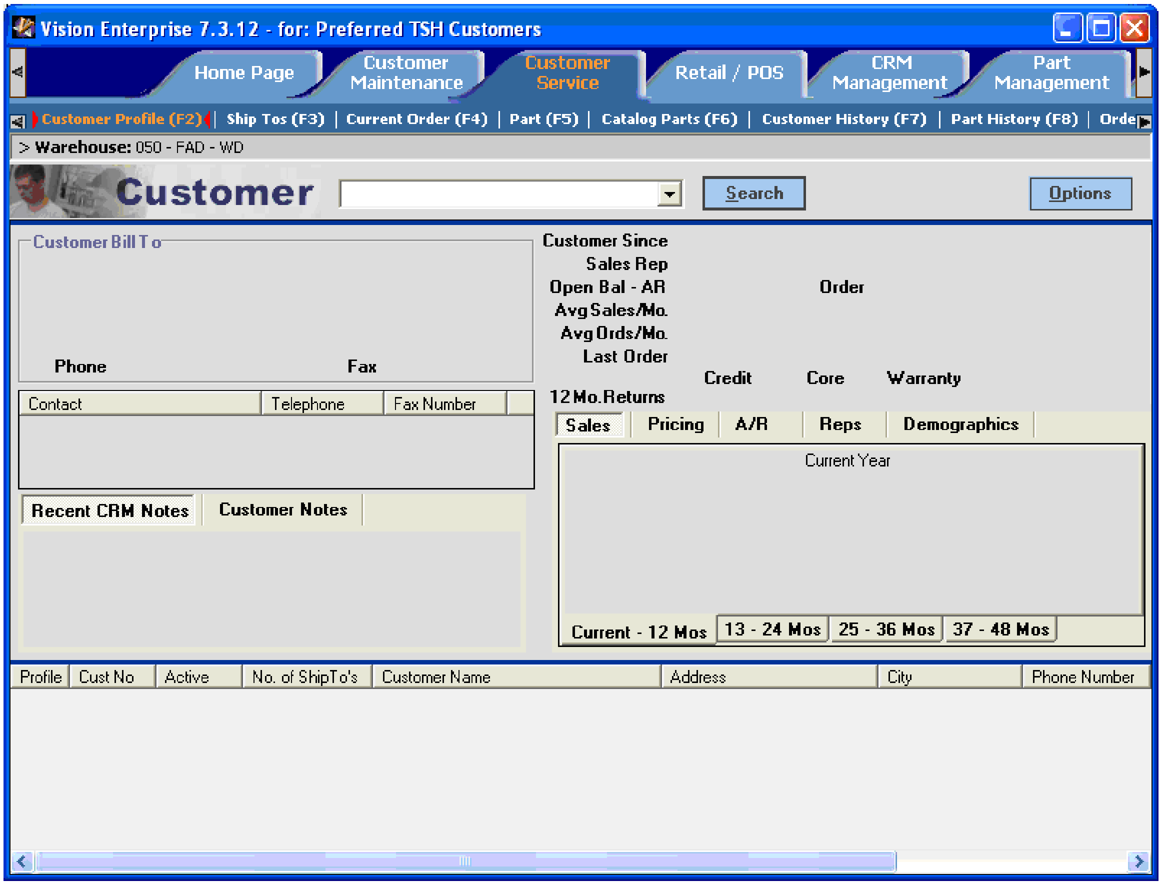
Customer Service Current Order Screen, restricted access:



Customer Profile Screen, with all fields:



Customer Profile Screen, restricted access:



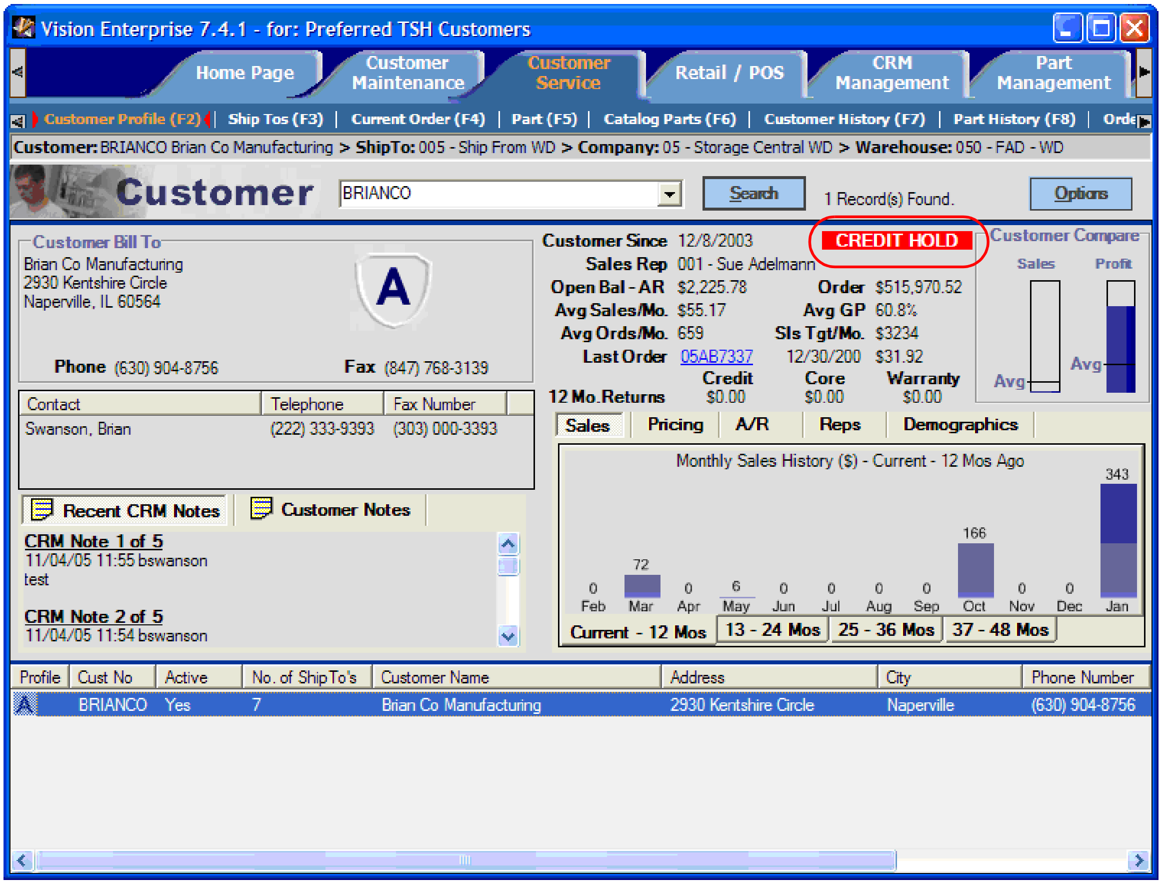
Line Entry Credit Warning

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.

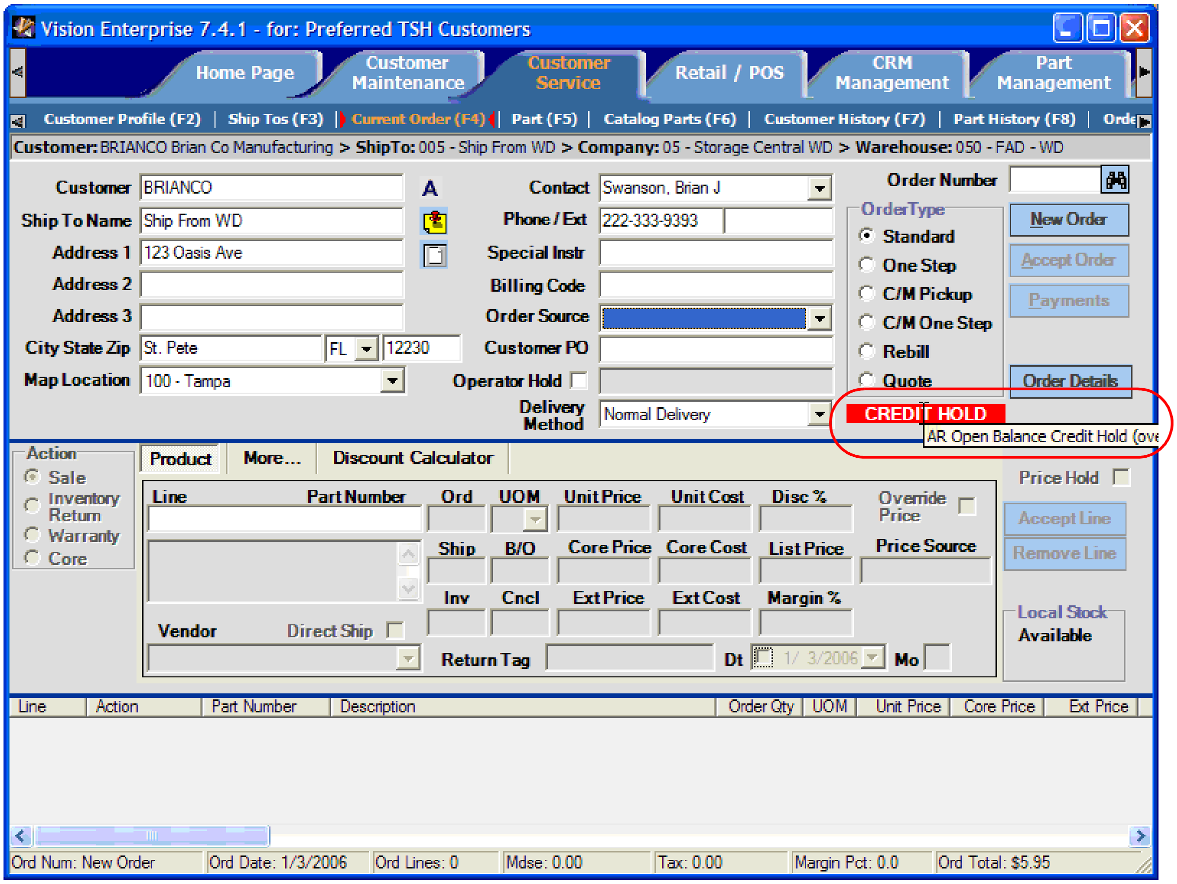
This information is shown by use of a warning box in the Current Order form and Customer Profile form on the Customer Service tab

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:



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

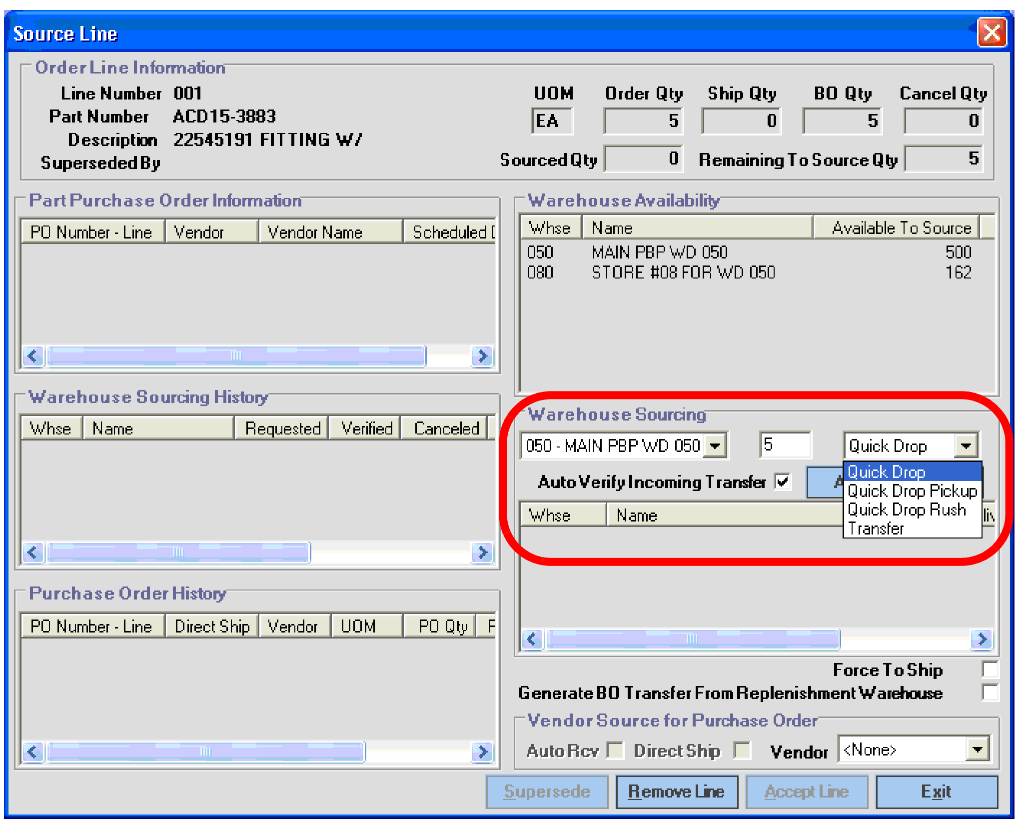
Activant Vision™ 7.4 allows you to use the sourcing form to source items from another location for a customer order, then indicate that items should be drop-shipped to customer or picked up by customer at the store location

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:

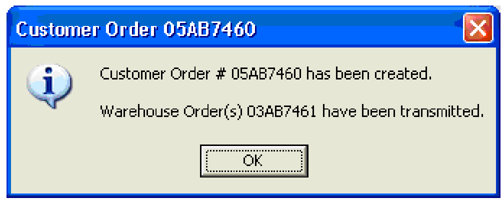


Select a warehouse from the drop-down list, enter a quantity, and select a sourcing method, as shown above.

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:



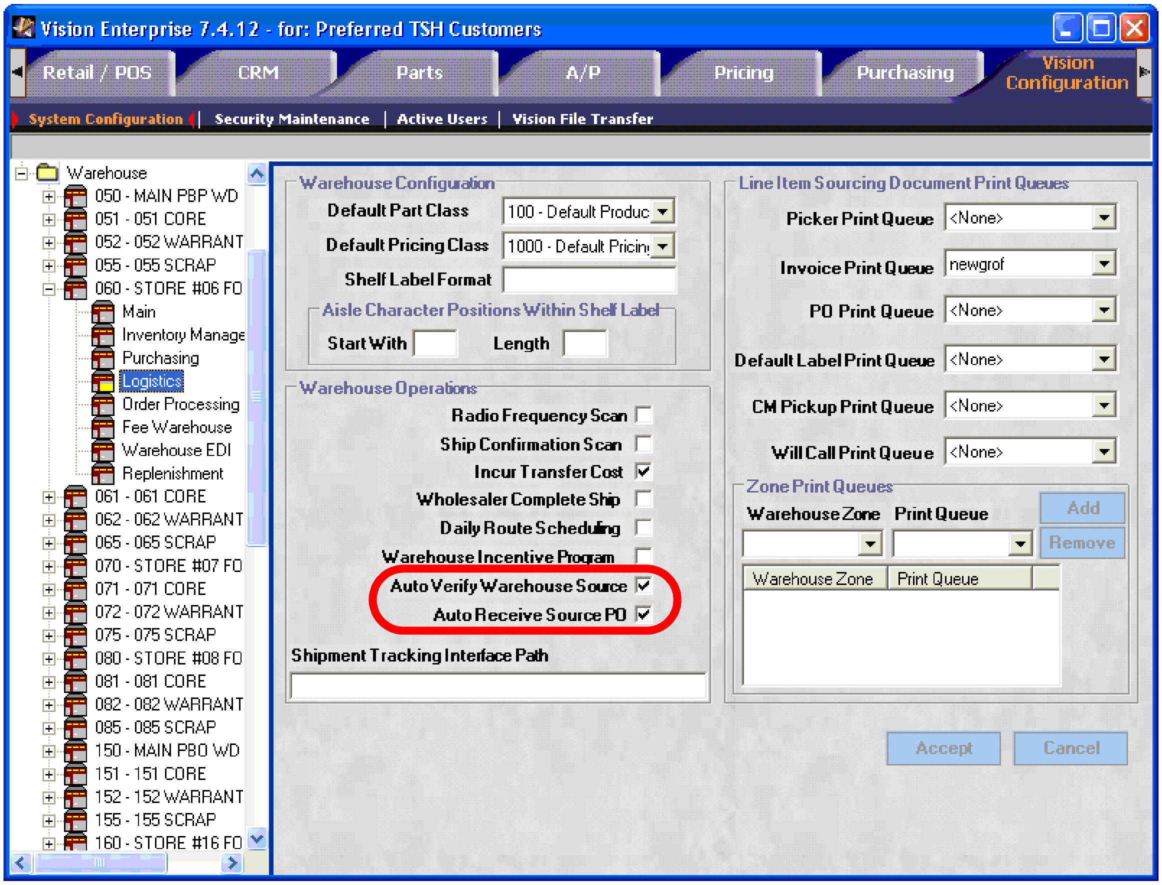
Auto-Receive for Buyout POs

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

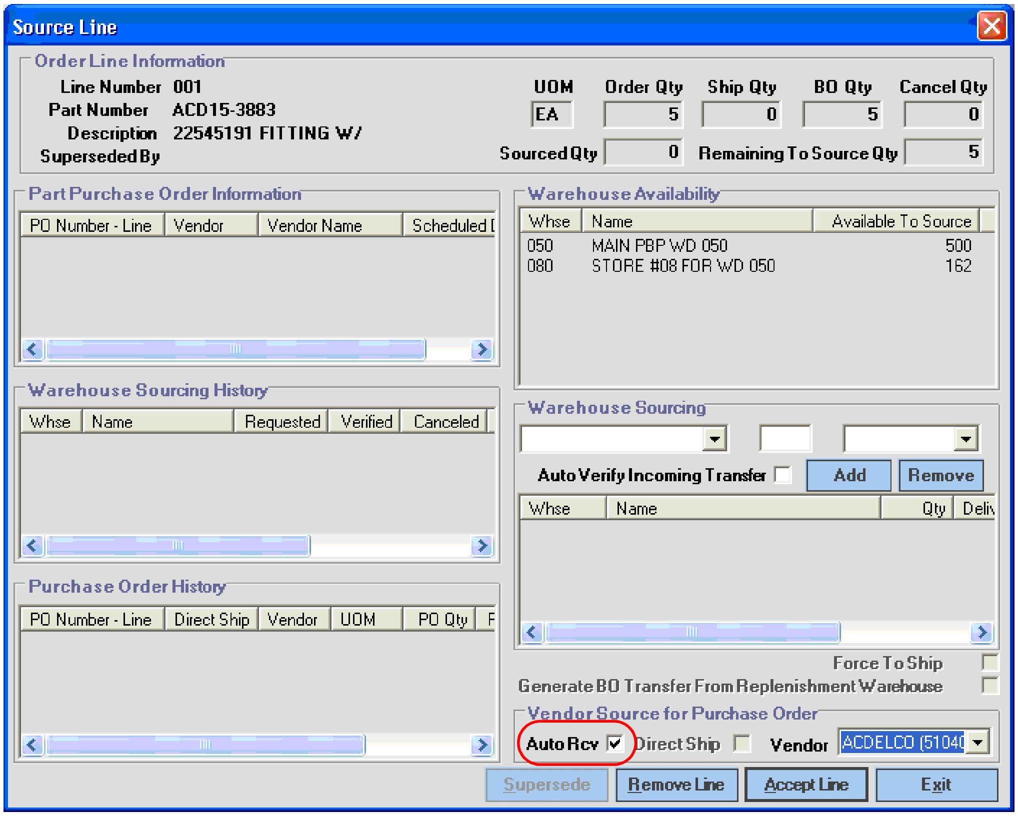
Whether these checkboxes default to checked or un-checked is controlled in the Logistics form of each warehouse under the Vision Configuration tab. When checked, the boxes on the Source Line form default to checked. All warehouses will be default flagged to 'Auto

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



Use

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



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 counterman 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.

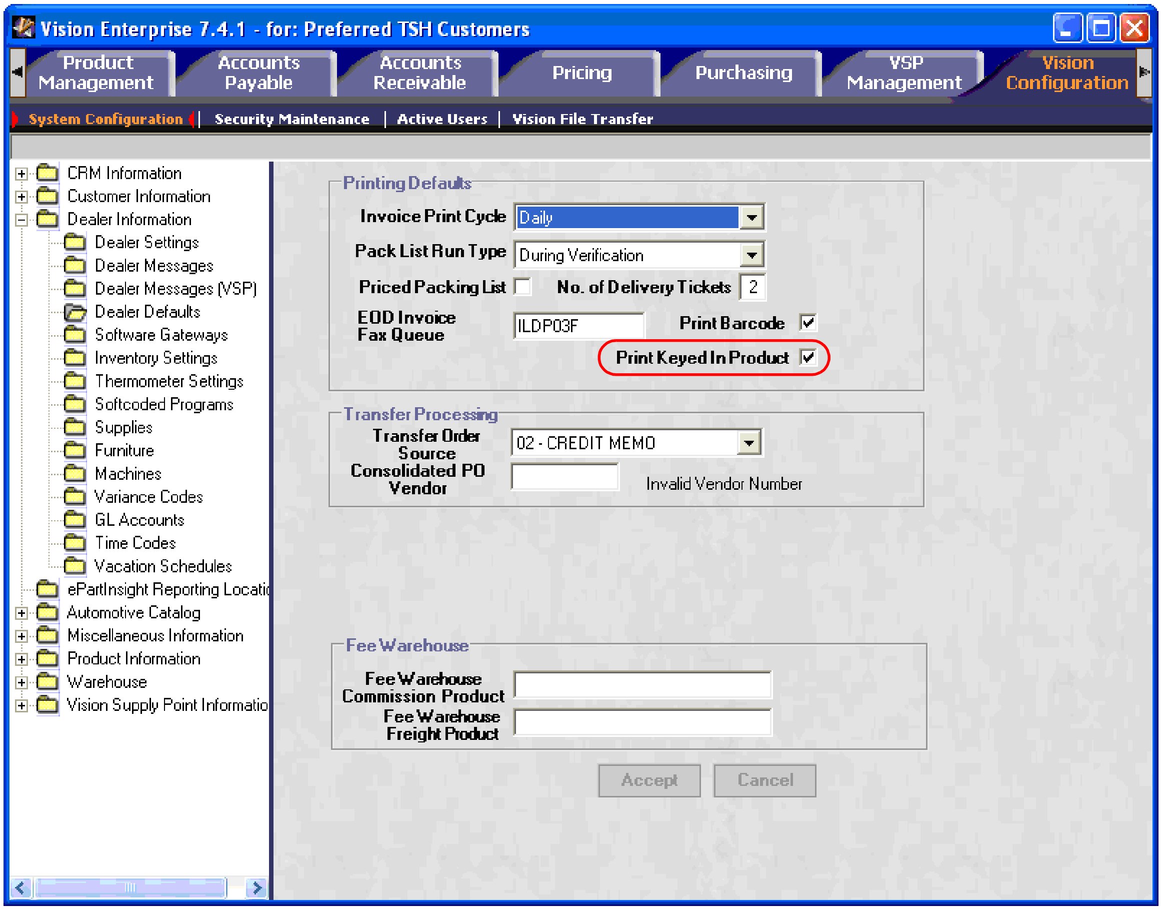
The overselling capability is optional, and can be activated by checking the “Oversell Inventory” check box in the dealer settings “Processing Options” group box.

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:



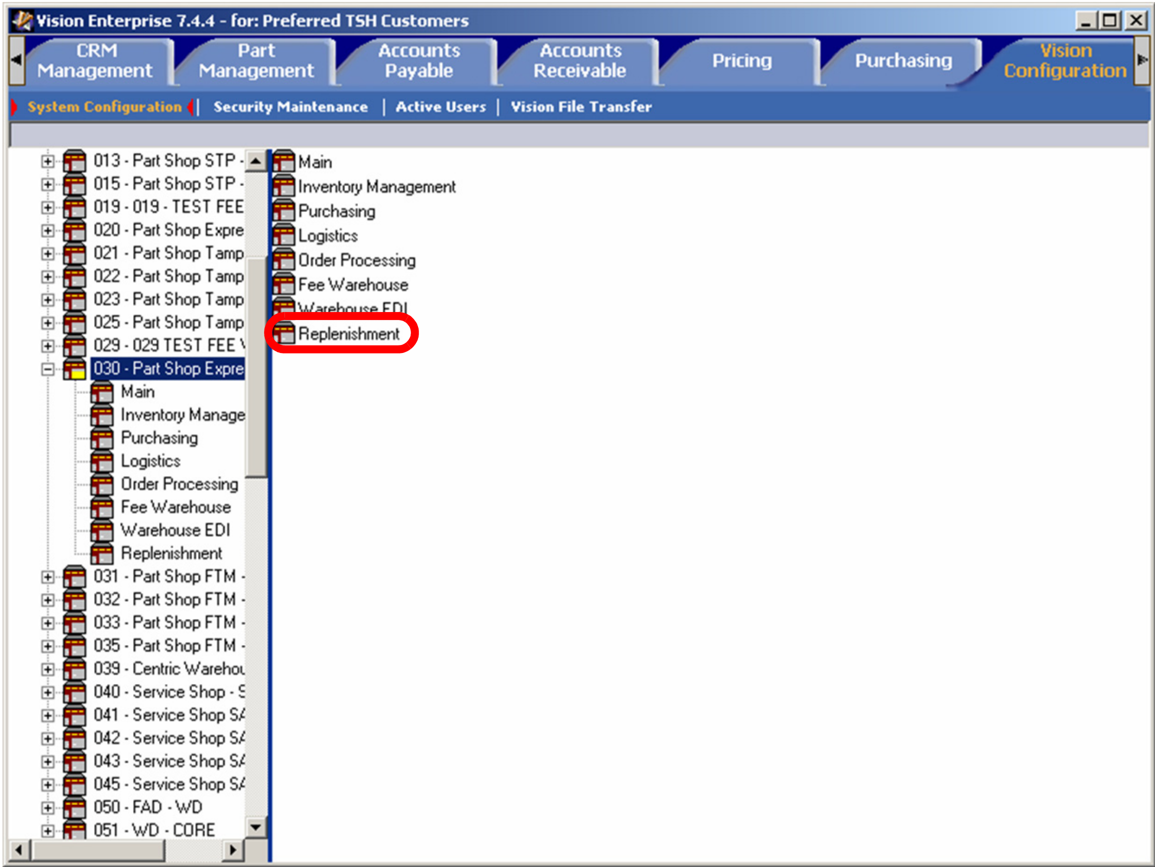
Purchasing

Direct Store Re-Order

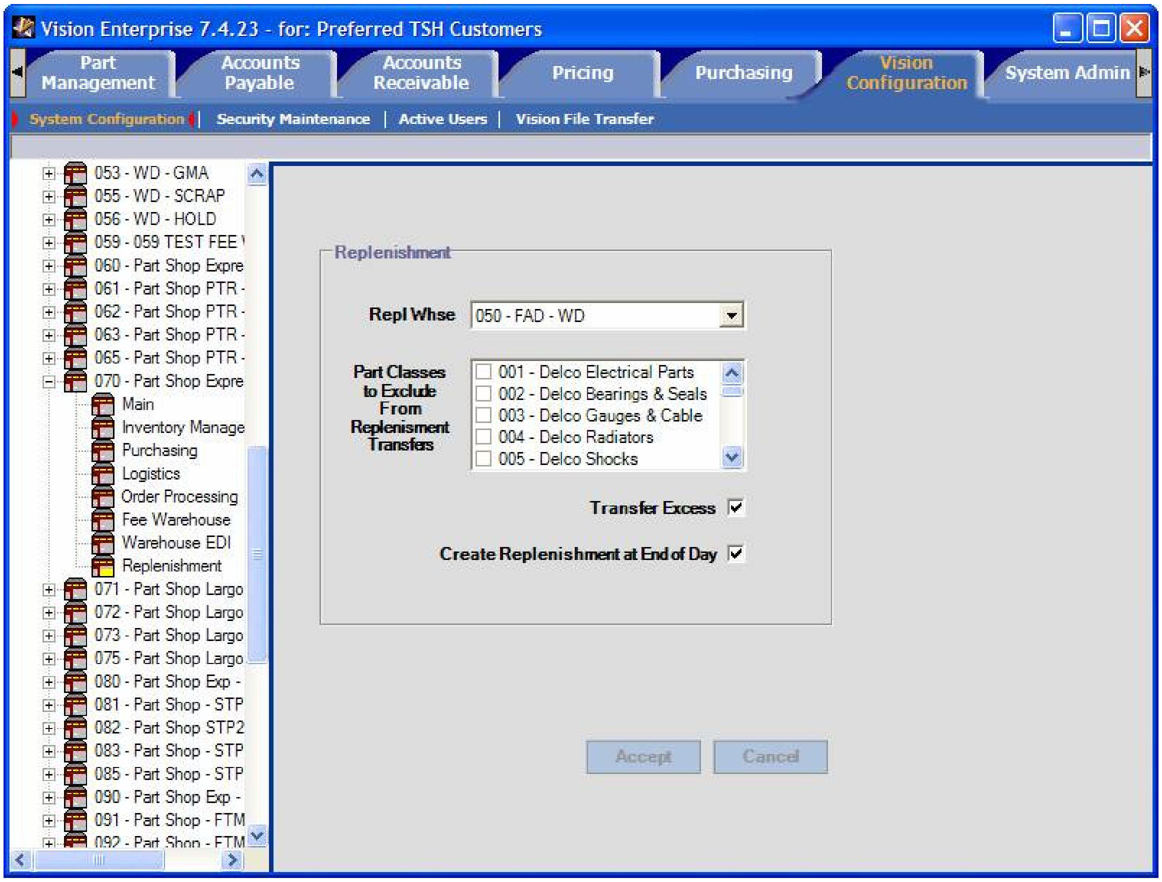
The End-of-Day Replenishment process evaluates stocking levels for replenished warehouses and automatically generates the appropriate transfer orders. Activant Vision™ 7.4 has the capability to exclude specified warehouses from automatic end-of-day replenishment. Such warehouses can still be replenished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

Additionally, some warehouses purchase certain product classes directly from the vendor. Theses 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

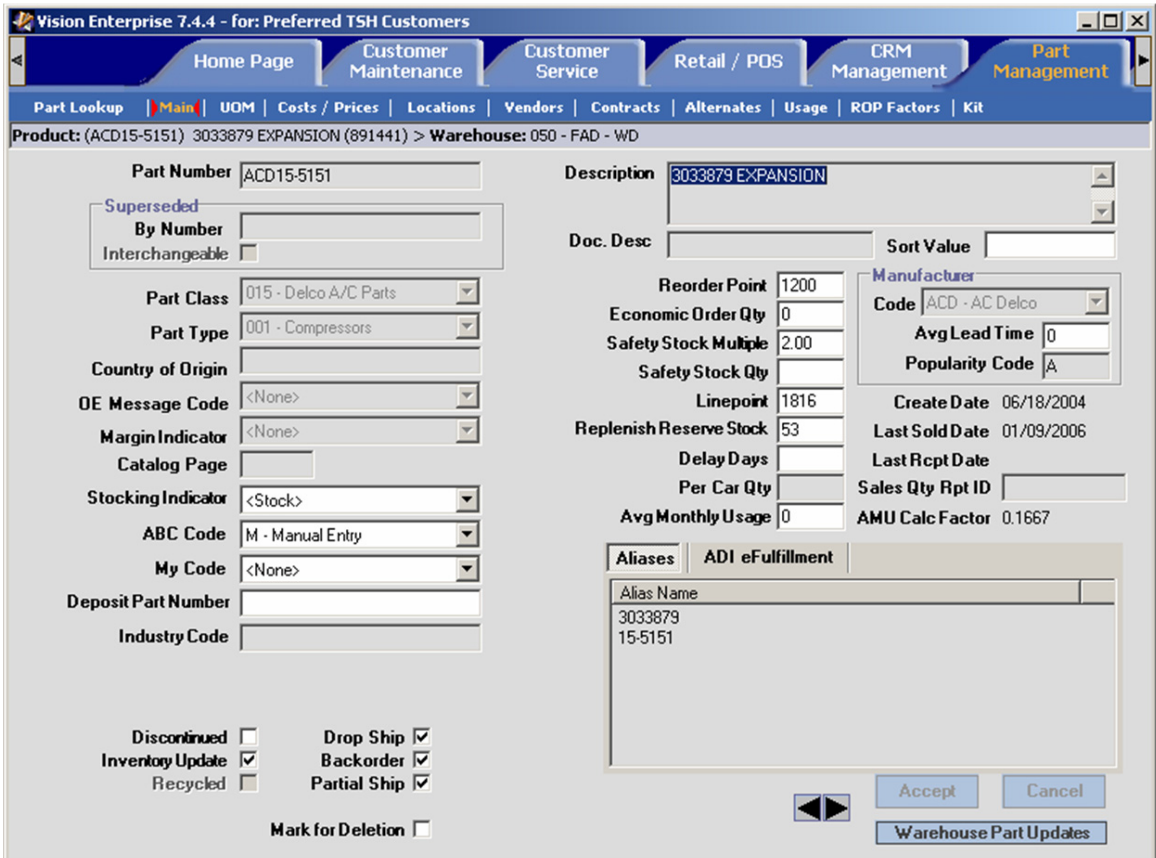
To prevent depletion of inventory at distribution warehouses, a replenishment stock reserve has been added to the ROP Factors form for Product Maintenance and Purchasing Management. This new field will only be enabled for Distribution Warehouses (warehouses that replenish other warehouses).

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

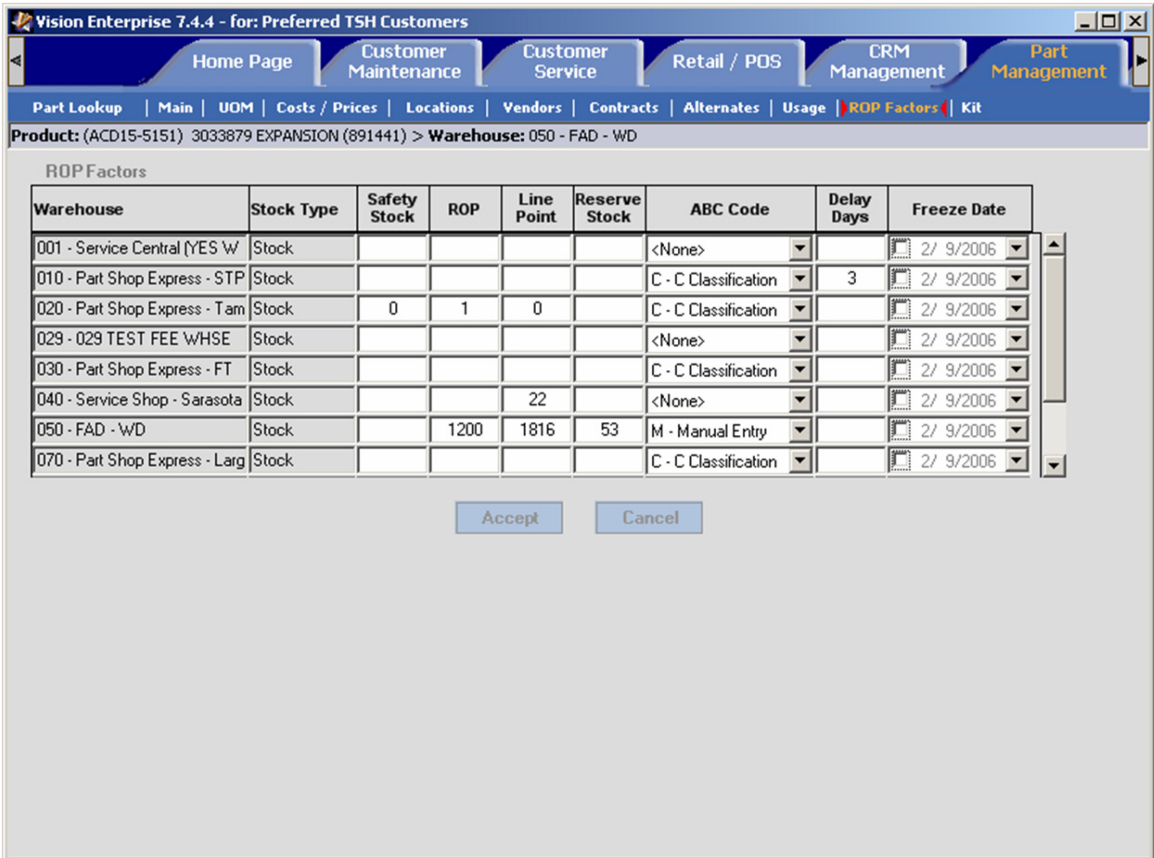
Each part now has a new attribute in Product Detail for Replenishment Reserve Stock

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.



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.



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

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.

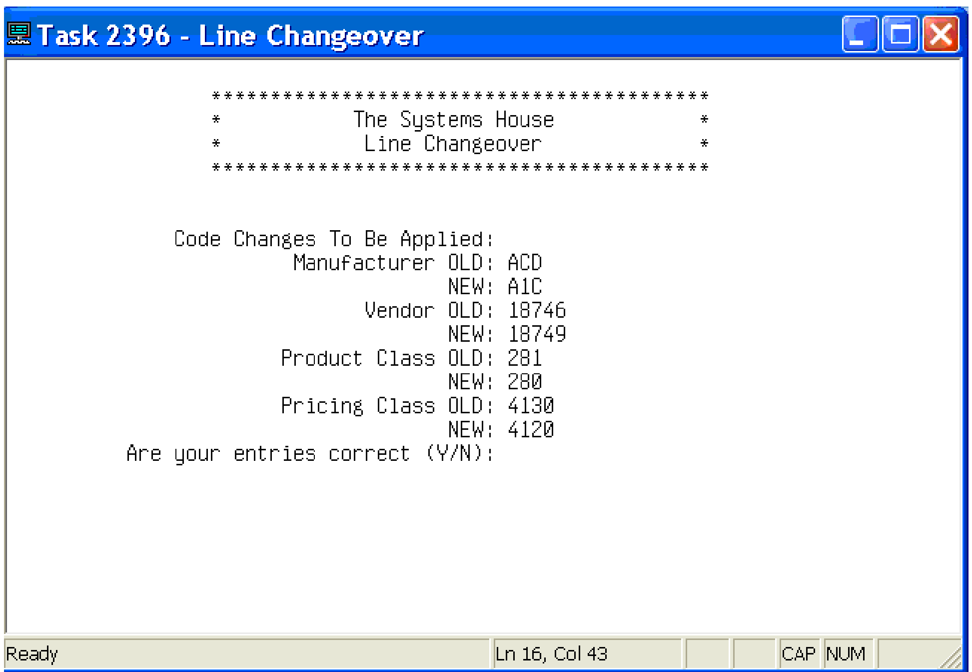
2 Then, you will be prompted for yes or no responses to the following:

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



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              L I N E   C H A N G E O V E R   E X C E P T I O N S
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
```

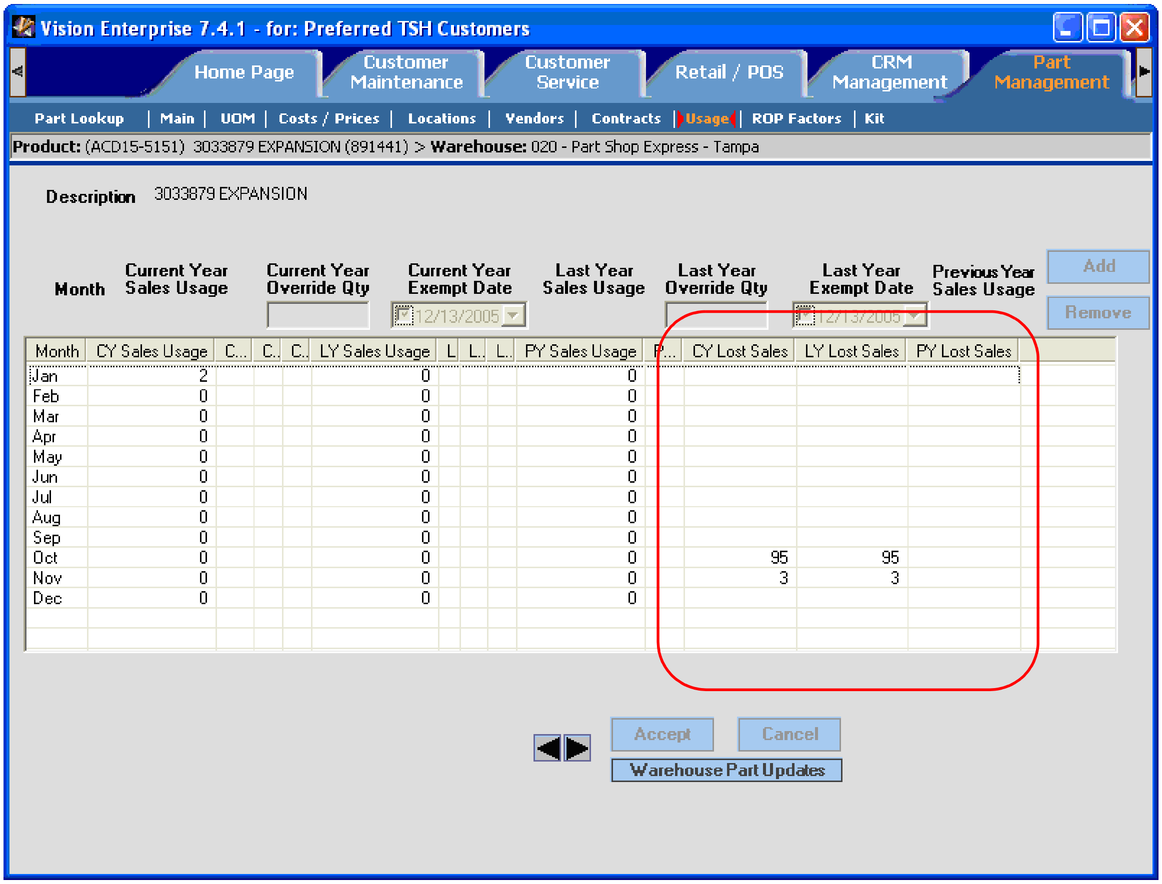
Lost Sales Improvements

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, an 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

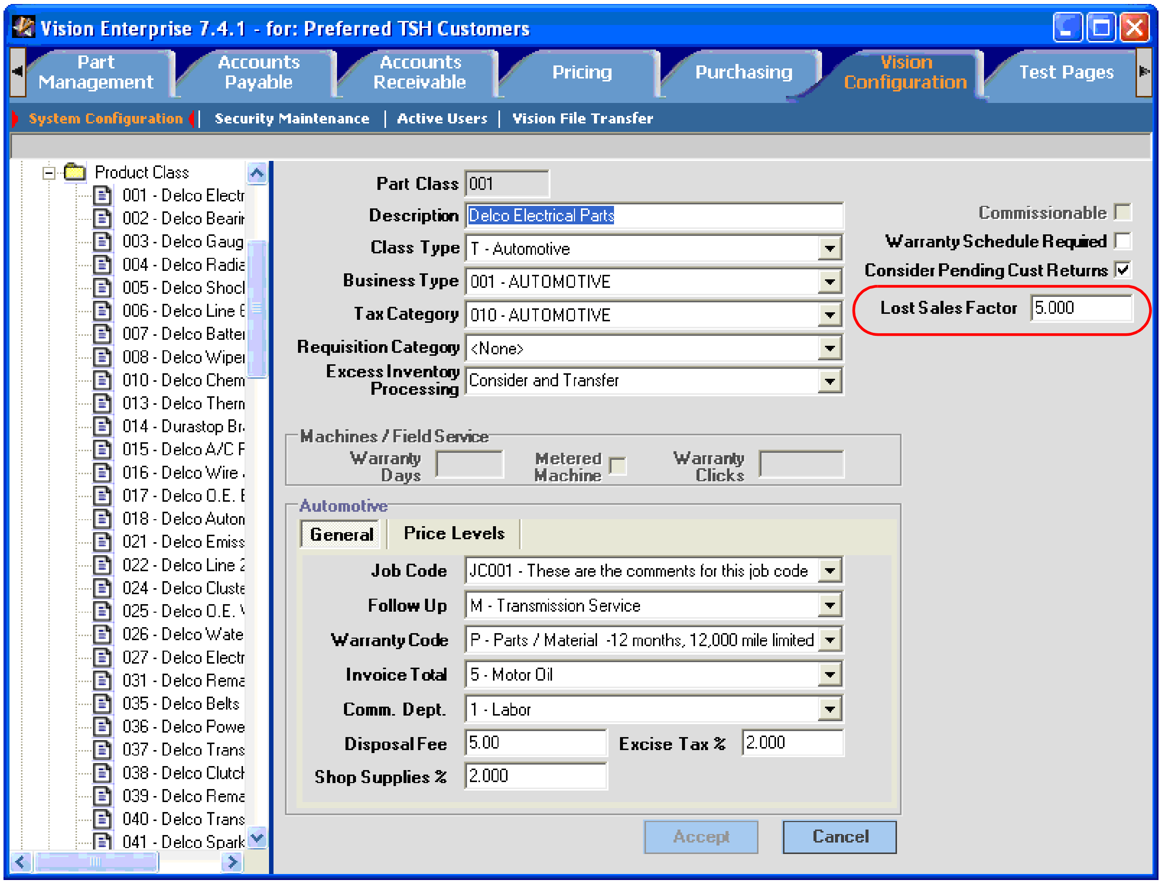
Here is an example of the new lost sales display on the usage form:



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:



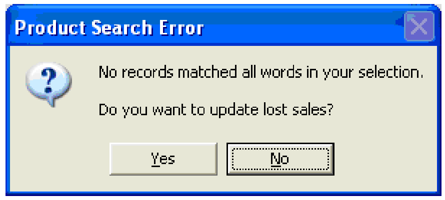
Order Entry Lost Sales Updating

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:



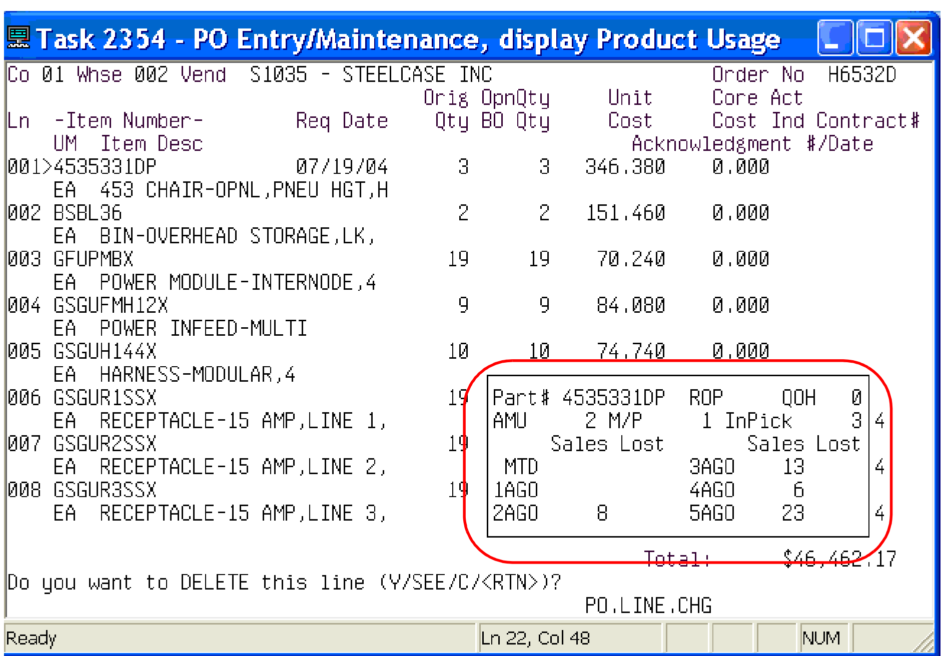
The default is **No**. If you click the **Yes** button, Vision displays the lost sales form

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.

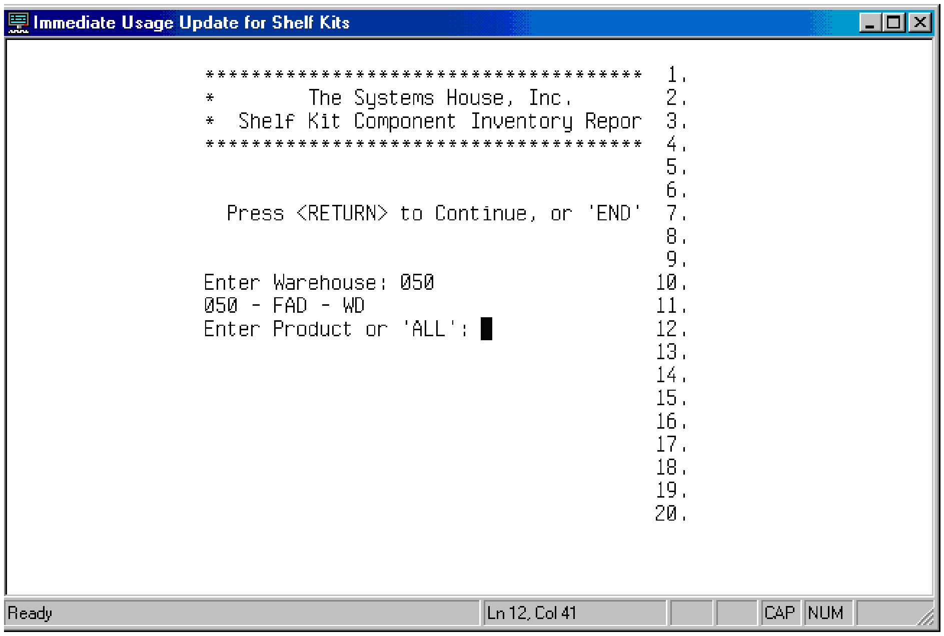
Activant Vision™ 7.4 has two enhancements for the build-to-shelf kits feature:

- 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:

10:02:10 Dec 22 2005 SHELF KIT COMPONENT INVENTORY REPORT Page: 1

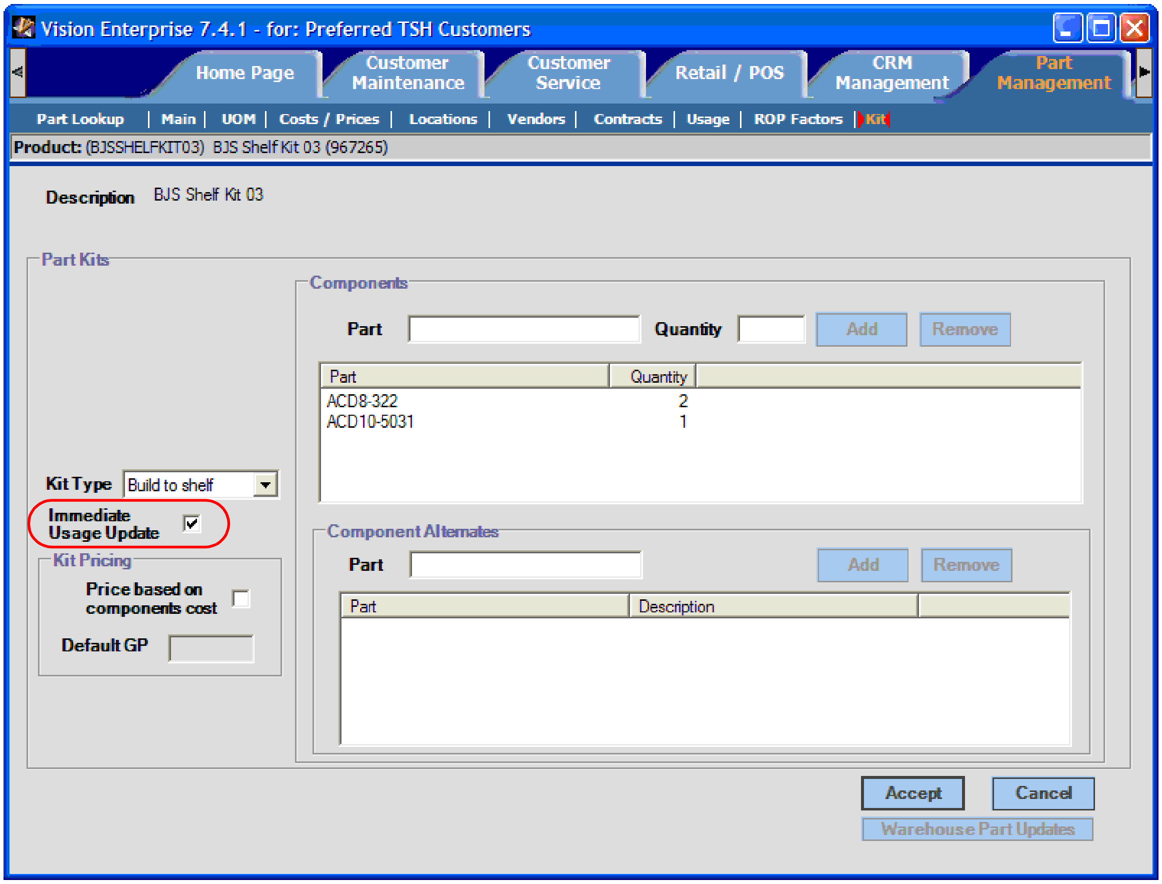
Whse: 050 - FAD - WD

Kit Master	Kit Component	Required Qty	Available Cmpnt Qty
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:

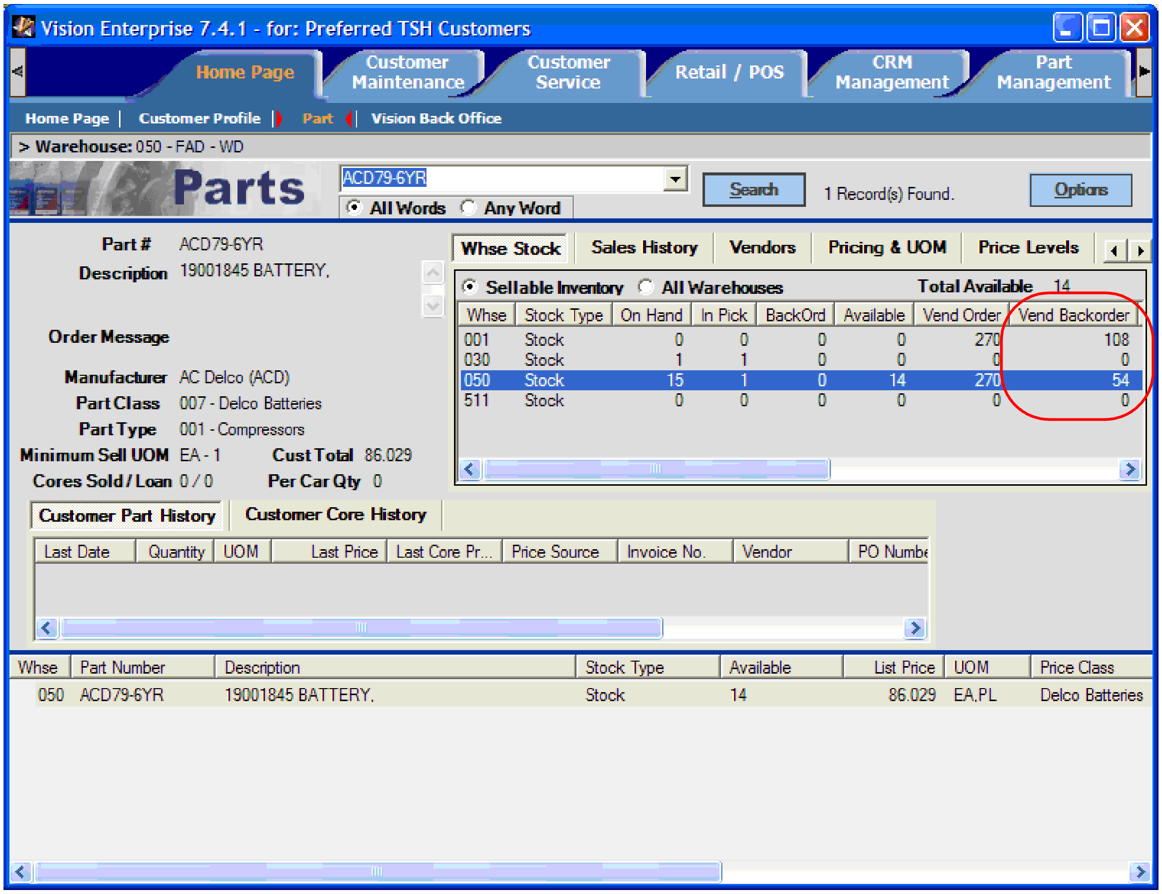


Vendor Backorder

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:

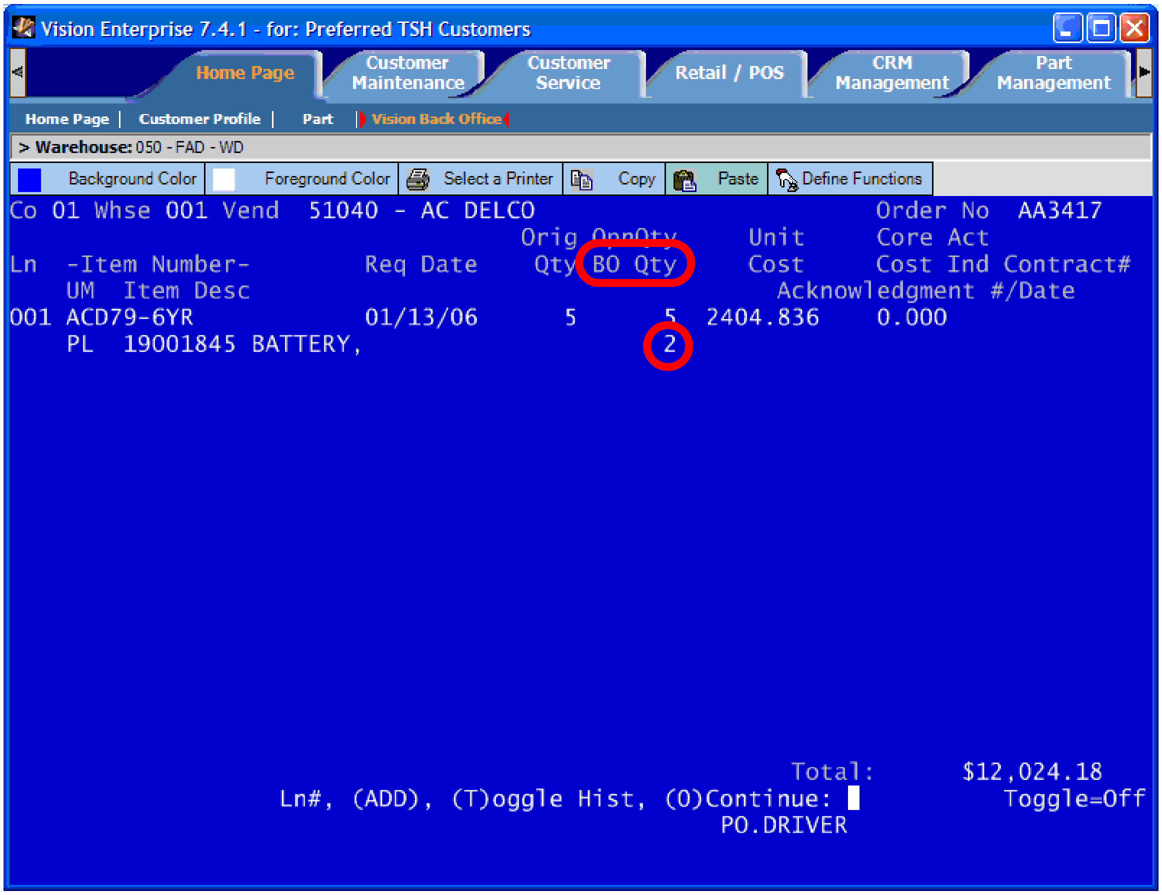


You may sort by vendor backorder quantity by clicking on the column heading. Click once to sort ascending, and double click to sort descending.

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.

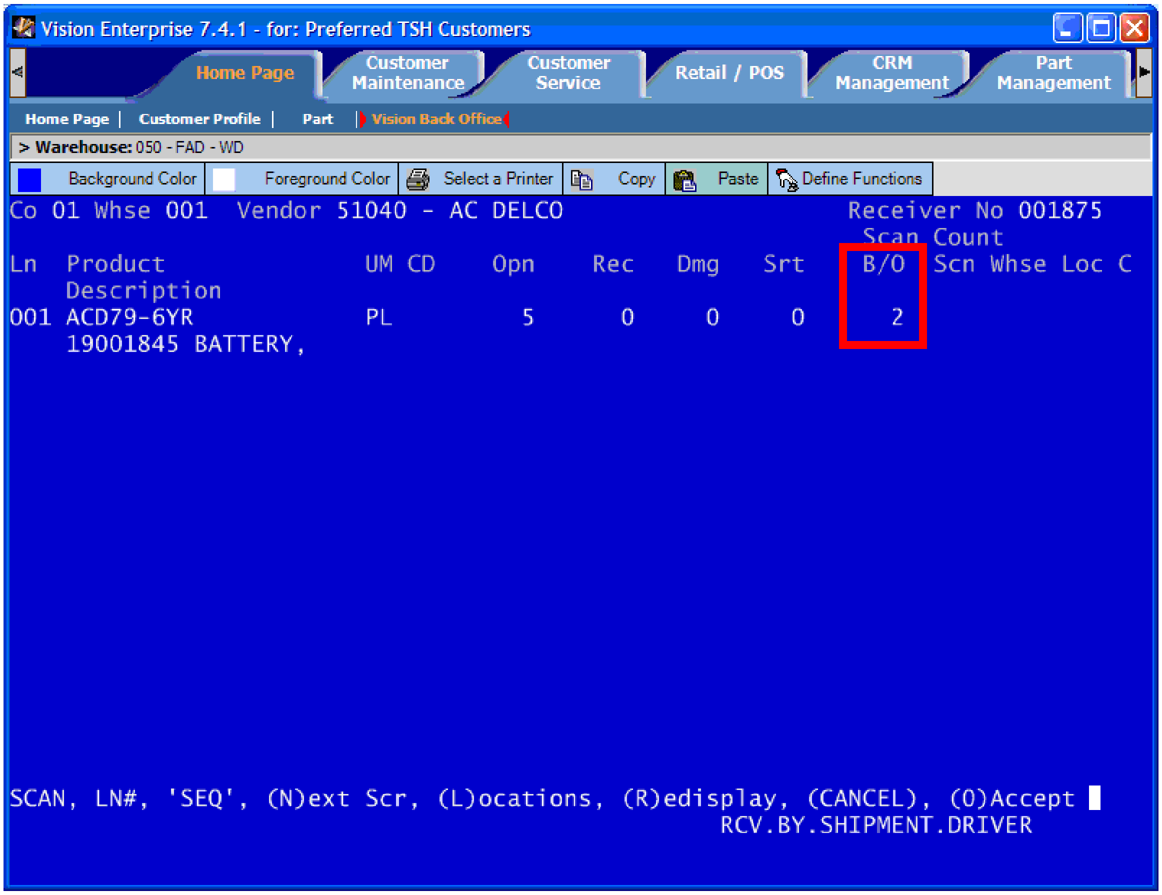


Open Quantity and Backorder Quantity Columns are stacked, and displayed as “OpnQty” and “BO Qty”.

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

Entering Backordered Items In Receiving

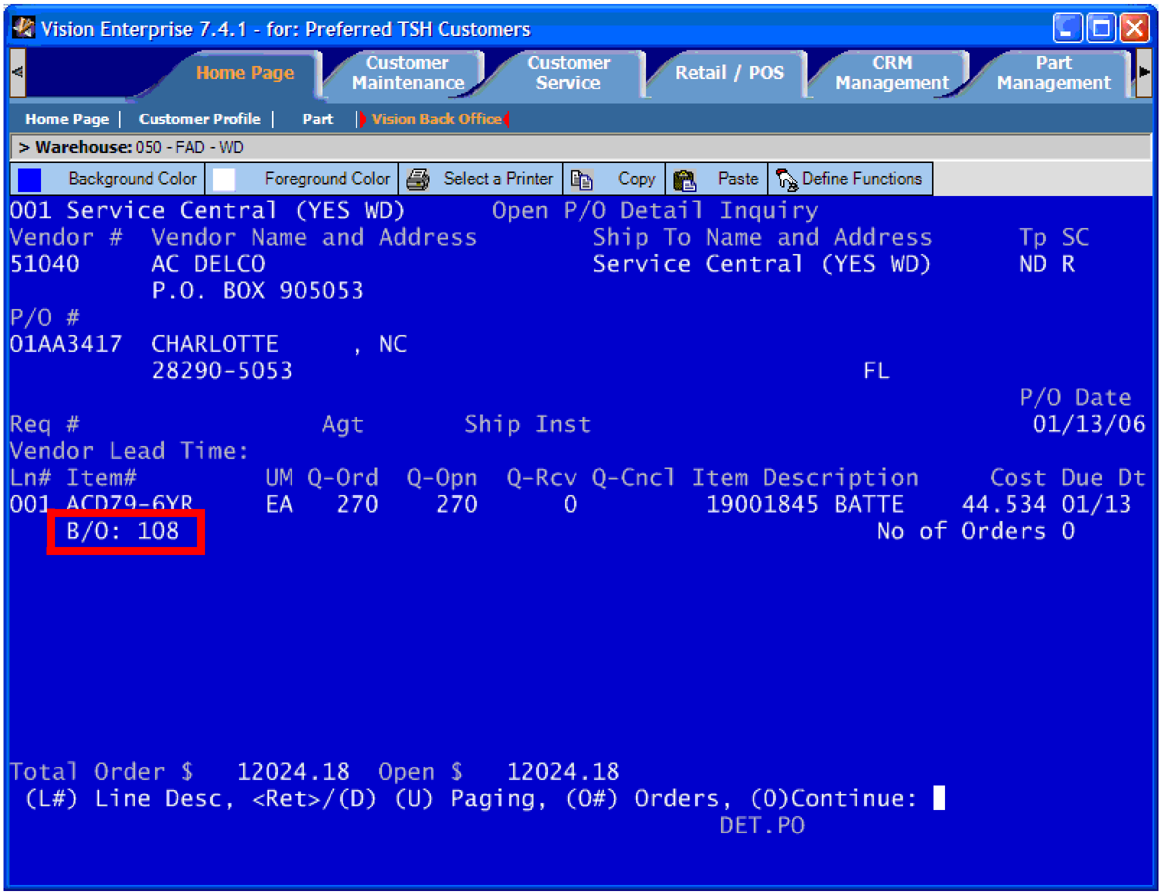
The receiving clerk may enter the On Vendor Backorder quantity when receiving the shipment by using the Back-Office Receive By Shipment line item screen:



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:

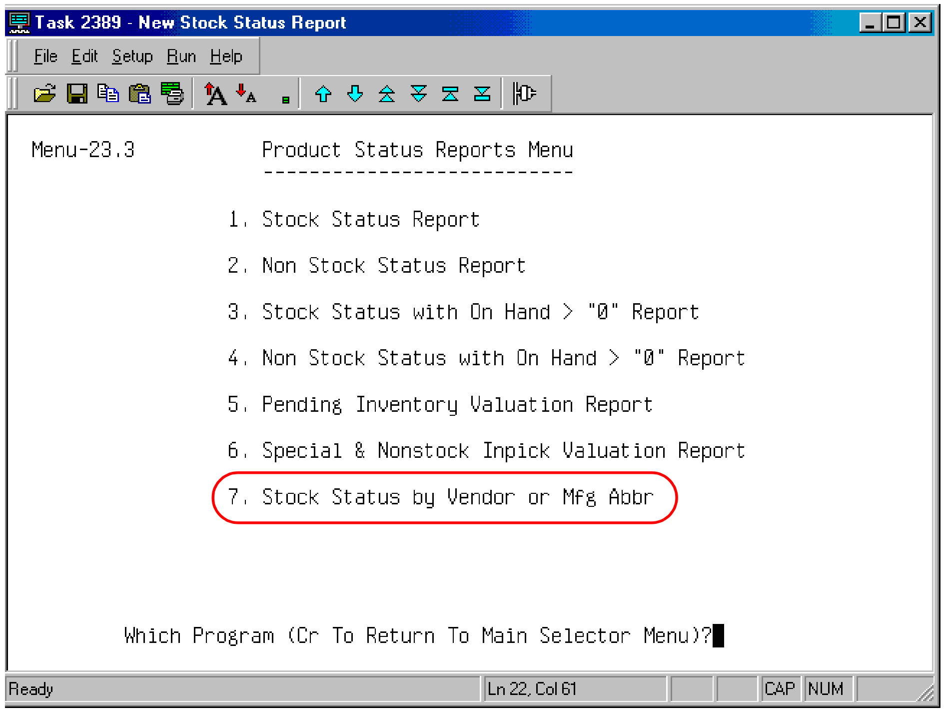


The backordered quantity is shown just below the item number in the line display.

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.

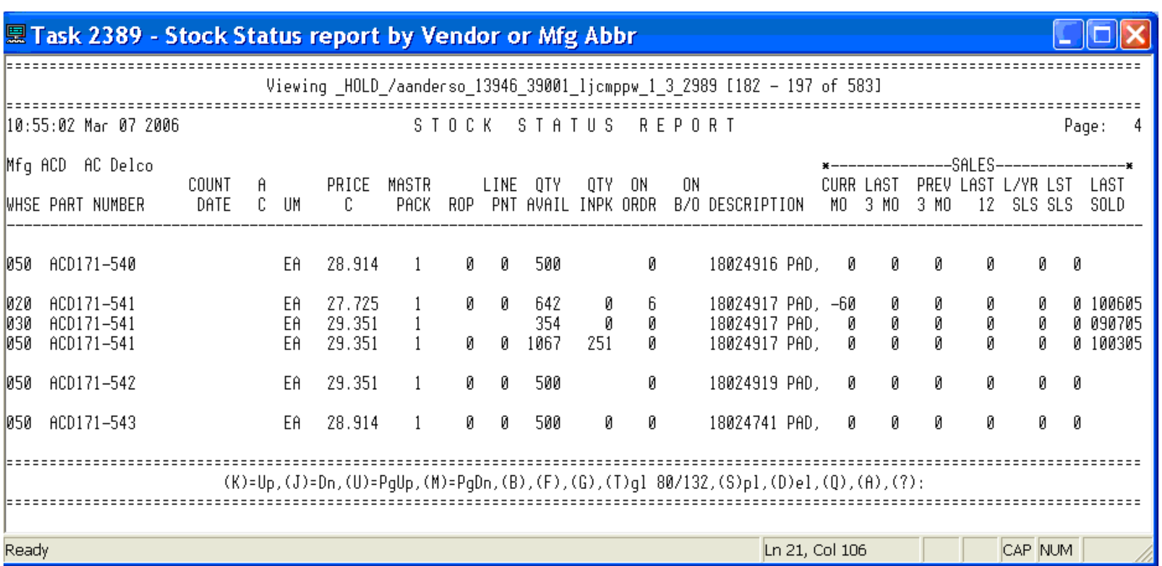
To print the new report use Back Office Menu-23.3, and select menu item 7 - Stock Status by Vendor or Mfg. Abbr.



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:



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:

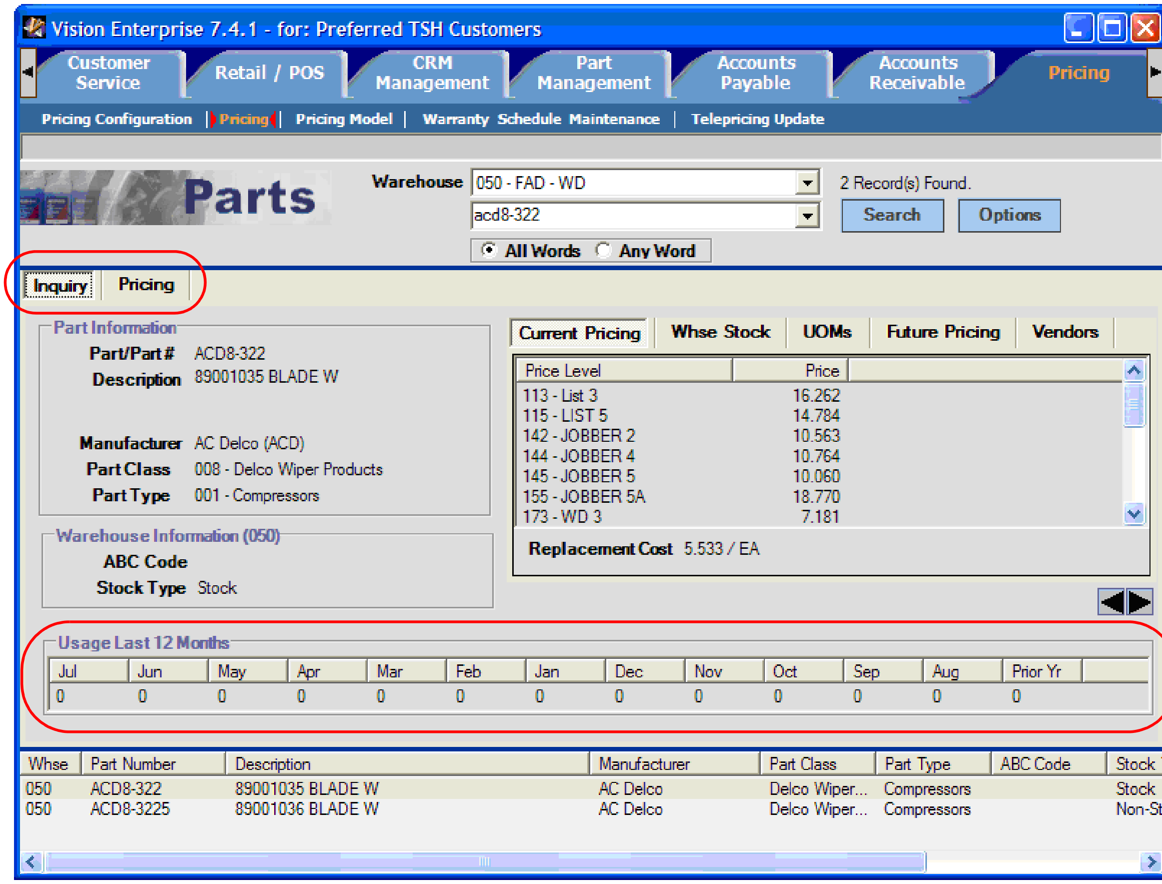
```
13:15:44 Jan 13 2006        R E P L E N I S H M E N T   S U M M A R Y   R E P O R T - No Customer Owned Goods        Page:    1
=====================================================================================================================================

     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

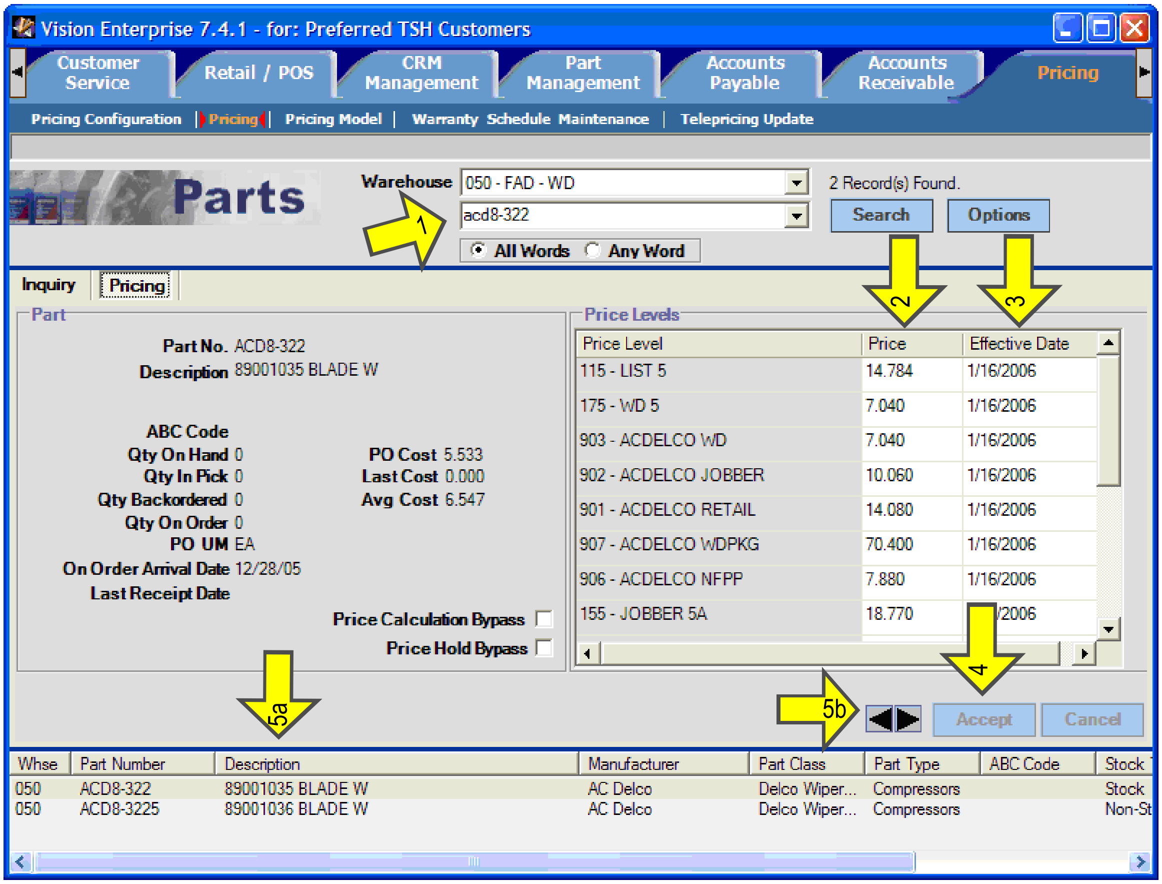
Quick Pricing Maintenance

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:



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.



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.

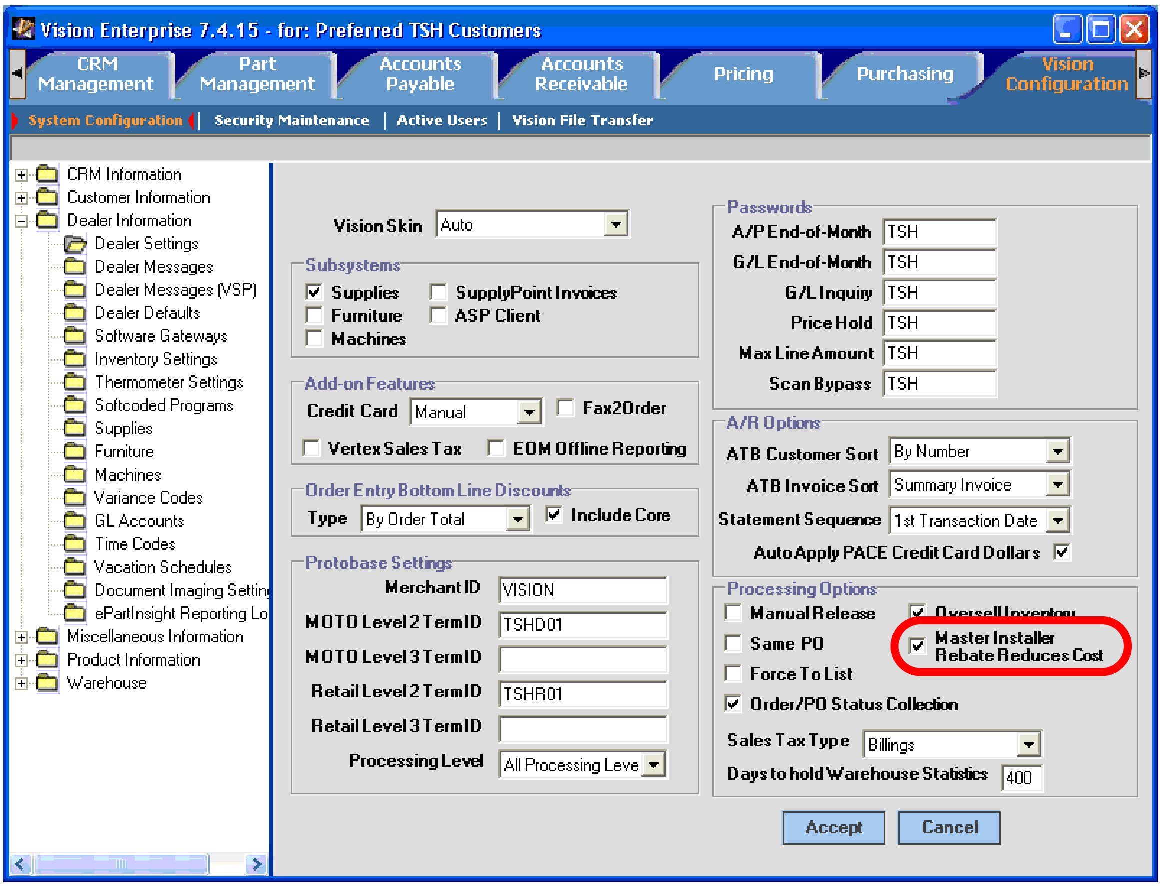
The most common rebate programs have been related to oil and air filters. Using filters as an example, a manufacturer may establish a program where you will get 10% of off Jobber Price for all filters sold to a designated Master Installers at a price lower than jobber plus 20%.

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.



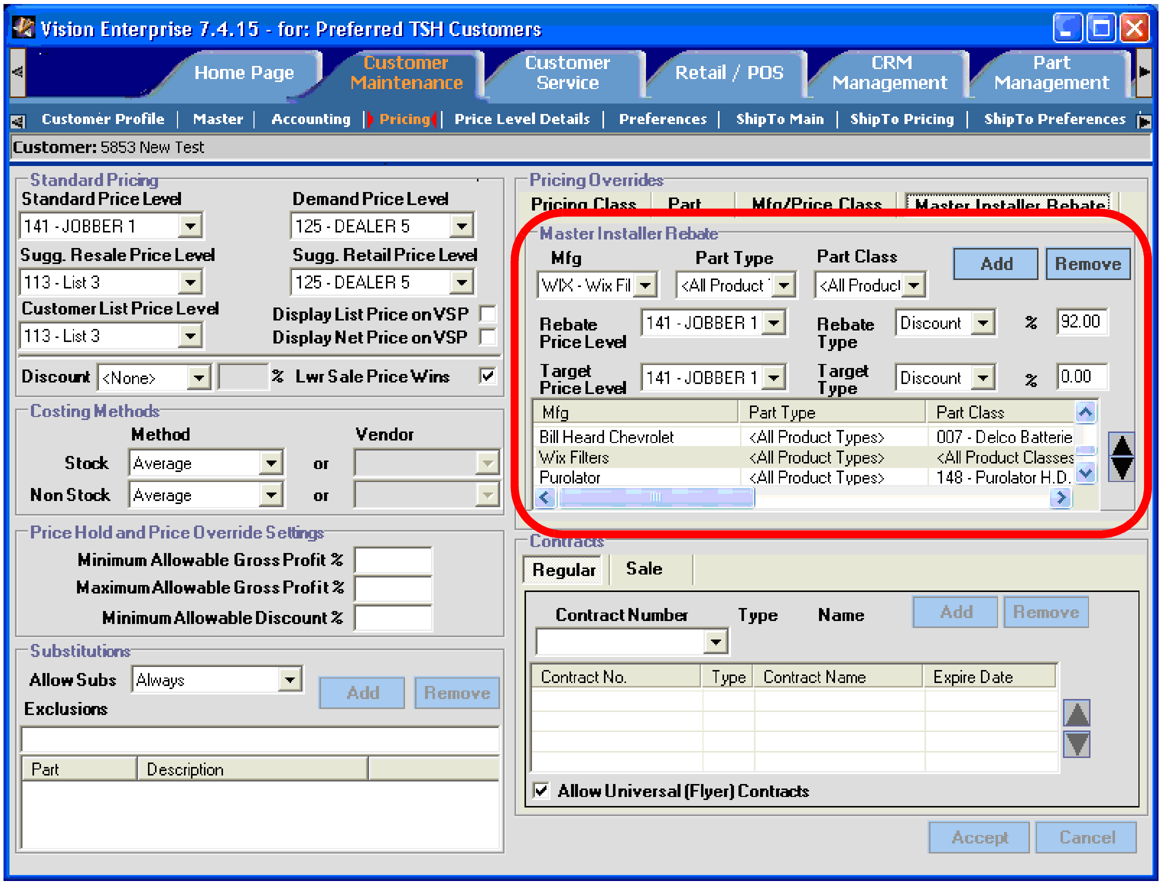
Rebate Program Setup

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



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% of 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

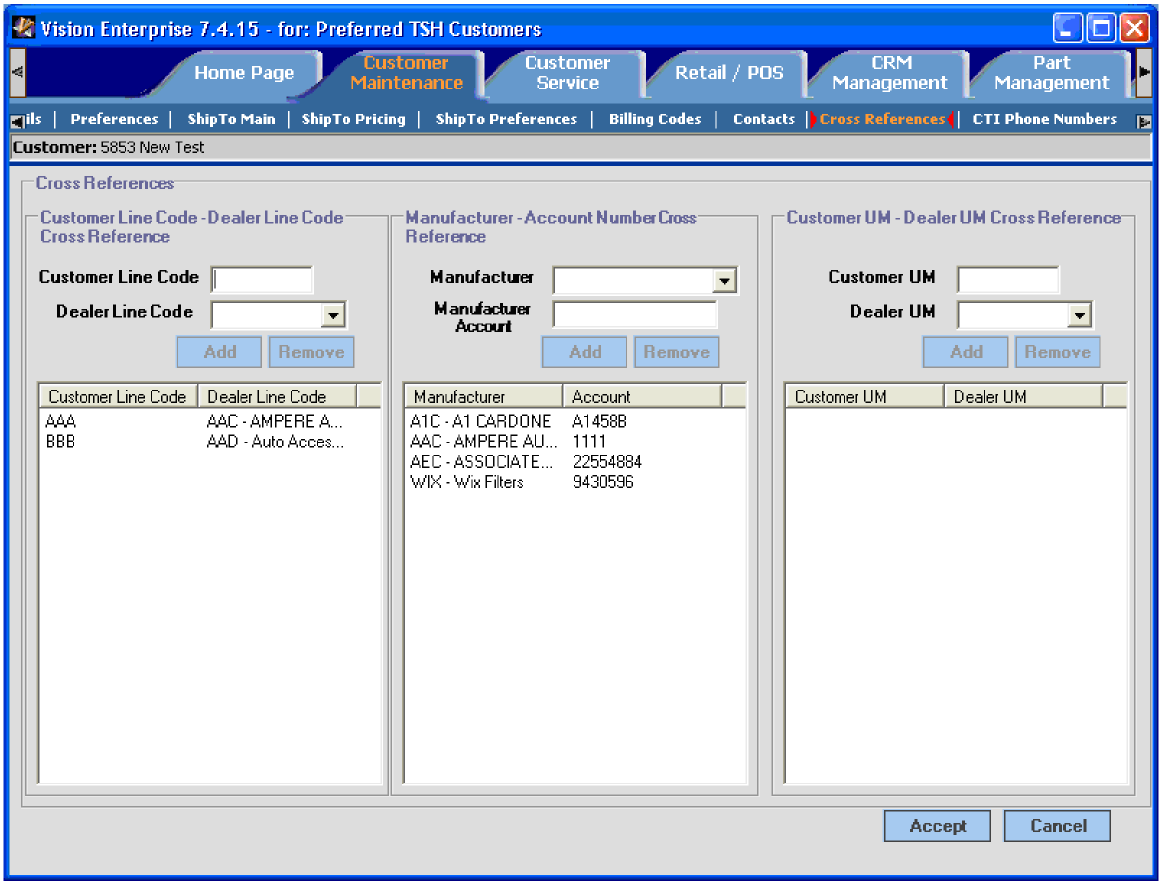
- The Target Price Level is Jobber pricing.
- The Target Type is Load.
- The Target % is 20.

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:



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

                         CUST    CUST                         RELEASE                              REBATE        REBATE  EXT REBATE
WHSE MFG PART NO........ NO..... NAME..................... NO.......... INV DATE QTY.. PRICE... COST... GP%.. AMT....     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 51515           5853    General Installer         05AB7731001  03/09/06     1     5.18     2.62  49.4    0.38        0.38
 050 WIX 51515           5853    General Installer         05AB7732001  03/09/06     1     5.18     2.62  49.4    0.38        0.38
 050 WIX 51515           5853    General Installer         05AB7733001  03/09/06     1     5.18     2.62  49.4    0.38        0.38
 050 WIX 51515           5853    General Installer         05AB7741001  03/10/06     1     5.18     2.62  49.4    0.38        0.38
 050 WIX 51515           5853    General Installer         05AB7743001  03/10/06    -1    -5.18    -2.62  49.4   -0.38       -0.38
 050 WIX 51515           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

                         CUST    CUST                         RELEASE                              REBATE        REBATE  EXT REBATE
WHSE MFG PART NO........ NO..... NAME..................... NO.......... INV DATE QTY.. PRICE... COST... GP%.. AMT....     AMT....

     ***                                                                                                              ----------
     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.

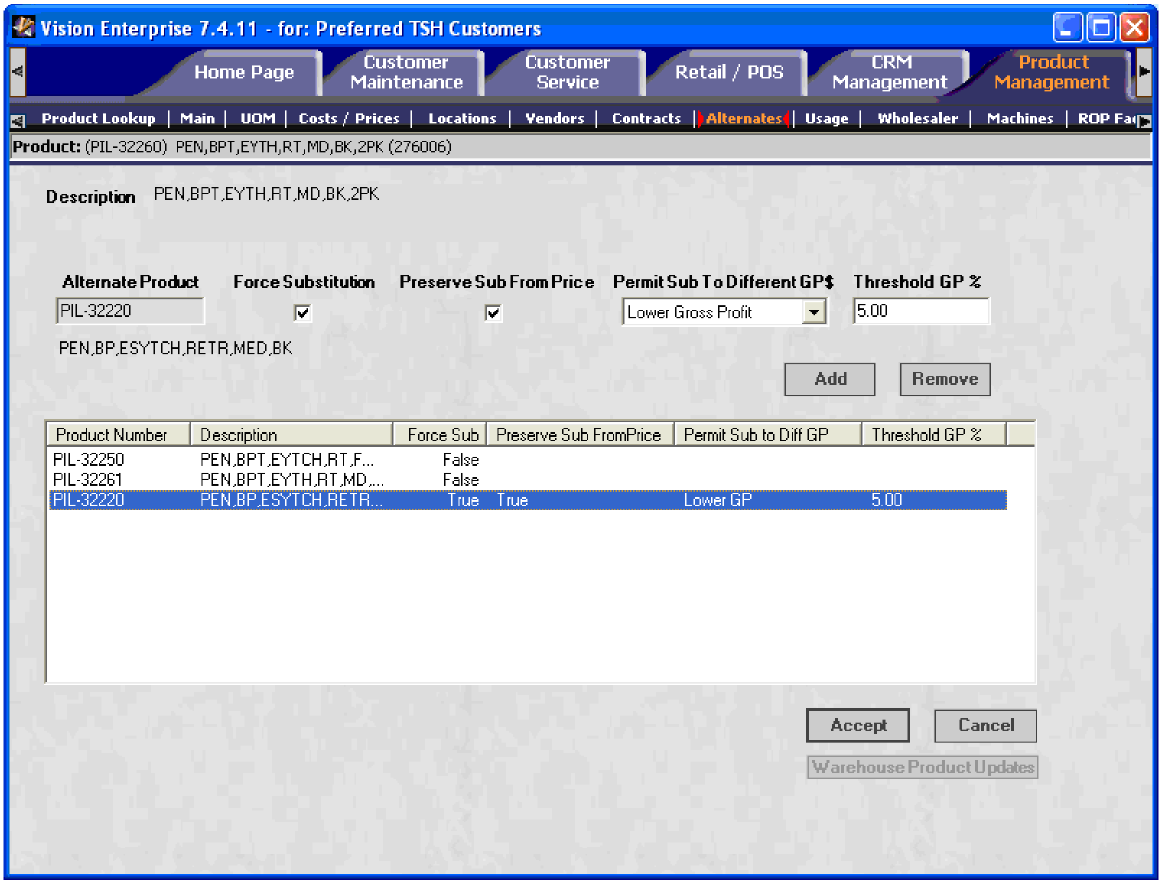
Alternate Products are maintained on the Product Management form, and they appear in the Product search result window, available to be added to an order when a search retrieves an item with alternates. This allows the Vision user to have the choice of picking an alternate or their original item.

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:



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.

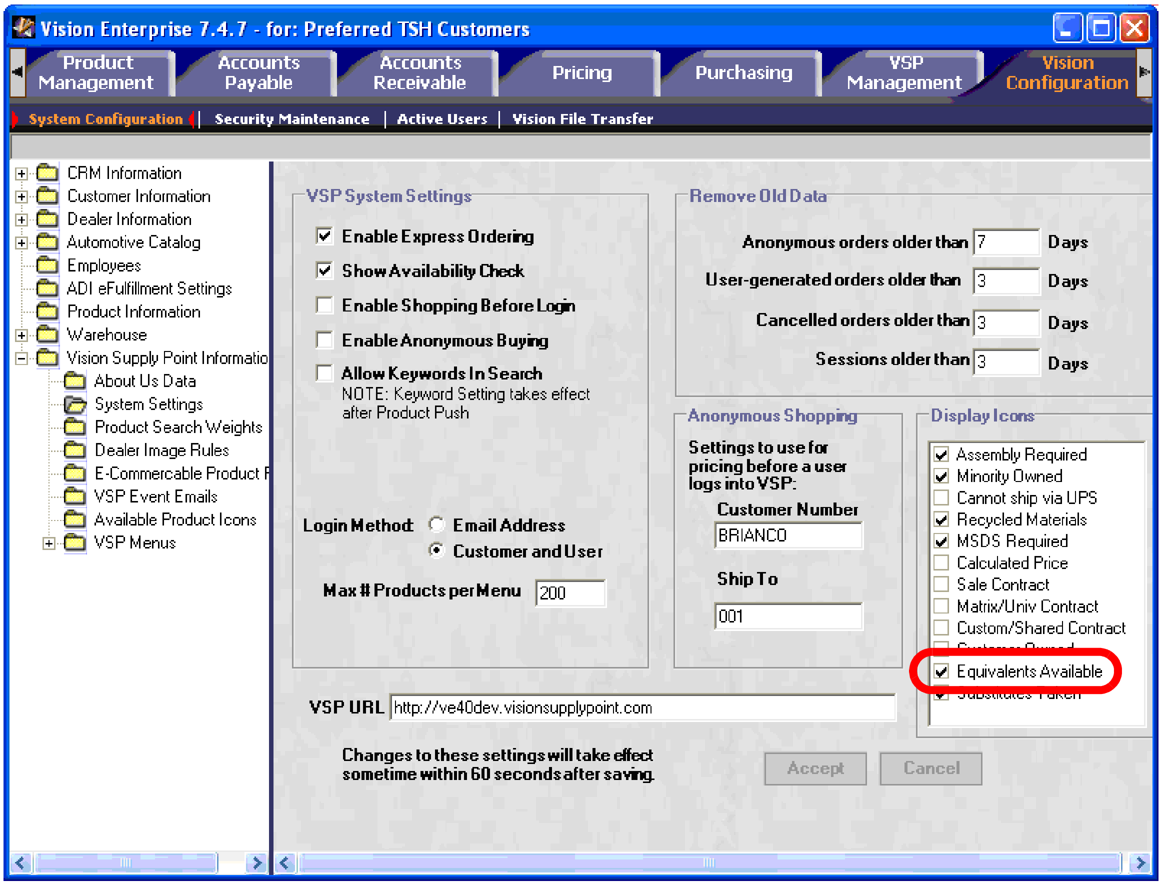
New Vision Behavior

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

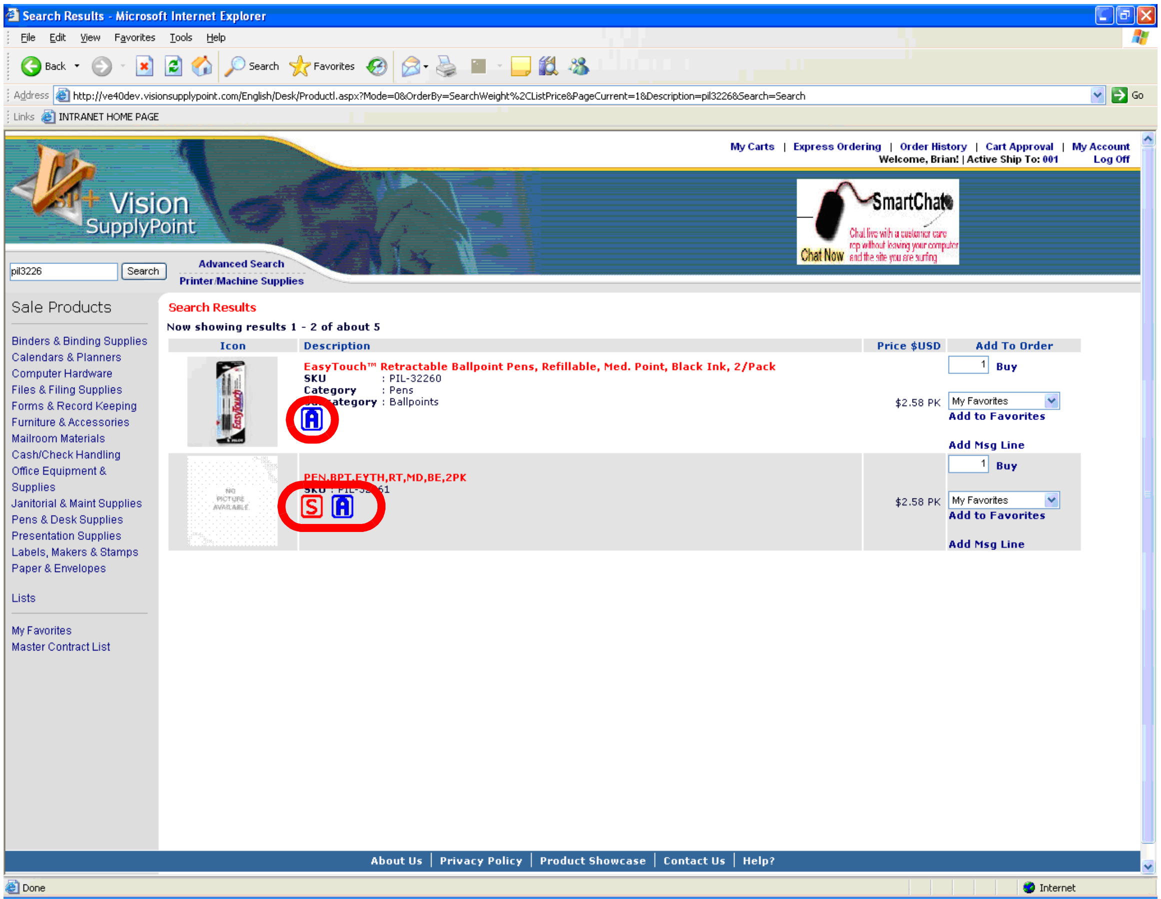
To show part substitution icons on the VSP+ search results page, go to the Vision Configuration tab, system configuration screen, Vision Supply Point information folder, System Settings sub-folder



Check the “Equivalents Available” check box.

VSP+ Behavior

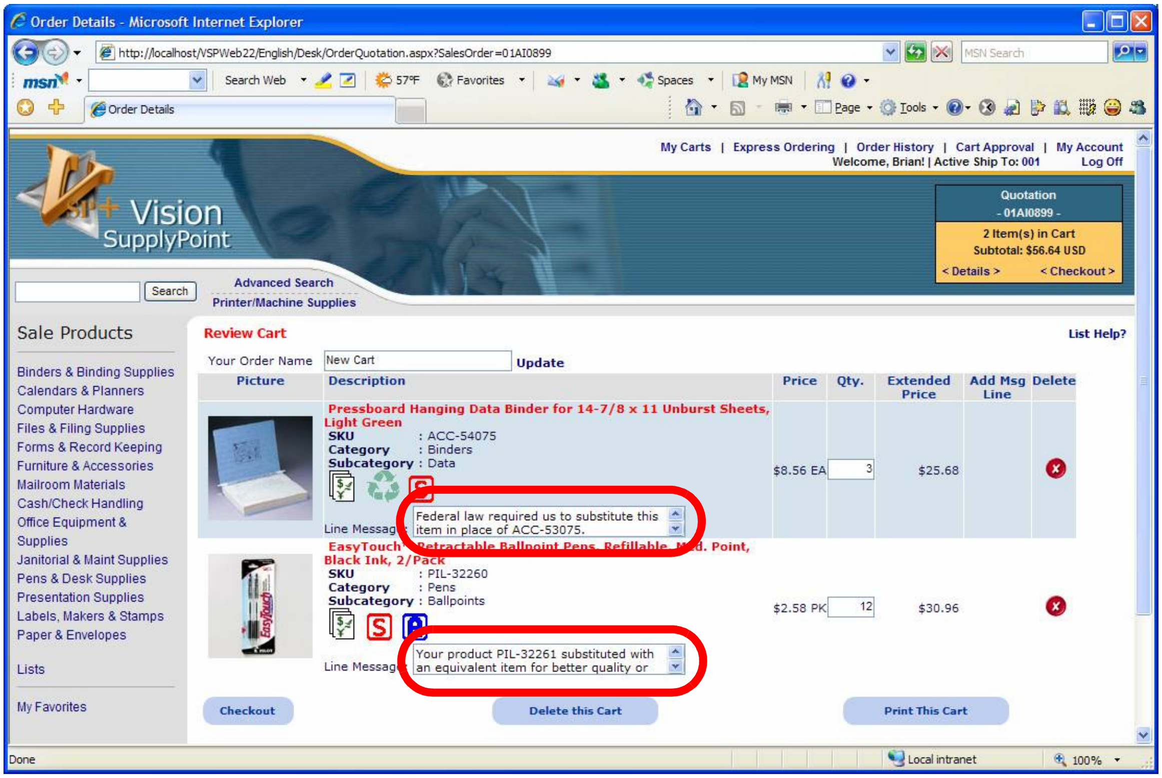
If A forced substitution is available in VSP+, the substitution icon shows that the product will be substituted when the user either goes into the details page or when they purchase the product. The price shown is the price of the substitute product, unless the substitute product is configured to preserve the substituted-from price, then the price of the original, “substituted from” product will be used.



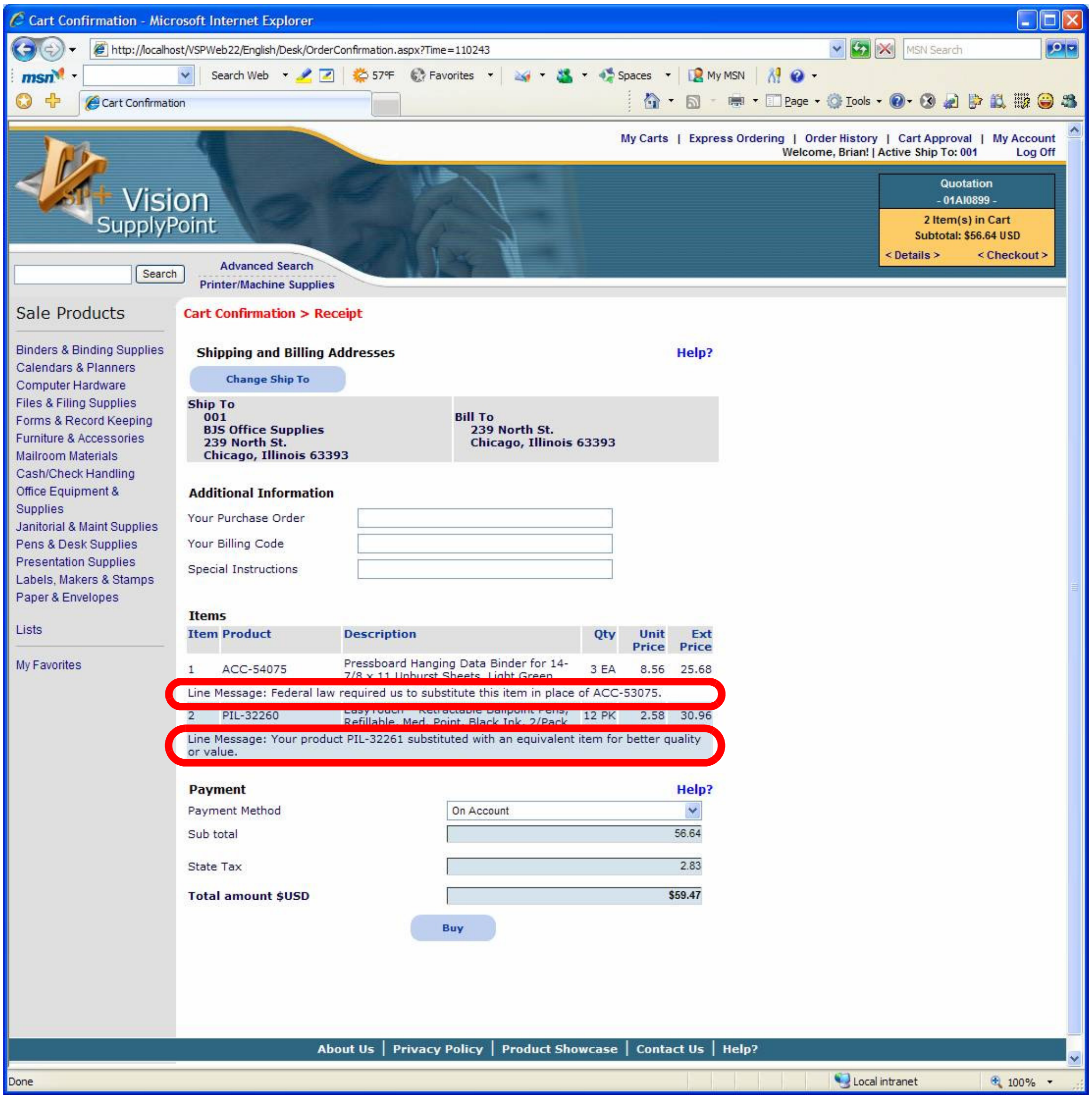
If equivalent products are available, the alternate icon is shown. You may turn off the display of these icons on the VSP System setting under the Vision Configuration tab, as described in the VSP+ Setup section.

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:



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



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

                      Product               Last    12 Mos              ------------------- Cost -------------------
Part #                Cls Typ ABC OnHand    Sold     Usage                       PO    %Chg      Core    %Chg   Extended     Change

GEN17800578MB         532 901          3  12/05/05      18   Average:  1127.200              0.000            3381.60
                                                                Last:  1127.200                               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.

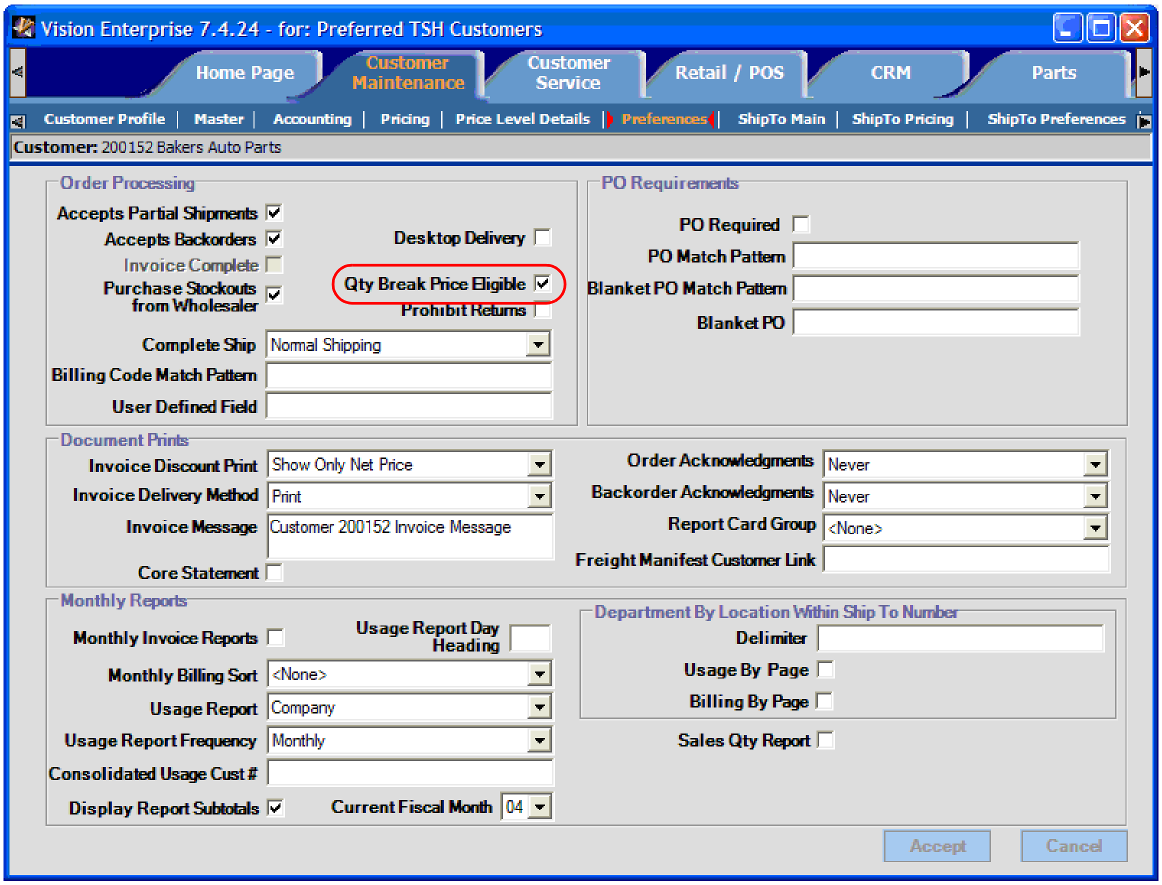
Quantity Pricing Breaks

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).

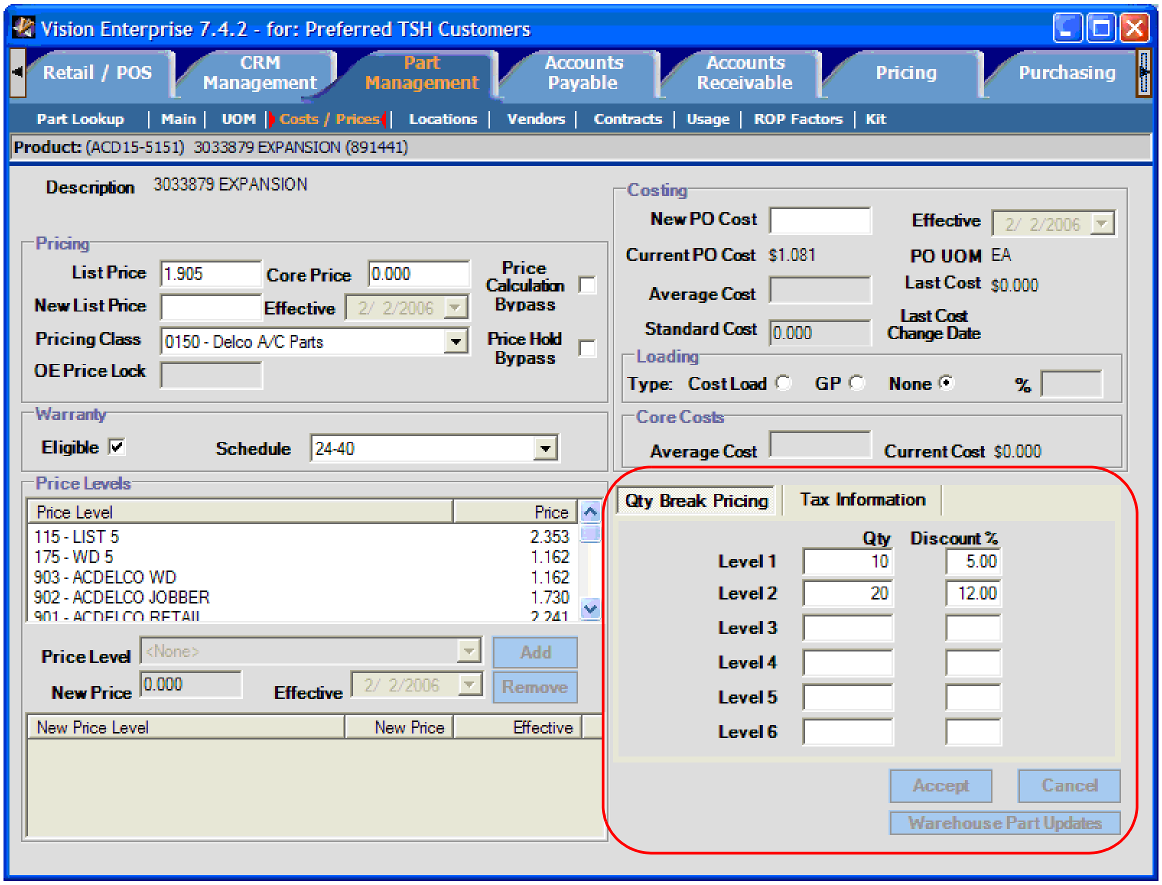
You may define up to 6 levels of quantity break discounts for each product.

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.



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:



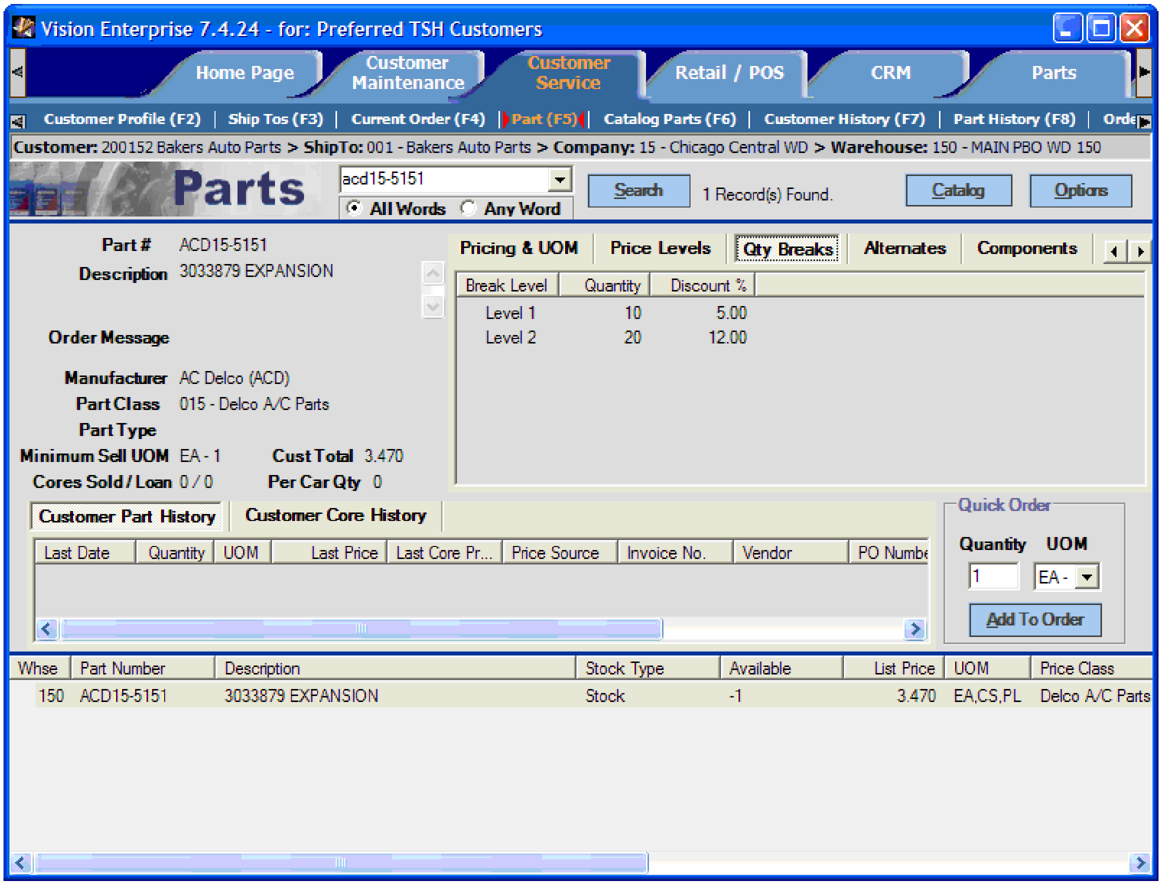
Enter the quantity and discount percentages for up to six levels. Break levels must be entered in sequence (i.e. you cannot have break level 3 defined if break levels 1 and 2 are not defined)

Use

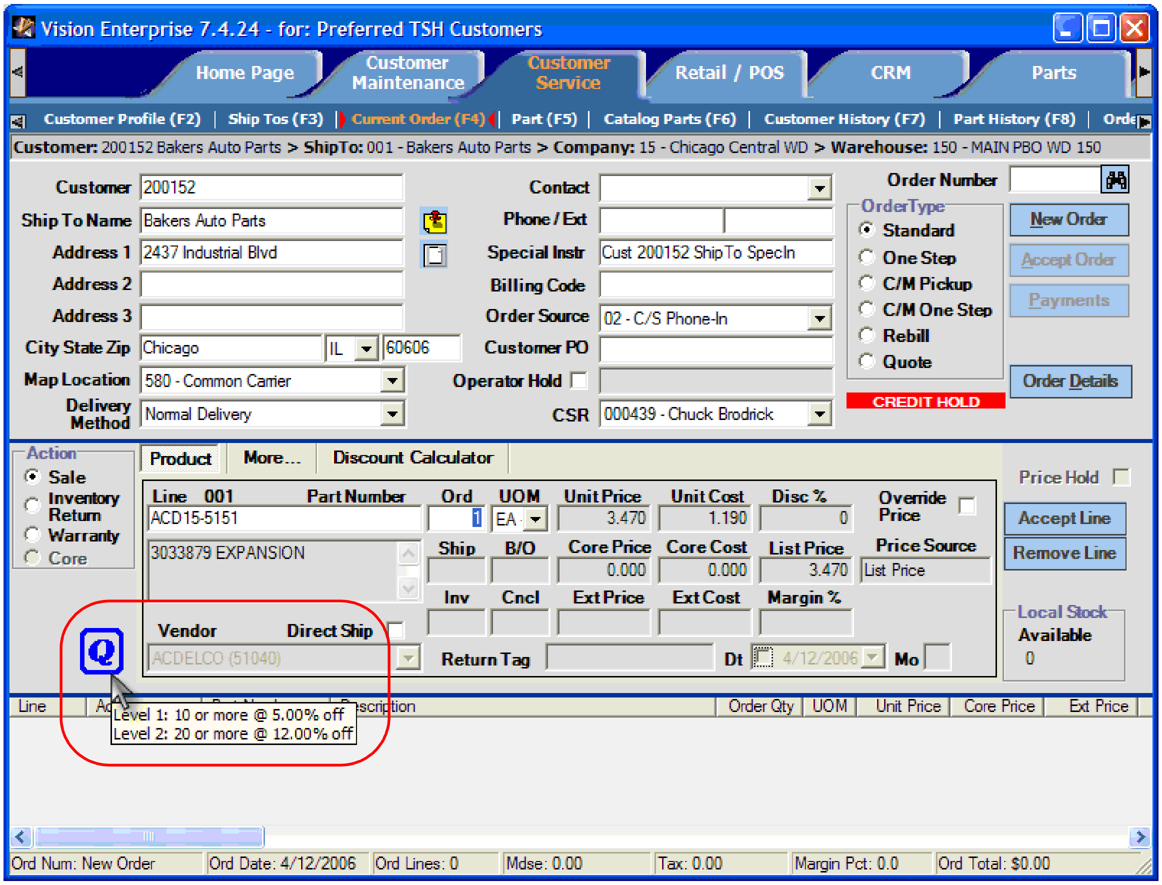
When you have set up pricing and eligibility, the discount is automatic. During order entry, if a customer is set up as “eligible” for quantity pricing and the order quantity falls within the range of quantity break discount parameters, Vision adjusts the customer's price by the discount percent on the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

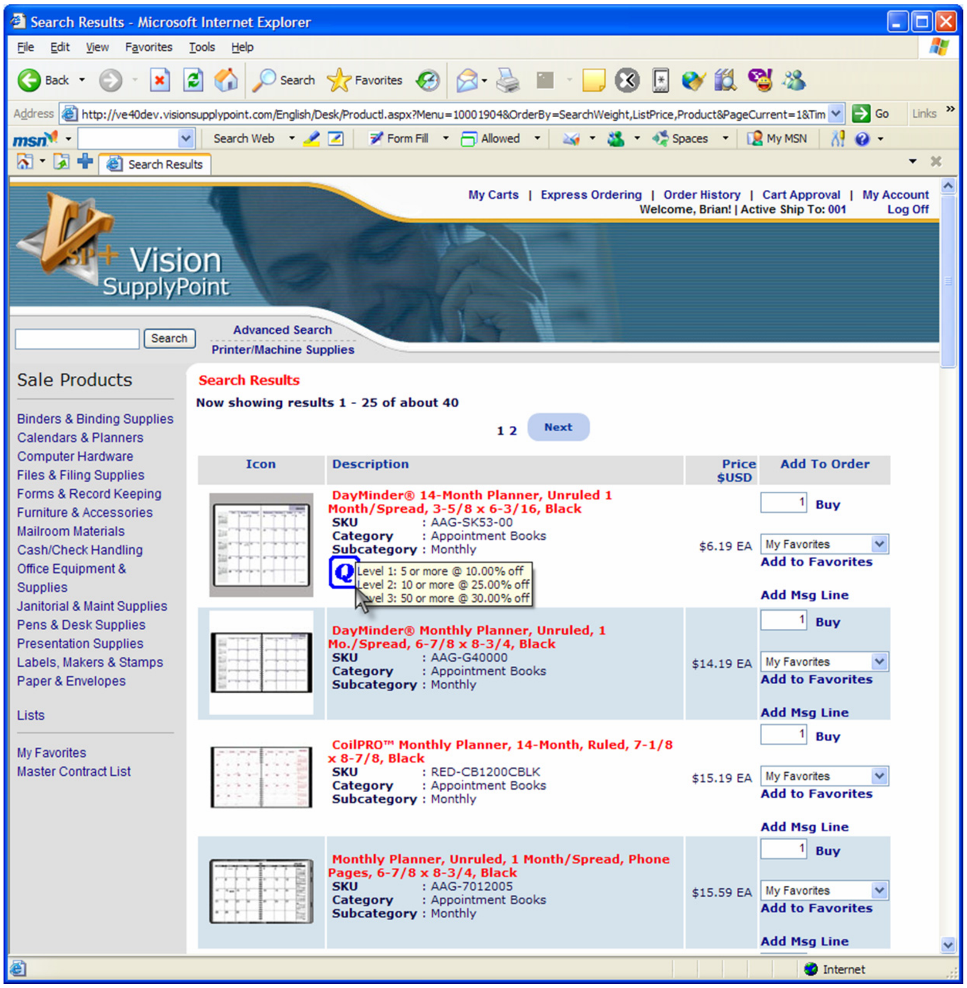


When a quantity pricing break is used, the current order form will have an icon added to denote the quantity break, and show the break levels when you hover the mouse pointer over the icon:

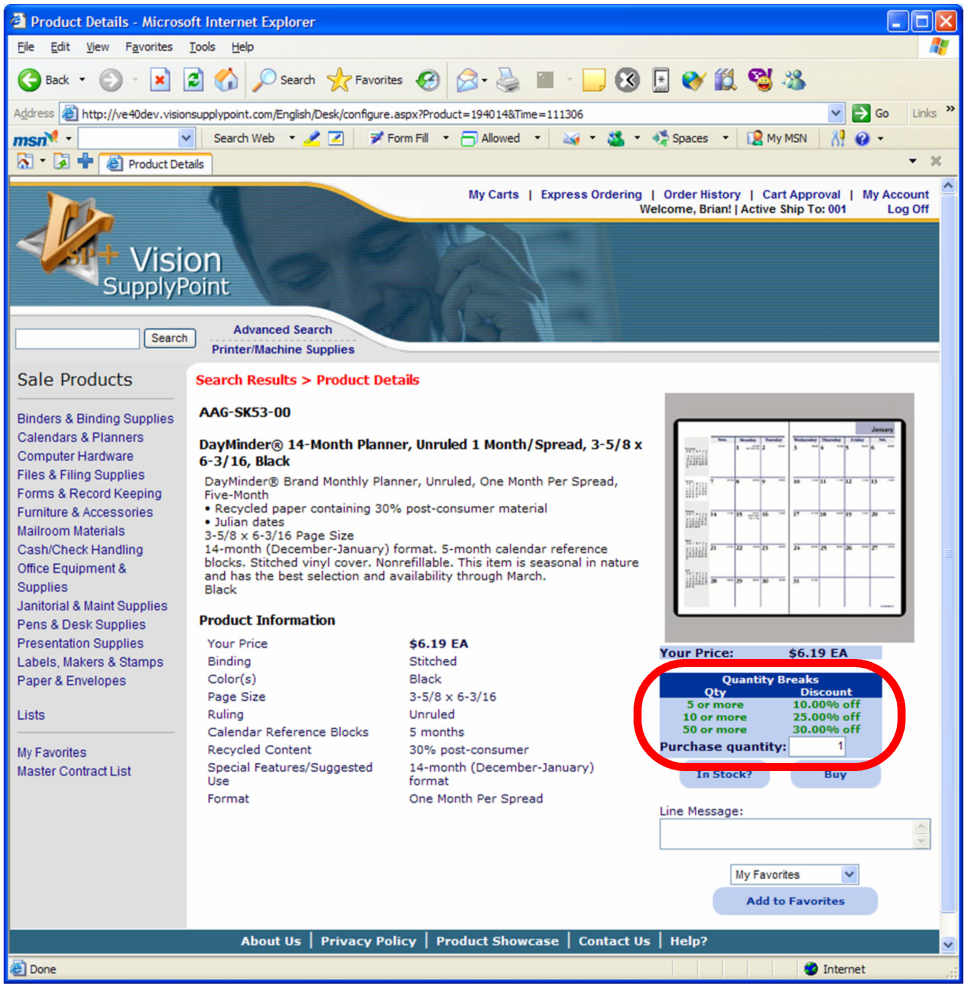


VSP+ Use

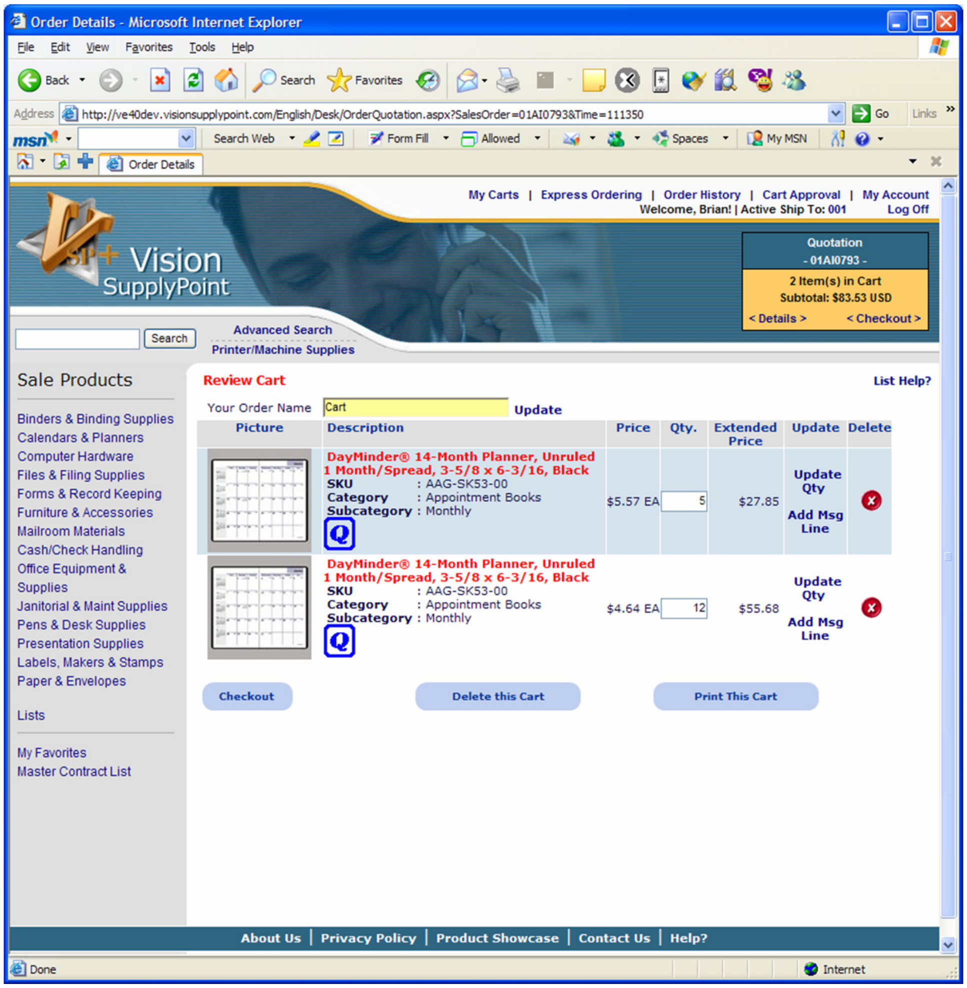
In VSP+, Product Search results indicate Quantity Break pricing with a “Q” icon. Hovering over the icon displays the available quantity breaks:



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



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:



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

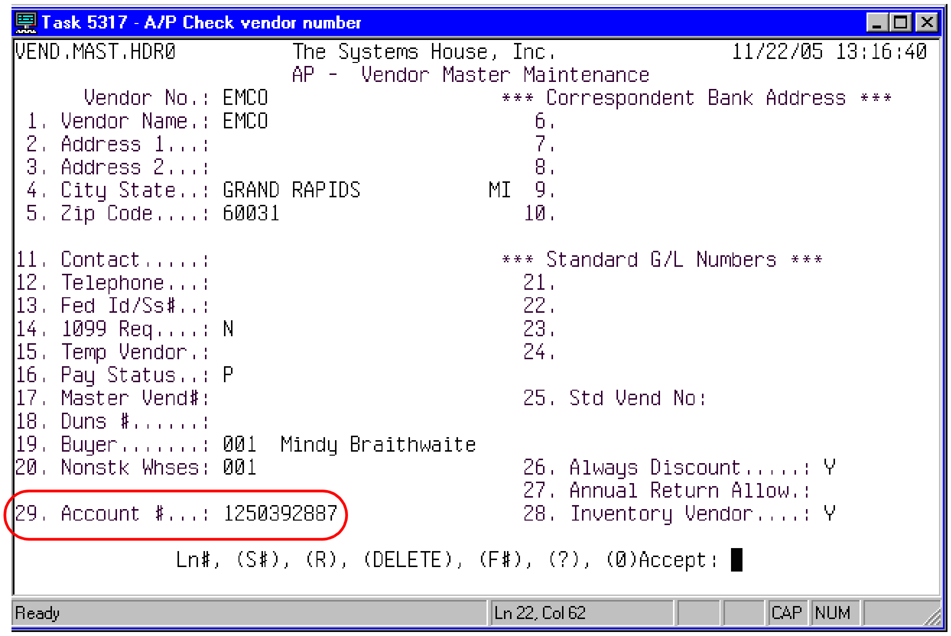
Add Multiple Receivers to a Voucher

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

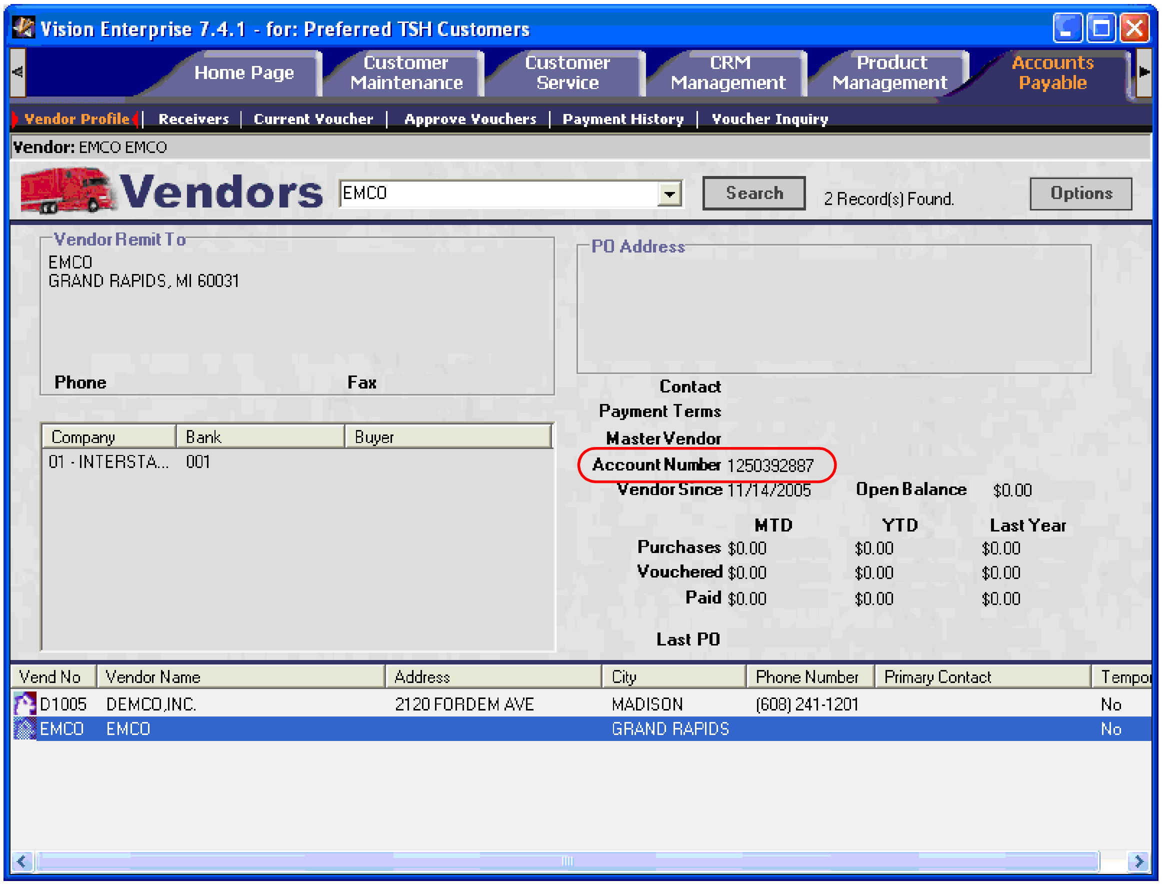
Sometimes, you may be known to your vendor by several different names. For example, a company name and a warehouse name, or a DBA name and a corporation name. This may confuse vendors if you don’t have an absolute way to refer to yourself.

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.



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



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.

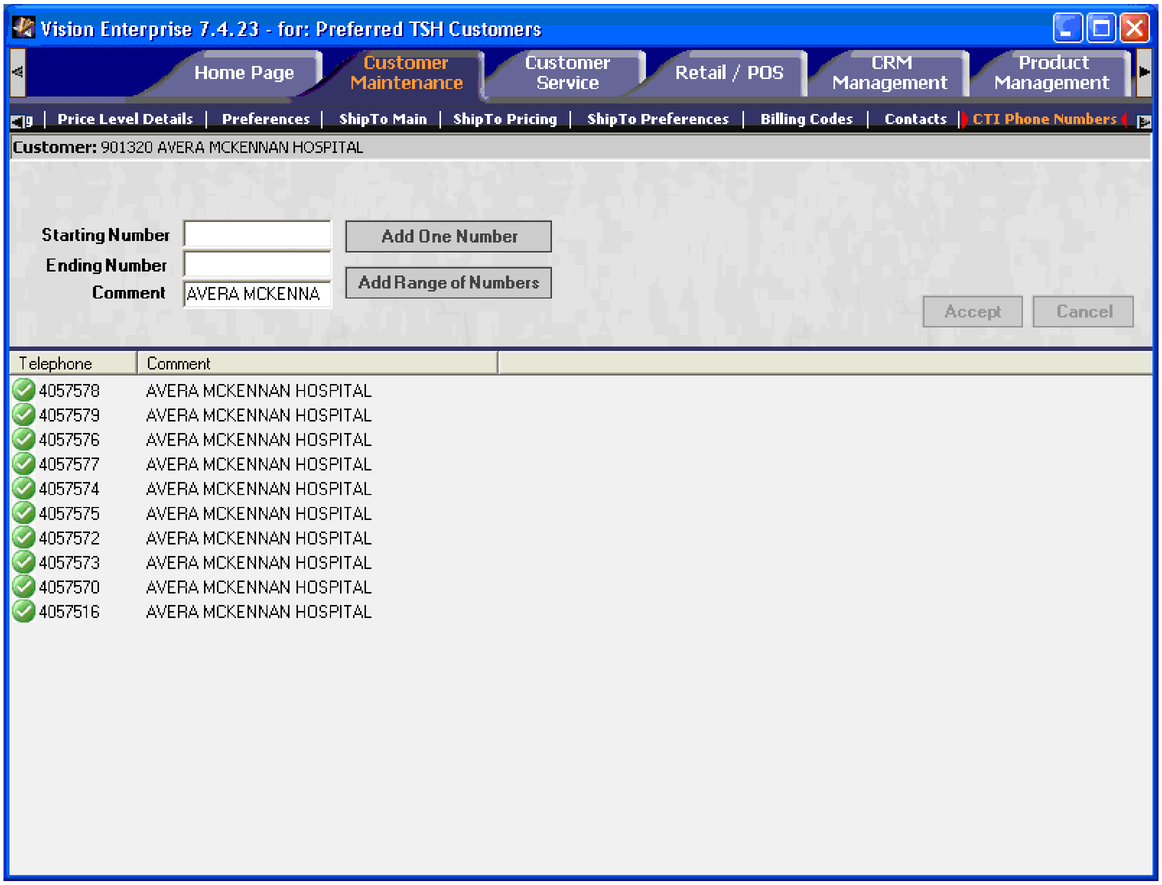
A new button will be visible on the Customer Profile forms on the Customer Service, POS, Customer Maintenance, A/R Inquiry and Home Page tabs.

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:



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

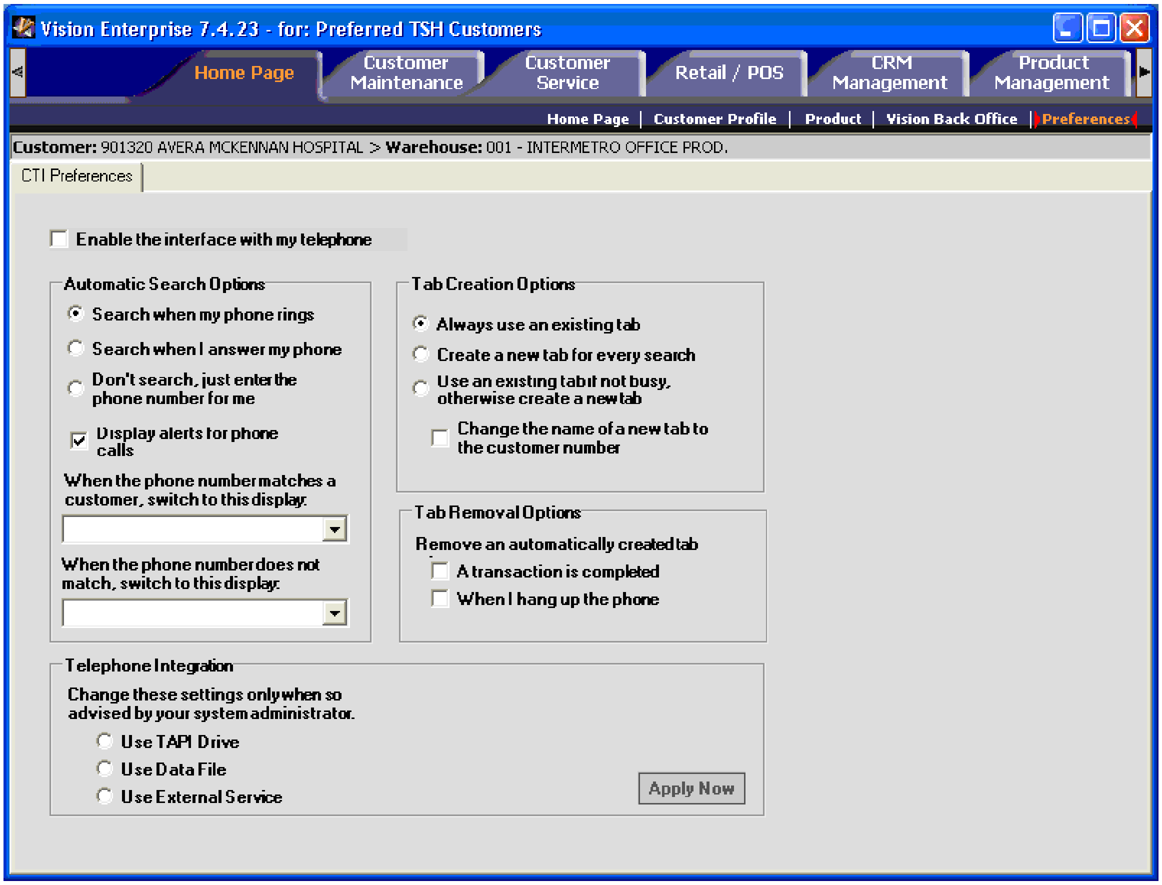
If entering a range of consecutive numbers, Enter the first number in the “Starting Number” field, and the last number in the “Ending Number” field. Click the “Add Range of Numbers” button to generate the list of entries.

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:



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

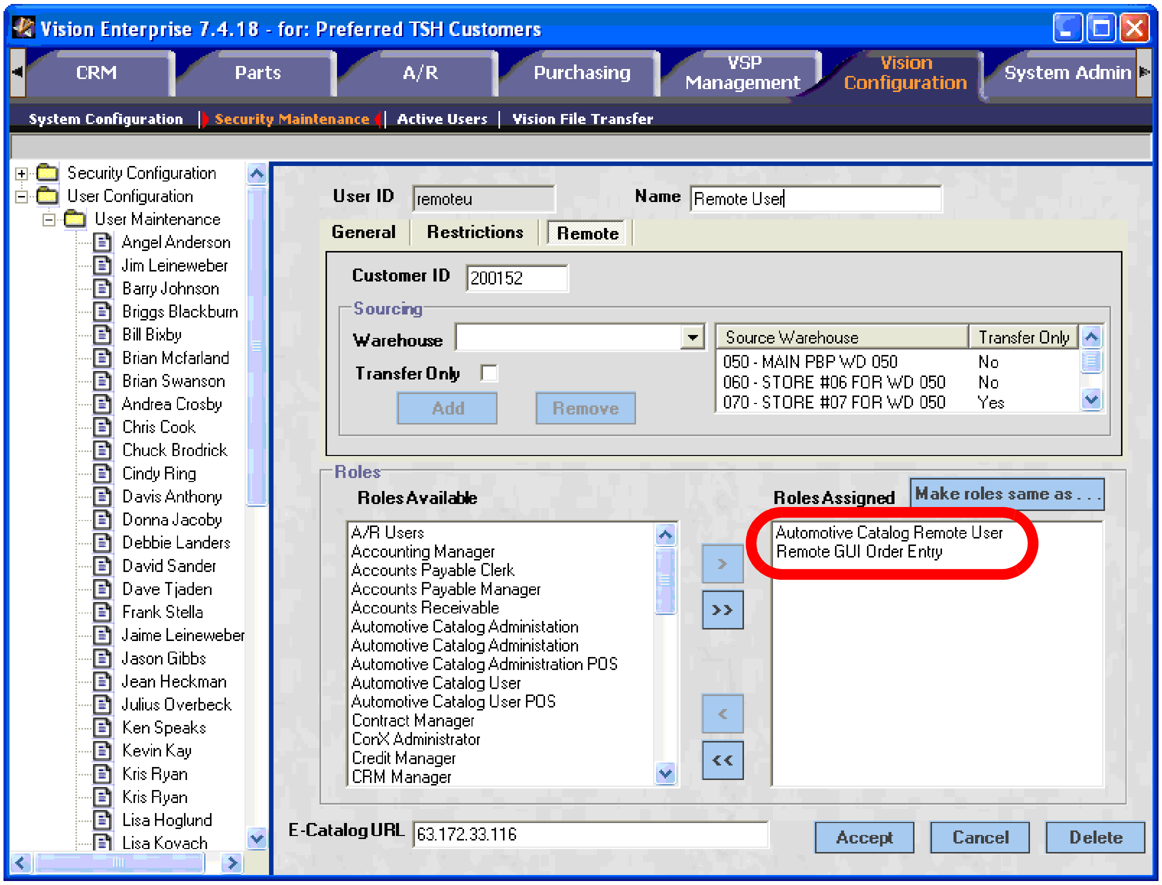
Activant Vision™ 7.4 provides the ability for a customer to enter an order into Vision GUI remotely. With a restricted login, the customer can enter orders and use the catalog, but not change any part of the system or see proprietary information.

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.

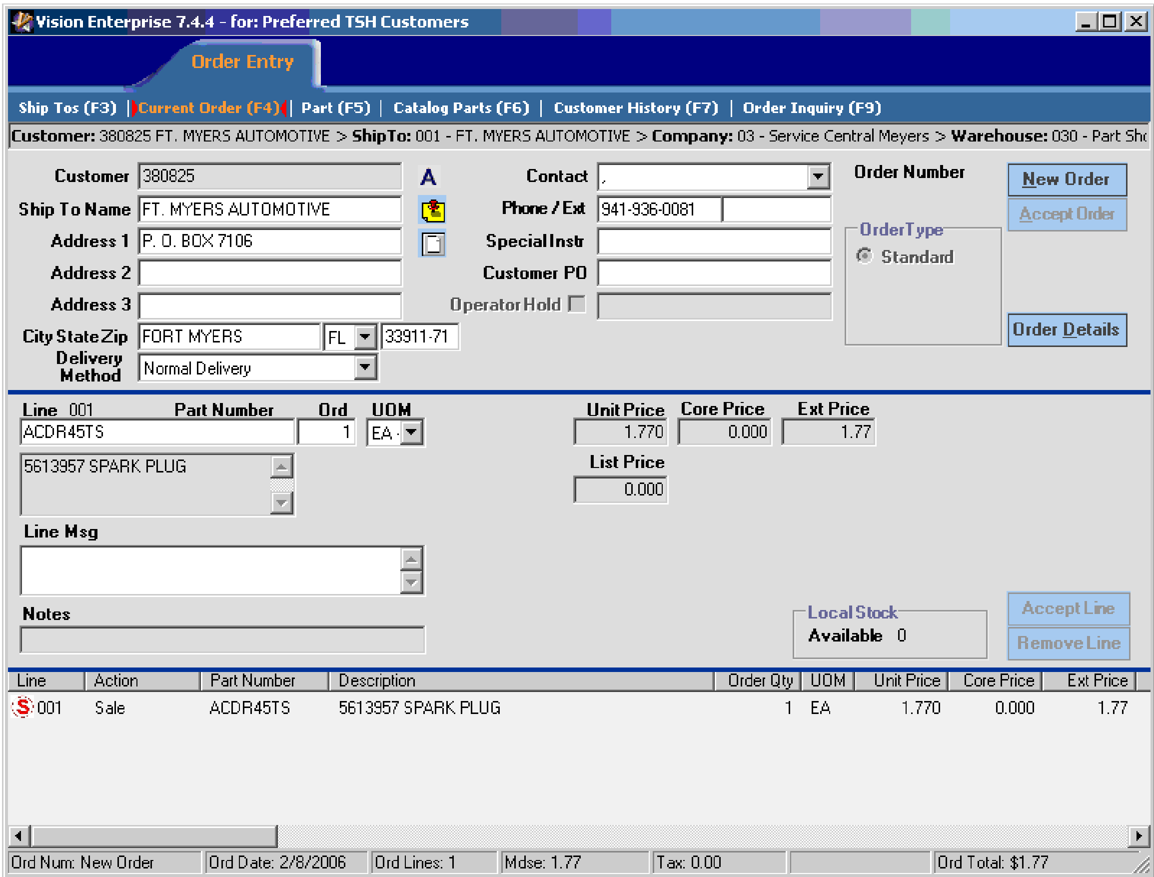
Assign them only the job roles Remote GUI Order Entry and Automotive Catalog Remote User.



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:

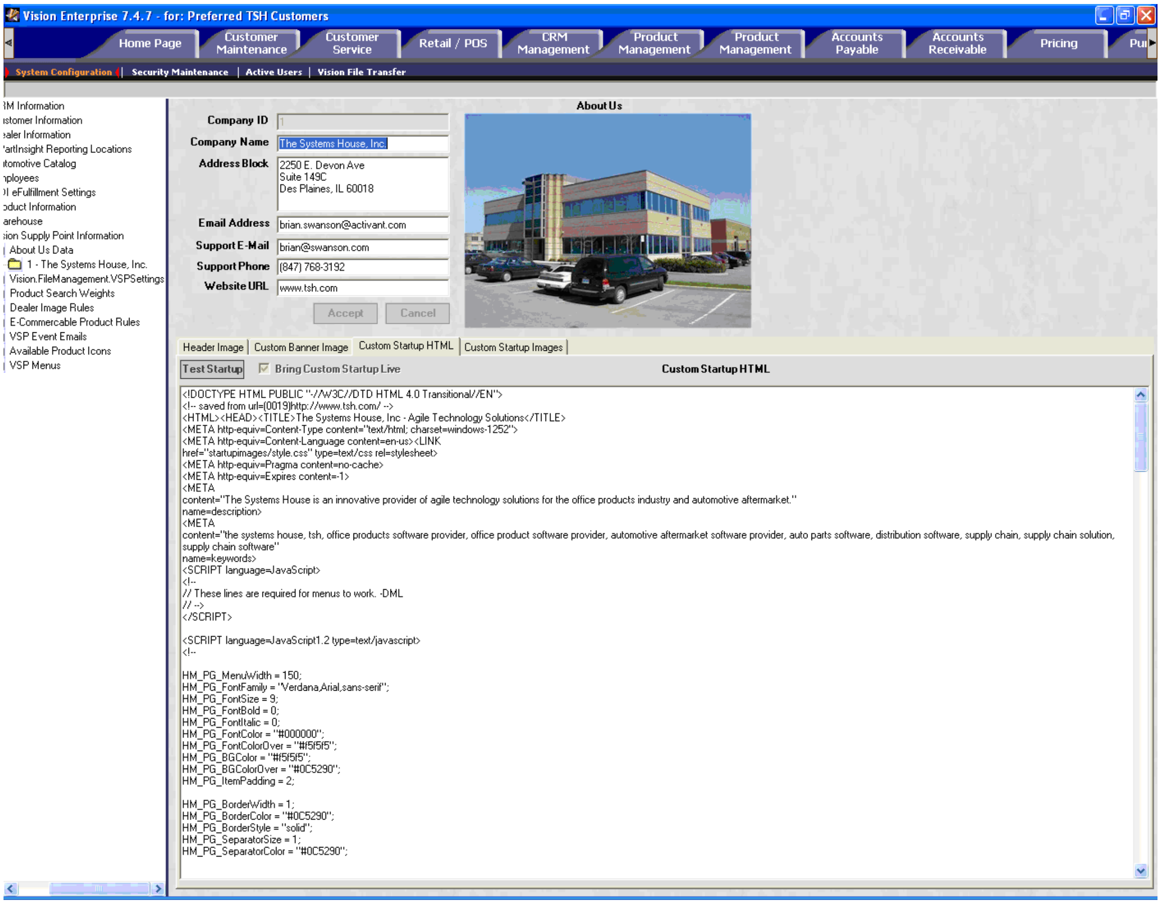
- At least one line dedicated to a bisync modem. This modem should be capable of using the Bell 201C protocol. The UDS2140 modem currently in use by customers can be used.
- A CLEO SYNCcable+. This is used to convert synchronous communications to asynchronous communications.
- A Windows PC which will 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.



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.

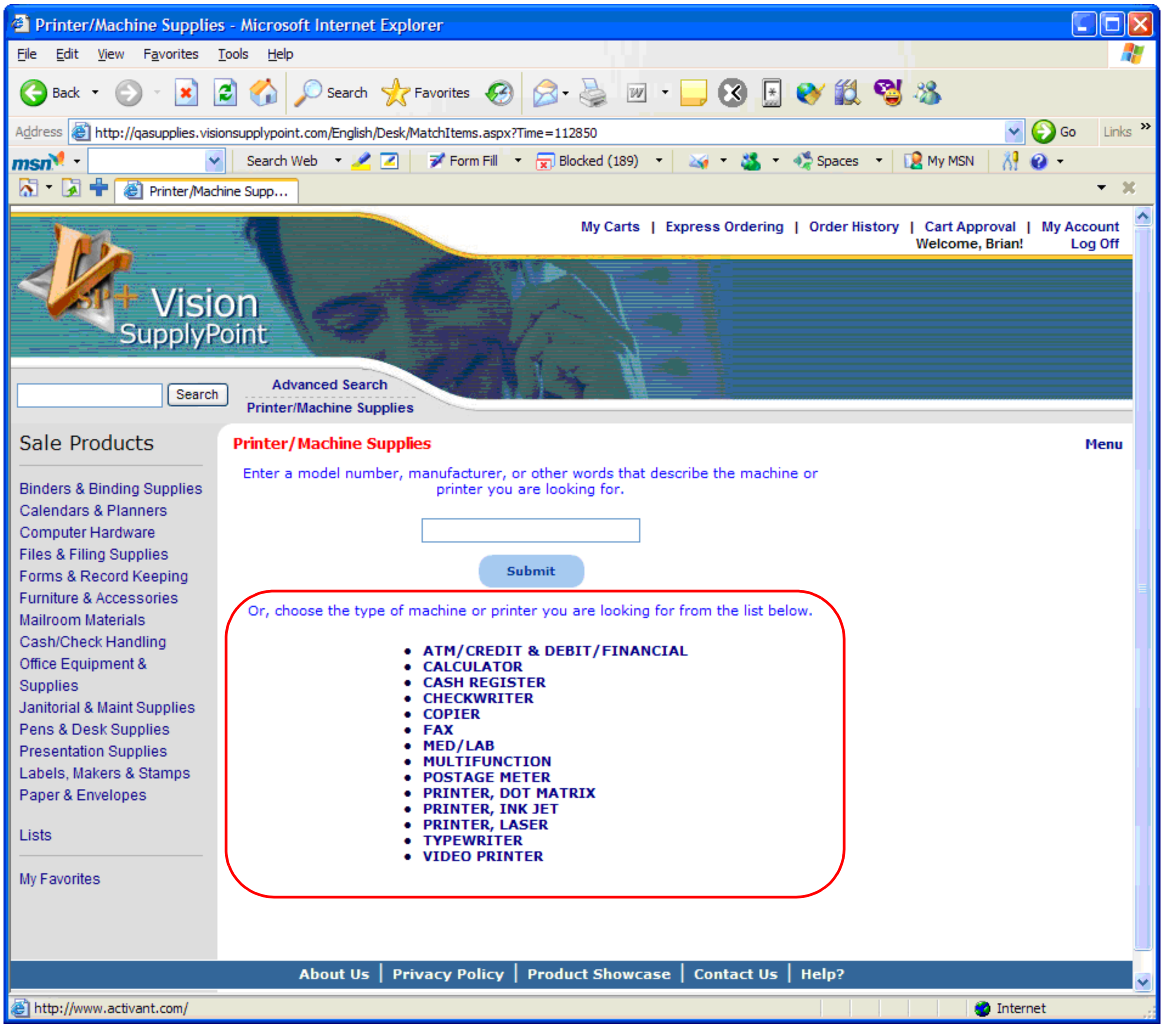
Note: Only BMP, JPG, and GIF files may be uploaded. Each image must reside in a subdirectory called “startupimages”. Any HTML that references these images must refer to them using the general format “startupimages/imagename.ext”.

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.

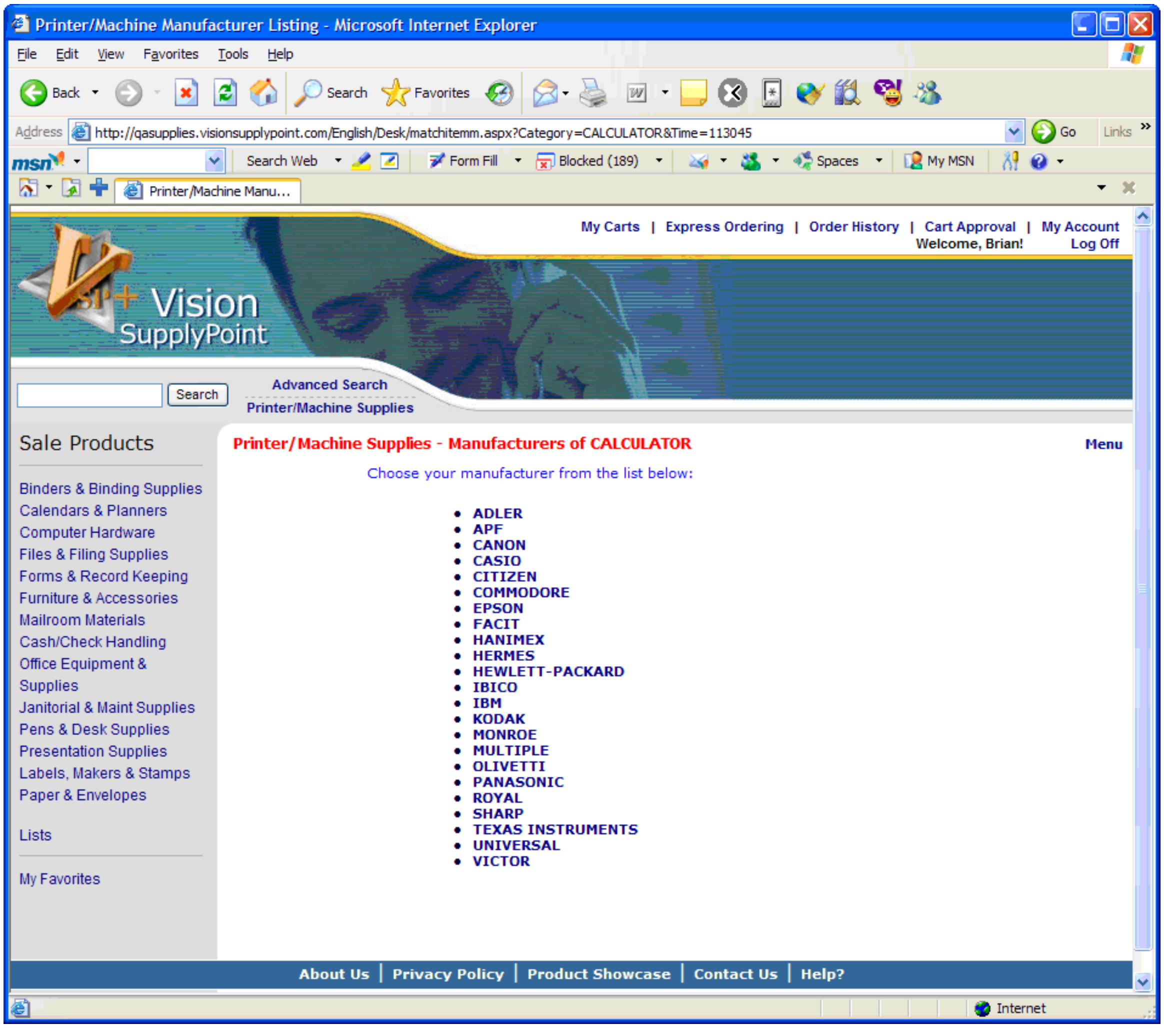
A new section has been added to the existing machine matching page that provides the list of possible machine categories. For example, PRINTER DOT MATRIX, PRINTER LASER, FAX, CALCULATORS, etc. When you click on one of these links, a new web page is displayed, allowing you to further drill down into the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

Here is an example of the new search feature:

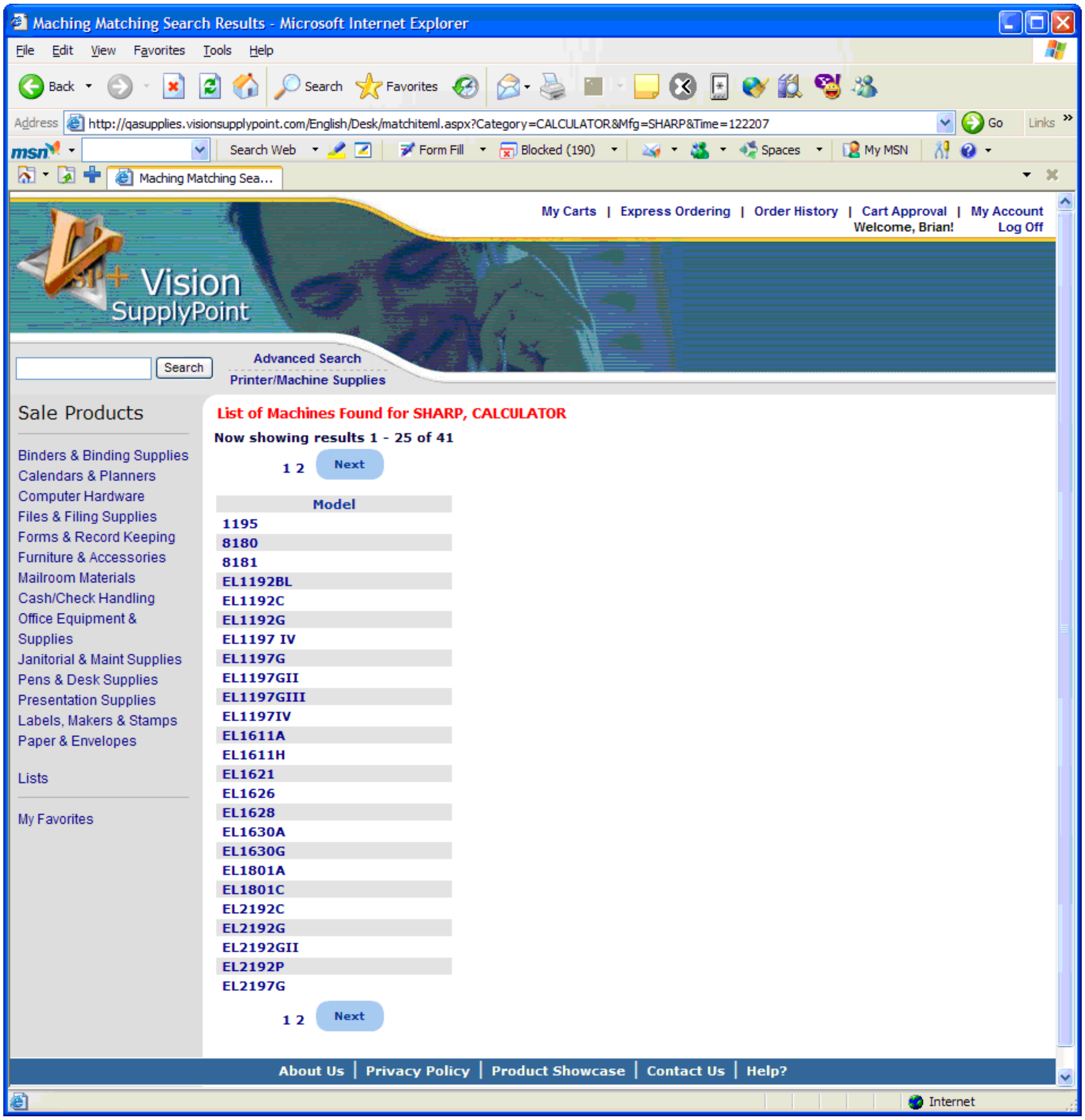


To start searching hierarchically, click on one of the machine categories.

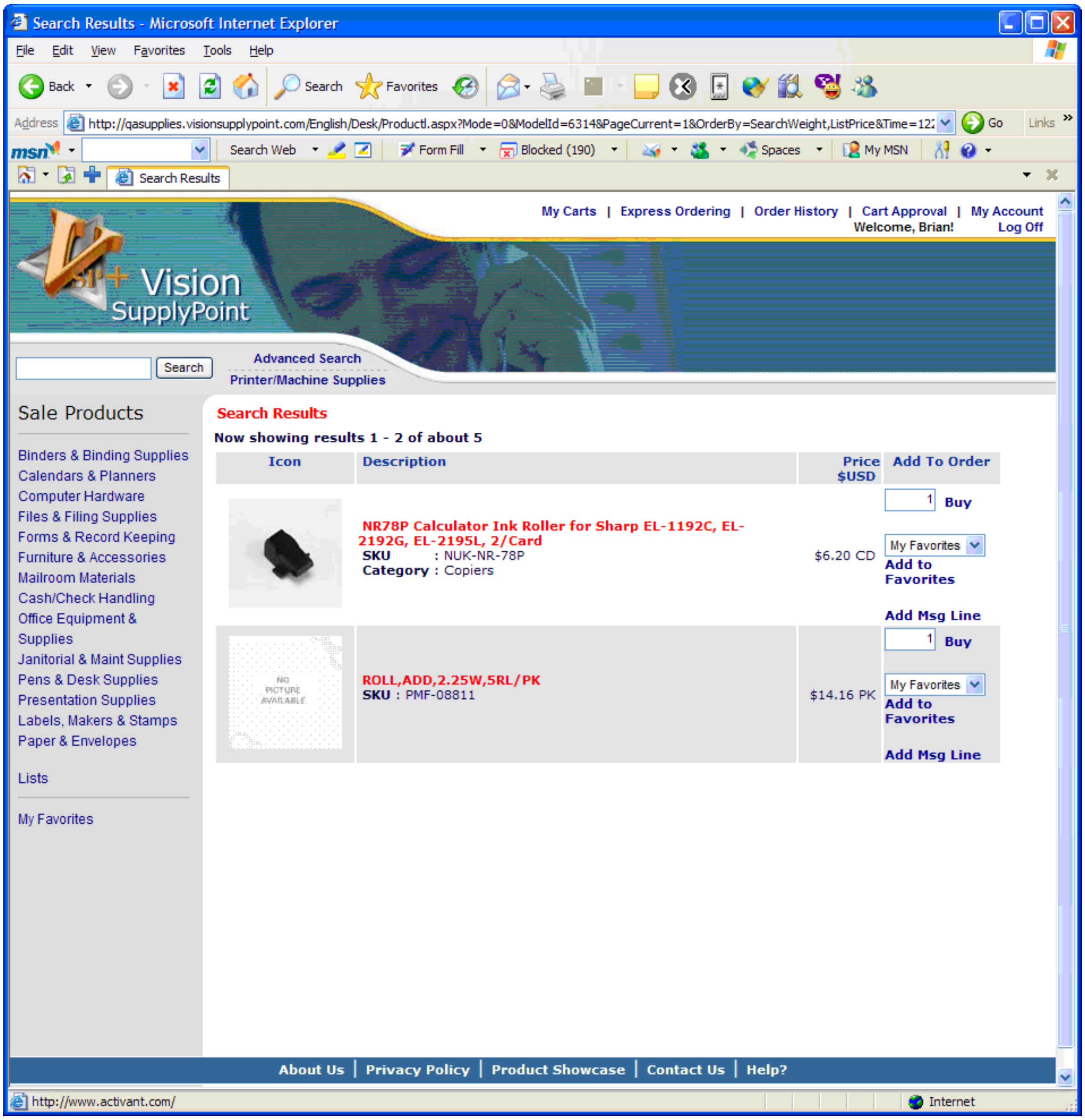
After clicking on a category, VSP+ shows a list of manufacturers of machines in that category:



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:



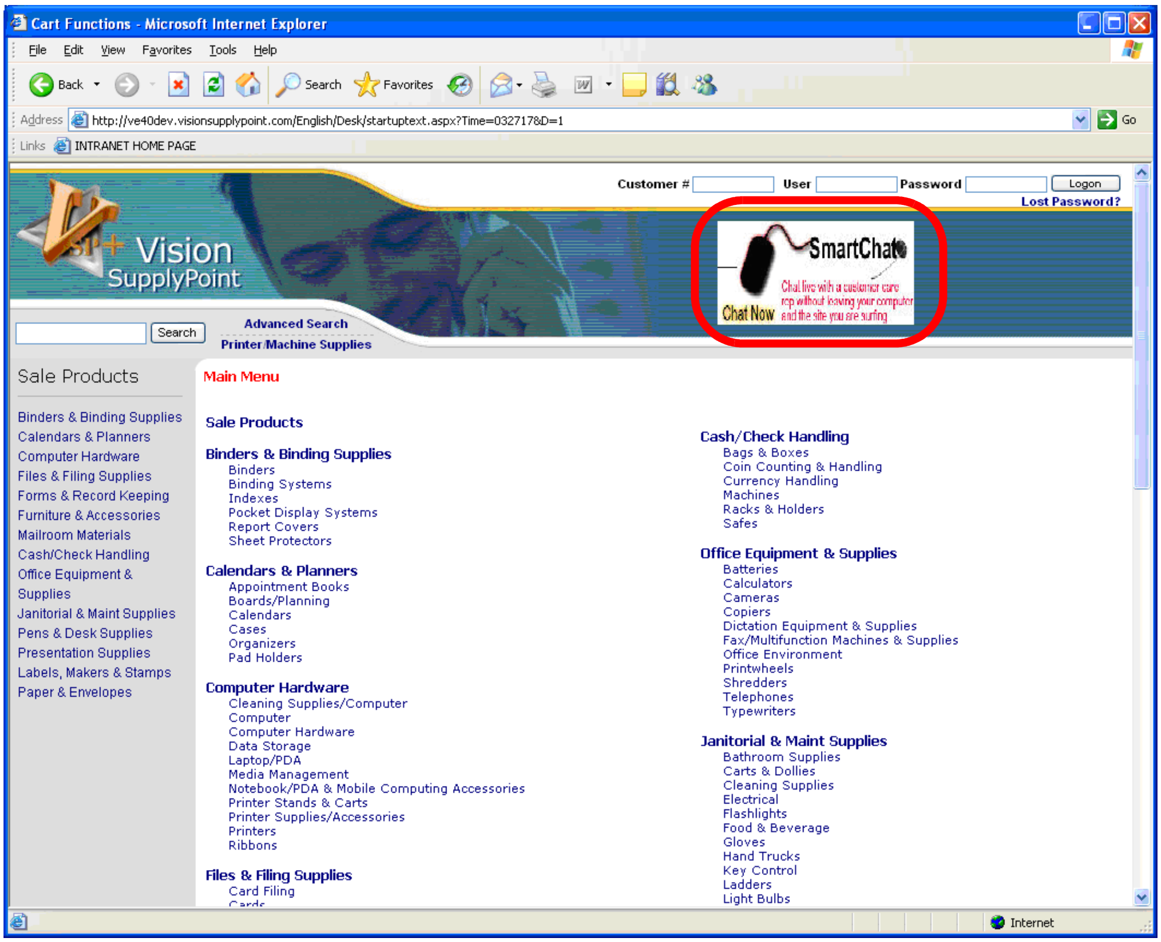
VSP+ Search Enhancements

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.

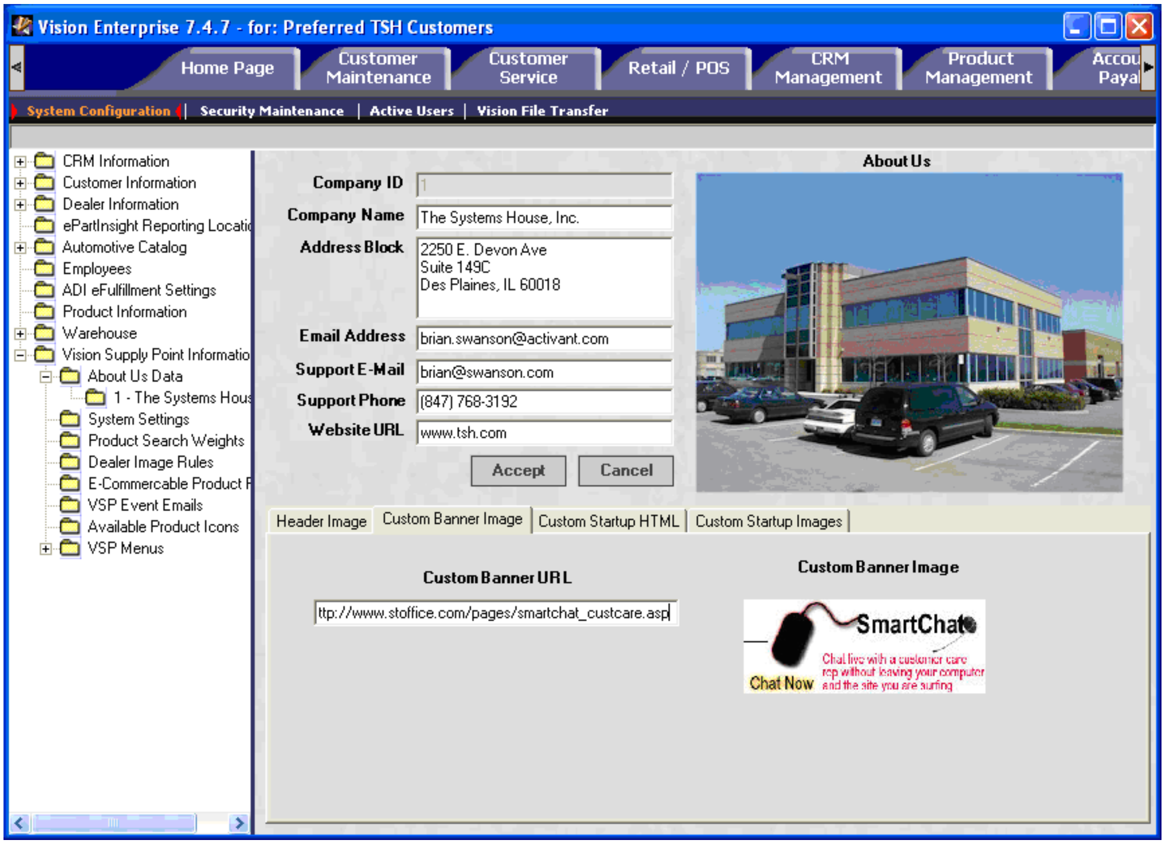
The new image and link displays in the header section, to the left of the user's shopping cart:



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.

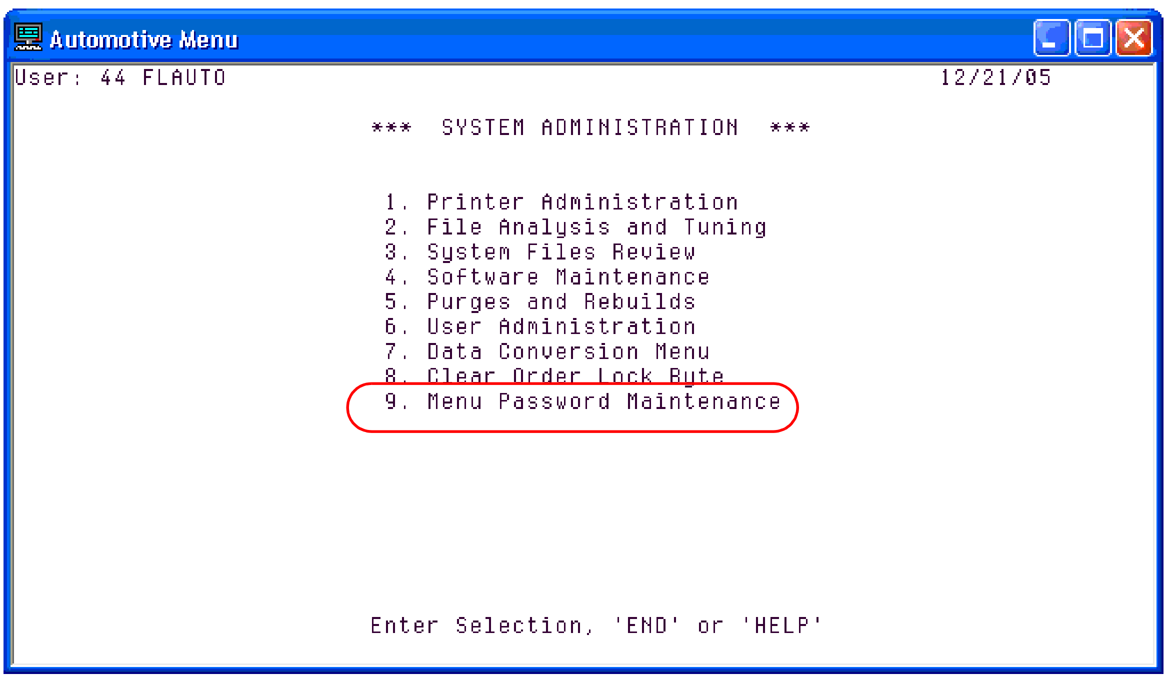
To configure this error message, go to VSP Management, “Vision SupplyPoint Information”, “About Us” maintenance to enter values for the “Support Phone Number” and “Support E-Mail Address” fields.

System Administration

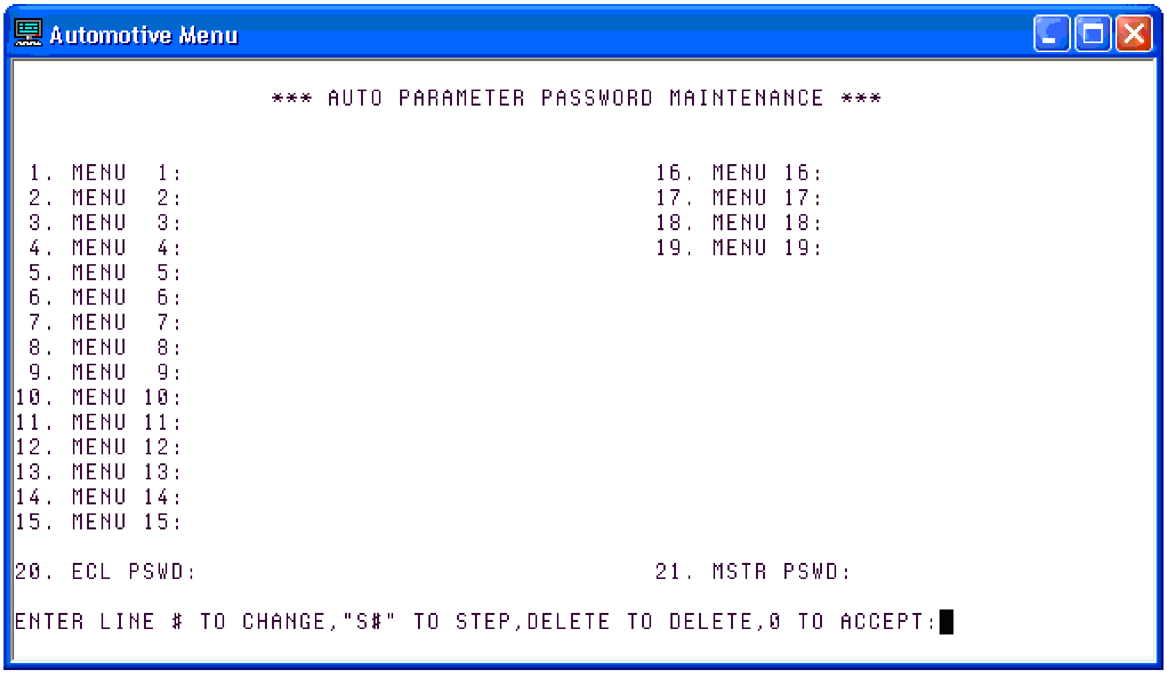
Backoffice Password

The Automotive Backoffice can now be secured by password. Each menu can have a different password. In addition, ECL has it’s 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.

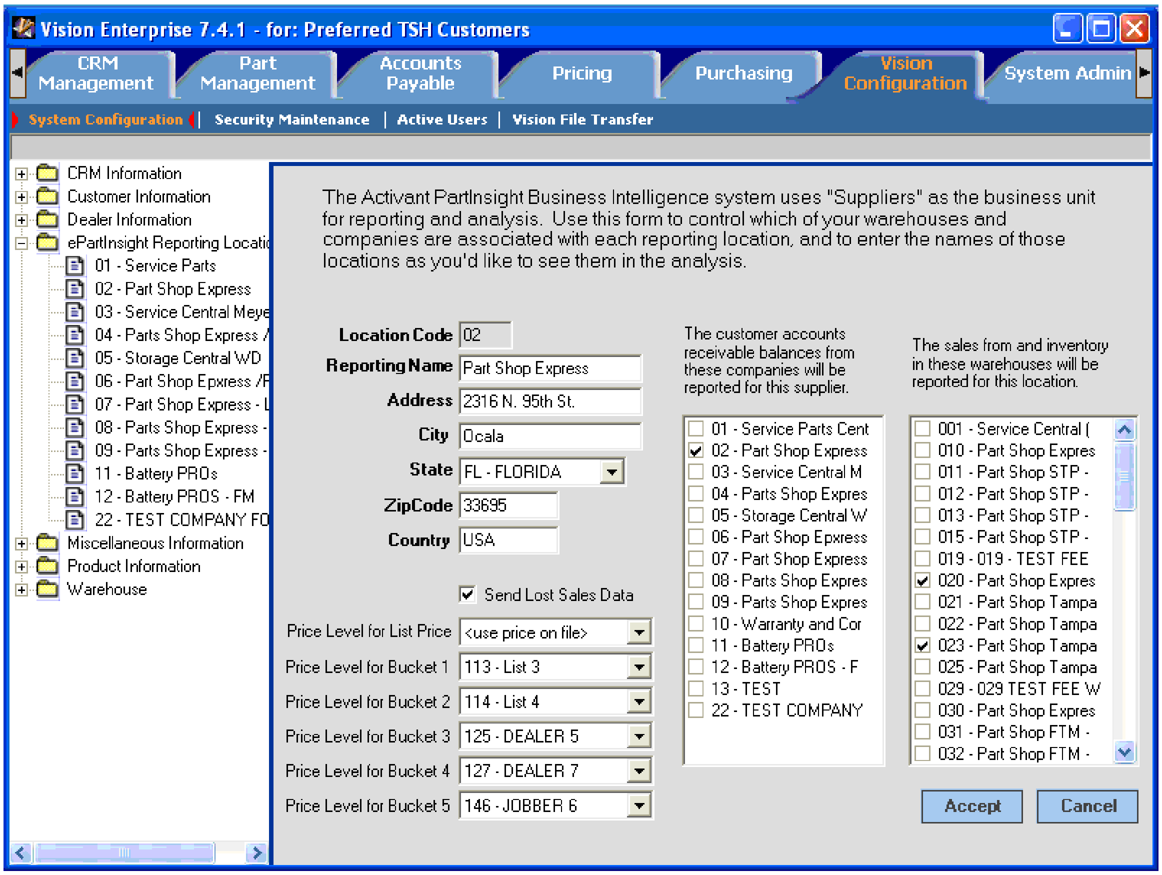
The Activant Vision™ 7.4 interface to ePartInsight has the following features:

- 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

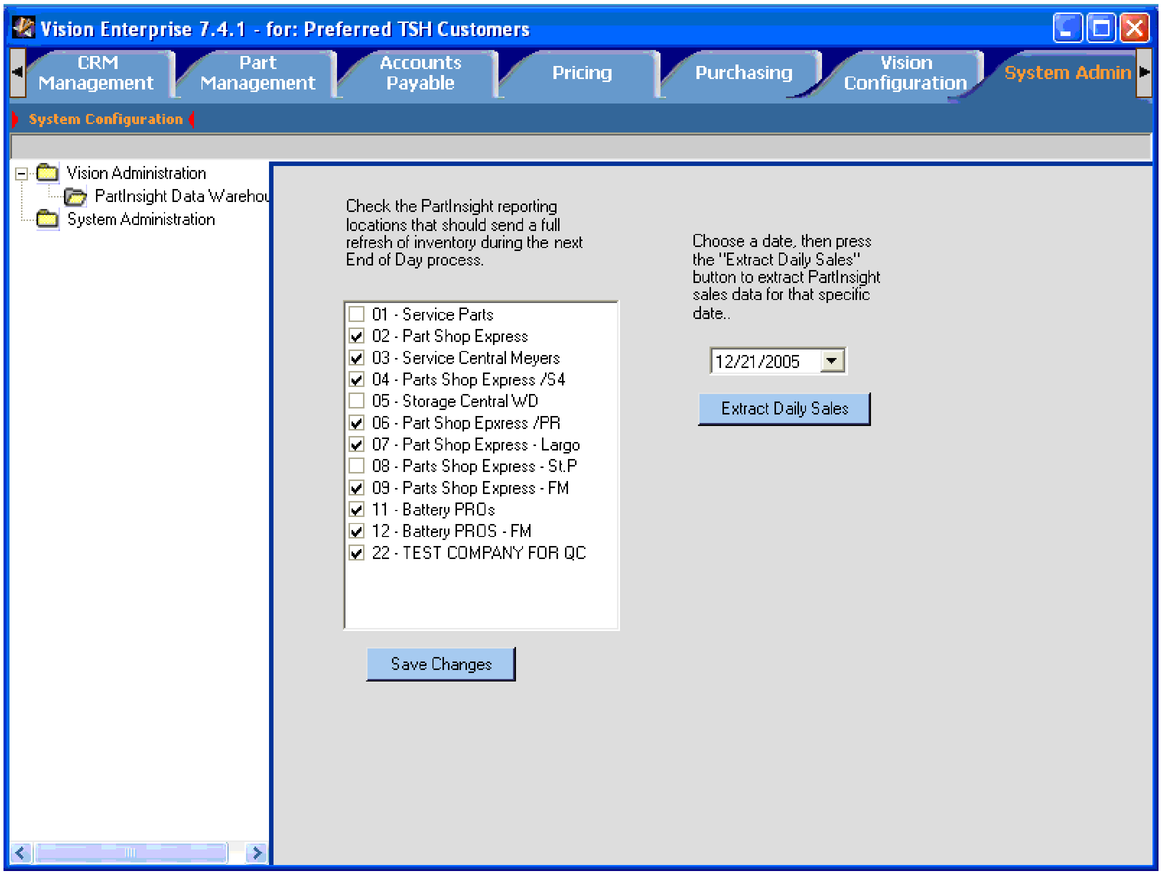


To properly configure your DataWarehouse feed using ePartInsight, contact your DataWarehouse/ePartInsight administrator or the Activant help desk.

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

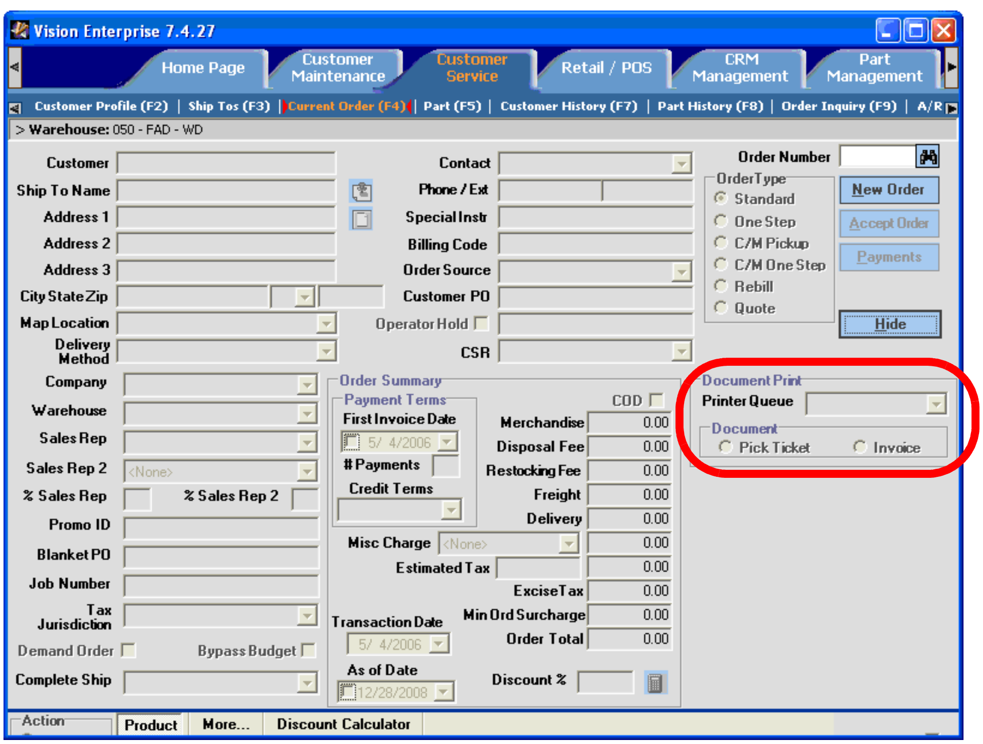
Two new programs will be added to the end of day process - one for inventory extraction, and the other for sales transaction extractions. Files older than two weeks are deleted by the end-of week process.

Supplementary Enhancements

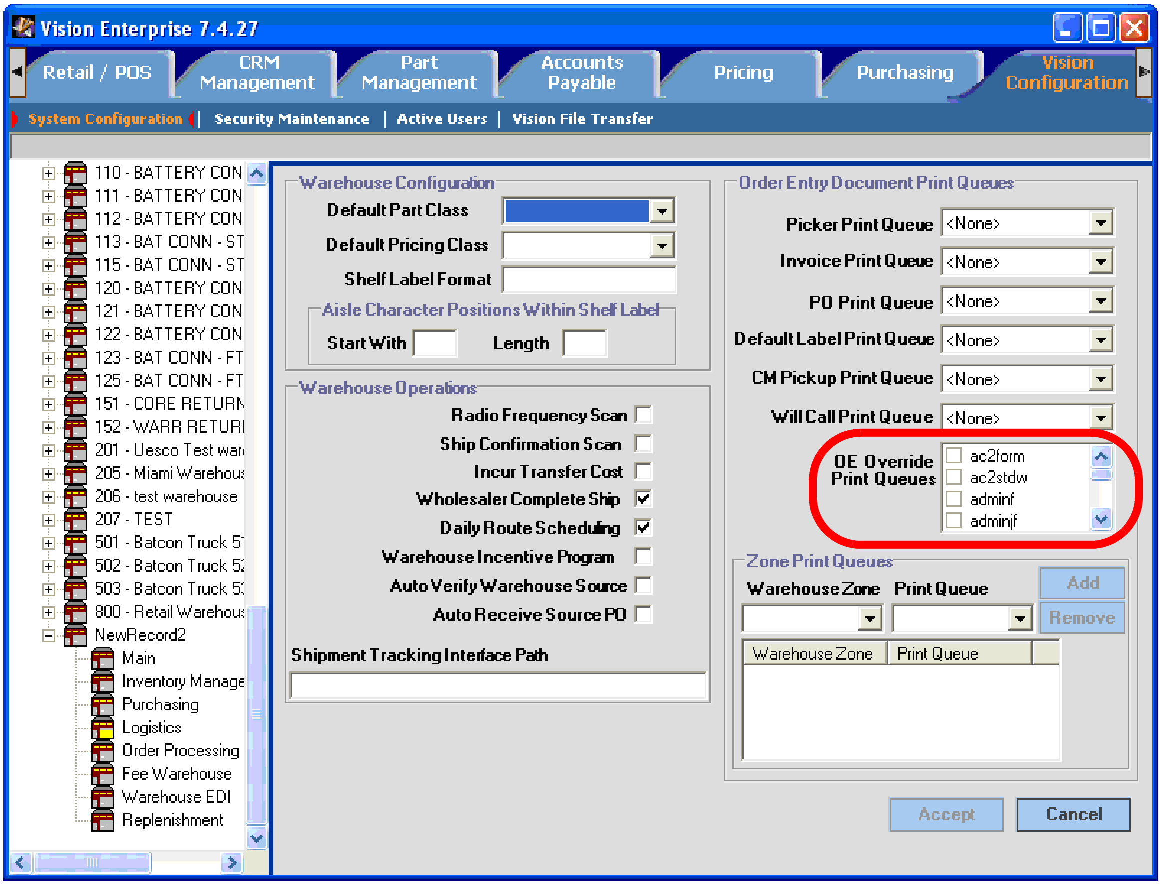
Printer Selection in Order Entry

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

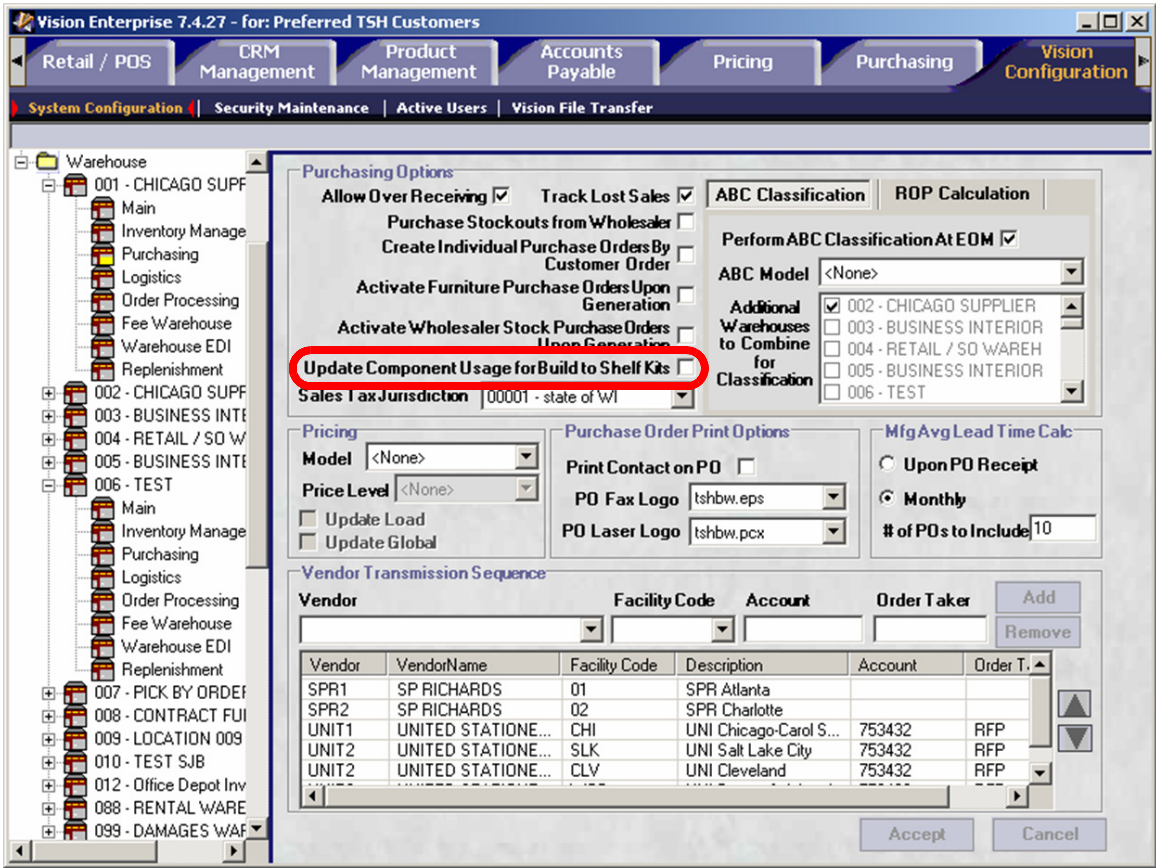
Vision supports two kinds of kits; Build-to-Shelf Kits and Demand Kits. A Demand Kit is not assembled until the pick ticket is processed. A Build-to-Shelf Kit is pre-assembled and appears as only a single line on the order.

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 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:



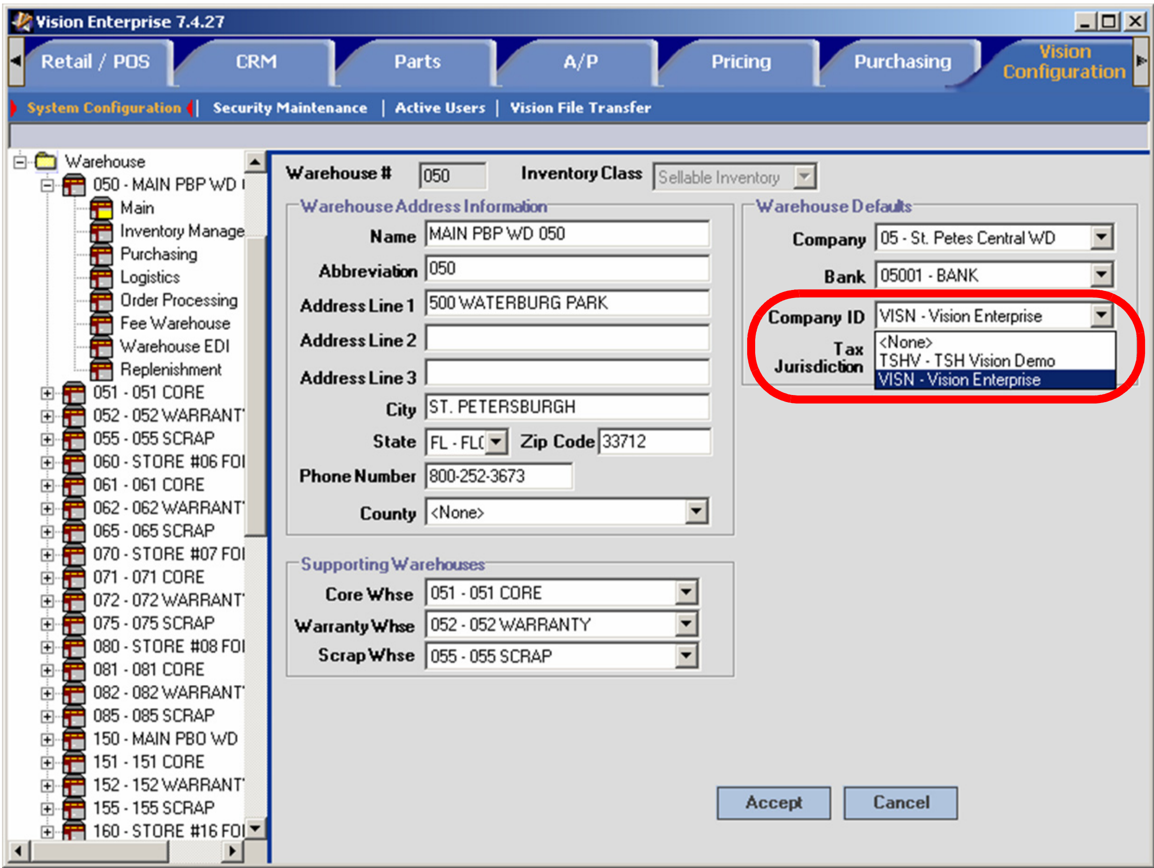
If the box is checked, the component usage is updated during PO acceptance. If the box is not checked, usage is not updated at the warehouse level.

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:

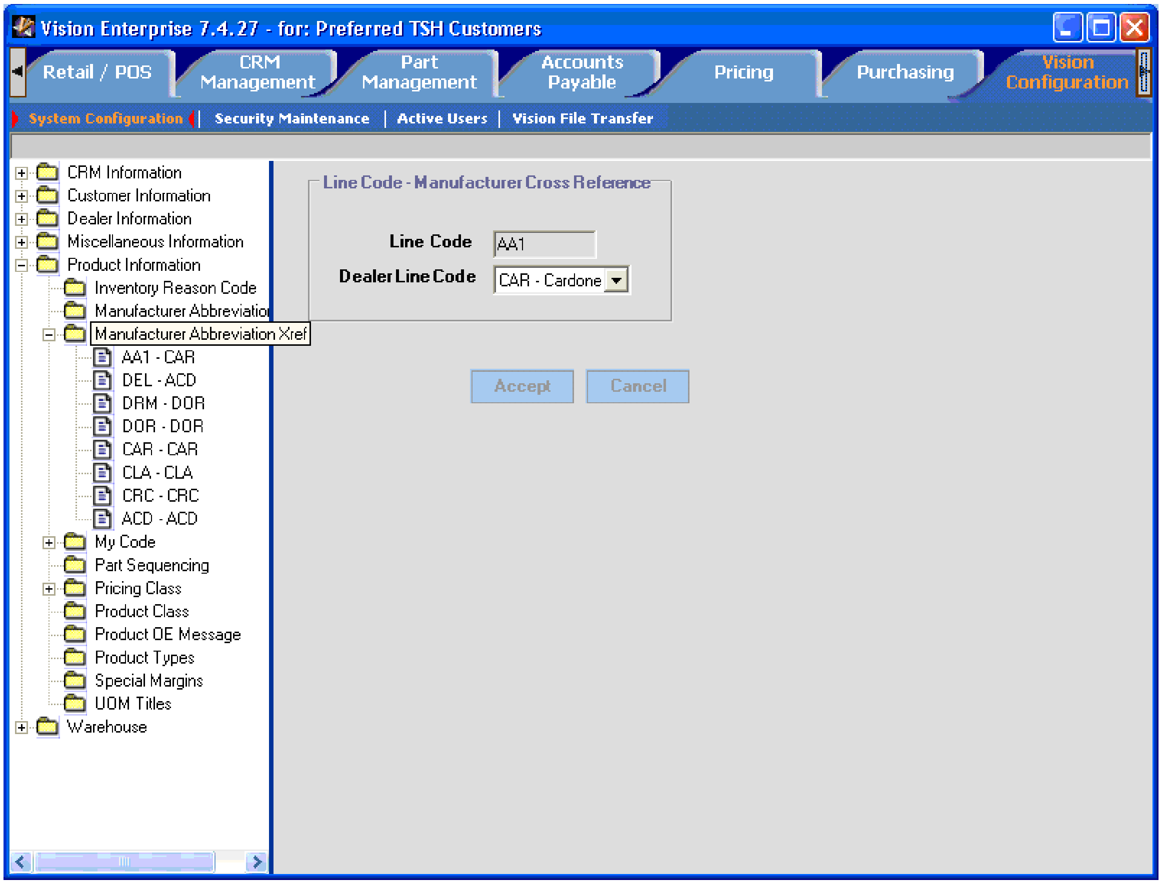


Barcode Expert Import

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.

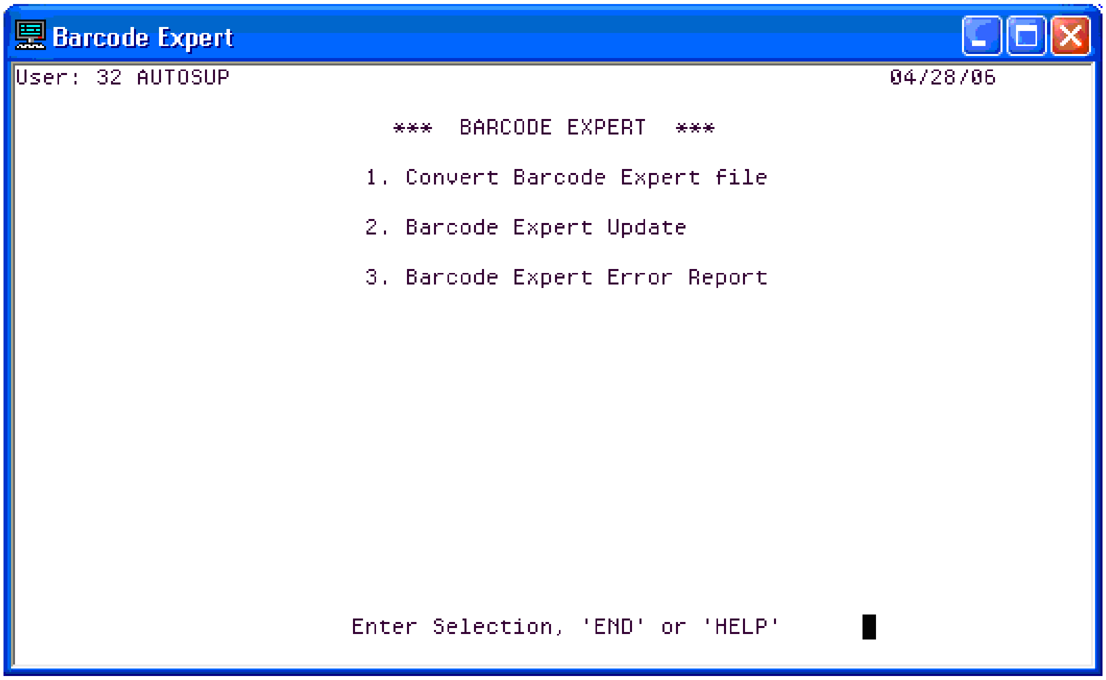
You need to do this for each Manufacturer Abbreviation, even if the abbreviation matches the Line Code in the barcode file.

Import

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

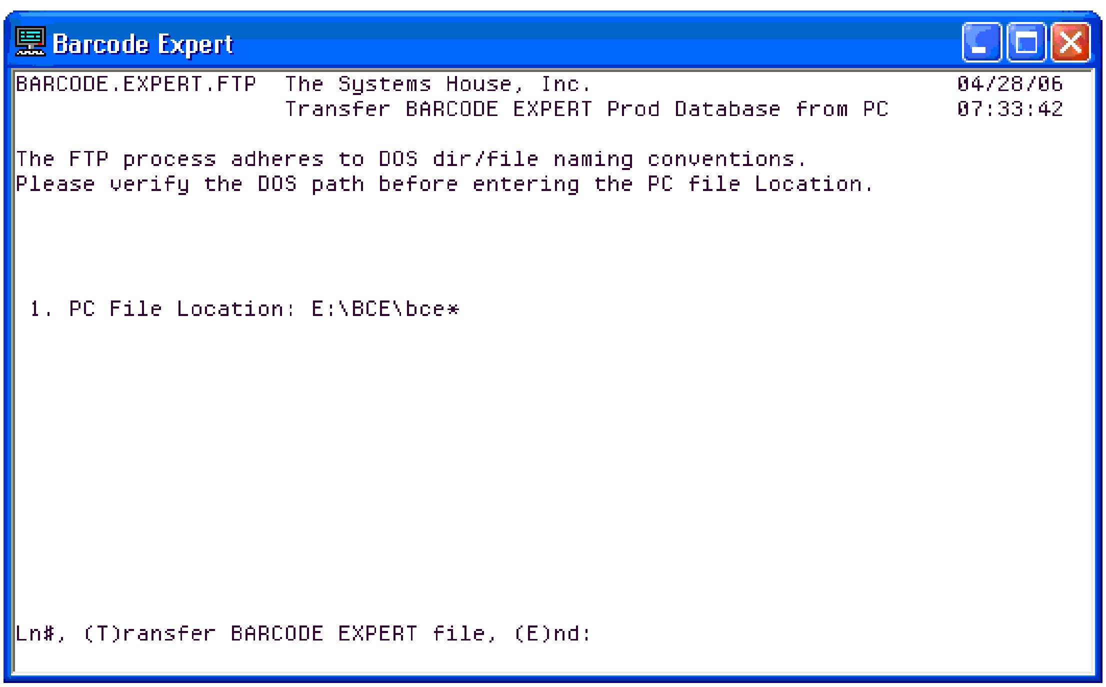
To import the file:

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.

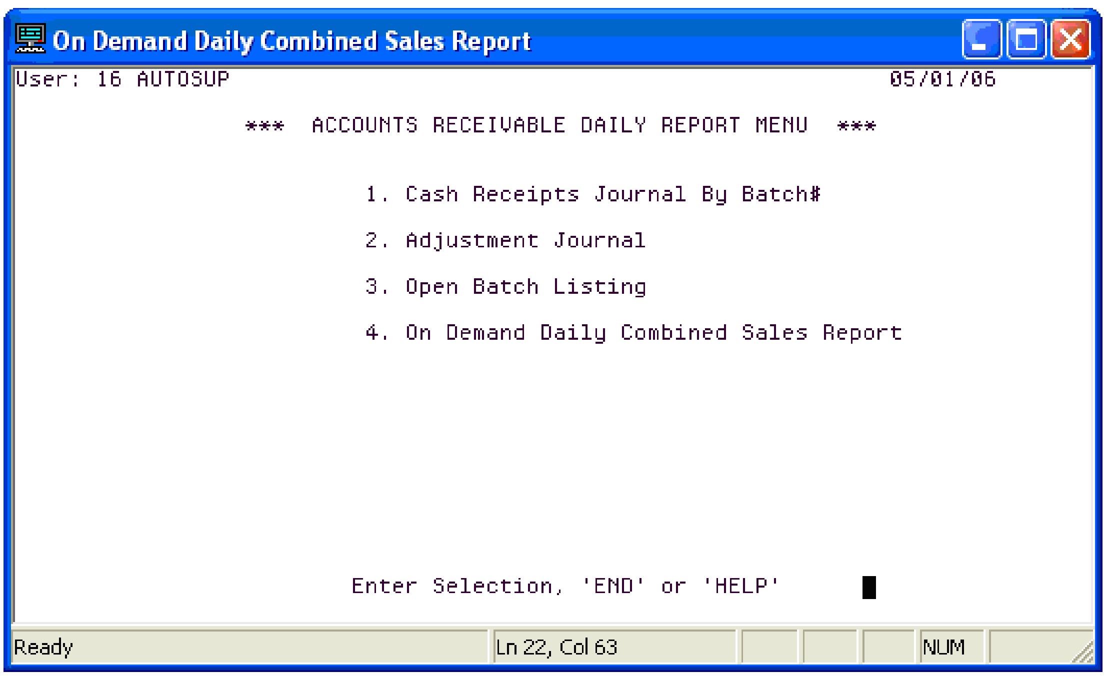
Vision updates the Barcode Expert file. This can take quite a long time. You may want to do it over the weekend, or at night.

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.

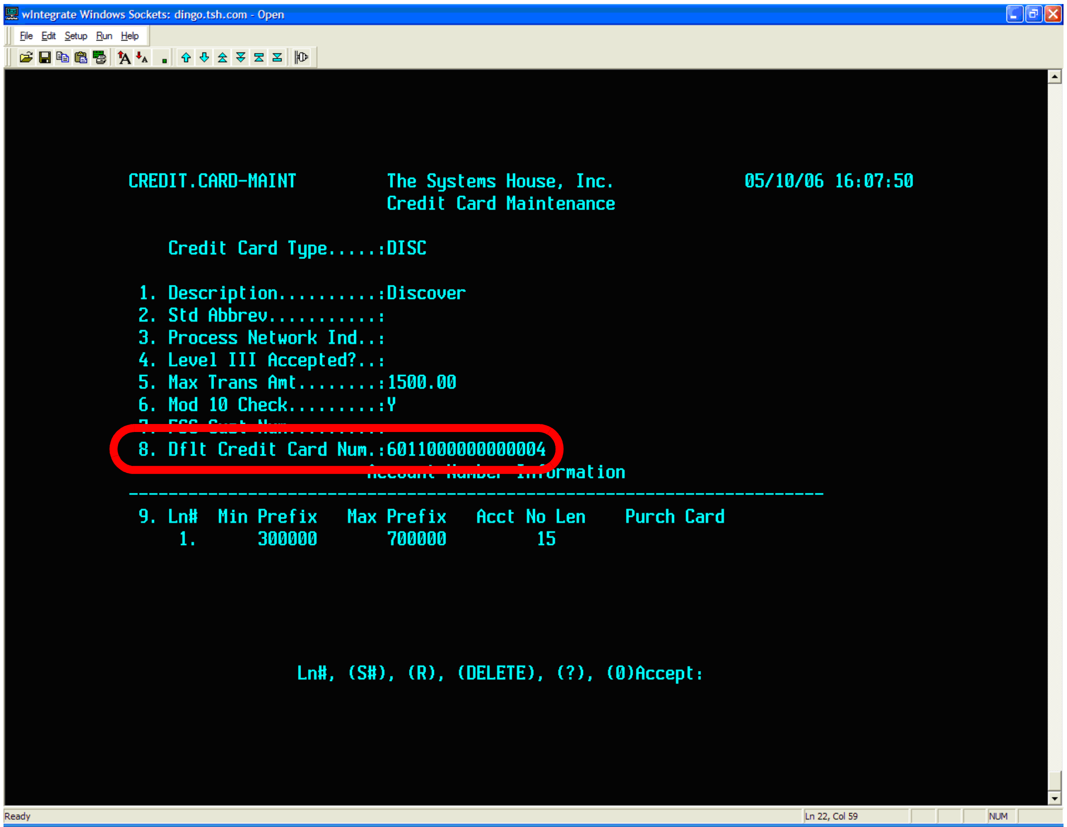


When the program asks, enter the location for which to run the report.

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.

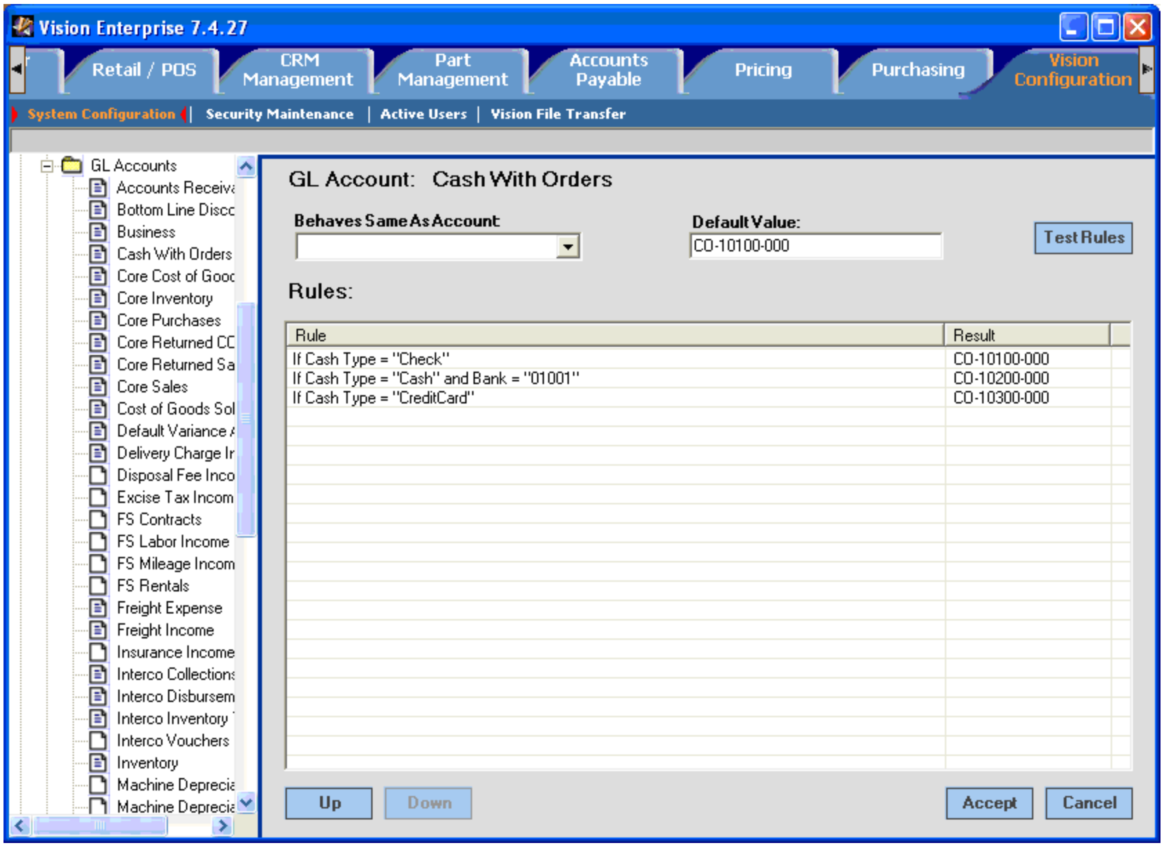
To set up the default credit card number, enter a credit card number in item 8 of Credit Card maintenance:



Cash Type in General Ledger

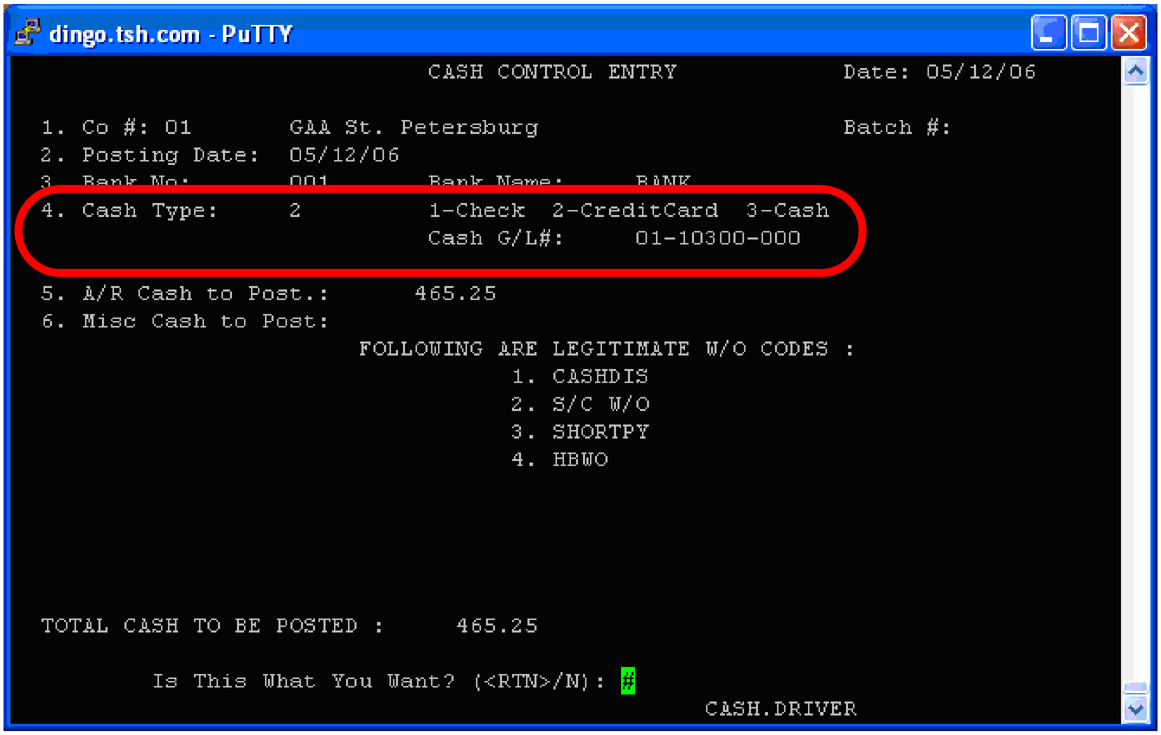
Vision previously used the Bank record to determine the cash general ledger number. Orders are allowed to have only one bank but may have multiple payment types. You may now use the GL Rules to determine the general ledger number. The GL Rule “Cash With Orders” is available for this purpose, and has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