

The logo for STORIS, featuring the word in a bold, dark blue, sans-serif font. The letter 'O' is replaced by a yellow four-pointed star with a white center, set within a white circle. The letters 'S', 'R', and 'I' have a slight shadow effect.The logo for Vision9, featuring the word in a dark blue, sans-serif font. The letter 'V' is stylized with a yellow and white gradient. The number '9' is also stylized with a yellow and white gradient. The text has a slight shadow effect.

Enhanced Features Guide

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What's New in This Release?

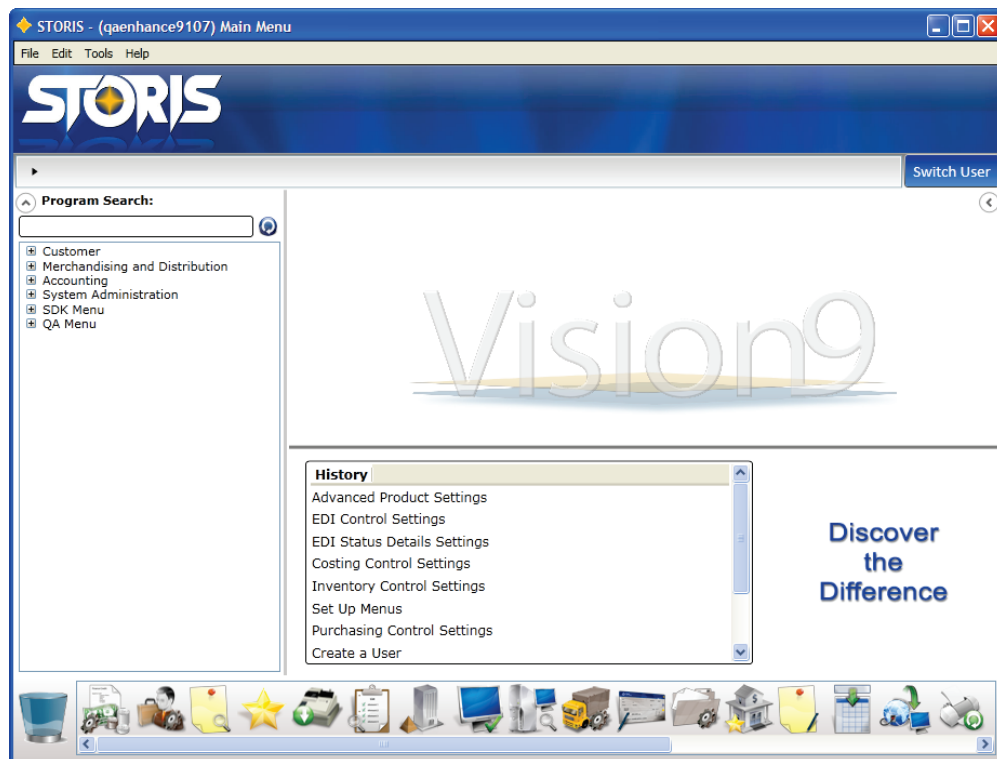
STORIS Has a New Look!

STORIS Vision9 has been redesigned with a new look and feel that includes user-friendly screens and new navigational tools. Moving around in STORIS and accessing processes already familiar to you is more efficient with our new program search, breadcrumbs, and history features. Quick Launch icons, as well as navigational buttons within applications are easier to see and use. The following describes the key features of the redesign. For enhancements to processing within the STORIS Vision9 product, see the Enhanced Features section.



Main Menu Screen

- ◆ Enriched graphical displays
- ◆ New look and feel, with the same stable development foundation



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Program Search

- ◆ Just start typing, and a list of possible options appears
- ◆ Easily select a program from the search results

Program Search:

Enter a sa

- Enter a Floor Sample Transfer
- Enter a Quick Sale
- Enter a Reconciliation Transaction
- Enter a Sales Lead
- Enter a Sales Order
- Enter Statement Messages



Historical Intelligence

- ◆ Easily accessible list of your previous actions
- ◆ Double-click to run the routine

History

- Build a Transfer Manifest
- Report Open Sales Order Summary
- Enter a Sales Order
- View Customer Activity
- Enter a Customer Payment/Refund/Gift Certificate
- Enter a Shopping Cart
- Cost Center Settings
- Enter a Quick Sale
- Report Bar Code Manifest Verification
- View an Existing Account Budget

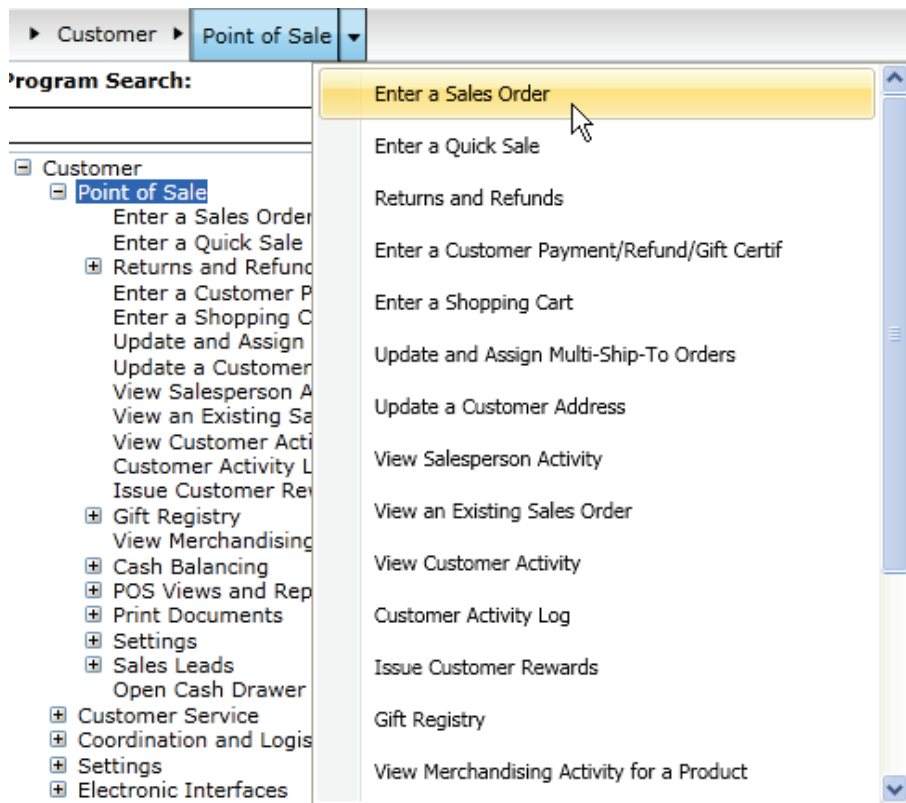
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Bread Crumbs

- ◆ Shows menu path for selected program
- ◆ Click to go back to previous menu level
- ◆ Click to access listing of programs in a category



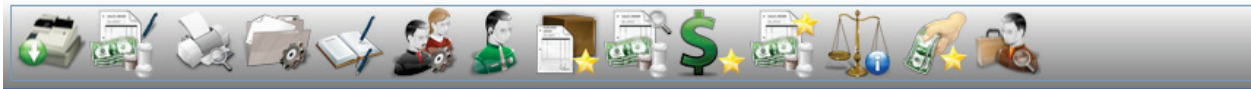
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Quick Launch Icons

- ◆ Increased visual parameters
- ◆ Additional icon differential
- ◆ Large toolbar allowing for more icons



- ◆ Right-click on the icon and select Remove to delete an icon from the launch pad



- ◆ Click and drag an icon to the waste basket on the left to remove the icon from the launch pad



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Application Screen Format

- ◆ Improved user experience configurations
- ◆ Increased security while streamlining navigation
- ◆ Dynamic multi-tabbed screen layouts

The screenshot displays the STORIS application window titled "STORIS - (qaenhance9107) View Customer Activity". The interface includes a menu bar (File, Edit, Tools, Help) and the STORIS logo. Customer information is shown: Customer Code 8812012, Home Phone 999 999-9999, and Name JAS. A navigation pane on the left lists tabs: Customer History, Accounts Receivable, Purchases, Service, General Info, Deposits, Deposits History, and Open Orders. The main area shows financial data: Credit Limit 1.00, Deposits 4460.00, A/R Balance -186.27, Work Phone -, and Extension -. Below this is a table of orders with columns: Order Number, Type, Ord Date, Merch, Other, Total, Amt Paid, and Balance. The table lists 8 orders and a TOTALS row. At the bottom, there are navigation icons: a question mark, a refresh button, and a close button.

Order Number	Type	Ord Date	Merch	Other	Total	Amt Paid	Balance
882207	ORD D	01/03/12	200.00	12.00	212.00	212.00	0.00
882005	ORD D	12/12/11	800.00	98.00	898.00	898.00	0.00
882001	ORD D	12/12/11	100.00	56.00	156.00	156.00	0.00
881979	ORD D	12/08/11	400.00	74.00	474.00	0.00	474.00
881975	ORD D	12/07/11	100.00	56.00	156.00	0.00	156.00
881922	ORD D	12/02/11	200.00	32.00	232.00	232.00	0.00
881809	ORD D	11/23/11	200.00	62.00	262.00	0.00	262.00
881808	ORD D	11/23/11	200.00	62.00	262.00	0.00	262.00
TOTALS			4900.00	714.00	5614.00	4460.00	1154.00

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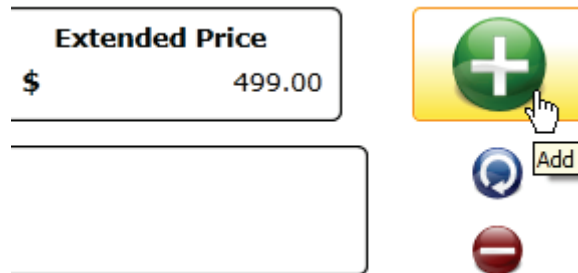


User-Friendly Navigation Tools

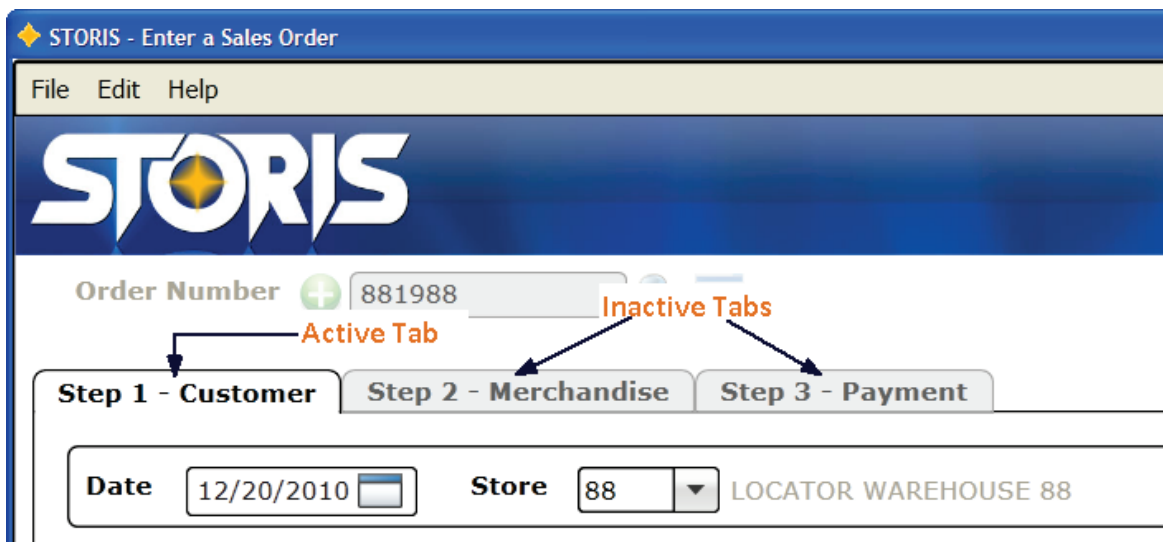
- ◆ Easy to see navigation buttons



- ◆ Hover text identifying button actions



- ◆ Fully activated tab focusing



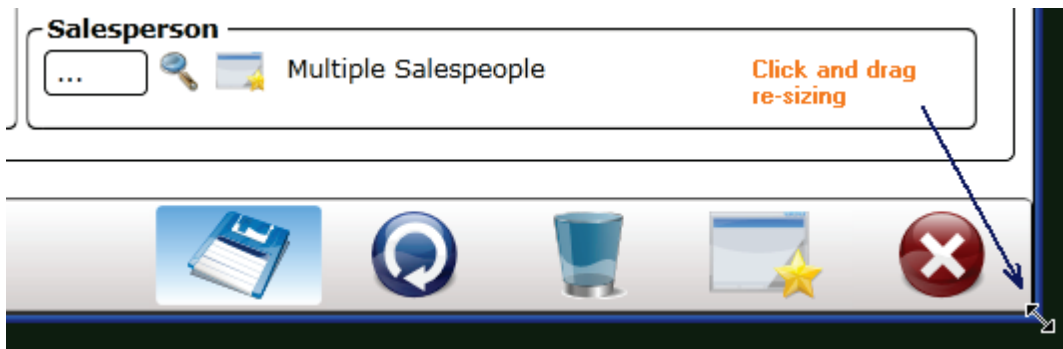
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Scalable Screen Rendering

- ◆ Resize without resolution restrictions
- ◆ Resize without losing information
- ◆ Ideal for mobile devices



Grid Display Actions

- ◆ Double-click grid line to select line

Customer History Accounts Receivable Purchases Service

84 MAIN AVE
MT ARLINGTON, NJ 07856

Document Filter A All Transactions

Transaction	Type	Date	Product Code	Description	Qty	Price
881648*1	ORD	11/22/10	JAS1	JORGES STCK PRODUCT 1	1	200.00
2 111183*1	ORD	10/19/10	MO2	MO 2ND PROD	1	1025.00

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- ◆ Right-click grid line and select More Details to view transaction details

Customer History Accounts Receivable Purchases Service

84 MAIN AVE
MT ARLINGTON, NJ 07856

Document Filter A All Transactions

Transaction	Type	Date	Product Code	Description	Qty	Price
881648*1	ORD	11/22/10	JAS1	JORGES STOK PRODUCT 1	1	200.00
2 111183*1			MO2	MO 2ND PROD	1	1025.00

- ◆ Right-click grid line and select Export Grid Data to export the contents of the grid to a file (comma separated, Excel spreadsheet, or XPS document)

Transaction	Type	Date	Product Code	Description	Qty	Price
881648*1			JAS1	JORGES STOK PRODUCT 1	1	200.00
2 111183*1			MO2	MO 2ND PROD	1	1025.00

- ◆ Double-click column header for on-the-fly grid re-sorting

- Down arrow identifies descending sort order
- Up arrow identifies ascending sort order
- Click arrow to reverse sort order
- Click again to return to default order

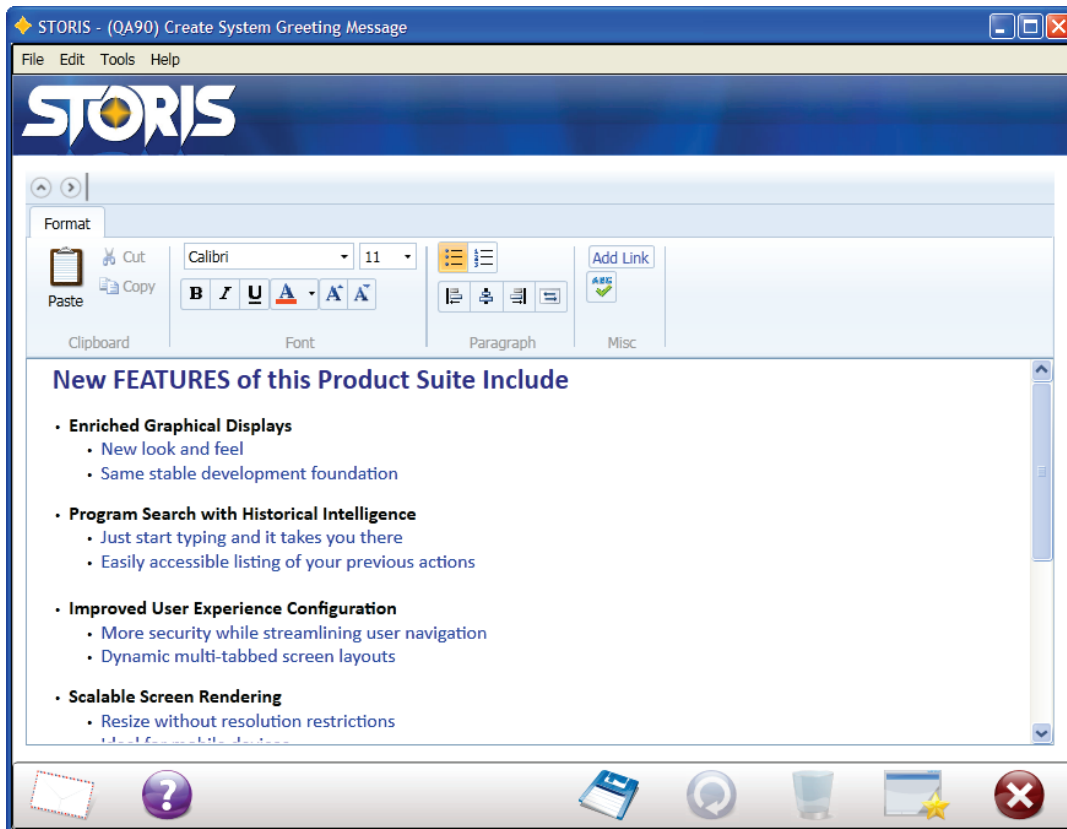
	Order Number	Type	Ord Date	Merch	Other	Total
1	881182	ORD D	10/19/10	999.00	59.94	1058.94
2	661489	ORD D	11/15/10	200.00	12.00	212.00
3	661485	ORD D	11/15/10	200.00	12.00	212.00
4	661474	ORD D	11/15/10	1200.00	72.00	1272.00
5	881553	ORD D	11/17/10	1000.00	107.70	1107.70
6	881552	ORD D	11/17/10	500.00	53.85	553.85
7	881801	ORD D	12/09/10	200.00	38.17	238.17

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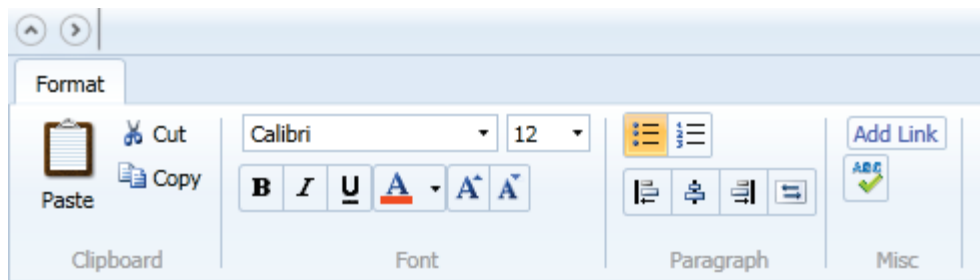
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Editing Tools in Create System Greeting Message



◆ The toolbar provides formatting options familiar to users of Windows® applications.



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Enhanced Features Guide

- ◆ Editing and formatting tools provide the ability to:
 - Change the font type, size, and color.
 - Cut, copy and paste text.
 - Apply bold, italics, and underline to text.
 - Add bullets or numbering to lists.
 - Change text alignment to left, center, right, justified.
 - Automatically check spelling.
 - Add hyperlinks to external files and web sites.

- ◆ Also included are options to expand the editing window and hide the toolbar.
- ◆ Greeting message text appears on the main menu screen for all users who log to that account.



Function Keys

- ◆ Certain Function Keys, located in the top row of your keyboard, are available as alternate methods of accessing often-used features in Vision9.
- ◆ Using these keys in place of the mouse, you can access the following functions.

Key	Where Available in STORIS	Function
F1	Available at the main menu screen and any STORIS screen where the context-sensitive Help button is available.	Accesses STORIS' context-sensitive On-Line Help. When you press the F1 key, a separate browser window opens, displaying a Help topic for the current routine or the Welcome topic if you accessed the Help from the main menu.
F2	Available at the main menu screen and any STORIS screen where the Messenger Mail button is active.	Accesses STORIS' Messenger Mail. When you press the F2 key, you access the Send/Review Mail Messages routine in STORIS Messenger where you can view all unread mail and tasks for the log-on user.

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Enhanced Features

The following is a brief overview of the enhanced features that have been added to STORIS' new Vision9 suite of products. This document is updated regularly. Check back often for the latest information. For further information on a particular feature or product, please contact us at STORIS.com.

Important

Included in the Vision9 package are free daily updates! Contact your STORIS representative for more details.

Note

Some features on this list are new STORIS routines. To access new routines, you must add them to a menu in STORIS. To add items to your STORIS menus, see the Online Help topic on creating menus.

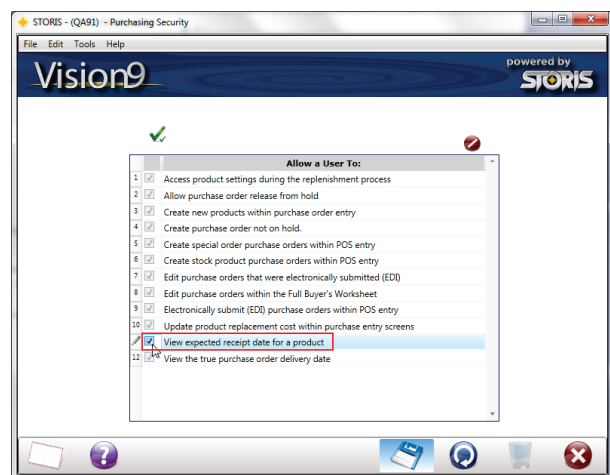
New Features as of 03/12/2013

Point of Sale

◆ Configurator pricing has been enhanced to calculate the **standard configurator price** and **sale configurator price simultaneously** for configured products. With this enhancement, the standard and sale configurator prices are stored to allow printing of both values on a sales order document. The existing Line Original Price and Line Selling Price XML tags are now populated with the regular configured selling price and the sale configured selling price.

◆ An enhancement has been made to **extended security** to control display of the **Expected Receipt Date** on the **View Product Activity** and **View Product Availability** screens.

- A new setting, **View expected receipt date for a product**, has been added to User and User Group Purchasing Security.
- The location tabs on the View Product Activity and View Product Availability screens have been enhanced to check

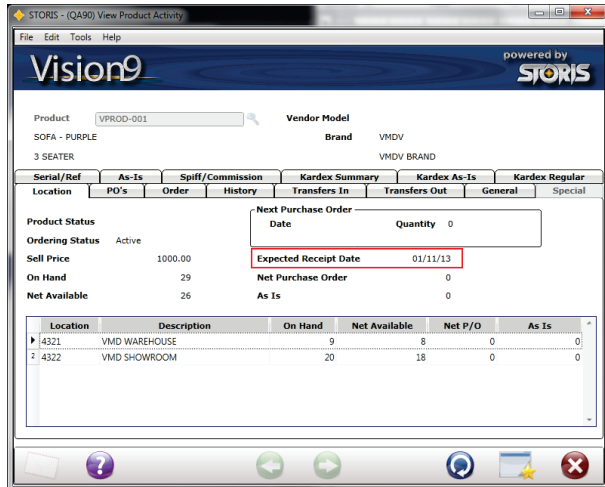


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this new security setting to determine if you have the required permission.

- If you have the required security, the Expected Receipt Date displays on the inquiry screens.
- If you do not have the required security, the field name (Expected Receipt Date) and date are not displayed on the inquiry screens.



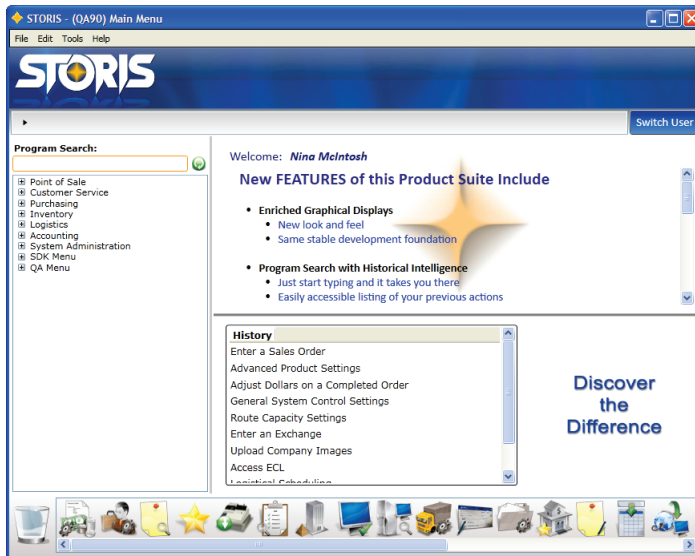
- ◆ A new program has been developed to remove incorrectly processed documents from the order file. This new program has been added to the end-of-day process in the sales order module to remove the incorrectly processed documents prior to the open sales order reports. An on demand version of the program called **Remove Sales Orders Not Processed Correctly** is also available from the STORIS Main Menu.
- ◆ The new sales order based report called **Report Inventory Fill Dates in Jeopardy** has been added to report on regular and/or special order sales orders and includes fill date logic. This report includes the following run-time options: one or multiple locations, one or multiple salespeople, include regular and/or special orders, page break on location, and total on orders. The report prints the following information: salesman code, order number, order date, customer, estimated delivery date, fill delivery date, fill document, product and net line amount.

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General

- ◆ The **Upload Company Images** program allows you to upload images that you want your users to see when they log in to the same account in STORIS.



- ◆ Upload the following image types:
 - Company Banner - appears at the top of the main menu screen and at the top of all STORIS application screens
 - Menu Background - appears on the main menu screen only, as a watermark behind the System Greeting Message
 - Company Logo - appears on the main menu screen only, to the right of the History pane

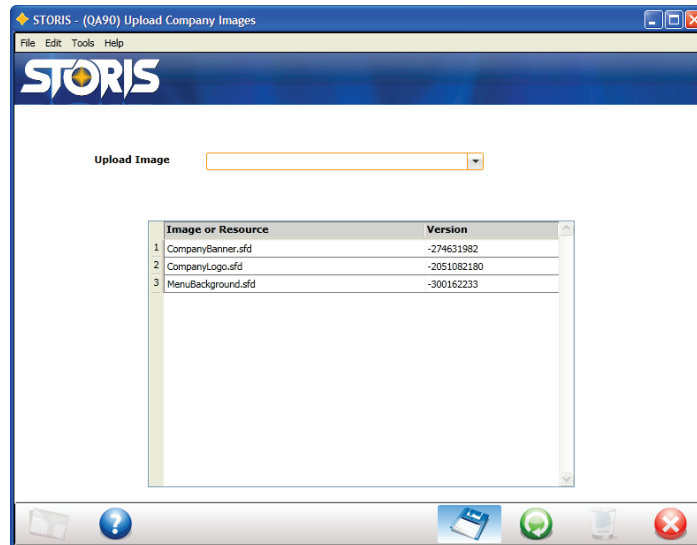
Image File Types and Names

- Images can be in any of the following image formats: .png, .jpg, .jpeg, .tif, .tiff, .bmp, or .gif
- Before uploading, ensure that the image file is named appropriately and does not contain spaces in the name.
- The Company Banner file must be named "CompanyBanner".
- The Menu Background file must be named "MenuBackground".
- The Company Logo file must be named "CompanyLogo".

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Uploading Images



- At the Upload Image prompt, click the Arrow button and select the type of image to be uploaded: CompanyBanner, CompanyLogo, or MenuBackground.
- Next, click the Save button to access the Select Image for CompanyBanner (or CompanyLogo or MenuBackground) window, and browse for the image file.
- Select the image file to be uploaded and then click the Open button in the browse window.
- When finished uploading the image file, click the Save button to update changes.
- Log in again to view the changes. (Use Switch User button on main menu screen.)

◆ An interface to the RetailDeck® retail information software program is now available. If your organization uses RetailDeck, you can use this interface to load product data from RetailDeck directly into Sales Order Entry. For each product you import in this way, STORIS creates a record in the Product file.

To specify your RetailDeck parameters, use the new RetailDeck Control Settings, for example to specify how often to check for RetailDeck updates or to specify a mark-up percentage for products you import from RetailDeck. To restrict user access to this new import process, use the new Import Products from Retail Deck field in the Extended Security (Sales) settings.

You can import RetailDeck information in either of two ways:

- via the new Create a RetailDeck Product screen, which you access via the Action button at the Product field on the Merchandise tab of Sales Order Entry.

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- by entering a model number into the Product field in Sales Order Entry. If the model number exists in RetailDeck, STORIS imports selected product data associated with the model number.
- ◆ The following function keys can now be used to access features in Vision9.
- **F1** = Use this key at the main menu screen and any Vision9 screen where the context-sensitive Help button is available. When you press the F1 key, a separate browser window opens, displaying a Help topic for the current routine or the Welcome topic if you pressed the key while at the main menu.
 - **F2** = Use this key at the main menu screen and any Vision9 screen where the Messenger Mail button is active. When you press the F2 key, you access the Send/Review Mail Messages routine in STORIS Messenger where you can view all unread mail and tasks for the log-on user.
- ◆ STORIS now offers a product via which third-party developers can access certain business logic and database values within the STORIS V9 product. Access to this business logic is via web services. The initial methods available via these web services are geared towards usage on a web site, but usage is not limited to the web. Examples of the new services are:
- Find Existing Customer (by email, phone number or name)
 - Get Product Details (for an existing product)
 - Submit Sales Order (actual real-time creation of a sales order inside of STORIS)
- ◆ The Import Data program has been enhanced to provide the ability to run data conversions for Invoice (completed orders) and Service Order data.
- New Conversion File selections have been added for Invoice and Service Order History. Both processes utilize two spreadsheets each, for header and detail data.
 - When you select Invoice, new prompts called INV Header File Name and INV Detail File Name appear, where you specify the file names of the spreadsheets holding your data.
 - Similarly, when you select Service Order History, two new prompts called SO Header File Name and SO Detail File Name appear.
- ◆ **Important**
- When converting invoice and service order data, the Invoice data **must** be imported prior to importing Service Order data.
- ◆ This update to the UP System includes four enhancements to provide more security. The following changes have been made:

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- A new column has been added to the Edit Assignments grid to show the date the activity was completed.
- The EOD Close button is now accessible by users with Up System Editing capabilities. Previously this process was only available to Up System Administrators.
- The Full Purge button has been removed to avoid accidental complete purging of system data.
- A user must have access to at least one viable selling location from the Valid Logon Locations list in order to log in to the Up System. If not, an error message is displayed and the logon process stopped.

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Inventory

◆ This enhancement introduces the capability to send Advanced Ship Notice (ASN) updates received via the EXIM EDI (Electronic Data Interchange) process to the RedPrairie Warehouse Management System (WMS) interface. In addition, the Enter a Purchase Order and Print a Purchase Order routines have been enhanced to include the linked Sales Order and Linked QTY in the data sent to RedPrairie for lines that have special-order type products.

◆ A new field called Calculate Receiving Landed Cost is now available in the Costing Control Settings. Use this field to specify the vendor to use when calculating receiving landed costs. You have the following options:

- Product Vendor
- Purchase Order Vendor



Note

If you set this field to Purchase Order Vendor, the system prevents you from setting the Landed Cost Distribution field in the Costing Control Settings to "General Ledger Only", and vice versa.

◆ The following two new routines are now available. Use these routines to compare user-defined estimated add-on costs with actual add-ons costs from vendor invoices. Based on the comparison, you can decide whether to update your settings for estimating add-on costs.

- **Distribute Add-on Receiving Costs:** Use this routine to enter information from invoices received from vendors and create a database of the actual landed add-on costs on each invoice. Note that the data you enter here does not update receiving data to reflect the actual costs - it is only for reporting purposes.
- **Report Add-on Distribution Analysis:** This report displays information on variances between estimated landed add-on costs and actual landed add-on costs entered via the Distribute Add-on Receiving Costs routine.

◆ A new field called Action Required has been added to the Category Settings. This field is active only for non-inventory categories, for example warranties. If the warranty products assigned to a category require an action to be taken during the delivery process (for example, apply a fabric protection), check the box at this field. STORIS sends this information to Warehouse Management System (WMS) Interface.

◆ The following routines have been enhanced to allow users to view costing information only if they have access via the View and Access Product Cost Information field in the Extended Security (System) settings.

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- Report Inventory Aging by Location
- Report Inventory Aging by Product

Previously, these routines ignored the restrictions imposed by the View and Access Product Cost Information field.

- ◆ An enhancement has been added that allows you to view kit product details by selected locations.
 - A new field called Location has been added to the General Tab of the View Kit Product Details screen.
 - You can click the Arrow button to select a location from the drop-down or click the Action button to select multiple or all locations.
- ◆ This enhancement incorporates a new feature called Predefined Configured Item into the sales order configuration process.
 - You can add and maintain predefined configured items using the new **Set Predefined Items** screen.
 - Special order pricing has been enhanced to obtain the predefined configurator price for the selling price when an exact match to a Predefined Configured Item is selected in a sales order. If there is no exact match, the standard option cost calculation is used to calculate the price.
 - In addition, a new configurator load option called Predefined Configured Item was added to the Update Product Configuration Detail process to import data for predefined configured items.
 - A new tab (worksheet) called Predefined Configured Item has been added to the Configurator Conversion Spreadsheet provided by STORIS. Use this new spreadsheet with the Update Product Configuration Detail process to upload multiple predefined options for configured products.

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Receivables

- ◆ STORIS has been enhanced to export Collections comments via the Report Builder using the COL.COMMENTS.DETAIL file. In addition, the Collections Activity Log routine has been enhanced to allow users to specify a range of dates for which to view comments.
- ◆ In the past, customers were assigned to collections during cycle processing. This enhancement provides the ability for you to assign customers to collections during end of day (EOD) processing rather than cycle processing. The following new settings were added to **Collections Processing Control Settings**.
 - The **Evaluate During** setting determines whether collection assignment is to be performed during cycle processing or during EOD processing.
 - The **Number of Phantoms** setting determines the number of phantom processes that can be run when assignment is set to run during EOD.

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Point of Sale

- ◆ A new field called Print Pickup Ticket has been added to the Enter a Return routine. Use this field to print pickup tickets directly from Return Entry. To edit this field, you must have clearance via the Print a Customer Pickup Ticket Within POS Entry field on the Logistics tab of the Extended Security settings.
- ◆ A new field called Change Customer Price Category Within POS Entry has been added to the Sales Security tab of the Extended Security Settings. If you check the box at this field, you allow users to edit the Customer Price Category field in the following routines:
 - Advanced Customer Settings (Point of Sale tab)
 - Customer Order Information Screen (Billing tab)

The default for this field is “checked”.

- ◆ A means of identifying the source of customers for marketing and promotions has been added to STORIS. Two new attributes have been added to customer history to store the initial source marketing codes for the customer. This record is used for selecting customers when generating mailing lists.
 - Two new fields, Marketing Code 1 and Code 2 were added to the Update Customer Mailing Data and Request Credit Information screens. These fields can be used to enter and maintain marketing codes associated with a customer.
 - Marketing Code 1 and Marketing Code 2 were also added to the list of options at the Criteria Name field in Create a Mailing List.
 - In addition, Marketing Code Settings has been enhanced to prevent the deletion of existing marketing codes that have been referenced in sales orders.



Note

Customer history data is not transmitted to the Data Warehouse. Therefore, the source marketing codes are not available for reporting using the data warehouse.

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Point of Sale (Continued)

- ◆ A new feature called Delivery Contact Status is now available in STORIS. Use this feature to associate a delivery contact status code with a sales or service order. Once you create a group of delivery contact statuses, you can then associate them with individual orders. Each time you communicate with a customer about their delivery, you can update the delivery status code on the order. In this way, you can monitor the most recent contact with a customer regarding the delivery of an order. Then, when scheduling orders for delivery in Logistical Scheduling, you can sort your list orders by delivery contact status code.

The following routines use delivery status codes:

- Customer Order Information Screen - to apply a delivery contact status code to any of the following order types, use the Contact Status field on the Shipping tab:
 - ☞ sales orders
 - ☞ customer returns
 - ☞ exchanges
- Enter a Service Order - to apply a delivery contact status code to a service order, use the Contact field on the Merchandise tab.
- Logistical Scheduling - to restrict the grid display to orders associated with a selected delivery status code, use the Contact Status field on the Confirm Schedule tab.

Setting Up the Delivery Contact Status Feature

- Delivery Contact Status Settings - use this routine to create a group of delivery contact status codes.
 - Extended Security Settings - use these settings to restrict user access to delivery contact statuses:
 - ☞ Sales tab - to edit a delivery contact status code on an order, users must have access via the Change Contact Status field.
 - ☞ Logistics tab - to allow users to edit the delivery contact status and the stop time for orders on a manifest, use the Update Status and Stop Time for an Order on a Manifest field.
- ◆ A new field called Delete Special Order Line Item Linked to a Purchase Order not on Hold has been added to the Sales Security tab of the Extended Security settings. To allow users to delete special order line items linked to purchase orders not on hold, check the box at this field. Otherwise, leave the field blank. The default is “checked”.



Enhanced Features Guide

Point of Sale (Continued)

- ◆ The Default Delivery Charge Calculation feature has been enhanced to include a new method of calculating default delivery charges called Per-Piece Delivery Charge. Previously, the only method of calculating default delivery charges was the Base Delivery Charge feature you apply via the Delivery Charge Settings. Now, when calculating default delivery charges, you can
 - apply Per-Piece Delivery Charges only,
 - apply Base Delivery Charges only, or
 - apply both of the above.

To support the new Per-Piece Delivery Charge feature, the following routines and fields are now available in STORIS:

- **Per-Piece Delivery Charge Settings:** Use this routine to specify information required to calculate per-piece delivery charges for sales orders. You specify a piece limit per delivery, over which the system applies an additional fixed charge per piece. The system applies this amount to all zip codes. You can exclude selected products, product groups, or product categories from the piece limit count. Note that the Inventory Formations Settings is accessible via the Actions button in this routine.
- The following fields appear on the **Delivery** tab in the **Point of Sale Control Settings**:
 - ⦿ **Delivery Charge Settings** (formerly named Active): Specify your delivery calculation method (that is, base, per-piece, none, or both).
 - ⦿ **Recalculate Delivery Charge:** Use this field to specify the method by which to apply the Automatic Delivery Charge Re-Calculation feature. This field includes a new option to recalculate delivery charges on open orders after partial completion. You have the following options at this field.
 - Never Recalculate Delivery Charges
 - If Delivery Date, Route and/or Status Changes
 - If Partially Completed
 - If the Delivery Date, Route and/or Status Changes or is Partially Completed.



Enhanced Features Guide

Point of Sale (Continued)

- 🕒 **DELIVERY CHARGES – Apply Pick Up Charges to Returns:** To automatically calculate pickup charges on customer returns, check the box at this field. The system calculates pickup charges using the method specified at the Delivery Calculation Method field.

 **Note**

If you check the box at the new Delivery Charges - Apply Pick Up Charges to Returns field, the Recalculate Delivery Charge field (above) affects the calculation of pickup charges for customer returns.

- In addition, the **Delivery Company Settings** routine has been reorganized to support this enhancement. The Delivery Information tab has been removed and its fields moved to the General and Delivery Charge tabs.
- ✦ A new setting called Purchase Delivery Pad Days is now available in STORIS. The Purchase Delivery Pad Days is a number of days you can add to the Purchase Lead Days for selling purposes. The period of days adds a cushion to prevent salespeople from making delivery date promises to customers that can potentially be incorrect. The Purchase Delivery Pad Days field holds the number of days to add to the Purchase Lead Days for users who are not allowed to view the true delivery date via the View True PO Delivery Date field in the Extended Security (Purchasing) settings. This setting uses the same hierarchy as Purchase Lead Days. All processes that display or print the Purchase Order Delivery Date utilize the Purchase Delivery Pad Days.

Expected Receipt Date is calculated by adding the Purchase Lead Days to the current date plus the Purchase Delivery Pad Days if the user has access.

The Restrict Delivery Date Based on Available Date field on the Delivery tab in the Point of Sale Control Settings controls whether users can assign delivery dates and pickup dates for out of stock merchandise prior to the Next Available Incoming Purchase Order Date or Expected Receipt Date if no available purchase orders exist. The Next Available Incoming Purchase Order Date and Expected Receipt Date include the Purchase Delivery Pad Days when appropriate. If you check the box at this field, only users with the proper security can override this restriction. The default for this setting is "unchecked".

Two new security settings affect purchase delivery pad days:



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- View the True Purchase Order Delivery Date in the Extended Security (Purchasing) settings - to exclude purchase delivery pad days when calculating purchase lead days, check the box at this field. The default is "checked".
- Override Delivery Date Restrictions Based on Available Date in the Extended Security (Sales) settings - When the Restrict Delivery Date Based On Available Date setting in the Point of Sale Control Settings is active, use this field to allow users to override that restriction and assign delivery dates for out-of-stock merchandise prior to the next available date, including the Purchase Delivery Pad Days when appropriate. The default for this setting is "checked".

The STORIS conversion spreadsheet has been enhanced to allow for import of purchase delivery pad days.

- ◆ A new routine called Enter a Commission Adjustment is now available. Use this routine to adjust commissions posted to completed orders. Previously, STORIS allowed commissions adjustments only to open orders. Note that this functionality applies only to commissions posted after the introduction of this enhancement.




To support this enhancement, the following settings have been added to the Pricing and Commissions tab of the Point of Sale Control Settings process. Note that a new field called Override Commission Rules field in the Extended Security (Sales) settings allows selected users to override the functionality of these fields.

- **Split Commissions Evenly** - To split commissions evenly on orders with multiple salespersons, check the box at this field. The default for this setting is "unchecked".
- **Maximum Split Commissions** – Use this field to enter the maximum number of salespeople you want to allow for a commission split. The default is "blank".
- **User Entering Order Must Be Salesperson** - To assign the current user as at least one of the specified salespeople for new orders, check the box at this field. Otherwise, leave the field blank. If you check the box at this field and the current user is not a salesperson, users must specify the house salesperson (ZZZ). The default is "unchecked".
- **Salesperson Defaulted on Order Is** - Use this field to specify how to default salespersons onto sales orders. The default for this field is "In Customer Settings". You have the following options:

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-  In Customer Settings – default the salespersons associated (if any) with the customer at the Salesperson 1 and Salesperson 2 fields on the Point of Sale tab in the Advanced Customer Settings. If no default salespersons exist for the customer, default the house “ZZZ” salesperson.
-  The Current User – default the current user. If the user is not a salesperson, default the house “ZZZ” salesperson.
-  Not to be Defaulted – Do not default a salesperson (that is, require users to manually provide a salesperson code during order entry).
- Adjustments Update Written Business - To update written business as part of the commissions update process, check the box at this field. If you leave the box blank, only delivered business updates as part of the commission update process.

In addition, the Adjust Dollars on Completed Orders routine has been enhanced to provide access to the Multiple Salesperson Commission screen, via which you can specify multiple salespeople and/or commission splits.

Finally, the Report Sales Commission routine has been enhanced to

- identify commission adjustments by displaying a “J” in the Type column. Note that this column was previously labeled “ST”.
 - include a column called ADJ that displays an asterisk for all spiffs that result from a commission adjustment.
- ◆ A new report called Sales Performance is now available via the Schedule a Process routine. The report outputs one detail line per salesperson, each representing the cumulative sales data for that salesperson for the date range. Dollar amounts calculate based on the salesperson split percentage. Columns for quantity and average lines are based on the actual values and not the salesperson split percentage. Because this report is intended to represent sales performance, it reports on written sales, not delivered.

This report does not appear on any menu, and thus cannot be run on demand. In addition, the report outputs only as an email file - standard output options are not available.

To support this enhancement, a new field called Department has been added to the Salesperson Settings. Use this field to specify the sales department (if any) with which you want to associate a selected salesperson. The sales department appears on the Sales Performance Report.

 **Note**

This enhancement also adds the Schedule a Process routine to the STORIS Business and Modular menus. Previously, this process was not available on any menu.

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✦ This enhancement adds a new feature to allow both system generated & manually entered order/transaction numbers at specified locations. Previously, controls for the assignment of the order/transaction number were only available globally; with this new feature, controls for numbering can be determined by warehouse or store location.

- A new field called **Automated & Manual POS Numbers** has been added to the Advanced tab of **Warehouse/Store Location Settings**. If the box at this field is checked for a location, users logged in to that location have the option of manually entering order numbers or using system generated order numbers.
- The new numbering feature is used by all processes that require an order/transaction number.
- This process has no effect on the numbering for auto-transfers.

✦ A new column to display **Truck** number has been added to the **Confirm Schedule** tab of **Logistical Scheduling**. The Truck column appears to the right of the Route column in the Logistical Scheduling grid. If you have the Routing/Mapping Interface active in STORIS, this new column displays the Truck number, if any, assigned to each order.

The screenshot shows the STORIS Logistical Scheduling interface. At the top, there are tabs for 'Search for Schedules' and 'Confirm Schedule'. Below the tabs, there are filters for 'Delivery Status' and 'Contact Status', both set to 'No Filter'. Summary statistics are displayed: Stops: 738, Dollars: \$ 677,113, Units: 1,145, Volume: 89,727. A note says 'Click the Help Button to View the Grid Legend'. The main grid has columns: Order/Transfer, Customer Name, Status, Date, Route, Truck, Time, T, D, P, F, M, H, S, and City. The 'Truck' column is highlighted with a red box. The data rows show various orders with their respective details.

Order/Transfer	Customer Name	Status	Date	Route	Truck	Time	T	D	P	F	M	H	S	City
145 881353	CAT, FINBAR	SCD	11/05/10	A	TR01		D	Y	C	Y				ROCKAWAY
146 881857	CAT, FINBAR	EST	12/15/10	A	R01	10:45	D		C					ROCKAWAY
147 881867	CAT, FINBAR	SCD	12/15/10	100	R01	10:15	D		C					ROCKAWAY
148 883831	CAT, FINBAR	SCD	04/27/11	A			D	R	C					ROCKAWAY
149 886169	CAT, FINBAR	SCD	11/10/11	A			X	Y	C	Y				ROCKAWAY
150 886441	CAT, FINBAR	SCD	11/30/11	A			D		N					ROCKAWAY
151 886473	CAT, FINBAR	SCD	12/01/11	A			D		C					ROCKAWAY
152 886523	CAT, FINBAR	EST	12/02/11	A			D		N					ROCKAWAY
153 886562	CAT, FINBAR	SCD	12/05/11	A			D		C					ROCKAWAY
154 886694	CAT, FINBAR	SCD	12/08/11	A			D		N					ROCKAWAY
155 887414	CAT, FINBAR	SCD	01/23/12	A			X		C					ROCKAWAY
156 887449	CAT, FINBAR	D2	01/25/12	A			D		C					ROCKAWAY
157 887693	CAT, FINBAR	SCD	02/17/12	A			D		C					ROCKAWAY
158 888235	CAT, FINBAR	SCD	04/07/12	A	26	10:45	D	Y	C	Y				ROCKAWAY
159 883044	CAWLEY, DAVE	SCD	03/31/11	A			D		P					MT ARLINGTON
160 884555	CAWLEY, RON	SCD	06/02/11	A			D		P					IRONBA
161 884576	CAWLEY, RON	EST	06/13/11	A			D		P					IRONBA
162 884590	CAWLEY, RON	EST	06/15/11	A			D		C					IRONBA
163 885716	CAMI, EY, RON	EST	10/20/11	A			D		N					IRONBA



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- ◆ A new security setting called Change Taxable Settings has been added to User/User Group Sales Security. This setting allows you to control which users can change the taxable status for customers and orders.
 - If this field is checked, the user can change the taxable status for a customer via Advanced Customer Settings, modify the taxable status for a specific order through Customer Order Information, and zero out tax amounts via the Order Total Full Display window.
 - If this field is blank, the user is required to obtain a security override by an authorized user in order to make a change to the taxable status.

- ◆ A new field, **From Email Address**, has been added to the Advanced tab in Warehouse/Store Location Settings.
 - Use this field to designate an e-mail address for a specific warehouse/store location to display as the sender of e-mails generated while printing sales documents.
 - If you leave this field blank, the email address that is specified on the Document Server tab in the Point of Sale Control Settings is used.

- ◆ A new setting, **Override Minimum Deposit on Take with Orders**, has been added to **User / User Group Sales Security**. If this setting is enabled, users are able to override the restriction of a minimum deposit on Take With orders imposed by the Minimum Deposit Percent for Take With Lines in the Accounts Receivable Control Settings.



Note

Note this field only applies to sales orders and exchanges.