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## Introduction

### Welcome!

The **Elliott System Manager** manual provides information on how to install and set up your **Elliott** System, features found in all the **Elliott** packages, and utilities located on the Util\_Setup pull-down menu on the **Elliott** main menu.

While this manual is designed as a reference tool to assist new users learning to use **Elliott**, it is important for you to be familiar with the information here before actually running the software. This will prevent many problems and reduce the time it takes to solve any that may occur. While the volume of documentation that arrived with your **Elliott** system may appear overwhelming, much of it is meant to be used mainly during troubleshooting. Take a few minutes to read through the sections of this book and you will be rewarded with much smoother sailing later on.

### Before You Get Started

The following checklist is provided as a tool to guide you through the installation and configuration of your new **Elliott Software**. As you become familiar with your system, and wish to increase the benefits to your company, please refer to the additional sections of all your manuals.

### What You Have Received

You should have received a program CD, a registration diskette (excluded if Demo was purchased) and the latest release notes. Help, user manuals for all packages and other documentation are included on the CD. If any of the above is missing, contact your **Elliott** reseller or the **NETcellent System Inc.** Customer Service Department at (888) 595-3818.

### Where To Go For Help

Should a problem occur with your Elliott Software, use the following procedure to assist in finding a solution:

1. Press **Shift-F1** to display help files for the appropriate field, application, or package. For more information on using help files, see the **Online Help** section of this manual. Refer to the Elliott user manual for the appropriate package. If the **Elliott** system displays an error message, see **Appendix A** of this manual for error descriptions and possible solutions.
2. For the latest updates information, access **Elliott** web site at <http://www.elliott.com>.
3. Contact your **Authorized Elliott Reseller**, or **NETcellent System Inc.** if you have purchased direct support.

When calling your reseller or NETcellent Technical Support Department, please have the following information available:

- Elliott license #
- Elliott Version #
- Package release # (i.e. **A/R V7.00**)
- Application where the problem was encountered (i.e. **G/L Budget File Maintenance**)
- Error number (if applicable)
- Operating Environment
  - Hardware
  - Operating System and Version
  - Network information (if applicable)
  - Pervasive Version

The following outline is designed to show the “big picture” for installing and using **Elliott** Software. You can also use it as a reference when reinstalling or updating your **Elliott** System.

For specific instructions on installing your Elliott Software, see the **Initial Startup Checklist** that follows this outline.

- I. Setup hardware and operating system.  
Make sure your hardware meets the minimum requirements specified in the **Hardware Requirements** section of this manual. Set up your operating system, network, and file handling software according to the specifications in this individual package manual.
- II. Install the Elliott Software.  
Follow the **Initial Startup Checklist** to install the Elliott programs, help, tutorial, and registration files.
- III. Enter Company Setup information.  
Enter the Company Setup application to tell the system, which packages you will be using and where they are located.
- IV. Initialize necessary files.  
This setup will be done automatically if you create a new company and specify the module and drive letter for each module before you startup the company. However, if you choose to turn on additional modules in the future, then you will need to initialize the individual package files using the File Utilities application. (This should be done for your company files only, not in the Tutorial Company!)
- V. Enter package setup information.  
Enter each package's Setup application and tailor how the package should function to your company's needs.
- VI. Key in maintenance application in each package and enter your company's data (i.e. customers, inventory, etc.).
- VII. Begin Processing.
- VIII. Use Elliott to increase your profits and improve your customer satisfaction.

## ***Elliott Software Manuals***

Elliott Software Packages are menu-oriented. This means that a selection of applications will be displayed on the screen in five pull-down windows. These windows are **Maintenance, Inquiry, Processing, Reports, and Global Setup**.

### **Maintenance**

The Maintenance window is used for establishing and supporting applications. An example would be the **Customer File Maintenance** in the Accounts Receivable where you may **Add, Change, Delete, List** customers.

### **Inquiry**

The **inquiry** window is used for query only. **Add, Change** or **Delete** can't be done in the **Inquiry** application.

### **Processing**

The **Processing** window is used for data entry, posting, period end processing and printing forms such as Invoices.

### **Reports**

The **Report** window is used for the printing of package reports.

### **Util setup**

The **Util-Setup** window is used for performing application setup, printing spooled reports, and in some packages, the definition of forms to be used within that application.

### **Global Setup**

Contains additional setup procedures for features and functions that the user may wish to setup to improve functionally and productivity.

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## ***Initial Startup Checklist***

### **Installation**

### **Configuration**

### **Startup**

The following checklist is for initial installation, configuration, and start-up of live object code. If you intend to use the tutorial data provided, do not perform the steps preceded by an asterisk (\*) while in the Tutorial Data Directory. If you perform the steps marked by an asterisk, it will delete the tutorial files and the data will be lost.

**Step #1** Turn to the **Hardware Requirements** section and verify that your computer meets the requirements to successfully run **Elliott Software**.

**Installation:** The next section of this manual begins the installation process.

**Step #2** Tailor the system to your company's needs using the **Company Setup** application. For instructions, turn to **Company Setup** under the **Main Menu Util\_Setup Menu** section of this manual.

**Step #3 (\*)** If password security is desired, set up passwords using the Password Setup application. For instructions, turn to Password Setup under the Main Menu Util\_Setup Menu section of this manual.

**Step #4 (\*)** Set up printer fonts and codes using the Printer Setup application. For instructions, turn to Printer Setup under the Main Menu Util\_Setup Menu section of this manual.

**Step #5** If you will be printing labels from the **A/R**, **A/P**, or **COP** packages, set up label codes using the **Label Code Setup** application. For instructions, turn to **Label Code Setup** under the **Main Menu Util\_Setup Menu** section of this manual.

**Note:** Up to this point, you have loaded all the programs onto the computer and entered your company's data in the Company File. You are now ready to start setting up the individual packages (i.e. **G/L**, **A/R**, **A/P**, etc.).

The following is a recommended order for setting up all the **Elliott** Accounting/ Distribution Packages.

- ☐ 1. **G/L**
- ☐ 2. **A/R**
- ☐ 3. **A/P**
- ☐ 4. **PR**
- ☐ 5. **B/B**
- ☐ 6. **I/M**
- ☐ 7. **BOMP**
- ☐ 8. **COP**
- ☐ 9. **P/O**

- Step #6** Go into each package (**G/L, A/R, A/P**, etc.) and enter the data in the **setup** application under each package's **Util\_Setup** pull-down menu.
- Step #7** Go into the applications under the **Maintenance** pull-down window of each package and enter the data requested. Refer to the **Startup** section of each package's user manual for the proper order of accessing the applications.
- Step #8** Refer to the **Processing** section in each package's user manual to perform Daily, Period and year-end Processing Procedures.
- Step #9** Your **Elliott software** is now ready for you to use to increase your profits and improve your customer satisfaction.

## Overview

### Operating Systems

Elliott V7.00 is a Windows 32-Bit application and currently supports the following operating systems:

#### Client

- Windows 98
- Windows ME
- Windows NT 4.0
- Windows 2000
- Windows XP

#### Networks

- Novell Netware 3.2
- Novell Netware 4.x
- Novell Netware 5.x
- MS Windows NT 4.0
- MS Windows 2000
- MS Windows 2003
- MS Windows XP
- Peer-To-Peer Network with no more than 3 users

### Windows NT/2000/XP

An Elliott application performance on a Windows NT/2000/XP workstation is significantly faster than on a Windows 98/ME workstation. This has to do with the fact Windows NT/2000/XP is a true 32-bit operating system while 98/ME is a 32-bit operating system built on top of 16-bit architecture. Also, Elliott is much more reliable when running on Windows NT, 2000 or XP. For report printing, it is up to 50% faster than a Windows 98 workstation. The screen refresh speed is probably even more.

Some of the problems related to Windows 2000/XP have to do with the way it changes how user groups work. Specifically, when you start Elliott, the system will attempt to update the HKEY\_LOCAL\_MACHINE registry in your computer where the PSQL Microkernel routing is set. If the setting to use Requester or Local engine is different between EL700.CFG's setting, Elliott will update the local registry to be the same as EL700.CFG. Elliott is not able to update the local HKEY\_LOCAL\_MACHINE registry with Windows 2000/XP if you do not have power user privileges. This may cause problems for the PSQL client. However, this is not a problem for power users and we suggest that you always log in as a power user in a Windows 2000/XP environment.

### Hardware Requirements

PC Pentium II 100 Mhz with 64 Meg RAM. To run a fully installed Elliott Ver. 7.00 you will need 300 MB of hard drive disk space. Pervasive may have other requirements and you should review these to see if they exceed the requirements listed here.

## Installation Directory

By default, Elliott installs to a "C:\ELLIOTT7" directory. However, you have the option to install to any directory. If you are in a network environment, we suggest you install Elliott on a network drive so all users can share the same directory for Elliott. This will simplify your update and upgrade process as you will only need to update one directory that applies to all users. In a network installation, there is no local client (DLLs) required to be installed on your local hard drive. The only requirement to setup a workstation to work with a network-installed version of Elliott is to set up a desktop shortcut.

## Licensing Issues

For Elliott Business Software users, there are no special licensing requirements other than the number of users. The system counts each concurrent workstation using Elliott as one user; no matter how many sessions that workstation may open. Elliott V7 can run simultaneously with Elliott V6.7. However, the Elliott V6.7 users who access the system will be counted as a user as well. Therefore, your user license count should be the total number of users for Elliott V6.7 and Elliott V7.0.

The Elliott Version 7 License is named **ELIREG70.DAT** and must be copied into your startup directory (i.e. F:\ELLIOTT7). Without this license present, the system operates in demonstration mode with certain limitations imposed.

## Installation

### *Installation Procedures*

#### Software Requirements

Elliott V7.00 requires Pervasive PSQL to run. If you have PSQL already installed on your server, please make sure the PSQL Client is installed on your workstation. To install PSQL Client, go to the network drive where you installed PSQL, find the \PVSW directory and look for the following path:

\PVSW\CLIENTSWIN

To install your PSQL Client, run the Setup.EXE program from this directory. If you need to purchase a copy of PSQL, please contact your Elliott reseller to obtain an OEM version of PSQL for Elliott.

If you are evaluating Elliott Version 7 and do not have the PSQL Engine, you can download a trial version from Pervasive's website: [www.pervasive.com](http://www.pervasive.com).

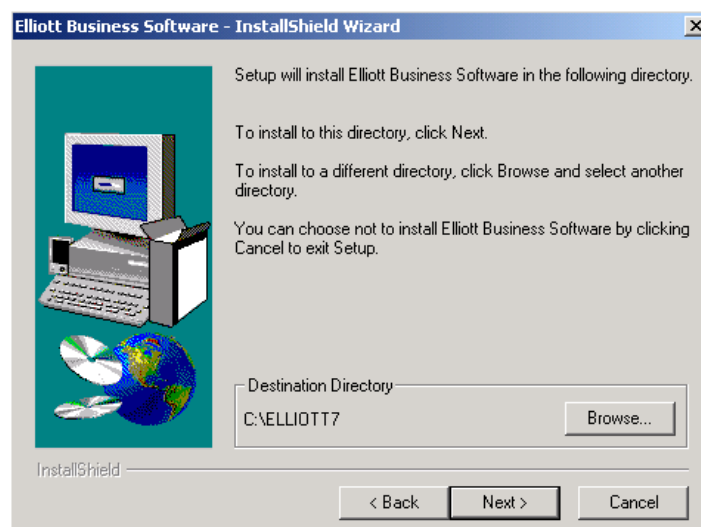
In this documentation, we are using the words PSQL, Btrieve and Microkernel Engine interchangeably.

#### Installing From CD

Insert the CD-ROM and the setup should launch automatically. If not, click the start button on your Windows desktop and select run. **Type D:\setup.exe** and press **Enter**. If the CD-ROM drive is a different drive letter other than D:, enter the correct drive.

#### Installation Directory

The default installation directory is C:\ELLIOTT7, but this is optional. If you need a multi-user installation, install Elliott on a network drive to let all users share a common Elliott directory such as F:\ELLIOTT7. Please make sure all users are mapped with the same drive letter for Elliott. Installing Elliott to a network drive will minimize support, update, and upgrade efforts in the future.



Elliott V7 may run in the same directory as Elliott V6.6 and V6.7. All programs and library files in V7.0 are independent from V6.6/V6.7 and the files do override each other. Since all Versions share the same database structure, you can have both versions running at the same time from the same directory.

For network installations, there are no clients (DLLs) that need to be installed on the workstations for Elliott. Setting up a workstation to work with Elliott is a simply a matter of setting up an icon on the desktop.

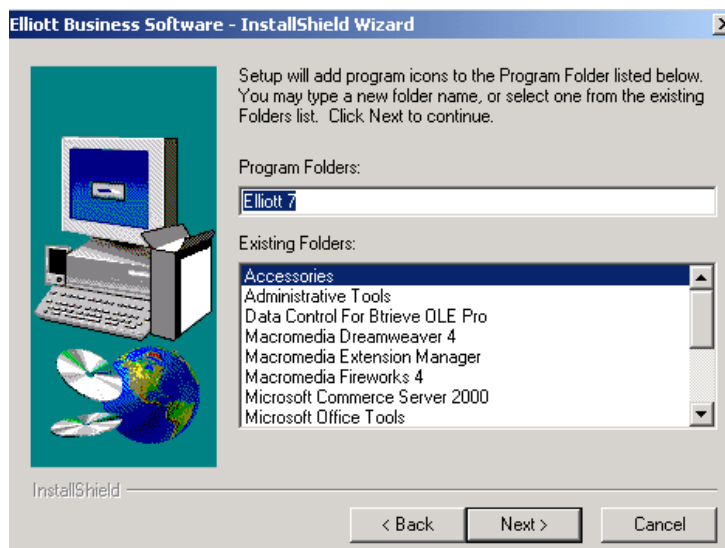
## Installation Types

The Elliott installation utility gives you the following three installation types:

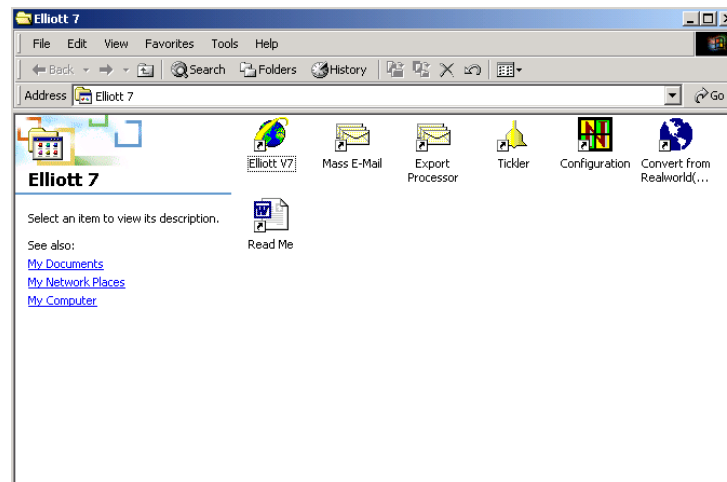
1. **Typical:** This will install all components on the CD to your selected directory. This includes Elliott program files and tutorial database.
2. **Compact:** Currently, this option is the same as the Typical Option.
3. **Custom:** Pick and Choose components to install. If you are **upgrading** from a previous Elliott version, **use this option to only install** the Application Files without the tutorial database.

## Folder and Icons

During the installation process the default folder is Elliott7. If you wish to change or rename, you can do it here.



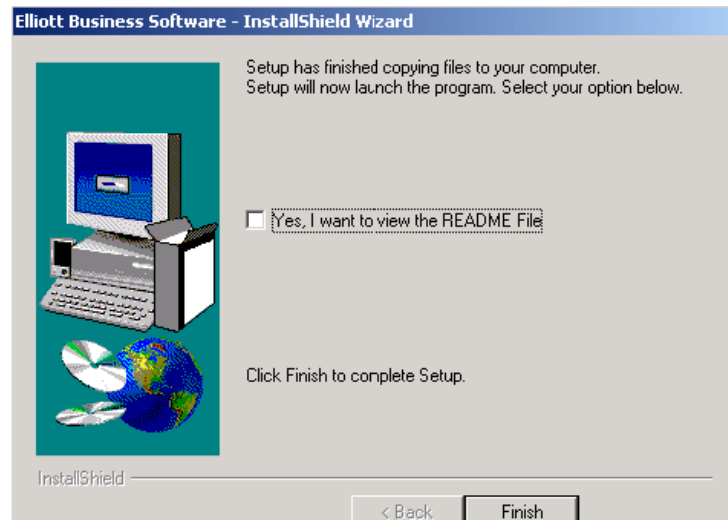
Once the software is installed, the system by default will create an Elliott folder similar to the following:



Moving from Left to Right in the above screen, the following is an explanation for each icon:

- **Elliott V7** – Start Elliott. If you need to run a second session of Elliott, simply click this icon again.
- **Mass E-Mail**: Launches Elliott Mass E-Mail program. This is an independent program that uses the Elliott eContacts program as its database.
- **Export Processor** – This function is used to export certain master files to either comma or tab delimited format. You can launch Excel directly from this application to bring up the data you export. You may also use this function as a simple report writer.
- **Tickler** – Although integrated with Elliott software, users can start the tickler tracking program independent of Elliott.
- **Elliott Configuration** – You can use this utility to configure global flags that apply to all users that share this installation. If you do not configure Elliott first, when you startup Elliott for the first time, the system will automatically launch this configuration utility for you.
- **Convert From RealWorld V8.x** – This is a conversion utility that will convert existing RealWorld 8.x data to Elliott Version 7.

When you close the Elliot Folder window, (previous page), created during the installation process, you will be taken to the final installation screen as shown below.



Click Finish To Exit

## Registration File

Without a Registration File, Elliott works in Demo Mode with certain limitations. After the software is installed and if you have a registration diskette from NETcellent, you will need to copy the Registration file to your startup root directory, (Directory Elliott was installed to). To copy, you can use Windows Explorer, Windows Run or DOS command of COPY A:\\*. \* X:\ELLIOTT7 (Drive and directory installed to).

There are two files on the registration diskette:

- |              |   |
|--------------|---|
| ELIREG70.DAT | - This is the registration file (required for live production purposes) |
| ELIREG70.TXT | - Text file indicating what features you are licensed for.              |

## Adding Elliott Network Users

To add Elliott users on the network, make sure PSQL 2000 Client or Workgroup Engine is installed on their workstation.

To begin adding user workstations, right click on their desktop and add any of the following shortcuts:

### Elliott V7

Command/Location: f:\elliott7\el700.exe (Drive and directory installed to)  
Name: Elliott V7



## Mass E-Mail

Command/Location: f:\ELLIOTT7\el700me.exe (Drive and directory installed to)  
Name: Mass E-Mail

## Export Processor

Command/Location: f:\elliott7\el700me.exe -e (Drive and directory installed to)  
Name: Export Processor

## Tickler

Command/Location: f:\elliott7\el700tk.exe (Drive and directory installed to)  
Name: Tickler

→ **Make sure all users are mapped to the same network drive.**

All workstations can share a common network directory for the Elliott program files. This is very helpful when there's an update or upgrade for Elliott since the update only needs to be installed once and it applies to all workstations.

## Multi-tasking Sessions

Elliott provides the ability to run multiple sessions of the application software while only using one user license. For example, you may start a stock status inquiry while you are in a COP add orders session. Moving around multiple sessions is simply a matter of switching, (**ALT-TAB**), to different windows. This means you do not have to exit the order entry screen to handle a customer call regarding stock availability.

## Start Exploring Elliott

To explore Elliott, click on the Elliott V7 icon. By default, passwords are not turned on and you will be logged in as SUPERVISOR. If you chose to install our tutorial data, the database "Elliott Demonstration Company" was installed for evaluation and training purposes.

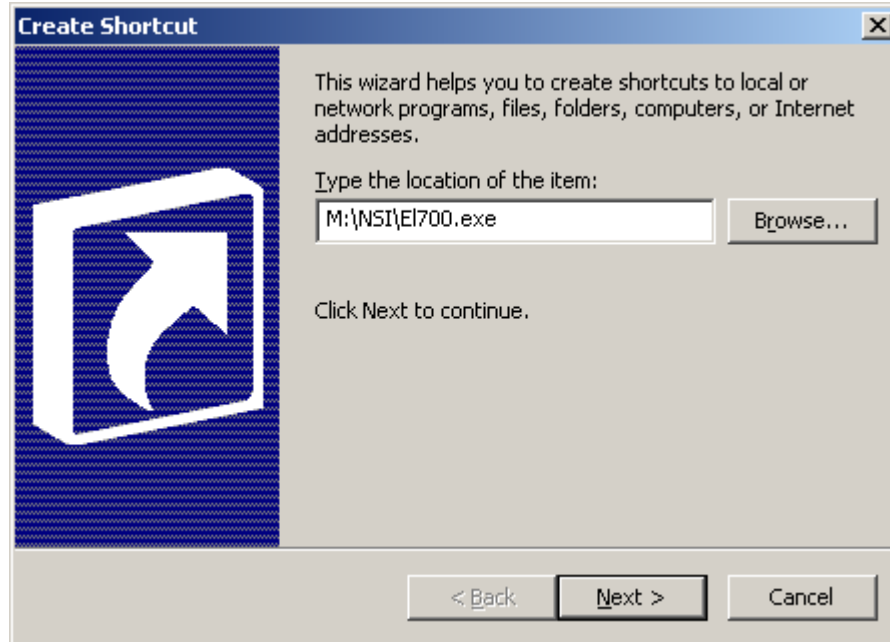
When you are ready to start building your live data, **create a new company** from the company selection screen.

**This Page Intentionally Blank**

## Special Startup Options

### Creating a desktop shortcut

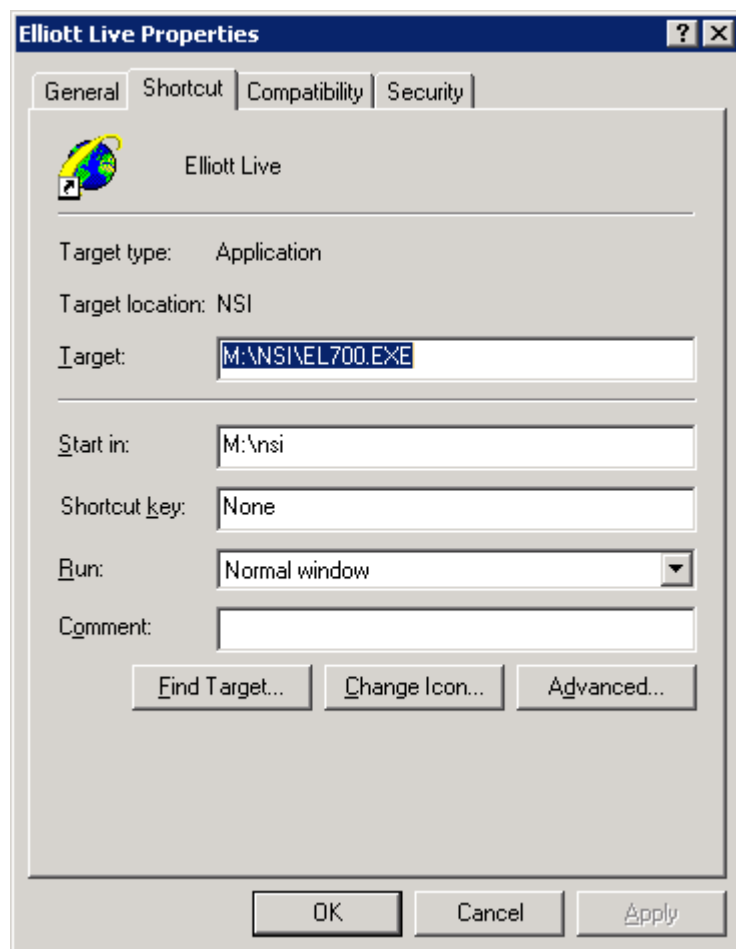
You can create a shortcut on your desktop and use it to start Elliott with many different options. Our example has Elliott installed on the M: drive under the NSI directory. You can create a desktop icon by right clicking on your desktop and then click new and shortcut. Browse to your Elliott directory and click on EL700.EXE.



Fill in a name for your shortcut and click Finish. A new icon will be created on your desktop for you to run Elliott.



You can right click on the icon and then click Properties. This will show you the properties for this shortcut.



## Startup A Module Directly

When you start up each session, by default it will bring up the main menu. If you wish to start up a session and go directly into a specific module, you should add the following startup parameters to the startup command line:

EL700.EXE 02

EL700.EXE is the executable file for the first session and "02" stands for Accounts Receivable. By using these parameters, when you choose this icon the system will start up the first session and go directly to Accounts Receivable. When you exit Accounts Receivable, the system will exit immediately without exiting to the main menu first. You may want to use this option if a user only has access to a limited number of packages, and there is no need to let them go through the main menu selection. The following is a list of package IDs for each module:

- 01 – General Ledger
- 02 – Accounts Receivable
- 03 – Accounts Payable
- 04 – Payroll
- 05 – Bankbook
- 06 – Inventory Management
- 07 – Customer Order Processing

- 08 – Purchase Order
- 09 – Bill of Material Processor

## Startup A Menu Item Directly

It is also possible to start at a specific menu item (module) directly from the icon. For example, you may set up an icon with the following startup command parameters:

EL700 02 0101 02

By clicking on this icon, the system will start at the customer file maintenance in change mode where:

- 02 – Accounts Receivable
- 0101 – Maintenance, Customer File
- 02 – Change

After the user is done with the Customer file in change mode, the system will allow the user to access other menu items without exiting out of the system. However, once the user exits out of the A/R module, the system will exit out of the entire system (because “02” is specified).

This function is universal and applies to all menu items. If you wish to start at a menu item on the main menu utility section, specify “00” for the package ID.

There are many potential uses for this function. One example is the accounting system administrator can setup the month end process by setting up a separate icon and parameters for all the steps that need to be done in the process. This makes it easy for the user to perform the month end process step by step without the need to lookup notes and navigate through the menu system.

This function does not bypass the user security rights. Therefore, the user must have the right to access the menu items before this function will work.

## Startup A Company Directly

By adding /CO:01 as a parameter, you can start Elliott directly in company 01. You can combine the company selection option with Elliott Macro features. For example:

```
EL700.EXE /CO:02 02 0101 02
```

This will bring up Elliott and go directly to company 02, choose the Accounts Receivable module (02), Customer File Maintenance (0101) and end up in change mode (02). You may consider using this capability to organize routine tasks and set them up as icons on your desktop or in a folder.

## Execute A Program Directly

You may choose to execute a program directly from the command prompt, or you can set it up as a short cut. For example, you may specify the command line parameters as:

```
EL700 02 0101 05 "000100" "000200" {enter} {enter} %S {enter} {close}
```

This command will start Elliott and go into Accounts Receivable, Customer File Maintenance, select print Numeric Edit List and supply the following information for prompt window:

```
Starting Customer No  000100
Ending Customer      000200
Print Comment?       N (use {enter} to accept default value)
Any Change?          N (use {enter} to accept default value)
```

After the print option window pops up, Alt-S (%S) will specify print to screen. It will then issue {enter} key to accept [OK] button. Once the edit list is printed, and the focus is returned to Elliott, the system will close Elliott and exit.

In short, this command will print a copy of the numeric customer edit list to screen and exit out of Elliott. The implications of this function are enormous. You can automate most of your routine tasks by setting up the short cut as we just discussed, and placing them in a folder, and then executing them as needed. This also makes every single Elliott application callable from other applications.

Windows O/S allow up to 256 characters for the command prompt. If you need to execute a script that has more than 256 characters, you may put it in a macro file and execute it with the following command:

```
EL700 02 /F:ARLIST.MAC
```

EL700 will launch Elliott and the "02" will launch the "Accounts Receivable" module. The "02" for the module is required. The rest of the menu path, along with the data will be stored in ARLIST.MAC file. The following is an example of what the macro file may look like:

```
0101 05
"000100" "000200"
{enter}
{enter}
%S {enter}
{close}
```

For writing the macro file, it is pretty much up to your personal preference to determine where to insert a line break. As long as you do not have more than 256 characters in one line, you will be OK. You can have unlimited number of lines in a macro file. This capability allows you, for example, to load a large number of customer or item records through a batch if you have another application that can create the macro file.

By default, the macro file has MAC as an extension. If you don't specify the file extension, the system will assume the extension to be MAC. By default, it will look for Macro files in MACRO directory if the path is not specified. That is, it will look for Macro files in:

```
\\ELLIOTT7\MACRO
```

Macros can also be executed inside Elliott. For more information about Macros, especially, the syntax for special keys, please refer to the chapter MACRO.

## **Bypass Username, Password and Company Selection**

In some situations, the user may want to completely automate the startup process by not entering the password or selecting a company. To do so, you can add the following line in a batch file before starting up Elliott:

```
SET NWSMDLOG=$USERNAME$PASSWORD$99$
```

Where:

USERNAME is the name that the user logs into Elliott as.

PASSWORD is the password for the user.

99 is the company that the user wishes to log in to.

This information can also be setup in the login script or computer Environmental Variables area of System Properties. However, the setup of this information may potentially cause security problems since others can easily find out the user's password. Use this feature at your own discretion.

## **Suppress Startup Image**

You may want to suppress the startup image and background image if you are running Elliott on a Terminal Server over a slow connection. Once Elliott is on the main menu, click the Setup Preferences icon and click the Misc. tab. A checkbox is available in the middle of the window, Suppress startup and background images. When this is checked, the background images will not display until the box is unchecked.

## **Canadian Installation**

If you are running Elliott in Canada, simply use the Elliott Configuration utility (icon installed during the installation) and choose "Canada" as the country. This will tell the system that this application is running in Canada and will make certain changes that are unique for Canada.



## Special Path

Users may specify the following environmental variables in the EL700.CFG file [Path] section:

```
[Path]
Mdata=M:\ELLIOTT7\DATA_05
Mprog=M:\ ELLIOTT7\PROGRAMS
Mhelp=M:\ ELLIOTT7\HELP
```

The EL700.CFG file is in the \ELLIOTT7 directory. For Mprog, it is possible to specify multiple paths to look for program files:

```
Mprog=F:\STDPROG;F:\CUSTPROG
```

This is most helpful for the developer when there is a need to keep one central common program directory with many individual smaller custom modification directories. The Mprog option is only valid for Developers with the special license flag turned on.

## Files/Directory Structure

### Directory Structure

By default, Elliott will be installed into the \ELLIOTT7 directory. All program files are under the \ELLIOTT7 directory. There are the following subdirectories under \ELLIOTT7:

\ELLIOTT7	Contains all the runtime programs and configuration files for Elliott.
\ELLIOTT7\ADOBE	Setup program for Acrobat Reader 5.0 to read Elliott documentation
\ELLIOTT7\CONTRACT	Stores Predefined Link Type CONTAC
\ELLIOTT7\DDF	PSQL Database Definition Files for Legacy Programs (Version 3.0)
\ELLIOTT7\DDF40	PSQL Database Definition Files for ODBC (Version 4.0)
\ELLIOTT7\DOC	Contains Elliott on line documents – requires Acrobat Reader 5.0 installed
\ELLIOTT7\HELP	Contains the help files as well as error codes for Elliott.
\ELLIOTT7\IMAGES	Stores images for Predefined Link Type IMAGES
\ELLIOTT7\LOG	Contains log files for tracing and diagnostics for Elliott
\ELLIOTT7\MACRO	Contains the macro files shared by all users
\ELLIOTT7\PROGRAMS	Stores programs file for each module
\ELLIOTT7\SOUND	Stores sounds for Predefined Link Type SOUND
\ELLIOTT7\SPEC	Stores files for Predefined Link Types SPEC
\ELLIOTT7\TUTORIAL	Tutorial database, (Company 00)
\ELLIOTT7\WAVE	Contains wave files for sound effects
\ELLIOTT7\WGE	PSQL 2000 Workgroup Engine Installation Files (discontinued in Version 7.2)

### Company Data

As you **create (add) new companies**, Elliott creates the following subdirectories to store company data.

DATA	Company 01
DATA_02	Company 02
DATA_03	Company 03
DATA_99	Company 99

## Key Files \ELLIOTT7 Directory

The following are files for which it will be helpful to know by name and function:

### EXE Files:

EL700.EXE	- ELLIOTT V7
EL700TK.EXE	- Tickler Reminder Program
EL700ME.EXE	- Mass E-Mail & Export Process
EL700RW.EXE	- Conversion Utility for Realworld® 8.X users
EL700CR.EXE	- Class Registration to turn on File Logging for ActiveX
EL700EV.Exe	- Event Handling (Not a user program, to be run from inside Elliott only)
EL700CF.EXE	- Elliott Configuration Utility (Updates EL700.CFG File)
EL700US.EXE	- ELLIOTT User Count Control Program (Not a user program)
SQL2BTR.EXE	- This is a DOS utility to convert Btrieve data files to be SQL compatible
CONVERTB.EXE	- This is a DOS utility to convert Micro Focus ISAM database to Btrieve

### Configuration Files:

EL700.CFG	- Contains settings affecting Elliott global Operation. Configure by EL700CF.EXE.
EL700S.CFG	- Special Controls for Report Width, Module, Help File and ID. <b>Do not change!</b>
ELL700U.CFG	- Similar to EL700S.CFG, however, it is to be Configured by users or developers to override Or supplement the default in EL700.CFG. (Does not come with ELLIOTT V7)
CALENDAR.CFG	- Configuration file for Holidays and Vacations.

### Library Files:

EL700B.LBR	- Elliott V7 System Runtime Base File
EL700U.LBR	- Elliott V7 System Runtime Update File
EL700E.LBR	- Elliott V7 Runtime Enhancement (from your developer)
EL700C.LBR	- Elliott V7 Runtime Custom Modification (from your developer)
EL700BF.LBR	- Elliott V7 Btrieve File Handler
EL700US.LBR	- Elliott V7 User License Control
BFH.LBR	- Btrieve File Handler for DOS utility
BFH-A.LBR	- Btrieve File Handler for DOS utility
SORT.LBR	- Sort Library file for DOS utility

<b>Elliott Programs</b>	- Each Elliott Module, GL, AP, AR, PR, BB, IM, CP, PO and BM, can have up to five library files. The Standard Naming Convention is:
-------------------------	---

GL700B.LBR	- General Ledger Base Library
GL700U.LBR	- General Ledger Update Library
GL700V.LBR	- General Ledger Version Update Library (Early Release)
GL700E.LBR	- General Ledger Enhancement Library (from your developer)
GL700C.LBR	- General Ledger Custom Modification Library (from your developer)

### DLL And Other Files:

ELL700BM.DLL	- Bitmap Images for Elliott
GUILIB32.DLL	- WINCOM Support Module
BCXL32.DLL	- Barcode Printing Driver
BCDR32.DLL	- Barcode Printing Driver
COB32API.DLL	- Micro Focus 32-Bit Run Time
COB32ENV.DLL	- Micro Focus 32-Bit Run Time
MFINTERP.DLL	- Micro Focus 32-Bit Run Time
MFRTNS32.DLL	- Micro Focus 32-Bit Run Time
MFRTS32.DLL	- Micro Focus 32-Bit Run Time
MFRTSCAL.DLL	- Micro Focus 32-Bit Run Time
MFSCREEN.DLL	- Micro Focus 32-Bit Run Time
MFTXTWIN.DLL	- Micro Focus 32-Bit Run Time
MSVCRT20.DLL	- Micro Focus 32-Bit Run Time
PAN2NT.DLL	- Panels2 Run Time
ROBOEX32.DLL	- Windows Help Support Module
EL700.SF	- Panels2 Side File for ELLIOTT
EL700.INT	- For Elliott Animation Purposes
COBENV.DLE	- DOS utility runtime support module
COBLIB.DLE	- DOS utility runtime support module

### Developer's Files

If you are a developer, you should know that Elliott will also recognize the following Library files for enhancement or customization purposes. Users or developers may put their own enhancement library files in the following files:

EL700E.LBR	- Elliott System Runtime Enhancement File (From NETcellent only)
EL700C.LBR	- Elliott System Runtime Custom File (From NETcellent only)
RU700E.LBR	- Elliott Runtime Enhancement File (From developer or NETcellent)
RU700C.LBR	- Elliott Runtime Custom File (From developer or NETcellent)
??700E.LBR	- Module Enhancement Library File (from your developer)
??700C.LBR	- Module Custom Modification Library File (from your developer)

The “??” represents each module like GL, AR, AP, etc.

The following is the calling sequence of Library files:

??700B.LBR	- Lowest Priority
??700U.LBR	
??700V.LBR	

??700E.LBR  
??700C.LBR - Highest Priority

While the system expects module programs library files like GL700?.LBR in the ELLIOTT7\programs directory, the system will expect run time library files like EL700? Or RU700?.LBR files in the ELLIOTT7 (start up) directory.

## Special-File-Path

In the EL700.CFG file, you may specify a flag, "Special-File-Path", to indicate that you have certain files that will be placed in a special directory that does not follow the Elliott directory structure:

```
[Path]
Special-File-Path=Y
```

If this flag is set to "Y", the system will look for the following entries in the EL700U.CFG file. The following is an example how the EL700U.CFG file may look:

```
[File-Path]
ARCUSFIL.DAT=F:\SPECIAL\ARCDATA
```

Every time the system tries to open the ARCUSFIL, it will look for this table to see if it is in a special path; if it exists, the system will use it. If not, the system will use the original path as designed by Elliott's directory structure. You should be aware of the following when entering entries in EL700U.CFG:

- You can have a maximum of 200 entries in the [File-Path] section.
- When you specify Mdata=Null in EL700.CFG file, the system will use either the current directory or search path to look for data files. The entries you specify in [File-Path] of EL700U.CFG will override the Mdata=Null feature.
- You must use .DAT as the file name's extension even though you may be using a Btrieve database.
- Do not specify a path that is too long, the path and file name must not exceed 50 characters.

The purpose of providing this feature is for the following reasons:

- (1) **Security Reasons:** You may have certain sensitive files that you may not want to let users access. You may block users out of the Elliott password setup. However, they still can access that file from the operating system level (DOS, Windows Explorer, etc.) since you can't block users' rights to access the ELLIOTT7\DATA directory. Placing it in a different directory will allow you the chance to define whether each user has access to that directory or not.
- (2) **Wide Area Network Performance:** Wide area networks require data to travel through a slower link to reach the other side. The link can be 56K, 128K, or fractional or full T1 line. The faster the link, the more expensive it will be. The fact is the wide area network link is much slower than the local area network. Therefore, the trick to get it working with acceptable performance is to minimize the data that needs to be transferred over the slow link. Therefore, different modules can be at different drives (and different servers). If a company has two locations, and one needs to use accounting modules, while the other needs to use distribution module, you can designate a drive letter for all the accounting modules with a different drive letter than the distribution modules. This means when the distribution facility needs to access the distribution data, it will access it locally. When it needs to access accounting data, it needs to go across the slower link to access data remotely from the accounting site. This improves performance, however the speed can be improved further by

specifying each file's location. For example, in the AR module we have the following files:

Customer File	Update Daily
Open Item File	Update Daily
Distribution File	Update Daily
Commissions Due File	Update Daily
Control File	Update Daily
Salesman File	
Codes File	
Job Code File	
Service Type File	
Customer Type File	
Freight Rate File	
Etc.	

For the files that will be updated daily, it must go across the slow link to get updated data. However, for the data that is not updated daily, you may consider having a copy right on your local site with the distribution files. When accessing those files there would be no need to go across the slow link, therefore the performance can be improved. Also, if you wish to designate the order number as the invoice number, then a copy of the AR control file can be placed at the distribution site as well to further improve the speed.

## ***Network File Locations***

In a wide area network environment, data may reside remotely while programs are executed locally. The company file, however, still comes from your local server. In the company file setup, you may specify the drive letter where your system module files reside. The system file drive letter setting does not apply to the company file where it should always be reside in your data directory where you start your Elliott.

In a wide area network situation, you need to make sure the directory structure on the remote server is identical to your local server. For example, you may have your local server Elliott installation mapped to the G: drive and the remote server is mapped to the H: drive. If on your local G: drive, you have Elliott installed as such:

```
G:\ELLIOTT7  
G:\ELLIOTT7\DATA
```

Then on your remote server, you will need to have:

```
H:\ELLIOTT7  
H:\ELLIOTT7\DATA
```

If the data will reside on drive H, then in your local G:\ELLIOTT\DATA directory, you will have the company file (COMPFILE.DAT) and specify H drive for each module.

## ***File Format Conversions***

### **Converting Micro Focus ISAM Database to Btrieve**

If you are using a Micro Focus ISAM Database, the first thing you need to do is to convert your ISAM files to Btrieve format since Elliott V7 does not support a Micro Focus ISAM database. Before you run the utility to convert your ISAM database to Btrieve, please make sure Pervasive SQL (2000 or higher) is already installed. In the directory where you installed Elliott V7 (which will be the same directory that your V6.6/V6.7 data resides), you can use the following command to convert ISAM files to Btrieve format:

```
CONVERT DATA
```

CONVERT is the batch file utility and DATA is the sub-directory where your ISAM database resides.

### **Convert Btrieve Database to be PSQL Compliant**

If you were using a V6.6/V6.7 Btrieve database before or if you were previously using a Micro Focus ISAM database and just converted to Btrieve format, your Btrieve database may not be PSQL compliant. Report writer or ODBC drivers may not always be able to read your data and erroneous results may happen. This condition is caused by an issue called "Segmented Keys." To illustrate this issue, let's take a look at the COP Order Line Item file. The primary key for this file consists of two segments:

```
Order-No   6 Bytes  
Line-No    3 Bytes
```

If your Btrieve database shows this file's primary key as one segment of 9 bytes, then it is "non-segmented." It will work fine with the Elliott Business Software, however it may not always work when other applications try to access this database through the PSQL relational database layer. To resolve this problem, we provide a utility (**SQL2BTR.EXE**) located in the Elliott root directory (i.e. F:\ELLIOTT7). To convert the Btrieve files that are in a non-segmented key format to one that is segmented, start a command prompt and from the root directory of Elliott type the following command:

```
SQL2BTR DATA
```

SQL2BTR is the EXE utility and DATA is the sub-directory that contains the non-compliant Btrieve data files. Please make sure the DDF files (you can find them in \ELLIOTT7\DDF40 directory) are in your data directory before you start the conversion. Also, PSQL (Version 2000 or higher) client or Workgroup engine needs to be installed before you convert.



## ***Elliott Transaction Control***

### **Application Overview**

This section explains how **Elliott** has implemented Transaction **Control (TRX Control)** into **Elliott** Software. **TRX Control** prevents corruption of major **Elliott** data files if the system fails during a posting, purging or clearing accumulator operation. When enabled, **TRX Control** views the operation as a single transaction. If the operation is completed successfully then **TRX Control** ends the transaction and the **Elliott** data files are updated. If an error is encountered or the system fails during the operation, **TRX Control** will perform an “automatic rollback” of the data files updated during the operation. Once the system is functioning again, **TRX Control** will undo all data file changes made by the operation and return the data files to their original state. When the problem has been corrected then the unsuccessful operation may be run again.

**Elliott** Software uses **explicit transaction tracking**. This means that **Elliott** automatically controls when each transaction is started and ended. **Elliott** Software will use **TRX Control** during most posting, purging and clearing of accumulator operations. However, because of design, some purging operations will not use **TRX Control**.

### **Trx Considerations**

There are basically two considerations that need to be taken into account as to whether **TRX Control** should be used with **Elliott** Software. The first consideration is disk space available. When a transaction is started, **TRX Control** will build a transaction rollback work file that is used until the transaction is aborted or ended. For example, a 2-megabyte transactional data file being updated would require an additional 2 megabytes for the **TRX Control** work file. **TRX Control** transaction work files are reused. However, there is a chance that the volume on which the transaction work files are kept will run out of space. The second consideration is performance on transactional data files. There is additional overhead associated with transaction control; therefore, if **TRX Control** is enabled, the performance of some **Elliott** Software applications will be affected.

### **Potential Problems With Trx**

The following are potential problems or limitations that may occur if **Trx Control** is in use with **Elliott** Software:

- Transaction control cannot guarantee data file integrity if there are disk failures.
- Transaction control cannot span across multiple file servers.
- Performance may be hindered if transaction control is used.

Furthermore, large transactions, like G/L year end closing, may cause the server to crash. Since G/L year end closing will purge out all prior year data and create a balance forward transaction for each balance sheet account, the process either has to completely finish or back out entirely. There is no middle point. If your GLTRXFIL is relatively small (a few meg), you might be OK with trx control on. However, if your GLTRXFIL is a 50 Meg file, the process to create the rollback file may become very inefficient toward the end and your server may simply running out of resources and crash. Therefore, you should turn off Trx Control before you start G/L year end closing procedure. The following are areas that you should turn off Trx control:

General Ledger Year End Closing  
Inventory Physical Count Posting  
Posting a single trx with more than 500 serial numbers.

## Transaction Backout

An active transaction is backed out by the system if the file server fails, the workstation fails or the **Elliott** application encounters a data file error while the transaction is in progress. The following can cause a transaction backout:

- **Elliott** Software encounters a data file error or the **Elliott** application is terminated abnormally. This can happen if the user enters CTRL-Break.
- The workstation fails or is re-booted.
- There is no activity between the workstation and the file server for 15 minutes.
- A **CLEAR STATION** command issued at the file server console.
- A **DOWN** command issued at the file server console.
- The file server fails or is re-booted.

## Failure Recovery

When a crash occurs in the middle of a transaction, the user may not know exactly where the crash occurred and which transaction was backed out. It is the responsibility of the user to verify the last operation attempted and take any steps necessary to successfully complete it.

Before any workstation can re-enter the **Elliott** Software system, the transactional flag of the data files **must** be reset. **Elliott** has provided the user with a batch file that will reset all the data file flags. Follow the steps below to reset all data file flags.

1. If the file server did not fail, log out all **Elliott** users.
2. One user should then log into the network as an **Elliott** user and change directories to the directory where the **Elliott** system data files are installed.
3. At the system prompt, type **RSETFLAG<data directory>**. For example, to reset the **ELLIOTTDATA** directory, you would type **RSETFLAG DATA** and press **RETURN**. This step is not necessary if you are using the **Btrieve** file handler.
4. All **Elliott** users can now log back into the network.

## Installing Trx

The following procedures must be followed in order for the **Elliott** Software to use transaction tracking:

The **Trx Control** Flag in **Company Setup** must be set to **Y**.

If transaction control is being used, posting applications will be able to access files used by other applications. Instead of informing the user that the file is currently in use, posting will proceed until a locked record is encountered. At that point the application will wait until the record is unlocked and then continue. A possibility of deadlock may happen. When that happens, we suggest you abort the less critical process (non-posting process) and log back in. If that does not resolve the record lock situation, you might need to use the Pervasive Control Center utility to clear out the aborted user connection. If that still does not resolve the record lock problem, then you will have to abort the posting process as well. Since trx control is on, you should not lose any data when you log back in again. However, if your post routine still leaves the files open, you will need to use the Pervasive Control Center utility to clear out the connection.

## Record Locking

Record locking means temporarily reserving an individual record for access by only one user. In normal use, this lock is in place for only a few seconds. An example is the updating of inventory during order entry. Only one person may allocate any individual inventory item at a time. Individual inventory items are temporarily locked until they are allocated to line items on an order. If two data entry persons try to order the same inventory item at the same time, one of the individuals will receive a record locked message.

Record lock messages Vary in both appearance and user response. Examples are:

**Ship Via Code Locked At Another Station – Press RETURN**  
**A Locked Record Is In The Way Of The Next Operation – Press RETURN**  
**Record Is Locked At Another Station – Press RETURN**  
**Customer No XXXXXX Locked At Another Station**  
**Customer No XXXXXX locked by XXXXXXXXXX**

Some programs will allow you to make another selection after pressing the **RETURN** key in response to the above messages. Other programs will redisplay the message until the record is cleared. Users should never leave their station when data is being entered because they may leave a record locked. If a station is to be left unattended, the user should make sure only a menu is being displayed. Other examples of locked record messages are:

### **A Locked Record Is In The Way Of The Next Operation...Please Wait**

This message will display until changes to the record are completed at another workstation.

### **Account Locked At Another Station – Will You Wait ? N**

If you answer **Y** to this question, you will get the same question again until the record clears. If you answer **N** you will have an opportunity to view another record.

### **Customer No XXXXXX Locked At Another Station**

Some procedures that process a range of records or an entire data file, like Set Customer Balances, will

notify you which record is locked. Generally, these procedures must continue to process and will check every second to see if the locked record has been released. By supplying the record information, you can determine who has that particular record locked and ask them to release the record. Once the record is released, processing will continue.

#### **Customer No XXXXXX locked by XXXXXXXXXX**

This is similar to the above lock message, but has been updated to include the user ID. Once the record is released, processing will continue.

## **File Locking**

File Locking means temporarily reserving an entire file or files for access by only one user. **Setup** files and the **Company** file are always locked when they are updated. An example of a file lock message is:

#### **Company File Presently In Use**

This will be displayed in a window when you try to access an application that needs this file while it is being exclusively used by another application.

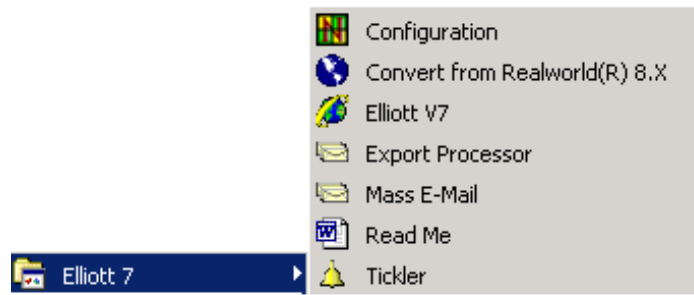
The most frequent display of file lock messages is in the use of posting applications. These programs need exclusive use of certain data files because of the extensive amount of updating that is being done. We recommend you **Defer** your posting until after your nightly backup has completed. By utilizing the **Deferred Processing** application, the files will be posted at a time when it is convenient to your company. See the **Deferred Processing** section of this manual.

If the Btrieve file handler is being used and the Trx Control Flag in **Company Setup** is set to **Y**, posting applications will be able to access files that are being used by other applications. Normally, the **File In Use** message would be displayed.

## Getting Started With Elliott

### Starting Elliott

After installing Elliott successfully, you are now ready to explore Elliott. From the Start, Programs, you should see the following six icons under the “NETcellent” Programs window.



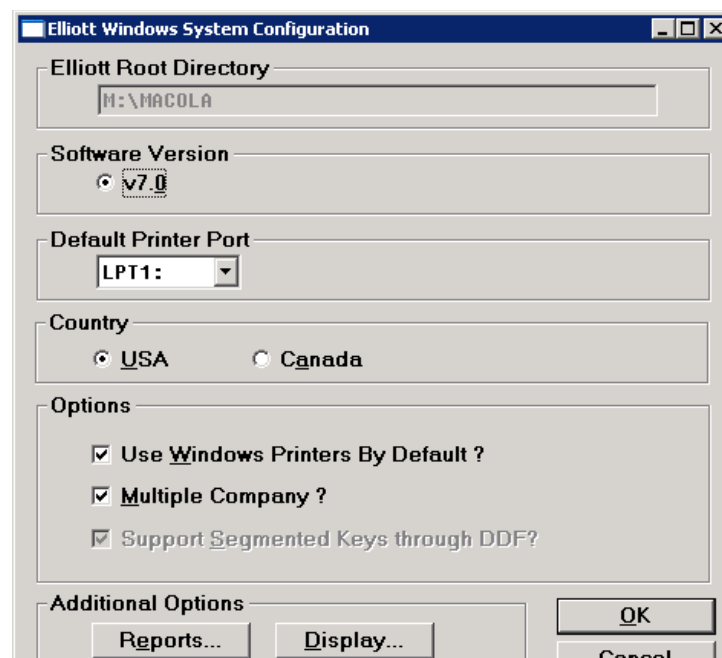
### Digitally Signed EL700\*.exe

All Elliott EXE files are digitally signed by Netcellent System, Inc. Starting with Windows XP SP2, users who run Elliott from a mapped network drive might be prompted with a security warning asking if they want to “run this software.” In the past, the prompt would show the manufacturer as “Unknown.”

The digital signature by Netcellent does not prevent the prompt from showing up. Rather, the prompt will simply show the software manufacturer as Netcellent System, Inc., so you can trust to execute the program. To stop this message from showing up, you will need to add the mapped drive server to your trusted Local Intranet zone (in Internet Explorer, choose Tools -> Internet Options -> Security tab).

### Configuration Utility

If this is the **first time** you have **started Elliott**, the system will detect that the ELLIOTT7.CFG file does not exist in your startup directory. Therefore, the ELLIOTT Configuration utility will start up automatically. Alternatively, you can click on the ELLIOTT Configuration icon first. Once you are done with the configuration, click on the Elliott V7 icon to start the program.



If system does not startup the configuration utility and kicks you out of Elliott, try to configure this manually by choosing the configuration icon before you attempt to start Elliott.

**Elliott Root Directory:**

This is the root directory where you installed Elliott.

**Software Version:**

Select the current software version. Currently there is only one choice and there is no maintenance here.

**Default Printer Port:**

This is to specify the default LPT port for the "Raw Data Pass Through" feature. You should leave it at "LPT1" unless you have a special reason to change it.

**Country:**

The Canadian version is different from the US version. Make sure you are using the right country.

**Use Windows Printer By Default?**

We suggest you check this field and use Windows printer drivers by default. The only time you may want to uncheck this box is when you are using mostly dot matrix printers in your organization. Windows printer drivers are usually not efficient when printing to dot matrix printers.

**Multiple Company?**

Please indicate whether you are using the multiple company option or not.

**The following two options were eliminated in Version 7.2:**

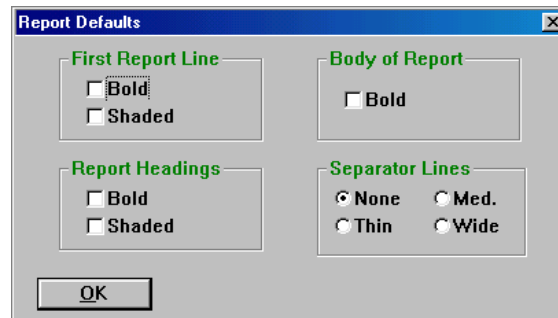
- **Use Btrieve Client Engine?**
- **Use Btrieve Requester (Server Engine)?**

**Support Segmented Keys through DDF?**

This flag, by default, will be checked and you can't turn it off through the configuration utility. The system will look for DDF files in the target directory's DDF subdirectory, (\ELLIOTT\DDF). When the system tries to initialize a file, it will attempt to create the segmented key structure as specified in the DDF definition. This is the key to supporting ODBC and many third party tools that can access a Pervasive SQL Database (Version 2000 and higher). If you need to turn off this flag for whatever reason, you will need to edit the EL700.CFG file manually.

**Report:**

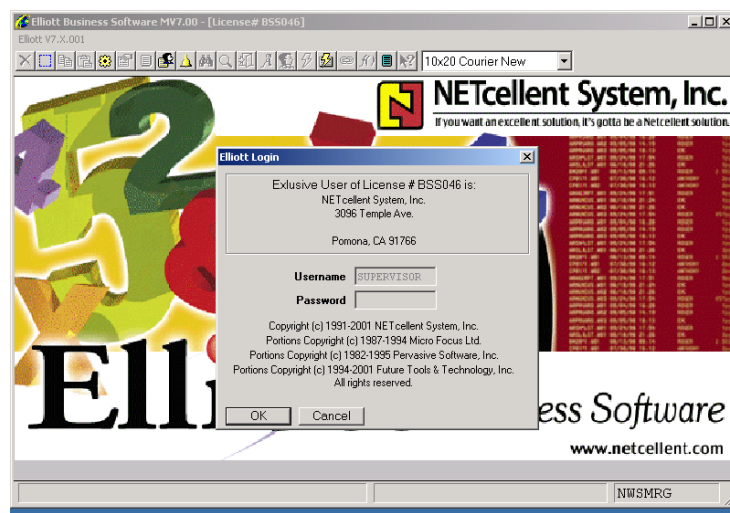
If you click on this button, another window will display and let you configure the default print layout for all users. Users still have the option to override this default setting at the time of actual printing. This includes report header shading, bold face, line separator between heading and body, etc. This option will work well and produce professional outputs on laser printers. However, it may slow the printing of reports on dot matrix printers.

**Display:**

This is for changing the screen update interval. By default, the Elliott screen updates for every 50 display actions or when there is an input field or condition that is waiting for a keystroke. For example, in customer file maintenance, Elliott displays all literals at one time instead of individually. This is for performance purposes. Sometimes, from a developer's standpoint, when you animate a program and do not see updates as the action is taking place, it can be confusing. This is one reason you may wish to change the default setting from 50 to maybe 1.

By default, the Elliott Configuration icon will only be installed on the first workstation installing Elliott from media. If you do need to run the Elliott Configuration utility from other workstations, you may go to the DOS prompt at a Windows 98/NT/2000/XP workstation and from the Elliott startup directory, type: EL700.CFG. You can also setup EL700.CFG as a shortcut manually on your workstation by specifying EL700.CFG.EXE as the startup command and F:\ELLIOTT7 as the startup directory.

Once you are done with this setup screen, click OK. The V7 ELLIOTT startup screen and login will appear like the following:

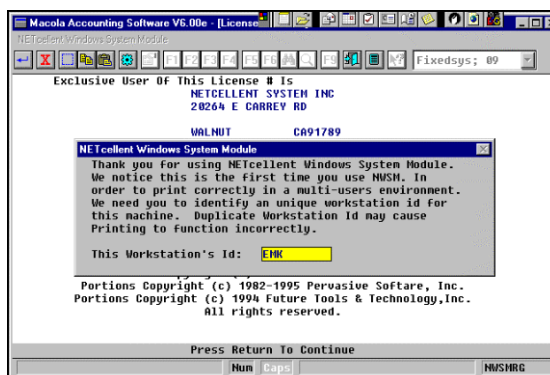


## User Login

By default passwords are in the off mode and there is only one user, SUPERVISOR. Here, click on the "OK" button to bypass the login process.

### Assign A Unique Workstation ID

Once you pass the login screen and the system detects this is the first time this workstation is using Elliott because (1) the system can't find the NSI.INI file under C:\WINDOWS if this is an upgrade from a previous version; or (2) the system can't find the Elliott V7 registry setting in the HKEY\_CURRENT\_USER area. The system will then automatically create the Elliott V7 registry setting either by copying the settings from the NSI.INI file or by using the default value and prompting the user to identify a workstation ID for this workstation:

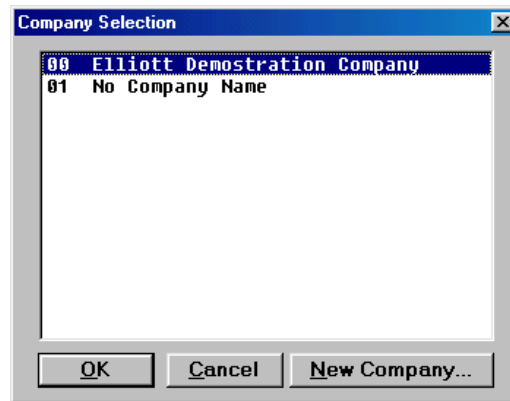


The workstation ID, by default, will be your login user name. However, you can override it. Workstation ID is a 10-digit alphanumeric field and you can choose any name you like, but you must make sure that your workstation ID is unique on the network (among all users that may access Elliott). Having duplicate workstation IDs may result in printing problems in the future. Therefore, it may be a good idea to use your machine name (NetBIOS name) as the workstation ID. Once you setup the workstation ID, you can only change it through editing the registry (dangerous) or login as SUPERVISOR and change it through the preference setup toolbar icon.



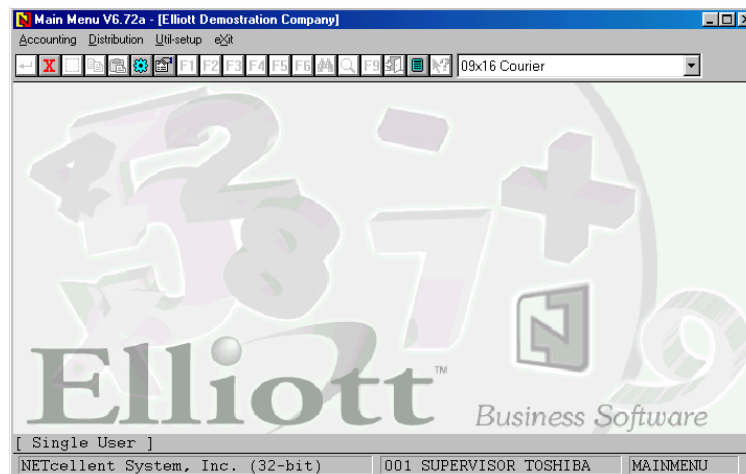
## Multiple Company Option

If you are using the “Multiple Company” option during the configuration screen, then you will be prompted to select the company to access:



## Main Menu Screen

If you did not choose the “Multiple Company” option, then the system will use company 01 and directly bring up your Elliott Main Menu. You are now ready to explore the system.



Startup Elliott Menu - Second Time

The first time you start Elliott, the system will prompt you to setup the ELL700.CFG (Global) and Elliott Registry in HKEY\_CURRENT\_USER area (Local). When you start ELLIOTT for the second time, since they are already setup, the system will not prompt you to setup this information again.

When you setup Elliott on another workstation and since the Elliott registry has not been setup in the HKEY\_CURRENT\_USER area yet, the system will prompt you for the workstation id.

## ELL700.CFG File

The EL700.CFG file resides in your Elliott startup directory and its value can be maintained through the Elliott Configuration Utility (EL700CF.EXE). Values in the EL700.CFG file control the Elliott global functions and affects all workstations' operations.

## Elliott Registry Setting

The Elliott Registry Setting is stored under the HKEY\_CURRENT\_USER area under the following path:  
HKEY\_CURRENT\_USER\Software\NETcellent\Elliott\7.0

Most of the values in the Elliott registry can be maintained through the "Setup Preference" toolbar button (or Ctrl-S). If you make changes to the Elliott registry, it will only affect this particular workstation. The types of flags you can change are:

- Set up your favorite colors for Elliott.
- Determine which fonts are available to use.
- Determine your Laser Printer Paper Margin.
- Determine whether to turn on auto skip or not.
- Determine the number of local parallel ports (for capturing to a network).
- Select your preferred editor for Macro editing and viewing spooled reports.
- Define default paths for Macro, Help, Wave and Log files.
- Change your diagnostic options.
- Setup your tickler function for Elliott users.

The following control flags in registry can't be changed through the preference setup toolbar option. If you need to change it, change the Elliott 7.0 registry setting in the following path:

**\Configuration\Use-Macro:** You may decide not to let certain users access the Macro function by setting this field to "No".

**\Configuration\Use-Preference:** You may decide not to let certain users access the "Setup Preference" function by setting this field to "No".

**\Configuration\Workstation:** This is the unique workstation id for this PC. Having duplicate workstation IDs may cause printing problems. If you accidentally assign duplicate workstation IDs, then you must manually change it with an editor.

Please be warned that changing a registry setting is a dangerous operation. If you delete or change the wrong registry setting, you might render your system inoperable.

## Special Considerations

### Account Numbers

Account numbers are always indicated in **Run Instructions** as the **standard account number format**. Depending on how you set your **Company File**, you may have up to eight characters for a part of the account number. The account numbers may be divided into three parts: a **main account number** of up to eight characters and two **sub-account numbers** (a profit center and department) of up to eight characters each. The total number of characters for any account number may be up to fifteen (15) characters. This includes any combination of the three parts equaling a **TOTAL** of fifteen characters or less. The format of the account number is defined by the user via the **Company Setup** application in the **Util-Setup** pull-down window off the **Elliott** main menu bar.

When you are required to enter an account number, you enter the first part of the number and press **RETURN**, enter the second part of the number followed by **RETURN**, and then the third part of the number followed by **RETURN**. If you realize that you have entered the first part of the number in error after you have already pressed **RETURN** the first time, press the key marked **ESC** and you will be allowed to enter the account number over again.

### Inventory Quantity Fields

Quantity fields may be entered in four different formats depending on how the decimal fields in **Company Setup** are defined. Quantities may be entered in integer format, one decimal point format, two decimal format or three decimal format. **The maximum quantity allowed for an item** is determined by the quantity decimal field formats.

Zero Decimal	999,999,999
One Decimal	9,999,999.9
Two Decimal	999,999.99
Three Decimal	99,999.999

The Entry Field Descriptions within the **Run Instruction** in the package user manuals always refer to this as the **standard quantity format or standard accumulator format**, meaning one of the above formats.

### Dates

The Company Date Format is determined in the **Company Setup** application.

#### If Company Date Format is American:

Dates are always entered in the format **MMDDYY** with no slashes where **MM** are the digits of the month (e.g., 08), **DD** are the digits of the day (e.g., 31), and **YY** the year (e.g., 01). So, to enter August 31, 2001 you would enter 083101. Since dates are formatted as they are entered, the leading zero for single digit months must be entered. The entry field descriptions within the **Run Instructions** always refer to this as

**The Standard Date Format**, meaning **MMDDYY**.

### If Company Date Format is European:

Dates are always entered in the format **DDMMYY** with no slashes where **DD** are the digits of the day (e.g., 31), **MM** are the digits of the month (e.g., 08) and **YY** the year (e.g., 01). So, to enter August 31, 2001 you would enter 310801. The Entry Field Descriptions within the **Run Instructions** always refer to this as **the standard date format**, meaning **DDMMYY**.

**Year Date Conventions:** 01 (YY) – 29 (YY) represent 2001 – 2029. This convention is valid until 2029

### Numeric Entries

Numeric entries are always entered without commas. After entry, the number will be redisplayed with commas. A decimal point must be entered only if there are non-zero digits to the right of the decimal point.

### Yes/No Answers

When a field a **Yes/No** answer, the following entries are valid:

**Y, y** or **1** will be taken as a **Yes** answer.

**N, n** or **2** will be taken as a **No** answer.

This has been done so that you can enter an answer without taking your hand off the numeric keypad.

### Back-up

One of the major advantages of transferring your bookkeeping to a computer is the reduction of paper files. Information will now be stored in your computer system on a hard disk. This information is contained in files called data files.

About 25 data files are used with each of the **Elliott** Software packages. All of the data files may be recognized as having an extension of **.DAT** or **.BTR**.

### When To Back-Up

There are many incidents that may cause the loss or destruction of data files. A few of these are listed below.

- A power failure or printer fault may cause the improper transfer of data. This problem only occurs during any posting operation. Therefore, the data files should be backed up prior to posting.
- A fire may destroy the computer and storage device. Therefore the back-up media should be stored in a safe place.
- A thief may break into your facility and steal your computer equipment. For this reason, we also recommend you secure your data with passwords.
- A bad sector on a hard disk may corrupt a data file. Many times the **Elliott File Utilities** will fix the corrupted file. However, if this procedure fails, the last back-up copy must be restored.
- A magnetic device will destroy data stored on a floppy diskette or hard disk if it is placed close enough.

It is recommended that the data files be backed up at least twice a week and a temporary back up should be done prior to any posting operation. A permanent back up should be performed before your month-end procedures are performed.



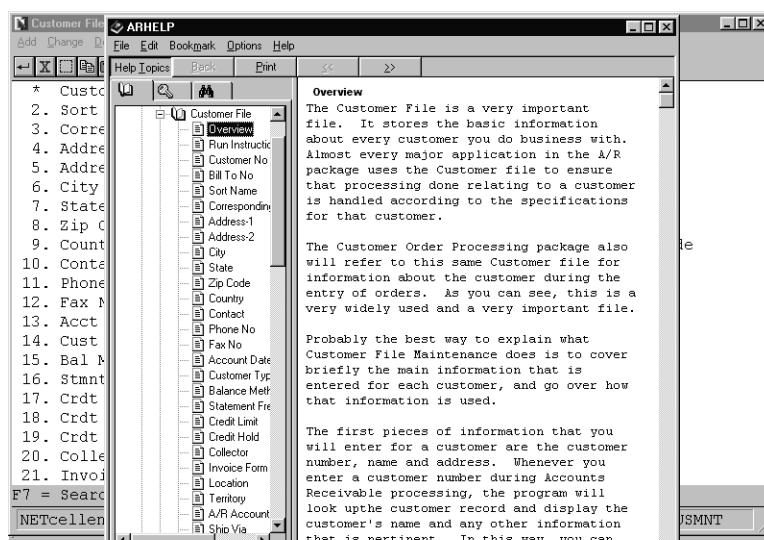
## On-Line Help

### Application Overview

The Elliott Help System is an on-line contact sensitive reference source. When activated by pressing **Shift + F1** or the tool bar **Help Question icon**. It will display a window explaining the portion of the package where the cursor is positioned.

For example, if you are in Accounts Receivable and press **Shift + F1** or the **Help Question icon**, a window will display explaining the Package Overview. If the information you need were in Customer File Maintenance, you would go to the Customer File Maintenance application and ask for help. This would display the application overview for Customer File Maintenance.

The further you go into a package, the more specific the help screen gets. The Help screen will go from the most general (Package Overview) to the most specific (an individual field). If you were in Customer File Maintenance, **screen 1, Field 10 (Contact)** and pressed **Shift + F1** or the **Help Question icon**, the window would display specific information about that field.



### Customer File Help

When you call the Help screen, it will display information about the field where the cursor lies, but will also give you access to the rest of help by using **Page Up/Page Down** or **Up Arrow/Down Arrow**. This is so you have the convenience of viewing information on other fields related to the specific field in question.

## Screen User Interface

### Keystroke Conventions

Elliott follows the following Keystroke Conventions for CAP Letters to access menu selections:



#### Main Menus:

Alt A would open the Accounting Menu  
Alt D would open the Distribution Menu  
Alt U would open the Util-Setup Menu  
Alt X would exit you from the system



#### Drop Down Menus:

G would open the General Ledger module  
R would open the Accounts receivable module  
P would open the Accounts Payable module  
Y would open the Payroll module  
B would open the Bankbook module

### Additional Windows Standard Keys in Elliott:

Ctrl C = Copy  
Ctrl V = Paste  
Ctrl X = Cut

## Special Elliott Key Functions:

Ctrl-Shift-L	Opens Library programs in use
Ctrl-Shift-O	Opens files in use
Ctrl-Shift-A	Opens API Log
Ctrl-Shift-F	Opens I-O Log
Ctrl-Shift-D	Database Activity Snapshot
Tab Key	= Down Arrow Key
Shift-Tab Key	= Up Arrow Key
Ctrl-O	Overwrite key – Used to overwrite information in a protected field

## Autoskip

Autoskip is a special way of data entry input that allows you to skip from one field to the next without the need to use the “Enter” key. The system simply issues an enter key automatically when the field is fully populated. Thus, we call this feature “Autoskip”.

You may enable the auto skip feature by using the “Preference Setup” button. Alternatively, you can edit the NSI.INI file under the C:\windows or C:\winnt directory:

```
[Preferences]
Autoskip=Yes
```

Once this feature is enabled, it only affects the local workstation only.



## ***Mouse***

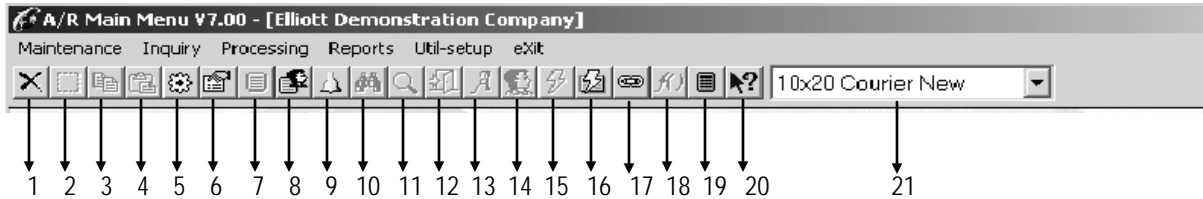
You can use the mouse to click on a field and position your cursor on that field. This will work only if the screen fields have been populated in change mode. When a field is highlighted, users can use the copy toolbar button to copy. Users can also paste into a field from the clipboard when the field is highlighted by clicking on the paste button on the tool bar. You can also Click and Drag to highlight an area for copying by first clicking on the toolbar button "Mark".

When a search window is displayed, double-clicking in a search window is equivalent to pressing the enter key. If you double click a line in the search window, it means highlight and return the line being selected. A single click simply means highlight the line. You can also use a mouse to click on the words PgUp, PgDn, Up, Dn and Return at the bottom of the search window. This is equivalent to pressing those keys. This feature is applicable system-wide. The following is a list of special key words recognized by ELLIOTT when you use a mouse to click on them:

Up down dn left right pgup Pgdn enter return f1 f2 f3 f4 f5 f6 f7 f8  
Home end Esc

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## Toolbar



As you pass over each tool bar icon with your mouse, a description will appear below the icon and in the bottom lower left portion of the Elliott screen. If there is a shortcut associated with the icon, it will also appear in the lower portion of the screen.

#	Icon	Description
1.	<b>Cancel</b>	Equivalent to the ESC key. You can either use the ESC key on the keyboard, or if you are using the mouse, you can click to generate the ESC keystroke.
2.	<b>Mark</b>	<b>(Ctrl R)</b> This allows you to click and drag to define an area that you want copy.
3.	<b>Copy</b>	<b>(Ctrl C)</b> This is used to copy the value of a field or to copy a marked area. You can also copy the value of a field by right clicking on the field and choosing "copy" from the context menu.
4.	<b>Paste</b>	<b>(Ctrl V)</b> This is used to paste the value from the clipboard into the current field.
5.	<b>Macro</b>	<b>(Alt A)</b> This program is designed for office automation. Macro can control another Window application from NSSM by sending it keystrokes. The Macro program is licensed as an add-on option and requires a separate license.
6.	<b>Setup Preferences</b>	<b>(Ctrl S)</b> This button is used for setting preferences for the local workstations. The changes you make will be saved to the NSI.INI file in C:\Windows or C:\WinNT directory.
7.	<b>Notes</b>	<b>(F6)</b>
8.	<b>User Notes</b>	<b>(Ctrl U)</b>
9.	<b>Ticklers</b>	<b>(Ctrl T)</b>
10.	<b>Look</b>	<b>(F7)</b> Search by Alternate Key choices
11.	<b>Search</b>	<b>(F8)</b> Search By Name
12.	<b>End</b>	<b>(F9)</b> Ends user input in the current screen.

- |                              |  |
|------------------------------|--|
| <b>13. Attributes</b>        | <b>(F11)</b> Opens the Attributes window for the current record you are in.  |
| <b>14. eContacts</b>         | <b>(F12)</b> Opens the eContacts program for the record you are in.  |
| <b>15. Specific Events</b>   | <b>(Ctrl E)</b> Opens the Specific Events Request window for the record you are in.  |
| <b>16. General Events</b>    | <b>(Ctrl G)</b> Opens the General Events Request window for the record you are in.   |
| <b>17. Links</b>             | <b>(Ctrl L)</b> Opens the Links window User, system, and Program links.  |
| <b>18. Special Functions</b> | <b>(Ctrl S)</b> Opens the Special Functions window   |
| <b>19. Calculator</b>        | <b>(Shft F2)</b> Calculator program with paste feature   |
| <b>20. Help</b>              | <b>(Shft F1)</b> Open the Help program to the topic related to the field that you were in when you clicked the Tool bar Help Icon. |
| <b>21. Font Selection</b>    | Gives you access to fixed mono spaced fonts available for the workstation.   |

## ***Context Sensitive Menu***

If users use the right mouse button to click on a field when it is highlighted, it will display a context menu for that field. The following are some special features that can be performed via the context menu:

Alpha Field: Upper, Lower, Proper Case, Copy, Paste, Clear

Date Field: Calendar, Copy Paste, Clear, Cancel

Yes/No Field: Toggle Between Yes/No

Numeric Field: Send to Calculator, Copy, Clear, Cancel

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## Fonts

Only mono-spaced (non-proportional spacing) fonts can be used. You cannot use any fonts that will cause an 80-column screen display to be bigger than the maximum screen allowed. Also, users cannot choose any fonts that will cause the 80-column screen display window to be so small that the toolbar will be cut off. Therefore, the number of fonts and font sizes that are available are limited. The following are typical fonts available:

- Terminal
- Fixedsys
- Courier

Terminal is the system default font because it will support a wide range of character sets, including extended ASCII code. Fixedsys fonts look best if you do not have a concern for the extended ASCII code.

If you change the font on the toolbar, the system will remember it and use it next time when you start Elliott. It will also update the NSI.INI file (in your c:\windows or c:\winnt directory) with the following entry:

```
[Preferences]
User-Font=09x16 Courier
```

There are situations where certain fonts appear to be available. However, when you choose them, the screen becomes unreadable. These types of fonts are for special purposes and should not be used. You can exclude these types of fonts from the font selection combo box by going to "Preference Setup" and choose the "Fonts" tab.

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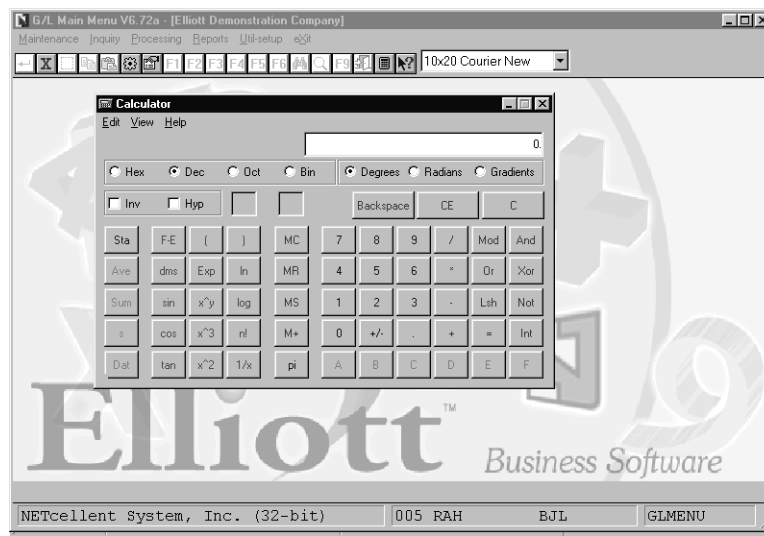
## Calculator

### Application Overview

The calculator system is designed to provide on-line access to a desk-type calculator. The calculator will provide you with the 4 basic mathematical functions and 4 memory functions. The calculator can be called using a particular field in the display window, which allows you to do calculations on that number and return the newly calculated number to the field where it came from.

### Activating The Calculator

You may activate the calculator from anywhere within the **Elliott** system by pressing **Shift + F2**.



Calculator

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## Office Automation

### Macros

#### Application Overview

The Macro was designed for office automation by sending pre-defined keystrokes to the application. There are two types of macros supported by Elliott: External and Internal. The external macro is used for controlling applications outside of Elliott, like Word, Excel, etc. The internal macro is used for controlling Elliott's applications, like printing an invoice.

#### External Macros

External Macros are used to control applications outside of Elliott which include tasks such as: generating a letter for a customer, printing labels, dialing a customer's telephone number, bringing up an image of an item, or any other daily routine that can be accomplished with one of the Windows applications. With External Macros, the system utilizes the data that is on the Elliott side and utilizes other Windows programs to perform necessary functions. You can accomplish the same purpose with copy and paste, which is currently supported by Elliott as well. However, copy and paste may not be fast enough and may require too many steps and keystrokes compared with Macros.

Elliott's External Macro accomplishes office automation by sending data from the current Elliott screen to another Windows application by sending keystrokes and data to that application with a pre-written script. Once the script is written, it can be used over and over again. By default, macros are shared by all users. You can have up to 999 external macros per screen (help-id).

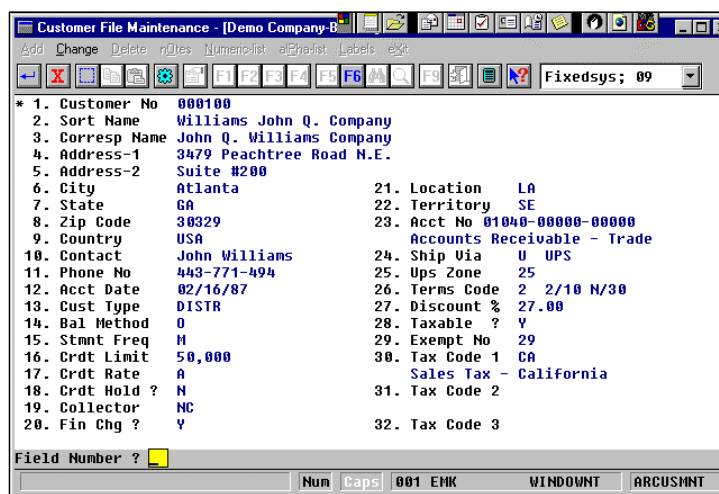
For example, you can develop an External Macro that sends a Microsoft Word welcome letter to any new customer that has just been added to your customer database. To do so, you will first develop the welcome letter in Microsoft Word without the customer name and address. Save the letter in a file that's located on the network drive so all users can access it. Second, you need to develop the script for the Macro that will start Microsoft Word and then bring up the letter that's stored on the network. In the Macro, you will send the fields on the customer screen that need to be sent to the letter and place them in the right positions. Then, all the user has to do is to print out the final letter with the address that comes from the customer. The macro will greatly reduce the time required to do some of the office routines. As long as the data is on one of the Elliott screens, and you need the data to be used in another Windows application, Macros can help. The possibilities are endless.

#### Internal Macros

The Internal Macro is used to automate tasks inside Elliott. Similar to the external macro, internal macros send key strokes to Elliott applications and automate routine tasks. The syntax and format for internal macros and external macros are similar, however, not identical. You can have up to 99 internal macros per screen (help-id).

#### Defining an External Macro

To define a new macro, you will need to click the Macro button (Ctrl-a) on any one of the screens that contain data. For example, you can click on the Macro button on the Customer Screen when a customer record is displayed on the screen.



Customer File Maintenance - [Demo Company-B]

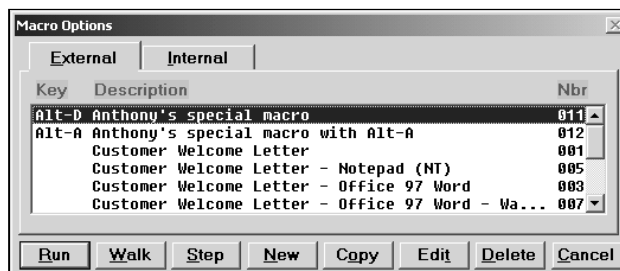
Fixedsys; 09

* 1. Customer No	000100	21. Location	LA
2. Sort Name	Williams John Q. Company	22. Territory	SE
3. Corresp Name	John Q. Williams Company	23. Acct No	01040-00000-00000
4. Address-1	3479 Peachtree Road N.E.		Accounts Receivable - Trade
5. Address-2	Suite #200	24. Ship Via	U UPS
6. City	Atlanta	25. Ups Zone	25
7. State	GA	26. Terms Code	2 2/10 N/30
8. Zip Code	30329	27. Discount %	27.00
9. Country	USA	28. Taxable ?	Y
10. Contact	John Williams	29. Exempt No	29
11. Phone No	443-771-494	30. Tax Code 1	CA
12. Acct Date	02/16/87		Sales Tax - California
13. Cust Type	DISTR	31. Tax Code 2	
14. Bal Method	0	32. Tax Code 3	
15. Stmt Freq	M		
16. Crdt Limit	50,000		
17. Crdt Rate	A		
18. Crdt Hold ?	N		
19. Collector	NC		
20. Fin Chg ?	Y		

Field Number ?

Num Caps 001 EMK WINDOWNT ARCUMNT

Once the Macro function is selected, the following window will display on top of the current screen:



Macro Options

External Internal

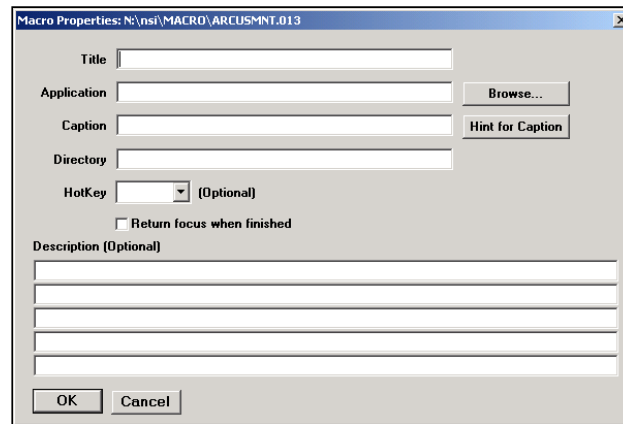
Key	Description	Nbr
Alt-D	Anthony's special macro	011
Alt-A	Anthony's special macro with Alt-A	012
	Customer Welcome Letter	001
	Customer Welcome Letter - Notepad (NT)	005
	Customer Welcome Letter - Office 97 Word	003
	Customer Welcome Letter - Office 97 Word - Wa...	007

Run Walk Step New Copy Edit Delete Cancel

Only the macros defined for the current screen will display in the list box. For example, the macros you defined for Customer File Maintenance will not display in the Item File Maintenance screen. The following is a brief description for the function of each button:

- Run:** Run the highlighted Macro.
- Walk:** Run the highlighted Macro with one second delay between every line of script.
- Step:** Run the highlighted Macro in debug mode where users can step through each line of script.
- New:** Create a new Macro.
- Edit:** Edit the highlighted Macro.
- Delete:** Delete the highlighted Macro.
- Cancel:** Exit the Macro Options Screen.

At the external tab, click on the “New” button to create a new external Macro, and the following window will display:

The image shows a 'Macro Properties' dialog box with a title bar that reads 'Macro Properties: N:\nsi\MACRO\ARCUSMNT.013'. The dialog contains several input fields: 'Title', 'Application', 'Caption', 'Directory', and 'HotKey'. The 'HotKey' field has a dropdown arrow and the text '(Optional)'. To the right of the 'Application' field is a 'Browse...' button, and to the right of the 'Caption' field is a 'Hint for Caption' button. Below the 'HotKey' field is a checkbox labeled 'Return focus when finished'. At the bottom is a 'Description (Optional)' section with four empty text lines. At the very bottom are 'OK' and 'Cancel' buttons.

**Title:** Enter a title for the Macro you want to create. The title you entered here will display in the Macro option window. Therefore, it is important that you do not create duplicate titles among different macros.

**Application:** The name of the application you wish to run, i.e. Winword.exe. If you do not know the exact spelling of your application, you may click the browse button to explore your hard drive and find your application.

A special application, START, can be used to launch a document file (any file that has an associated application for it). In this case, enter the document name (file name or http: address) as the only line in the [Script] section of the macro file.

**Browse:** To find the application, if you do not know the exact spelling. Alternatively, if you do not know the path for your application, you can use browse to find it as well.

**Caption:** Unless Macro has problems communicating with the Windows application you try to run, you should always leave this field blank. When you first try to write a Macro, it is suggested to leave it blank.

**Hint for Caption:** Clicking on this button will give you a hint for entering the caption if you need to (when Macro fails to communicate with your application). For example, if you are using Microsoft Word 6.0, the startup application is Winword.exe. However, once Winword.exe starts, it calls another EXE for the Microsoft Word main process and Winword.exe will terminate itself. Therefore, the macro will not be able to communicate with Winword.exe.

In this case, you need to specify the caption as “Microsoft Word” so the macro can communicate with Microsoft Word even though the startup application EXE has terminated itself. This, however, is not a problem with Office 97.

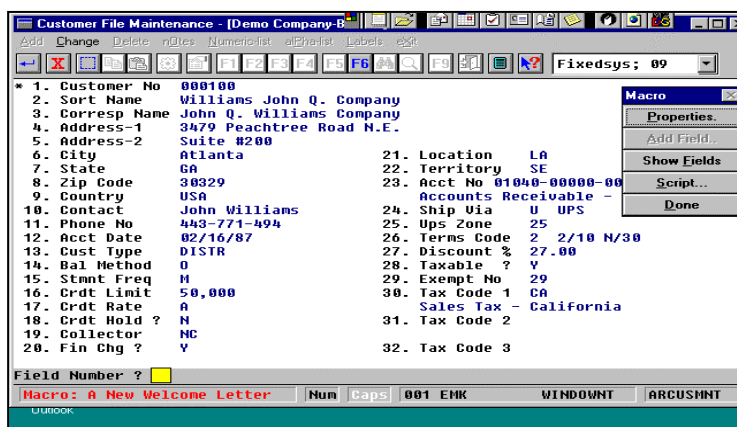
**Directory:** If you chose the browse button earlier, the right directory should have been returned back to this field. Otherwise, enter the directory where your Windows application resides.

**Hot Key:** You can assign a hot key with combination of the Alternate key, (Alt), and 26 alphabetic characters from A – Z to execute a macro. For this reason, you can only have maximum 26 macros that can be assigned with a hot key. Hot key speeds up the process of a macro since you do not have to pick and choose from the macro list box. This is an optional function.

**Return Focus When Finished:** By default, leave the check box off. In most situations, when you finish executing your macro, you want to leave the focus in the Windows application you try to run. For example, if you try to send a welcome letter to your customer, you may want to leave the focus in Microsoft Word and let the user choose which printer to print to. However, if you wrote the macro so that the printing is automatically done in Microsoft Word, then you might want to check this field and return to Elliott after the macro finishes the executing.

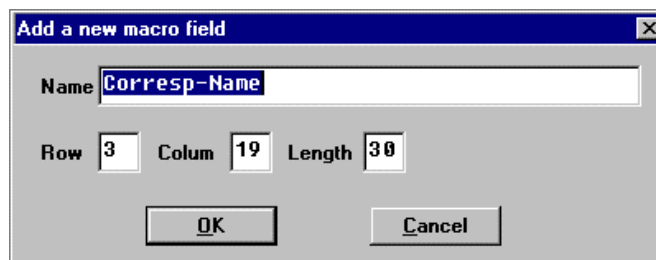
**Description:** Five lines of free format for you to enter the detailed description for the macro.

Once you finish entering each field and click on the OK button, a floating window will pop up on top of your current screen:



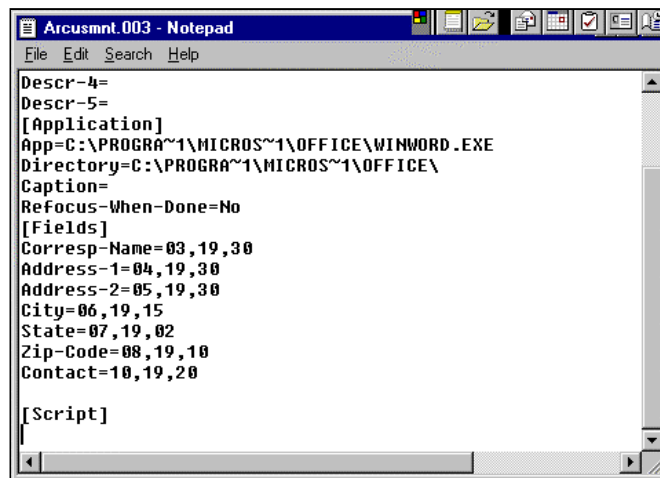
At this moment, the focus is back on the Elliott screen where you invoked the Macro function. What you need to do now is decide which fields on this screen are needed for your letter. For example, you may need the Customer Corresp Name on the letter. Therefore, you will put your cursor on field 3, Corresp Name, by either using the mouse or entering "3" when prompted for Field Number.

When the cursor is on field 3, the "Add Field" button on the floating window will be enabled. By clicking on the "Add Field" button, the following window will display:



The system will determine the field name, the position and length of the field automatically. In most situations, you will not need to do anything on this screen, just click the OK button to accept the default value. Repeat this step for all the fields you want on the letter. For example, you will want Address-1, Address-2, City, State, Zip Code, and Contact to complete a letter address portion. Repeat this step for these fields.

Now you are ready to write the actual script for the macro. Click on the "Script" button on the floating window, a notepad with the macro we have created this far is displayed. At the end of the macro, you will find a section starting with [SCRIPT] that is currently empty. The following is the sample script:



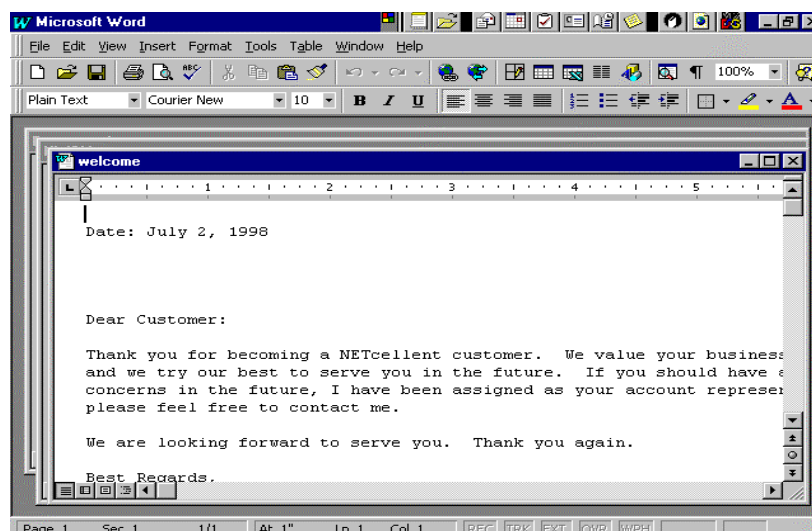
Notice that the fields you added earlier through the interactive user interface are in the macro as well. You can manually add these fields if you want to, provided you know the position and length of each field on the screen you try to capture. At this moment, Elliott has just created a skeleton of a macro where it contains the Macro Name, Application Name, Field Names and Position, etc. It does not contain the actual keystrokes that you wish to send to the other software application. It is your responsibility to write the script now.

The script you need to write will contain the actual keystrokes that you need to send to the Windows application. In this case, it is Microsoft Word. When the first keystroke is sent to Microsoft Word, the Microsoft Word application has been brought up already and it is in focus. Typically, you need to ask Microsoft Word to open a file for you. You will do so by sending two lines of script:

```
%fo
c:\nsi\welcome.doc{enter}
```

“%f” means Alt-f which will bring down the file menu in Microsoft Word. “o” means open a file on the file menu. Therefore, the file open dialog will display and the cursor is at the file name field.

If you send over the path and the file name, followed by an enter key, then this will open welcome.doc in Microsoft Word. At this moment, your screen may look like the following:

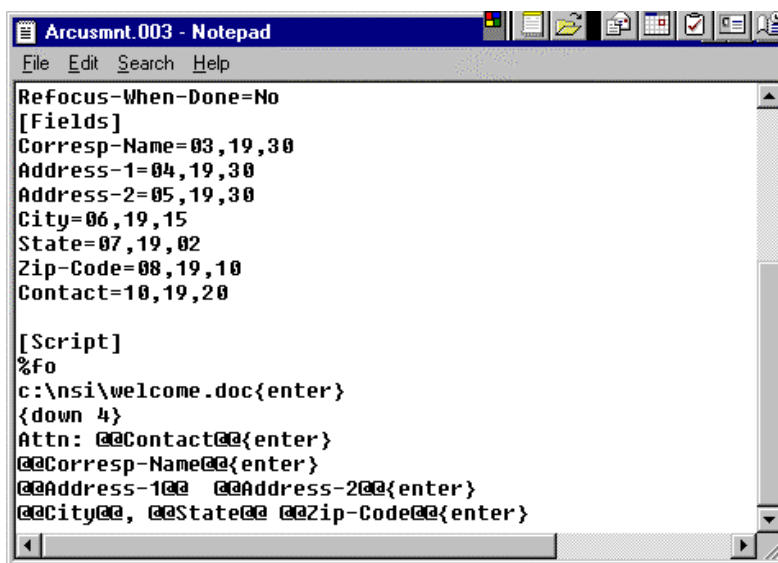


Since your cursor is at the beginning of the document, you need to move your cursor down before sending over the actual address information. Therefore, you'll need to write the following lines of script:

```
{down 4}
Attn: @@Contact@@{enter}
@@Corresp-Name@@{enter}
@@Address-1@@ @@Address-2@@{enter}
@@City@@, @@State@@ @@Zip-Code@@{enter}
```

{down 4} means press the down arrow key 4 times which will bring it to the correct position to populate the address information.

@@Contact@@ means send over the actual contents in the "Contact" field. Anything beginning with "@" and ending with "@" is the field name. You can have multiple fields per line and they can be combined with other characters. We put Address-1 and Address-2 in the same line because many times, address-2 is blank and we do not want to waste a blank line. Words like "Attn:" will be sent over to Microsoft Word as is. At the end, your script will look similar to the following screen:



If you would like to display the print dialog window so the only thing users have to do is select or confirm the printer, then you can add the following line at the end of the script:

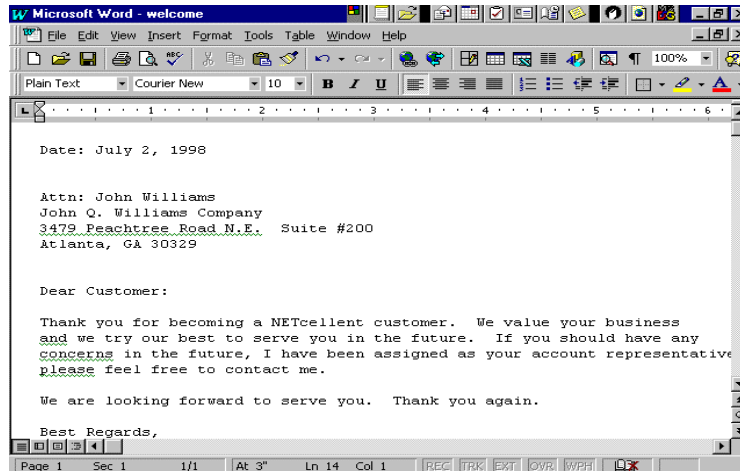
```
%fp
```

Where "%f" means Alt-f and will bring up the file menu and "p" means "Print".

At this moment, if you save your script and exit notepad, you will be back at the Elliott screen. Click the "Done" button on the floating window. Now you have finished defining the macro and you are ready to run it.

Click on the "Macro" button (or use Ctrl-a), the macro option window will be displayed and you will see the macro you just created. Highlight the macro you just created and click on the "Run" button. You should see the following result:





If your script does not produce desirable results, it is possible there is a problem in your script. You can use the "Step" method to let the system confirm every single line of the script before it sends it over to the Windows application. You will then see exactly the position where your script fails and you can then determine the measure to fix your problem.

## Syntax for External Macro Script:

**Execute a Special Command:** Any line beginning with **&&** indicates whatever follows on this line is either a DOS, or a special command to be executed. The following are some special commands:

**&&Wait n** – Wait for number of seconds. When the system does not respond fast enough with certain steps and you can see the keystroke it is sending before the system can respond to it, there's a possibility of losing keystrokes. You might want to consider using this command to delay the sending of keystrokes. For example, **&&Wait 1** means wait 1 second before sending the next line or keystroke. Alternatively, if the run method seems to lose keystrokes, you can try the "Walk" method, which delays 1 second between every line. If you omit the number of seconds, the script will use 1 second by default.

**&& Wait Close** – Use for waiting for a dialog box window to close before sending the next keystroke. This should only be used if you have a problem with your Macro sending the script faster than it is closing the window.

**&&Dos Command** - In the above example, you may want to save the original document in the welcome.tbl file and copy it to the welcome.doc file after you execute this script. This is a safety precaution just in case users accidentally override the welcome.doc file. You can only have one DOS command per line. Do not try to put multiple **&&** on the same line to execute multiple DOS commands.

**Sending a Field:** **@@field Name@@** means send the information in this field to the Windows application. No trailing spaces will be sent. This is the same field name that was defined earlier. You can have multiple fields on the same line. You can also mix fields with regular text.

**Putting Comments in a Script** – **“;”** means that whatever follows after until the end of the line is a comment and will not be sent to the Windows application software. **“;”** can begin anywhere, even in the middle of the line. Anything before **“;”** will still be processed normally.

**Other special symbols:**

Character - send the character  
 {{ - send the { character  
 }} - send the } character  
 {+} - send the + character  
 {^} - send the ^ character  
 {%} - send the % character  
 {char number} - send the character number of times  
 + - next character (or set in parens) is SHIFT  
 ^ - next character (or set in parens) is CONTROL  
 % - next character (or set in parens) is ALT  
 (chars) - group of characters (can all be shift/control/alt)  
 {backspace} or {bs} or {bksp}  
 {break}  
 {capslock}  
 {clear}  
 {delete} or {del}  
 {down}  
 {enter} or ~  
 {escape} or {esc}  
 {help}  
 {home}  
 {insert}  
 {left}  
 {numlock}  
 {pgdn}  
 {pgup}  
 {prtsc}  
 {right}  
 {scrolllock}  
 {tab}  
 {up}  
 {f1} {f2} {f3} {f4} {f5} {f6} {f7} {f8} {f9} {f10}  
 {f11} {f12} {f13} {f14} {f15}

**Sample strings:**

+(EC)      Uppercase E then C  
 +EC        Ec  
 {X 10}      XXXXXXXXXXXX  
 %fo        Alt-f then o (as in File Open)  
 {left 42}    Press left arrow 42 times

**Sample Scripts:**

```

&& copy f:\users\public\welcome.tbl f:\users\public\welcome.doc
%fo    ;;Alt-F for file menu, choose open a file
f:\users\public\welcome.doc{enter}    ;;type in the file name and hit the
          ;;enter key
&&Wait Close    ;;waiting for the file open dialog to close before
          ;;sending the keystroke
{down 5}    ;;press the down arrow key 5 times
Attn: @ @Contact@ @ {down}    ;;@ @Contact@ @ indicates the field
          ;;name just created
@ @Corresp-Name@ @ {down}
@ @Address-1@ @ @Address-2@ @ {down}
@ @City@ @, @ @State@ @ @ @Zip-Code@ @ {down}
  
```

```
@ @Country@ @  
%fp{enter} ;;Alt-F for file menu, choose to print and press enter to  
;;choose the default printer  
%fxn ;; Alt-F for file menu, choose exit and do not save the change
```

In the above example, the first line will copy welcome.tbl to welcome.doc and the third line will use welcome.doc as the letter file. This may be beneficial if you do not want your users to accidentally override the original document when exiting Microsoft Word.

## Writing and Testing Your External Macro Script

**Writing the script:** The best way to write the macro script is to start the application software and try to find the keystrokes that are needed to perform the process you need, step by step. Then you can write the keystrokes in the script. Any time you need to send a combination key like %f (Alt-f), make sure you use the lower case “f”. %F will be interpreted by the system as (Alt-Shift-f) and will not produce desirable results.

**Captions:** In most situations, you should leave Captions blank. The only time you may need to put something in the Captions field is when your Macro seems to fail to communicate with the Windows application you try to run. This may happen, for example, with Microsoft WinWord 6.0. WinWord 6.0 starts up with Winword.exe and calls another EXE for the main process, then terminates itself. Therefore, when the Macro tries to communicate with Winword.exe, since it has been purged from memory, nothing will happen. In this situation, you need to put the caption, “Microsoft Word” (as in the WinWord title bar) for Macro to establish the communication.

If you need to put something in the caption in order for your Windows applications to work, the rule for determining the caption is to bring up your Windows application first and see what displays in the title bar. For example; when you start WinWord 6.0, by default the title bar is “Microsoft Word – Document1”. Here you should not use “Document1” as part of the Caption because that is not always part of the Caption for WinWord 6.0. In this case, using “Microsoft Word” is sufficient because the Macro will match with the prefix.

If a caption is entered when it is unnecessary, then you may get unexpected results. Lets use, NOTEPAD in Windows 3.1, for example. When NOTEPAD is executed it will have “Notepad – (Untitled)” in the title bar. If you enter “Notepad” as the caption, then it will work fine in the Windows 3.1 environment. However, in Windows 95/98, NOTEPAD uses “Untitled – Notepad” as the caption. The caption that works for Windows 3.1 Notepad will not work for Windows 95/98’s Notepad. In both situations, if you leave the captions blank, the system will function correctly. Therefore, you are better off leaving the caption blank if the Macro works. There is no rule to predetermine whether captions are needed or not with certain Windows applications. Users simply have to test each application.

**Test the script:** You may need to test and revise the script a couple of times before you achieve the final desirable results. Please be aware that different users may have different setups for their application programs and therefore, the same keystrokes that work for one user may not work for another. You need to take this into consideration and define keystrokes that will work for everybody.

**Test the script with animation mode:** The best way to test a script for problems is to execute the script in animation mode and choose the time delay for each line. Users can set the time delay anywhere between 1 and 99 seconds. This is done at the time of executing the Macro. In the Macro window, there is a checkmark where users can set the execution to animation mode and the “time delay field” will become available. Each statement will first be displayed and users will see the result of execution. At any moment, if you wish to stop the execution, choose “Stop” or “Edit”. “Edit” will start your favorite editor for the script you are currently executing and you can make changes if you have discovered any mistakes.

**Running the Macro:** Once a macro has been defined, you can run this macro over and over. In our example, a new customer is added into the system and the user only has to click on the macro button, choose “New Customer Welcome Letter” and the letter will automatically be printed. This will be a great time saving tool. Just use your imagination. You will find that there will be many applications to use with this feature to save you significant amounts of processing time.

**Make Your Macros Private:** You can specify a different macro directory for each user in the preference setup. By default, the system uses the Macro subdirectory of the Elliott startup path (i.e. \ELLIOTT\MACRO) as the default macro path for all users. This means that macros will be shared by all users. However, you may change this if you have the following concerns: (1) security issues – you may not want to let users run all macros in the system, (2) compatibility issues – a macro written for one workstation may not work for another because (a) not all workstations have the same applications installed and (b) not all of them are installed in the same directory. In this case, you can simply designate a different macro path for each user.

**Use A Different Editor for Macro Editing:** By default, the system will use NOTEPAD as the editor for your Macro script. However, you can choose to use your favorite editor by changing the default setting in the preference setup. You should be aware that by changing your default editor, it also changes the default viewer for your spooled reports.

**Tips for Speeding up Macro Execution:** You can use “&&Turbo On” to speed up the execution of Macro. Another technique is to combine multiple lines of script into one single line to avoid the delay between each line. Just keep in mind that the maximum length for a script line is 255 characters. For example, you can change the following script:

```
{down 4}
Attn: @@Contact@@{enter}
@@Corresp-Name@@{enter}

To:
{down 4}Attn: @@Contact@@{enter}@@Corresp-Name@@{enter}
```

The system will process the script as one request instead of three requests and thus speed up the performance.

## Defining an Internal Macro

An internal macro has two different formats depending on where it should be executed from: (1) to be executed from the command prompt, (2) to be executed inside Elliott. The command prompt macro is in free text format. It can be named anything you like, and can be placed in your macro directory, or in any directory you like. On the other hand, the macros to be executed inside of Elliott are subject to certain rules.

## Command Prompt Macro

The following is an example of command prompt macro which is a form of Internal Macro. It will print customer numeric edit list for customer number 100 – 200 to the screen and then exit Elliott.

```
0101 05
"000100"
"000200"
{enter}
{enter}
%S
%O
{close}
```

Normally, we will name this macro something similar to "CUSNLIST.MAC" and place in the MACRO directory which is either:

```
\NS\MACRO or
\ELLIOTT\MACRO
```

To run this macro, you would use the following command prompt (or setup in short cut):

```
EL700 02 /F:CUSNLIST.MAC
```

"EL700" will launch Elliott. "02" will open the Accounts Receivable module. You must specify the module for which the command prompt macro should run. If you wish to run a menu item on the main menu that does not belong to any module, then you should use "00". For example, the following command will start deferred processing:

```
EL700 00 0406 %P
```

Again, "EL700" will open the Elliott application. "00" accesses the Main Menu. "0406" stands for drop down menu 4 (Util-Setup) and menu item 6 (Deferred Processing). Depending on whether the manufacturing module is turned on or not, you may need to use "0306" in the above scenario if you only have accounting and distribution modules turned on. "%P" stands for Alt-P which is the keystroke for the "Process" button. You may want to backup your entire system without leaving any file opened by deferred processing. You can let Windows scheduler start deferred processing at certain hours after the back up is done. In this example, we will execute the internal macro script directly on the command line. The command line is limited to 256 characters, therefore you will have to use a command prompt macro file if your script is longer than the command prompt limitation.

By default, use MAC as an extension for command prompt macros. If you specify a command prompt macro without the extension, the system will assume MAC is the extension. You can also use the macro file from any directory. When you do not specify a directory, it assumes the macro file is in the MACRO directory.

## Syntax for Command Prompt Macro

The command prompt macro must begin with the menu path (excluding the module portion) first. In the previous example, “0101” stands for customer file maintenance. “05” stands for customer numeric edit list. Once the cursor is in the actual application, you will use the following scripts:

```
“000100”  
“000200”  
{enter}  
{enter}
```

The above corresponds to numeric edit list:

Starting Customer No	000100
Ending Customer No	000200
Print Comment?	N (Use enter to accept default)
Any Change?	N (Use enter to accept default)

Anything contained in double quotes stands for the data that will be entered into a field followed by the enter key, that is issued automatically. At this moment, the print option window will pop up. The following line will cause the print job to print to screen:

%S	- Alt-S stands for “print to screen”
%O	- Alt-O stands for the “OK” button

After the print job is sent to the screen, the {close} command will close ELLIOTT and exit.

You may combine each line of text on one line, as long as each command is separated by a space and the maximum length per line does not exceed 255 characters.

## Using % Symbol at Command Prompt

One thing you should be aware of when using the “%” symbol at the command prompt is that there is a special meaning associated with this symbol. For example, if you use %XYZ% on the command prompt, it tells the system to substitute the value of environmental variable XYZ with %XYZ%. This may create problems with the following example:

```
EL700 02 0101 05 “000100” “000200” {enter} {enter} %S %O {close}
```

The system will interpret “%S %” as an environmental variable. However, since this variable does not exist, it will be substituted with a blank space. The actual command parameters that EL700 receives in this case are:

```
EL700 02 0101 05 “000100” “000200” {enter} {enter} O {close}
```

As a result, the command will not work as you would expect. The alternative to this is to use:

```
EL700 02 0101 05 “000100” “000200” {enter} {enter} %S {enter} {close}
```

Since %O (OK Button) is the default, you can substitute it with an enter key.

Another alternative is to create a macro file and let the command prompt execute the macro file, instead of using direct keystrokes.

## By Pass User ID And Password with Command Prompt Macro

Command Prompt Macro can be a great way to automate certain routine tasks for daily, weekly or monthly process. If you wish to by pass the Elliott login User ID and Password, you could use the environmental variable NWSMDLOG for this purpose. Please refer to this manual for "Installation", "Special Startup Option", "Bypass Username, Password and Company Selection" section for more details. For example, you could create a batch file as following:

```
M:
CD \Elliott7
SET NWSMDLOG=$JOHN$123456$01$
EL700 02 0101 05 "000100" "000200" {enter} {enter} %S {enter} {close}
SET NWSMDLOG=
```

However, this method may have potential security issue since any users who have access to this BAT file will be able to see the password. Use it at your own discretion. Alternatively, you could ask the user who wish to use this function to start up an Elliott session first. Then the BAT file will be run as the 2<sup>nd</sup> session which will never prompt for user ID and password. If you choose to go with this way, there's no risk of exposing the password.

## Special Keys for Internal Macro

The Internal Macro supports the following special keystrokes:

- {F1} = F1 Key
- {F2} = F2 Key
- {F3} = F3 Key
- {F4} = F4 Key
- {F5} = F5 Key
- {F6} = F6 Key
- {F7} = F7 Key
- {F8} = F8 Key
- {F9} = F9 Key
- {F10} = F10 Key (End)
- {ENTER} = Enter Key
- ~ = Enter Key
- ;; = Anything on the same line after will be comment
- {ESC} = Escape Key
- {ESCAPE} = Escape Key
- {UP} = Up Arrow Key
- {DOWN} = Down Arrow Key
- {PGUP} = Page Up Key
- {PGDN} = Page Down Key
- {CLOSE} = Close ELLIOTT and Exit
- {COPY} = Copy the value in the current field to the clipboard
- {COPY 0000 9999} = Copy the value in the area as defined from 0000 to 9999 to the clipboard. For example, {COPY 0119 0124} will copy the area from column 1, row 19 to column 1, row 24.
- {PASTE} = Paste the value from clipboard to the current field (a enter key will not be issued automatically).
- {RUN 999} = Call and run an external macro. "999" is the external macro id.
- {WAIT} = Wait for user to enter input before continuing with the script.

These special keystrokes are similar to the external macro, however, not identical. These keystrokes are supported by all Elliott screens except GUI windows. A GUI window refers to note windows, ticklers, help windows, macros, etc. There are, however, two GUI windows that support certain macro keystrokes – the Print Option Window and the Deferred Processing Menu. More GUI windows may be added to the

support list in the future.

**Print Option Window** supports the following macro keys:

- %P = Alt-P (Print to printer)
- %S = Alt-S (Print to screen)
- %D = Alt-D (Print to disk)
- %O = Alt-O (OK button)
- %C = Alt-C (Cancel button)
- {ENTER} = Enter (OK button)

**Defer Processing Menu** supports the following macro keys:

- %P = Alt-P (Process button)
- %C = Alt-C (Cancel button in processing screen)
- %E = Alt-E (Exit button)

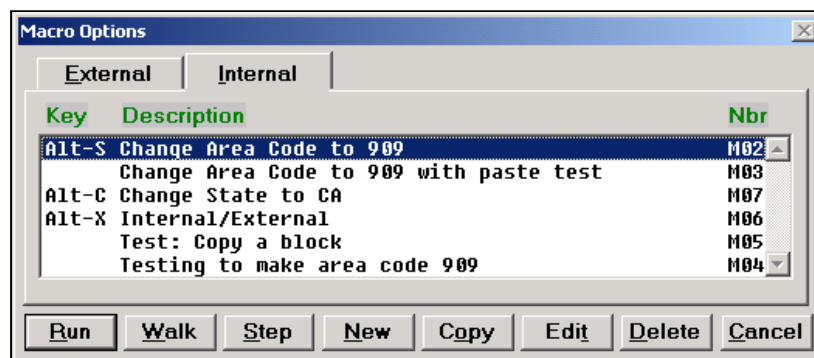


## Defining an Internal Macro inside an Application

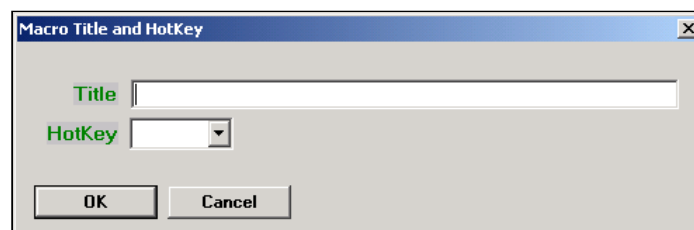
You can create an Internal Macro from any screen where the Macro button is active. Unlike the External Macro, which applies to the whole screen (help-id) meaning you can execute the external macro anywhere in the screen, the Internal Macro is cursor sensitive. An internal macro that executes successfully if the cursor is at phone number field will not work correctly if the current cursor is at the fax number field. For that reason, when an internal macro is saved, the cursor position for execution is also saved in the macro file heading area. When you try to execute an internal macro, only the internal macro that matches the cursor position will be made available to you.

The following is an example of adding an internal macro in customer file maintenance screen. The macro will be executed from the "Field Number to Change" position:

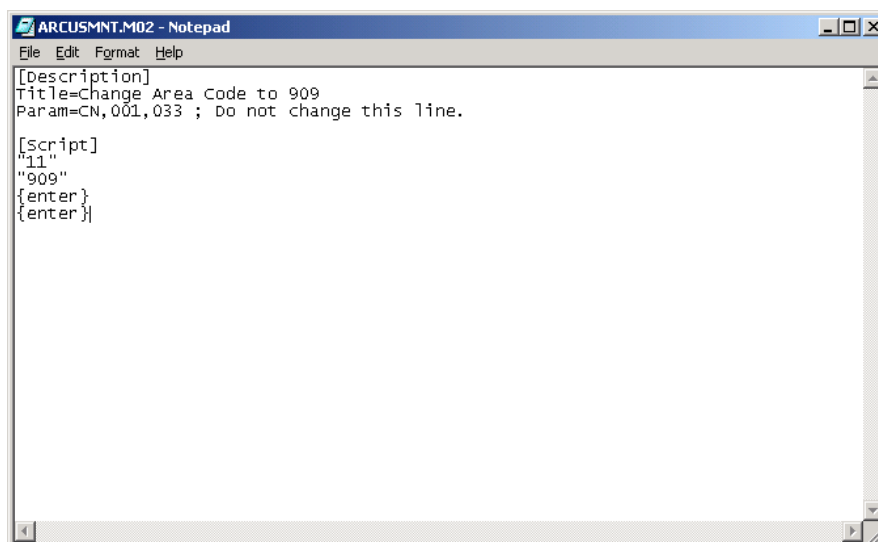
First, go to Customer File Maintenance and bring up a customer record in change mode. Then, place the cursor on "Field Number to Change." Next, click the Macro button (Ctrl-A) and choose the Internal tab. You should see the following screen:



Now you can click on the "New" button and the system will prompt you for the name of the macro:



We can enter, for example, "Change Area Code for 909" and confirm OK. After this, you will see the script for the macro show up in your favorite editor (by default, notepad) like the following screen. Currently, there is only the heading area without any script. You will need to enter the following script beneath the [SCRIPT] specification.



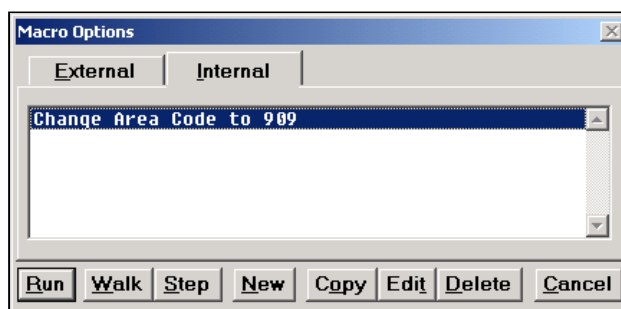
"11" means field 11 (Phone Number).

"909" indicates the first three digits of the phone number should be changed to 909. You will need to make sure that you are not in the insert mode when you execute this macro.

The first {enter} is to be executed at "Field Number to Change".

The second {enter} is to respond to the question "Do you wish to display next screen?" to which the default answer is "N."

In short, executing this script will change the phone number area code of the current customer to 909 and the screen will be cleared. Save the script in notepad and exit. If you wish to execute this macro, simply go to Customer File Maintenance and bring up a customer. Place the cursor at "Field Number to Change" and then click the macro button (Ctrl-A) and choose the internal tab. You should see the following screen:



Click on the button "Run" to run the macro. If you wish to change the macro script, simply choose on the "Edit" button. The internal macro will be saved in the MACRO directory with a naming convention of:

ARCUSMNT.M99

Where ARCUSMNT is the help-id of the current screen and 99 is a number sequentially assigned from 01 to 99 per help-id. You can have up to 99 internal macros per help-id.

The syntax for an internal macro that is to be executed from inside the application is similar to the command prompt macro with two exceptions:

- Command prompt macros require the startup menu path.
- Command prompt macros do not have a heading area.

A macro executed in one help-id can change itself to another menu item by supplying the menu path. To exit a menu, you may supply the menu number for exit or simply use {esc} in your script. You may also use {close} at the menu level to exit ELLIOTT.

## General Events

### Application Overview

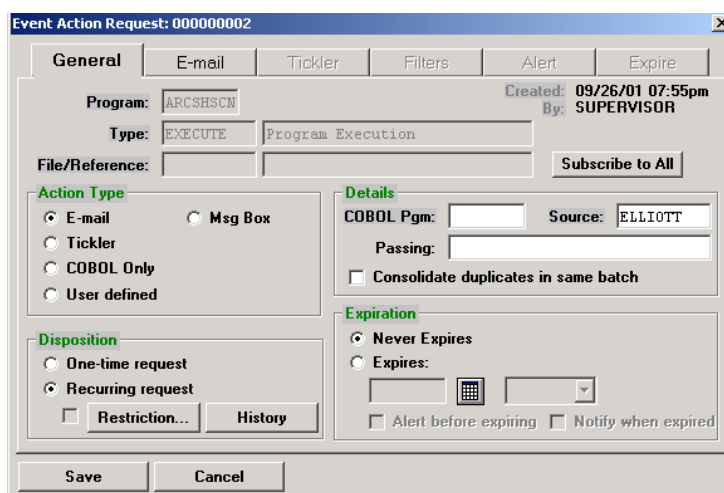
Elliott General Events add a new dimension to in-house systems management, functionality and auditing procedures. A general event can be defined as something that takes place within Elliott when a program is executed, such as a menu being accessed or a print function. Based on the event, you can trigger notification actions such as e-mail, screen messages or ticklers when the event takes place. Additionally, when the event takes place it can be set to trigger another event or action.

Normally general events occur at a higher level than specific events, which go below the general menu level to a specific file and record. The best way of helping you understand General Events is to give you examples of what can be done. Many of the functions and features are presented as we proceed from scenario to scenario, not because they are complex, but rather that they are extremely flexible and can be applied to many different situations. Once you are aware of what can be done, the flexibility and power of using General Events are yours.

Three simplified examples of General Events are:

1. Be notified via an e-mail or tickler when someone accesses the Employee File in Payroll.
2. Display a message in a popup window regarding Policies & Procedures when doing Inventory Item File maintenance.
3. Be notified via an e-mail or tickler when an Aging Report or Cash Projection Report is printed.

The figure below displays the basic setup to trigger actions for an event. All options and features will be discussed as we progress through **General Events**, **Specific Events** and **Advanced Features**.



The image shows a screenshot of the 'Event Action Request' window. The title bar reads 'Event Action Request: 000000002'. The window has several tabs: 'General', 'E-mail', 'Tickler', 'Filters', 'Alert', and 'Expire'. The 'General' tab is selected. Inside the window, there are fields for 'Program' (set to 'ARCSHSCN'), 'Type' (set to 'EXECUTE'), and 'File/Reference'. A 'Created' timestamp shows '09/26/01 07:55pm' by 'SUPERVISOR'. There are sections for 'Action Type' with radio buttons for 'E-mail', 'Msg Box', 'Tickler', 'COBOL Only', and 'User defined'. The 'Disposition' section has radio buttons for 'One-time request' and 'Recurring request', along with a 'Restriction...' button and a 'History' button. The 'Details' section includes 'COBOL Pgm' and 'Source' (set to 'ELLIOTT'), a 'Passing' field, and a checkbox for 'Consolidate duplicates in same batch'. The 'Expiration' section has radio buttons for 'Never Expires' and 'Expires', with a date picker and a dropdown menu. There are also checkboxes for 'Alert before expiring' and 'Notify when expired'. At the bottom are 'Save' and 'Cancel' buttons.

Event Action Request Window

## Programs Vs. Events

A program launches an application whereas an event triggers an action based on the program. Elliott programs are loaded, (**Registered**), in the event file **the first time they are executed**. This is explained in greater detail for Specific Events where it takes on a greater significance. As we proceed with Event examples, this will become much clearer. In the lower right hand bottom of the screen of the screen below, you will see **IM0101**. This is a Help Program ID, but can also be used to identify the program you are currently running.

Item File Maintenance - [Elliott Demonstration Company]

Base Data

* 1. Item No	
2. Description	
3. Prod Category	20. Qty On Hand
4. Code A	21. Qty Allocated
5. Def Or Mfg Loc	22. Qty Backorder
6. Activity Code	23. Qty On Order
7. Purch Or Mfg ?	24. Landed Avg Cst
8. Stocked Flag	25. Landed Lst Cst
9. Controlled Flag	26. Landed Std Cst
10. Substitute Item	27. Date Last Sold
11. Stocking U Of M	28. Qty Last Sold
12. Purchase U Of M	29. Ptd Qty Sold
13. Pur To Stk Ratio	30. Ptd Sales Amt
14. Selling U Of M	31. Ptd Cost Amt
15. Sel To Stk Ratio	32. Ytd Qty Sold
16. Selling Price	33. Ytd Sales Amt
17. Backorderable ?	34. Ytd Cost Amt
18. Taxable ?	35. Ytd Qty Ret'd
19. Bin No/Pick Seq	36. Sales Last Yr

F1=Next Itm F2=Prev Itm F3=Copy Itm F7=Srch By Itm No F8=Srch By Itm Desc

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Help ID Program = Program = Event

Print Options

Destination

☒ Printer ☐ Screen ☐ Disk ☐ Defer ☐ E-mail

Printer Selections

Sel	Copies	Collate	Printer	Configuration
<input checked="" type="checkbox"/>	1 / 1		\\david2000\HP LaserJet 4050 Series PS	Default Printer

Appearance

Font(01-98=Use raw data pass thru)

00 Use Windows Printer Default

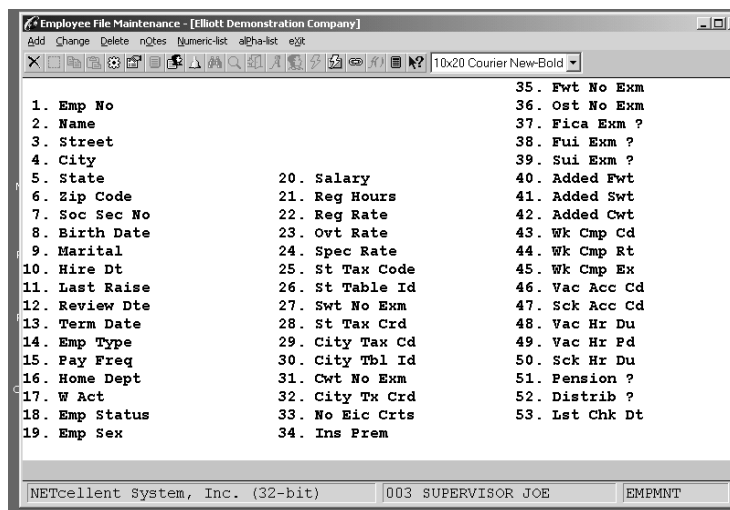
Options...

OK Cancel Task: APAGERPT

Print Function, (Task), is  
Print Aging Report

## Run Instructions: E-Mail Actions

We will help you create a General Event **by example** for an event that triggers an e-mail notification when someone accesses the Employee File in Payroll. The steps used are basic to all General Events of this action type.



Employee File Menu (EMPMNT = Program/Event Name)

### Step 1.

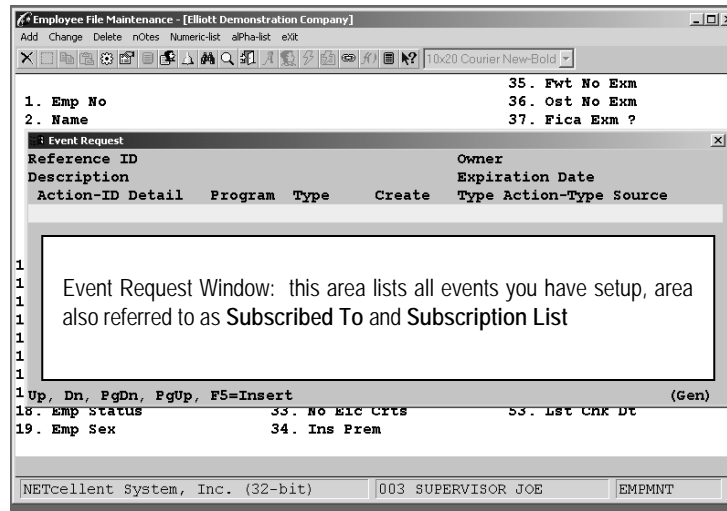
From the Employee File screen select the General Events Icon from the menu tool bar or press "Ctrl-G." (We are only in the Employee File screen to get the menu name EMPMNT. If you already know the name, you can create a General Event action from anywhere within Elliott.)



General Events Icon  
(Thunderbolt in a box)

After selecting the General Events Icon or pressing Ctrl-G, you will be taken to the **Event Request Window** listing all the General Events you have set up (**Subscribed To**). See next page.

## General Event Subscription List

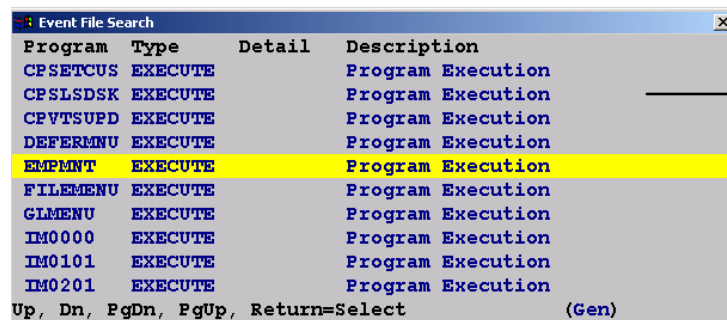


Empty Subscription List – Nothing Created Yet

## Create Subscription

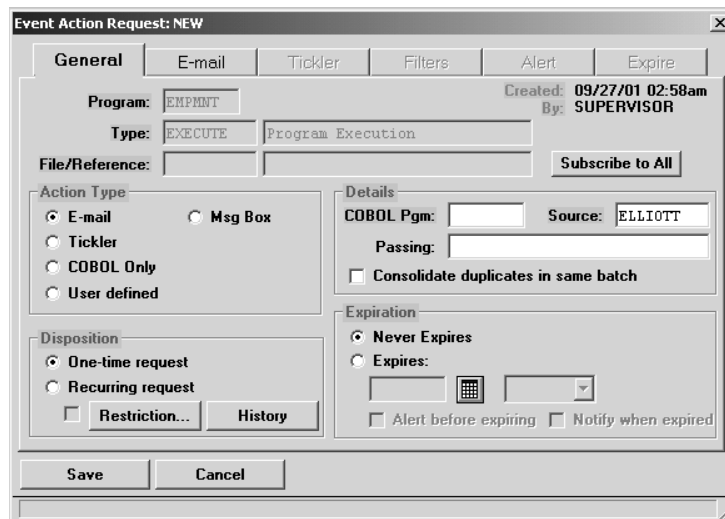
### Step 2.

In the Event Request Window List, press F5 to find EMPMNT. Place the cursor on the event to highlight and then press <Enter> or double click the mouse to insert.



Once selected, the system takes us to the **Event Action Request Window**, see next page.

### Step 3. Event Action Request Window



This window has 6 Tabs:

1. General = Shared by General and Specific Events
2. E-Mail/Msg Box = Define e-mails or message box text for General and Specific Events
3. Tickler = Define ticklers for General and Specific Events
4. Filters = Used By Specific Events Only
5. Alert = Define Alert messages (General and Specific Events)
6. Expire = Define Expiration messages (General and Specific Events)

Accessing Folders 2 - 6 is determined by what you setup in the Action Type and Expiration Boxes. The top section of the General Window is for information/reference purposes only. The radio button **Subscribe To All** applies only to Specific Events.

### Step 4.

#### 1. Action Type Option

- a. e-mail to send e-mail notification the event occurred
- b. Msg Box is to have a user defined message appear in popup window the event occurs
- c. Tickler is to create a tickler in Notes the event occurs
- d. Cobol Only is to trigger another Cobol program when the event occurs  
(Requires entry in the Detail Fields Cobol Pgm and Passing)
- e. User Defined is to trigger any application you define when the event occurs

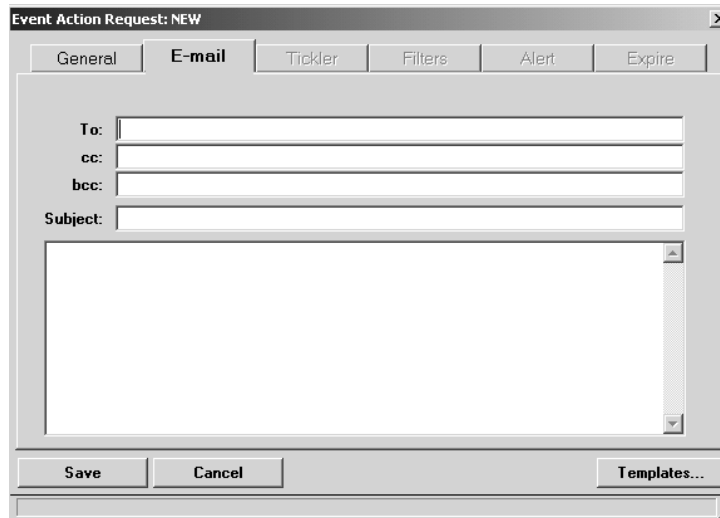
(When The Event Occurs = When a user accesses the Employee File)

#### 2. Select Action Type E-Mail

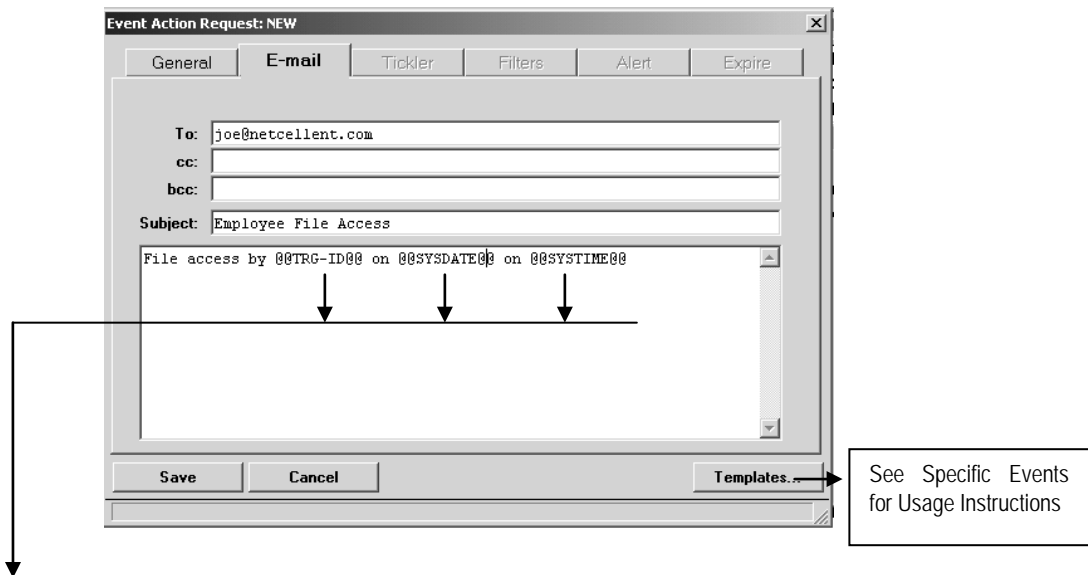




## Step 8. Select E-Mail Folder And The Following Window Appears



## Complete E-mail Message



**System Variables:** Right click mouse in e-mail subject line or text body to access fields available.

**TRG-ID** = Triggered by (User ID)  
**SYSDATE** = Date event triggered  
**SYSTIME** = Time event triggered

**Save →** Next time a user accesses the Employee File, addressee or addressees of the e-mail will be automatically notified via e-mail.

**Note →** If we wanted more detailed specifics as to what record or field was accessed, changed, or modified we could set up a Specific Event.

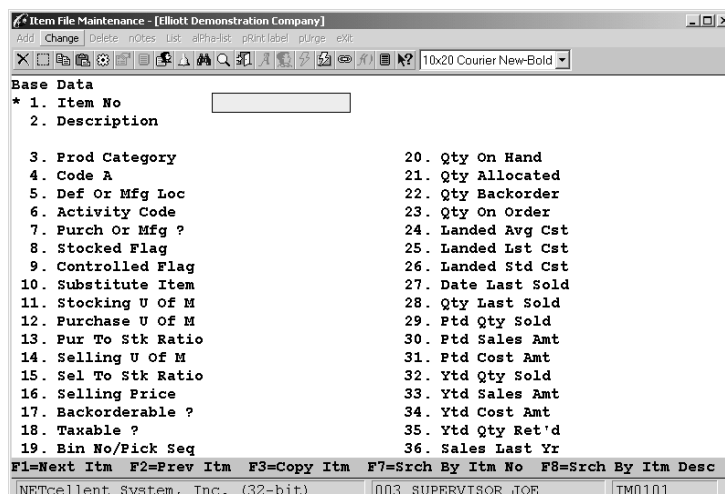
**IMPORTANT: General Events Do Not Work Immediately For All Users**

For faster processing and quicker response, all General Events are loaded into Cache memory. If you create or modify a general event, the current users in Elliott will not have access to it until they refresh their Cache by restarting Elliott and load new or modified events and actions into memory.

**NOTE:** Cache memory processing does not apply to Specific Events.

## Run Instructions: Message Boxes

We will help you create a General Event **by example** for an event that triggers a Message Box Notification regarding Procedures & Policies when someone accesses Inventory Item File Maintenance. The steps used are basic to all General Events of this action type.



### Step 1.

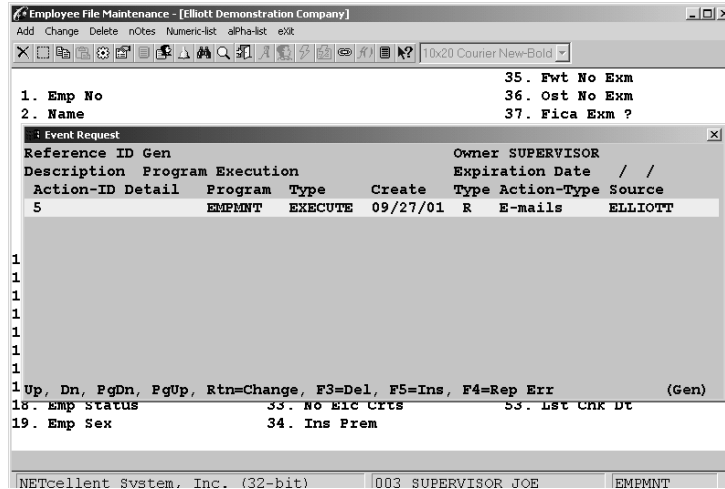
From the Item File screen select the General Events Icon from the menu tool bar or press "Ctrl-G." (We are only in the Item File screen to get the program name IM0101. If you already know the program name, you can create a General Event action from anywhere within Elliott.)



General Events Icon  
(Thunderbolt in a box)

After selecting the General Events Icon or pressing Ctrl-G, you will be taken to **Event Request Window** listing all the General Events you have set up (**Subscribed To**). See next page.

## General Event Subscription List



Employee File Maintenance - [Elliott Demonstration Company]

Add Change Delete nOtes Numeric-list alpha-list eXit

10x20 Courier New-Bold

1. Emp No 35. Fwt No Exm  
2. Name 36. Ost No Exm  
37. Fica Exm ?

Event Request

Reference ID	Gen	Description	Program	Execution	Owner	SUPERVISOR	Expiration Date	/	/
Action-ID	Detail		Program	Type	Create	Type	Action-Type	Source	
5			EMPMNT	EXECUTE	09/27/01	R	E-mails	ELLIOTT	

1 Up, Dn, PgDn, PgUp, Rtn=Change, F3=Del, F5=Ins, F4=Rep Err (Gen)

18. Emp Status 33. No Etc Ctrs 33. Lst Chk Dt  
19. Emp Sex 34. Ins Prem

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE EMPMNT

Subscription List – Shows first event we created in previous example  
Type R = Recurring. If it is a One Time Request  
Type O = One Time Request

### Create Subscription

#### Step 2.

In the Event Request Window List, press F5 to find IM0101. Place the cursor on the event to highlight and then press <Enter> or double click the mouse to insert.

Once selected, the system takes us to the Event Action Request Window as shown below.



Event Action Request: NEW

General E-mail Tickler Filters Alert Expire

Program: IM0101 Created: 09/27/01 06:06am  
By: SUPERVISOR

Type: EXECUTE Program Execution

File/Reference: Subscribe to All

Action Type:  
☒ E-mail  
☐ Msg Box  
☐ Tickler  
☐ COBOL Only  
☐ User defined

Disposition:  
☒ One-time request  
☐ Recurring request  
☐ Restriction... History

Details:  
 COBOL Pgm: Source: ELLIOTT  
 Passing:  
☐ Consolidate duplicates in same batch

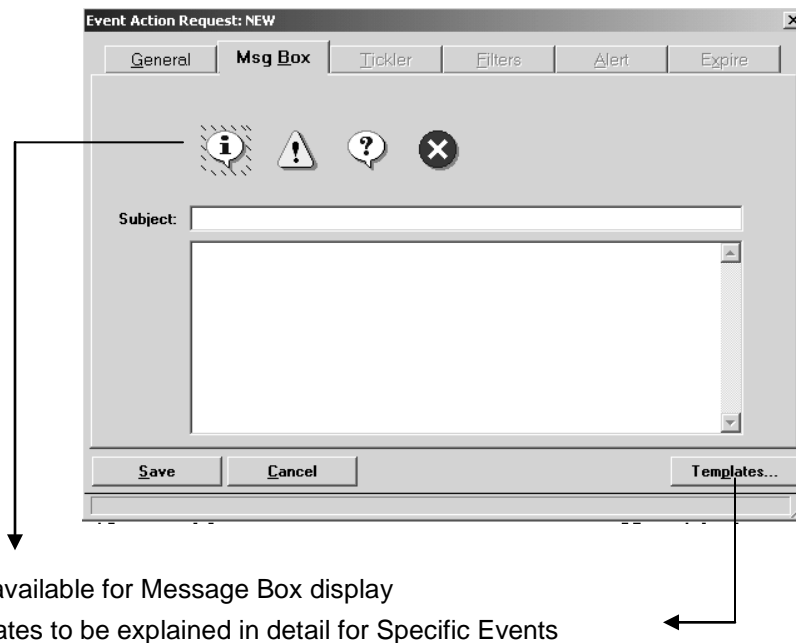
Expiration:  
☒ Never Expires  
☐ Expires:  
☐ Alert before expiring ☐ Notify when expired

Save Cancel

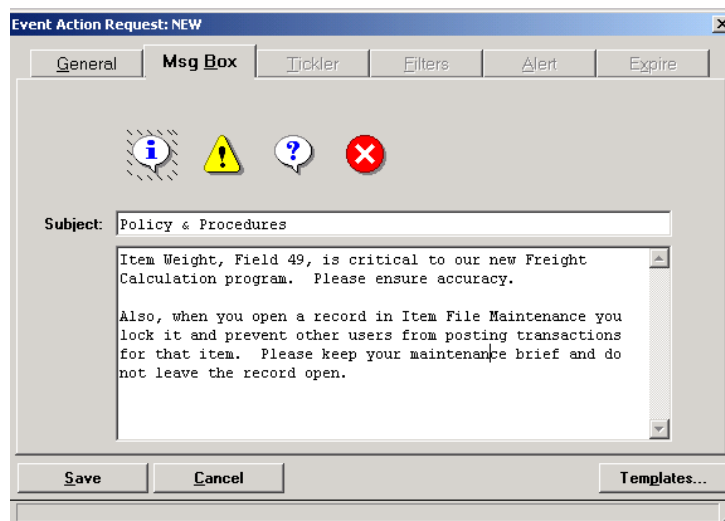
**Step 3. Disposition - Select Recurring**

**Step 4. Select Msg Box**

E-Mail Folder now changes to Msg Box Folder  
Open Msg Box Folder



**Complete Message**



**Save →** After refreshing cache memory, the next time a user goes to Item File Maintenance, the above message will pop up in a window. See examples on the next page.

Item File Maintenance - [Elliott Demonstration Company]

Add Elliott Event Message from SUPERVISOR

Policy & Procedures Cancel

Details

Base

1. Description

2. Qty On Hand

3. Qty Allocated

4. Qty Backorder

5. Qty On Order

6. Landed Avg Cst

7. Landed Lst Cst

8. Landed Std Cst

9. Date Last Sold

10. Qty Last Sold

11. Ptd Qty Sold

12. Ptd Sales Amt

13. Ptd Cost Amt

14. Ytd Qty Sold

15. Ytd Sales Amt

16. Ytd Cost Amt

17. Ytd Qty Ret'd

18. Sales Last Yr

19. Bin No/Pick Seq

20. Qty On Hand

21. Qty Allocated

22. Qty Backorder

23. Qty On Order

24. Landed Avg Cst

25. Landed Lst Cst

26. Landed Std Cst

27. Date Last Sold

28. Qty Last Sold

29. Ptd Qty Sold

30. Ptd Sales Amt

31. Ptd Cost Amt

32. Ytd Qty Sold

33. Ytd Sales Amt

34. Ytd Cost Amt

35. Ytd Qty Ret'd

36. Sales Last Yr

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE IM0101

Msg Box Popup Window

Item File Maintenance - [Elliott Demonstration Company]

Add Elliott Event Message from SUPERVISOR

Policy & Procedures Cancel

Details

Base

1. Item Weight, Field 49, is critical to our new Freight Calculation program. Please ensure accuracy.

2. Also, when you open a record in Item File Maintenance you lock it and prevent other users from posting transactions for that item. Please keep your maintenance brief and do not leave the record open.

3. Controlled Flag

4. Substitue Item

5. Stocking U Of M

6. Purchase U Of M

7. Pur To Stk Ratio

8. Selling U Of M

9. Sel To Stk Ratio

10. Selling Price

11. Backorderable ?

12. Taxable ?

13. Bin No/Pick Seq

14. Qty On Hand

15. Qty Allocated

16. Qty Backorder

17. Qty On Order

18. Landed Avg Cst

19. Landed Lst Cst

20. Landed Std Cst

21. Date Last Sold

22. Qty Last Sold

23. Ptd Qty Sold

24. Ptd Sales Amt

25. Ptd Cost Amt

26. Ytd Qty Sold

27. Ytd Sales Amt

28. Ytd Cost Amt

29. Ytd Qty Ret'd

30. Sales Last Yr

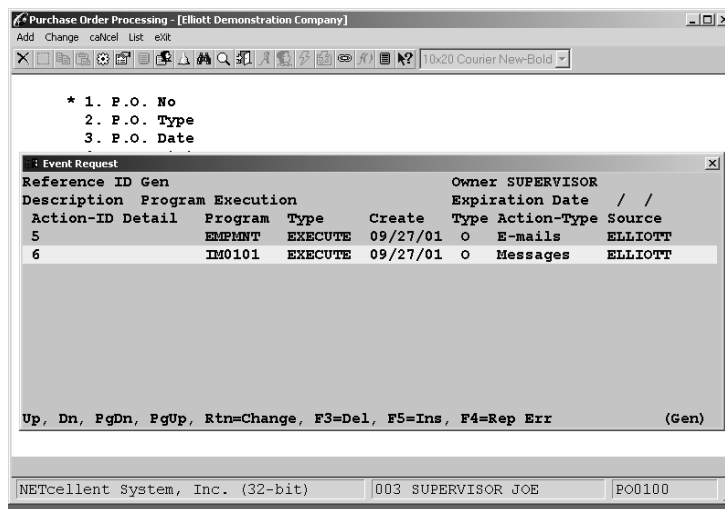
NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE IM0101

Msg Box Details

## Scenario Variations

Let's assume the Msg Box we just created was to be used in conjunction with the Elliott Freight Calculation program just implemented and we do not want this window to pop up after 45 days. To do this, we could manually delete the action in 45 days or let the system work more efficiently for us by adding an expiration date.

**From anywhere in Elliott**, click the General Events Icon, or press Ctrl-G, to access the Events Subscription List.



**Select IM0101** and press <Enter> or double click to access Events Action Request window.

In the Events Action Request window click **Expires** radio button, calculate 45 days from today and pick the date on the calendar.



**To Finish → Press Okay and Save**



Event Action Set To expire 11/11/01 at 12:00 am

Event Action Request: 000000006

General | Msg Box | Tickler | Filters | Alert | Expire

Program: IM0101 Created: 09/27/01 06:06am  
By: SUPERVISOR

Type: EXECUTE Program Execution

File/Reference:  Subscribe to All

**Action Type**

☐ E-mail ☒ Msg Box  
☐ Tickler  
☐ COBOL Only  
☐ User defined

**Disposition**

☐ One-time request  
☒ Recurring request  
☐ Restriction... History

**Details**

COBOL Pgm:  Source: ELLIOTT  
Passing:   
☐ Consolidate duplicates in same batch

**Expiration**

☐ Never Expires  
☒ Expires:  
11/11/01 12:00am  
☐ Alert before expiring ☐ Notify when expired

Save Cancel

## Run Instructions: Tickler Actions

Ticklers are discussed in detail in the Notes chapter. **Applied to General Events**; they are primarily used as a notification action substitute when e-mail is not available.

## Specific Events

### Application Overview

Specific Events unleash the power of database access to provide high levels of customer service and improve the productivity of all users. With Specific Events, the options and features available in the Event Action Request Window take on almost unlimited flexibility in designing actions when an event occurs.

**Before you proceed**, you should be very familiar with using General Events. The best way of helping you understand Specific Events is to give you examples of what can be done. Many of the functions and features of Special Events are presented as we proceed from scenario to scenario, not because they are complex, but rather that they are extremely flexible and can be applied to many different situations. Once you are aware of what can be done, the flexibility and power of using Specific Events are yours.

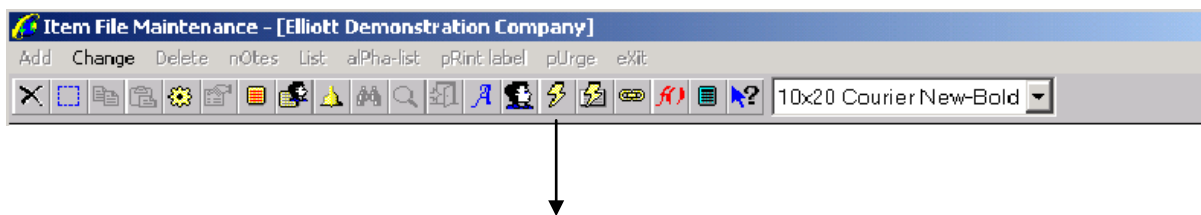
At the end of this chapter we have a topic titled **Advanced Features** for procedures not presented in our examples.

Our examples will consist of four scenarios:

1. Create an action to notify a customer when an out of stock item he interested in is received.
2. Create an action to notify a salesman when an order is created for one of his customers.
3. Create an action to notify a buyer when Quantity Available for an item goes negative balance, or zero. (Quantity Available = Qty On Hand – Qty Allocated)
4. Create an action to notify sales desk people to offer accessories for an item at time of order line item entry.

### Accessing Specific Events

**Elliott Programs are loaded (Registered) into the Event File after they are programmed for the first time.** If you needed to do a Specific Event based on adding an order, the event will not appear in the Event File until you have added an order. The same applies to receiving an item. That event will not appear until you receive a Purchase Order.



Specific Events Icon (Ctrl E)

The Specific Events Icon will only be accessible, (Yellow), when you are in a sub-menu and have opened a specific record. If not accessible, it will be grayed out. The above menu bar came from Item File Maintenance when we opened item "CAS-1917 Leica".

The Icon is normally accessible in the Maintenance, Inquiry and Processing sub menus when you open a record. If a specific event **already exists** for this record, the yellow **thunderbolt** will be **red**.

## Master Event List

There are a number of specific events that are available in Elliott.

Program	Type	Description	FileName	Variables
AP0101	ADDVEND	Add Vendor	APVENFIL	Vendor No, Vendor Name, Address 1, Address 2, City, State, Zip Code and Contact.
AP0101	CHGVEND	Change Vendor	APVENFIL	Vendor No, Vendor Name, Address 1, Address 2, City, State, Zip Code and Contact.
AP0101	DELVEND	Delete Vendor	APVENFIL	Vendor No, Vendor Name, Address 1, Address 2, City, State, Zip Code and Contact.
AP02P1	PSAPTRX	A/P Trx Posting	APVENFIL	Vendor No, Vendor Name, Invoice No, Voucher Date, PO No, Invoice Date, Invoice Amount and Voucher No.
AP08P2	PRTAPCHK	Print A/P Check	APVENFIL	Vendor No, Vendor Name, Check No, Check Date, Check Amount and Check Account No.
AP08P2	VODAPCHK	Void A/P Check	APVENFIL	Vendor No, Vendor Name, Check No, Check Date, Check Amount and Check Account No.
AP08P3	PSAPCHK	A/P Check Posting	APVENFIL	Vendor No, Vendor Name, Check No, Check Date, Check Amount and Check Account No.
ARAGEDEF	ARAGING	A/R Aging Info.	COMPFILE	Record No, Aging Period 1, Aging Period 2, Aging Period 3, Aging Period 4 and Total A/R Amount.
ARAGEDEF	ARCUSAGE	A/R Aging Info.	ARCUSFIL	Customer No, Customer Name, Credit Limit, Account Balance, Terms, Aging Period 1, Aging Period 2, Aging Period 3 and Aging Period 4.
ARCSHADD	ENCSHTRX	Cash Receipt Processing	ARCUSFIL	Customer No, Customer Name, Check Amount, Check No, Check Date, Terms Code, Terms Code Desc, Salesman No, Customer E-mail and Salesman E-mail.
ARCSHJNL	PSCSHTRX	Cash Receipt Posting	ARCUSFIL	Customer No, Customer Name, Check Amount, Check No and Check Date.
ARCSHTRX	PSCSHTRX	Cash Receipt Posting	ARCUSFIL	Terms Code and Terms Code Desc.
ARCUSMNT	ADDCUST	Add Customer	ARCUSFIL	Customer No, Customer Name, Customer Terms, Customer Ship Via, Customer Type, State, Zip Code, Salesman and E-mail Address.
ARCUSMNT	ADDCUSTS	Add Customer (Sales Desk)	ARCUSFIL	Customer No, Customer Name, Customer Terms, Customer Ship Via, Customer Type, State, Zip Code, Salesman and E-mail Address.
ARCUSMNT	CHGCUST	Change Customer	ARCUSFIL	Customer No, Customer Name, Customer Terms, Customer Ship Via, Customer Type, State, Zip Code, Salesman and E-mail Address.
ARCUSMNT	CHGCUSTS	Change Customer (Sales Desk)	ARCUSFIL	Customer No, Customer Name, Customer Terms, Customer Ship Via, Customer Type, State, Zip Code, Salesman and E-mail Address.
ARCUSMNT	CRCADD	Add Credit Card	ARCUSFIL	Customer No, Masked Crdt Card No, Exp Date, Card Holder, City/State/Zip, Phone#, E-mail Address, Trx Type, Trx Amount and Trx Status.
ARCUSMNT	CRCAVS	AVSOnly Credit Card	ARCUSFIL	Customer No, Masked Crdt Card No, Exp Date, Card Holder, City/State/Zip, Phone#, E-mail Address, Trx Type, Trx Amount and Trx Status.

ARCUSMNT	CRCCHG	Change Credit Card	ARCUSFIL	Customer No, Masked Crdt Card No, Exp Date, Card Holder, City/State/Zip, Phone#, E-mail Address, Trx Type, Trx Amount and Trx Status.
ARCUSMNT	CRCCHRG	Charge Credit Card	ARCUSFIL	Customer No, Masked Crdt Card No, Exp Date, Card Holder, City/State/Zip, Phone#, E-mail Address, Trx Type, Trx Amount and Trx Status.
ARCUSMNT	CRCDEL	Delete Credit Card	ARCUSFIL	Customer No, Masked Crdt Card No, Exp Date, Card Holder, City/State/Zip, Phone#, E-mail Address, Trx Type, Trx Amount and Trx Status.
ARCUSMNT	CRCRFND	Refund Credit Card	ARCUSFIL	Customer No, Masked Crdt Card No, Exp Date, Card Holder, City/State/Zip, Phone#, E-mail Address, Trx Type, Trx Amount and Trx Status.
ARCUSMNT	CRCVIEW	View Credit Card	ARCUSFIL	Customer No, Masked Crdt Card No, Exp Date, Card Holder, City/State/Zip, Phone#, E-mail Address, Trx Type, Trx Amount and Trx Status.
ARCUSMNT	CUSTCHGC	Credit Change for Customer	ARCUSFIL	Customer No, Customer Name, Salesman No, Old Credit Limit, New Credit Limit, Old Credit Hold, New Credit Hold, Old Terms Code and New Terms Code.
ARCUSMNT	CUSTCHGS	Credit Change for Customer	ARSLMFIL	Salesman No, Customer Name, Customer No, Old Credit Limit, New Credit Limit, Old Credit Hold, New Credit Hold, Old Terms Code and New Terms Code.
ARCUSMNT	DELCUST	Delete Customer	ARCUSFIL	Customer No, Customer Name, Customer Terms, Customer Ship Via, Customer Type, State, Zip Code, Salesman and E-mail Address.
ARSLMMNT	ADDSLMN	Add Salesman	ARSLMFIL	Salesman No, Salesman Name, Salesman Phone, Salesman Address 1, Salesman Address 2, Salesman Territory and Salesman E-mail.
ARSLMMNT	CHGSLMN	Change Salesman	ARSLMFIL	Salesman No, Salesman Name, Salesman Phone, Salesman Address 1, Salesman Address 2, Salesman Territory and Salesman E-mail.
ARSLMMNT	DELSLMN	Delete Salesman	ARSLMFIL	Salesman No, Salesman Name, Salesman Phone, Salesman Address 1, Salesman Address 2, Salesman Territory and Salesman E-mail.
BB17P2	CASHBAL	Cash Position Summary Balance	COMPFILE	Record No, Bank Account 1, Bank Account 2, Bank Account 3, Bank Account 4, Bank Account 5, Bank Account 6, Bank Account 7, Bank Account 8 and Bank Account 9.
BM19P1	PSPRDORD	Product Order Posting	IMITMFIL	Item No, Order No, Location, Trx Quantity, Enter Date, Orig Qty and Trx Date.
BM20P1	PRTWKORD	Print Work Order	IMITMFIL	Item No, Location, Order No, Product Desc1, Product Desc2, Due Date, Ord Qty and Reference Desc.
CP0101	ADDORDCU	Add Order For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No, Order Type and Order Total.
CP0101	ADDORDER	Add Order	CPORDHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No, Order Type and Order Total.
CP0101	ADDORDSH	Add Order For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No, Order Type and Order Total.

CP0101	ADDORDSM	Add Order For Salesman	ARSLMFIL	Salesman, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Order No, Order Type and Order Total.
CP0101	BILORDER	Order Billing	CPORDHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0101	CHGORDCU	Change Order For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0101	CHGORDER	Change Order	CPORDHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0101	CHGORDSH	Change Order For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0101	CHGORDSM	Change Order For Salesman	ARSLMFIL	Salesman, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CP0101	CUSTENTR	Customer Is Entered	ARCUSFIL	Customer No, Program, Order No, Cust Po No and Order Type.
CP0101	DELORDCU	Delete Order For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0101	DELORDER	Delete Order	CPORDHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0101	DELORDSH	Delete Order For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0101	DELORDSM	Delete Order For Salesman	ARSLMFIL	Salesman, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CP0101	DELPPORD	Delete Prepaid Order	ARCUSFIL	Customer No, Order No, Ship To Name, Order Total, Check Number, Check Date, Amount Paid, Comment-1, Comment-2 and Credit Charge.
CP0101	ORDHELD	Order Is Held	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No and Held Reason.
CP0101	UNSELORD	Unselect Order	CPORDHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP0102	ORDHELD	Order Is Held	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No and Held Reason.
CP0111	ADDORDIT	Add Order For Item	IMITMFIL	Item No, Customer No, Ship To No, Location, Ship-To Name, Cust Po No, Salesman No, Order No, Item Desc-1 and Qty Available.
CP0111	CHGORDIT	Change Order For Item	IMITMFIL	Item No, Customer No, Ship To No, Location, Ship-To Name, Cust Po No, Salesman No, Order No, Item Desc-1 and Qty Available.
CP0111	DELORDIT	Delete Order For Item	IMITMFIL	Item No, Customer No, Ship To No, Location, Ship-To Name, Cust Po No, Salesman No, Order No, Item Desc-1 and Qty Available.
CP02P1	PICORDCU	Picking Ticket For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP02P1	PICORDIT	Picking Ticket For Item	IMITMFIL	Item No, Customer No, Ship To No, Location, Ship-To Name, Cust Po No, Salesman No, Order No and Item Desc-1.

CP02P1	PICORDSH	Picking Ticket For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CP02P1	PICORDSM	Picking Ticket For Salesman	ARSLMFIL	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CP0305	SALESTTL	COP Posting Sales Total	COMPFIL	Record No, Total Sales, Ttl Frt & Other Chrg, Ttl # of Invoice, Ttl COGS, Ttl CR Memo Amt, Ttl Order Amt Today, Ttl# of Order Today, Ttl OrdAmt Yesterday and No of Ord Yesterday.
CP1001	ADDSHPTO	Add Ship To	CPSHPFIL	Ship To Key, Ship To Name, Ship To Address 1, Ship To Address 2, Ship To City, Ship To State, Ship To Zip Code, Ship To Ship Via and Ship To Salesman.
CP1001	CHGSHPTO	Change Ship To	CPSHPFIL	Ship To Key, Ship To Name, Ship To Address 1, Ship To Address 2, Ship To City, Ship To State, Ship To Zip Code, Ship To Ship Via and Ship To Salesman.
CP1001	DELSHPTO	Delete Ship To	CPSHPFIL	Ship To Key, Ship To Name, Ship To Address 1, Ship To Address 2, Ship To City, Ship To State, Ship To Zip Code, Ship To Ship Via and Ship To Salesman.
CPCNLORD	CNLORDCU	Cancel Order For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPCNLORD	CNLORDSH	Cancel Order For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPCNLORD	CNLORDSM	Cancel Order For Salesman	ARSLMFIL	Salesman, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CPCNLORD	ORDHELD	Order Is Held	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No and Held Reason.
CPCNLPIC	CNLPICCU	Cancel Picking For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPCNLPIC	CNLPICSH	Cancel Picking For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPCNLPIC	CNLPICSM	Cancel Picking For Salesman	ARSLMFIL	Salesman, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CPCNLPIC	ORDHELD	Order Is Held	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No and Held Reason.
CPINVPRT	INVPRT	Invoice Printing	COMPFIL	Record No, Starting Order#, Ending Order#, Starting Invoice#, Ending Invoice#, Invoice Date, Total Invoice, TTL Sales Amt, Invoice Print OK and Reuse Invoice.
CPINVPRT	INVPRTCU	Invoice Printing For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No, Invoice No and Invoice Date.
CPINVPRT	INVPRTIT	Invoice Printing For Item	IMITMFIL	Item No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No, Order No Item Desc-1 and Invoice No.
CPINVPRT	INVPRTOR	Invoice Printing	CPORDHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No, Invoice No and Invoice Date.
CPINVPRT	INVPRTSH	Invoice Printing For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Bill-To Name,

				Ship-To Name, Cust Po No, Salesman No, Invoice No and Invoice Date.
CPINVPRT	INVPRTSM	Invoice Printing For Salesman	ARSLMFIL	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Order No, Invoice No and Invoice Date.
CPINVPRT	ORDHELD	Order Is Held	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No, Invoice No, Invoice Date and Held Reason.
CPRECHDR	ADDORDCU	Add Order For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	ADDORDSH	Add Order For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	ADDORDSM	Add Order For Salesman	ARSLMFIL	Salesman, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CPRECHDR	ADDRECCU	Add Recurring Order For Custom	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	ADDRECUR	Add Recurring Order	CPRECHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	CHGORDCU	Change Order For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	CHGORDSH	Change Order For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	CHGORDSM	Change Order For Salesman	ARSLMFIL	Salesman, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CPRECHDR	CHGRECCU	Change Recurring Order For Cus	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	CHGRECUR	Change Recurring Order	CPRECHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	DELORDCU	Delete Order For Customer	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	DELORDSH	Delete Order For Ship-To	CPSHPFIL	Ship-To-Key, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	DELORDSM	Delete Order For Salesman	ARSLMFIL	Salesman, Customer No, Order No, Bill-To Name, Ship-To Name, Cust Po No and Order No.
CPRECHDR	DELRECCU	Delete Recurring Order For Cus	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	DELRECUR	Delete Recurring Order	CPRECHDR	Order No, Customer No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No and Salesman No.
CPRECHDR	ORDHELD	Order Is Held	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No and Held Reason.
CPRECLIN	ADDORDIT	Add Order For Item	IMITMFIL	Item No, Customer No, Ship To No, Location, Ship-To Name, Cust Po No, Salesman No, Order No, Item Desc-1 and Qty Available.
CPRECLIN	CHGORDIT	Change Order For Item	IMITMFIL	Item No, Customer No, Ship To No, Location, Ship-To Name, Cust Po No, Salesman No, Order No, Item Desc-1 and Qty Available.

CPRECLIN	DELORDIT	Delete Order For Item	IMITMFIL	Item No, Customer No, Ship To No, Location, Ship-To Name, Cust Po No, Salesman No, Order No, Item Desc-1 and Qty Available.
CPSHPVER	ORDHELD	Order Is Held	ARCUSFIL	Customer No, Order No, Ship To No, Bill-To Name, Ship-To Name, Cust Po No, Salesman No and Held Reason.
CPSLSDSK	ADDCNFRM	Add Confirm Line Item (Sales D	IMITMFIL	Item No, Qty, Unit Price, Customer No, Salesman No, Location and Product Category.
CPSLSDSK	CUSTENTR	Customer Is Entered	ARCUSFIL	Customer No, Ship Via, Terms Code, Past Due Amt, Credit Limit, Sales YTD, Sales PTD, Customer Disc%, State and Comment-1.
EL700DP	DFRPTERR	Deferred Report Interruption	COMPFILE	Company ID, Task, Description, Requester, Recurs and Message.
EMPMNT	ADDEMP	Add Employee	EMPFIL	Employee No, Employee Name, Street, City, State, Zip Code and Birth Date.
EMPMNT	CHGEMP	Change Employee	EMPFIL	Employee No, Employee Name, Street, City, State, Zip Code and Birth Date.
EMPMNT	DELEMP	Delete Employee	EMPFIL	Employee No, Employee Name, Street, City, State, Zip Code and Birth Date.
GLACTADD	ADDGLACT	Add GL Account	GLACTFIL	GL Account No, Acct Description, Search Acct Desc, Cntr Bal Acct, Consolidation Acct, Auto Dist Code, Paren Control Code and Compression Code.
GLACTADD	CHGGLACT	Change GL Account	GLACTFIL	GL Account No, Acct Description, Search Acct Desc, Cntr Bal Acct, Consolidation Acct, Auto Dist Code, Paren Control Code and Compression Code.
GLACTADD	DELGLACT	Delete GL Account	GLACTFIL	GL Account No, Acct Description, Search Acct Desc, Cntr Bal Acct, Consolidation Acct, Auto Dist Code, Paren Control Code and Compression Code.
GLACTCNG	ADDGLACT	Add GL Account	GLACTFIL	GL Account No, Acct Description, Search Acct Desc, Cntr Bal Acct, Consolidation Acct, Auto Dist Code, Paren Control Code and Compression Code.
GLACTCNG	CHGGLACT	Change GL Account	GLACTFIL	GL Account No, Acct Description, Search Acct Desc, Cntr Bal Acct, Consolidation Acct, Auto Dist Code, Paren Control Code and Compression Code.
GLACTCNG	DELGLACT	Delete GL Account	GLACTFIL	GL Account No, Acct Description, Search Acct Desc, Cntr Bal Acct, Consolidation Acct, Auto Dist Code, Paren Control Code and Compression Code.
IM0101	ADDITEM	Add Item	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category and User Defined Code.
IM0101	CHGAVCST	Change Average Cost	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category, User Defined Code, Old Average Cost and New Average Cost.
IM0101	CHGITEM	Change Item	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category, User Defined Code, Orig Prod Category and Orig User Def Code.
IM0101	CHGLACST	Change Last Cost	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category, User Defined Code, Old Last Cost and New Last Cost.
IM0101	CHGPRICE	Change Price	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category,



				User Defined Code, Old Price and New Price.
IM0101	CHGQTYAL	Change Qty Allocated	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category, User Defined Code, Old Qty Allocated and New Qty Allocated.
IM0101	CHGQTYOH	Change Qty On Hand	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category, User Defined Code, Old Qty On Hand and New Qty On Hand.
IM0101	CHGSTCST	Change Std Cost	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category, User Defined Code, Old Standard Cost and New Standard Cost.
IM0101	DELITEM	Delete Item	IMITMFIL	Item No, Item Desc 1, Item Desc 2, Product Category and User Defined Code.
IM2402	IMTRXADJ	I/M Trx Adjustment Posting	IMITMFIL	Item No, Doc No, Trx Date, Trx Quantity, Adjust Location and Adj Amount.
IM2402	IMTRXISS	I/M Trx Issue Posting	IMITMFIL	Item No, Doc No, Trx Date, Trx Quantity and Issue Location.
IM2402	IMTRXREC	I/M Trx Receiving Posting	IMITMFIL	Item No, Doc No, Trx Date, Trx Quantity and Location.
IM2402	IMTRXTRF	I/M Trx Transfer Posting	IMITMFIL	Item No, Doc No, Trx Date, Trx Quantity and From Location.
PO0203	PRTCHGPO	Print Change Purchase Orders	POORDHDR	Order No, Vendor No, Order Date, Vendor Name, No. of Line Changed, Ship To, Ship Via, Terms, PO Changed Qty and PO Changed Amt.
PO0203	PRTCNLPO	Print Cancel Purchase Orders	POORDHDR	Order No, Vendor No, Order Date, Vendor Name, No. of Line Canceled, Ship To, Ship Via, Terms, PO Cancel Qty and PO Cancel Amt.
PO0203	PRTNEWPO	Print New Purchase Orders	POORDHDR	Order No, Vendor No, Order Date, Vendor Name, No. of Line Item, Ship To, Ship Via, Terms, PO Qty and PO Amt.
PO0203	PRTPOITM	Print PO For Item	IMITMFIL	Item No, Vendor No, Order Date, Vendor Name, Order No, Ship To, Ship Via, Terms, PO Qty and Action.
PO0203	PRTPOVEN	Print PO For Vendor	APVENFIL	Vendor No, Order No, Order Date, Vendor Name, No. of Line Item, Ship To, Ship Via, Terms, PO Qty and PO Amt.
PO2002	RECVITEM	Receive Item	IMITMFIL	Item, Description 1, Description 2, Quantity Received, Quantity On Hand, Location, Allocated Qty, Back Ordered Qty, Old Qty-OH and Item/Inv Bin No.
PORBRPST	RECVITEM	Receive Item	IMITMFIL	Item, Description 1, Description 2, Quantity Received, Quantity On Hand, Location, Allocated Qty, Back Ordered Qty, Old Qty-OH and Item/Inv Bin No.
PRCHKPRT	PRTPRCHK	Print Payroll Checks	EMPFILE	Employee No, Employee Name, SSN No, Dept No, Check No, Check Date, Check Amount and Gross Amount.
PRINT30	PRINTBGN	Printing Begin	COMPFILE	Company ID, Task, Report Name, Defer Requester, Defer Workstation, Report Type and Destination.
PRINT30	PRINTEND	Printing End	COMPFILE	Company ID, Task, Report Name, Defer Requester, Defer Workstation, Report Type, Destination, Number of Pages and Elapsed Seconds.
SYACTLOG	SYACTLOG	System Activities Logging	COMPFILE	Record No, Activities File, Reference Id, Category, Type,

				Source, Client, Status, Comment and Log Id.
SYSTEM	ERROR	System Error Event	COMPFILE	Record No, Module, Program ID, Program Description, Error Level and Error Description.

## Run Instructions: Customer Notification

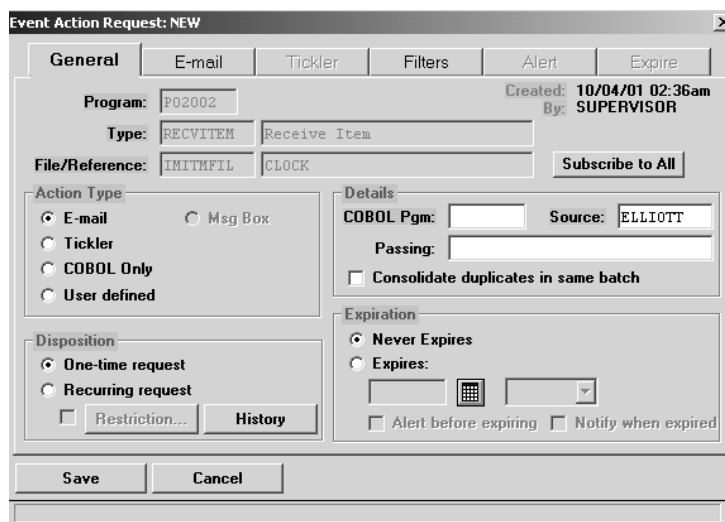
**Scenario:** We have a customer who wants to be notified when an out-of-stock item he is interested in has been received into inventory.

**Before proceeding,** you should be familiar with writing General Event actions.

**Step 1.** From the Inventory Item File (change mode), bring up the record for the out of stock item. In our scenario, it is Item CAS-1917 Leica.

Click on the Specific Events Icon or press Ctrl-E to access the Event Request window. The **Spe** text in the lower right hand corner designates Special Request Subscription Listings, which are kept separate from the General Events Subscription Listing, (**Gen**).

**Step 2.** In the Event Request Window, press F5 and Page Down to find and insert Program **PO2002** (Receive Item). This opens up the Event Action Request window shown below.



**Step 3. General Window**

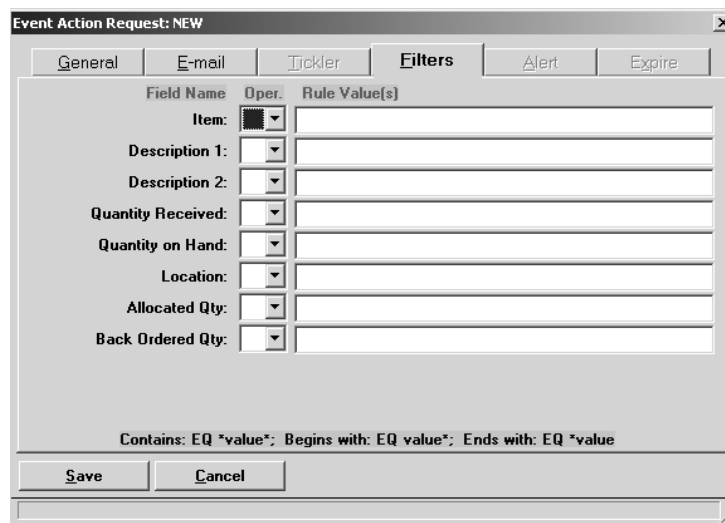
Select:  
Action type = e-mail

Disposition = One-time request  
Expiration = not applicable to this case

**Step 4. Click Filters Folder**

Filter the action by Customer and Item Number, see next page.

## Filter File Folder For Program PO2002



Event Action Request: NEW

General E-mail Tickler **Filters** Alert Expire

Field Name Oper. Rule Value(s)

Item: [ ] [ ]

Description 1: [ ] [ ]

Description 2: [ ] [ ]

Quantity Received: [ ] [ ]

Quantity on Hand: [ ] [ ]

Location: [ ] [ ]

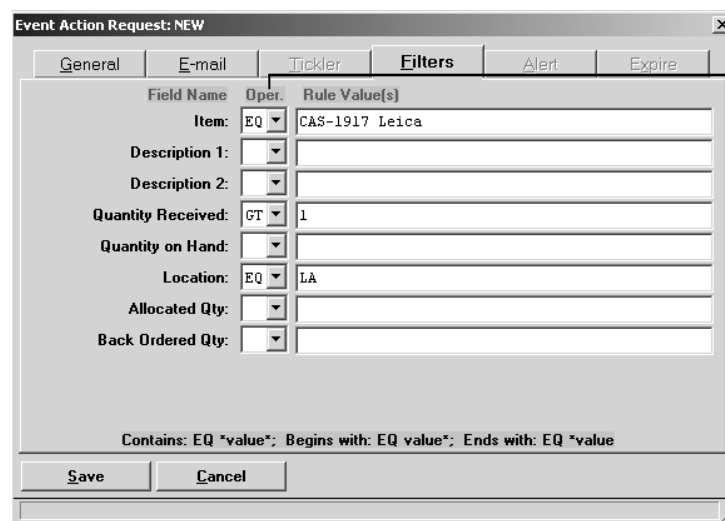
Allocated Qty: [ ] [ ]

Back Ordered Qty: [ ] [ ]

Contains: EQ \*value\*; Begins with: EQ value\*; Ends with: EQ \*value

Save Cancel

## Required Fields



Event Action Request: NEW

General E-mail Tickler **Filters** Alert Expire

Field Name Oper. Rule Value(s)

Item: EQ CAS-1917 Leica

Description 1: [ ] [ ]

Description 2: [ ] [ ]

Quantity Received: GT 1

Quantity on Hand: [ ] [ ]

Location: EQ LA

Allocated Qty: [ ] [ ]

Back Ordered Qty: [ ] [ ]

Contains: EQ \*value\*; Begins with: EQ value\*; Ends with: EQ \*value

Save Cancel

Operators Available:

EQ =  
NE ≠  
GT >  
GE >=  
LT <=  
LE <=  
BT Between

Example: BT A H  
This would return all values between A to H

Field Name	Operator	Rule Value
Item	EQ (Equal To)	CAS-1917 Leica (Customer interest)
Qty Received	GT (Greater Than)	1
Location	EQ (Equal To)	LA (Location that services customer)

**Synopsis:** After we complete the e-mail message, the next time Item CAS-1917 Leica is received into LA inventory via a Purchase Order, the system will trigger an e-mail to the customer that the item is now in stock. However, at this point we cannot save the event because we have not completed the e-mail yet.

**Note:** Text entered in Rule Values is **not case sensitive**. CAS-1917 Leica would be read the same as cAS-1917 LeICA.

**Step 5. Click on E-Mail Folder and Complete E-mail Message**

The screenshot shows a window titled "Event Action Request: NEW" with a tabbed interface. The "E-mail" tab is selected. The "To:" field is populated with "ixmm@earthlink.net". The "cc:" and "bcc:" fields are empty. The "Subject:" field contains "Item @@REF-ID02@@". The main text area contains the following text: "We have received @@REF-ID04@@ of the item your are interested in. Please call to place order. JEC| Netcellent 909-622-5009". At the bottom of the window are three buttons: "Save", "Cancel", and "Templates...".

Completed E-Mail

**Note:** In the Subject Line and Body Text we utilized **Event Literals** and **Event Variables** by right clicking our mouse in the line text and inserting what was applicable. Using literals and variables ensures message accuracy, are a great time saver, and extremely useful in Templates which we will discuss later.

Each event, such as PO2002, has its own set of Event Literals and Event Variables available to the user. **"Currently"** all Field Names in the Filter Window are available as Event Literals and Event Variables.

**Options:** If you do not want to wait on the customer to call and place the order, you could carbon copy yourself the e-mail. Upon notification, you could call the customer for the order and tell them about how great your Customer Service is, (thanks to Elliott software).

If two or more customers were interested in the same item, they can be included in the e-mail address separated by a semi-colon or in the carbon copy (cc:) field.

If a customer does not have e-mail, you could e-mail yourself and follow up when the notification arrives. It beats a hastily scribbled note or log book that keeps getting lost.

**Step 6. SAVE!**

**Note:** In e-mail action types, you cannot save the event until an addressee (e-mail recipient) has been entered. If not saved and you <Escape Out> to exit, you will lose your work. If you need to exit to access another Elliott function, we suggest you use a new session window or use your e-mail address in case the event is triggered before you have completed your work.

## Run Instructions: Salesman Notification

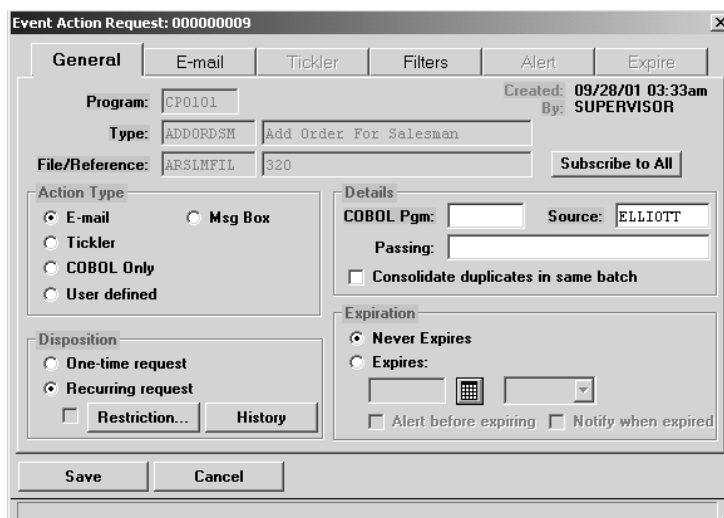
**Scenario:** We need to create an action to notify a salesman when an order is created for one of his customers so that he can follow up with a "Thank You" or take other actions such as to increase the order quantities, discuss new items, etc.

**Before proceeding,** you should be familiar with writing General Event actions.

**Step 1.** From The A/R Maintenance Menu open the Salesman File and select Change Salesman; in our scenario we are using Salesman # 320. Program is ARSLMMNT.

**Click** on the **Special Events Icon** or press **Ctrl E**. The Subscription List (Subscribe To) will be empty since a Special Event has not been associated with this salesman yet.

**Step 2.** Press F5 to open Event Search window. Find **CP0101 Add Orders for Salesman**, highlight and select it to open the Event Action Request Window.



The screenshot shows the 'Event Action Request' window for 'CP0101 Add Orders for Salesman'. The window has tabs for General, E-mail, Tickler, Filters, Alert, and Expire. The 'General' tab is active. It contains fields for Program (CP0101), Type (ADDORDSM), File/Reference (ARSLMFIL 320), and a 'Subscribe to All' button. The 'Action Type' section has radio buttons for E-mail (selected), Msg Box, Tickler, COBOL Only, and User defined. The 'Disposition' section has radio buttons for One-time request and Recurring request (selected), with a 'Restriction...' button. The 'Details' section has fields for COBOL Pgm, Source (ELLIOTT), and Passing. There is a checkbox for 'Consolidate duplicates in same batch'. The 'Expiration' section has radio buttons for Never Expires (selected) and Expires, with a date field and a calendar icon. There are checkboxes for 'Alert before expiring' and 'Notify when expired'. At the bottom are 'Save' and 'Cancel' buttons.

### Step 3. General Window

Select:

Action type = e-mail  
Disposition = Recurring request  
Details = **Consolidate duplicates in same batch**  
(Does not apply, add new orders is not a batch process)  
Restrictions = Does not apply  
(Salesman needs notification whenever an order is entered)  
Expiration = Not applicable to this case

#### Step 4. Select Filters Tab

Field Name	Oper.	Rule Value(s)
Salesman:	<input type="text"/>	
Customer No:	<input type="text"/>	
Ship To No:	<input type="text"/>	
Bill-To Name:	<input type="text"/>	
Ship-To Name:	<input type="text"/>	
Cust Po No:	<input type="text"/>	
Order No:	<input type="text"/>	

Contains: EQ \*value\*'; Begins with: EQ value\*'; Ends with: EQ \*value'

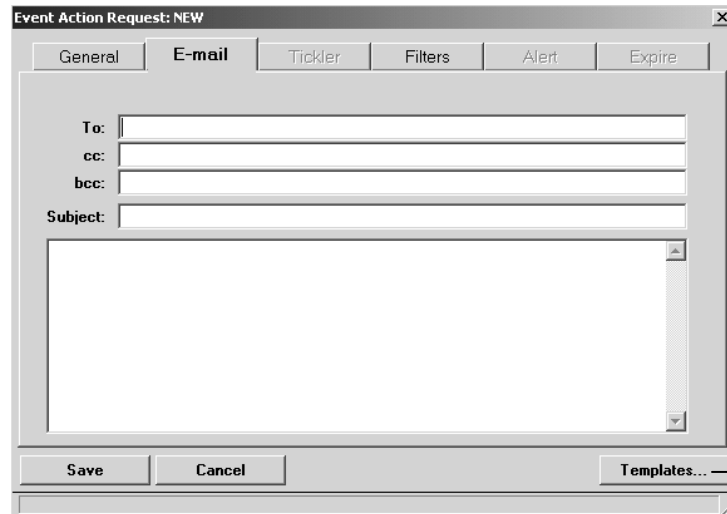
Save Cancel

**Synopsis:** After the E-mail message has been created, the event will now be setup to trigger the e-mail when new orders are added and Sales 320 is the Salesman of Record in Customer Order Processing.

#### Field Name Rule Value(s)

<b>Salesman:</b>	If this were an event where a Sales Manager or District Manager is tracking productivity, several salesmen could be entered here, e.g., 100 200 300 320.
<b>Customer No:</b>	When the Operator is <b>blank</b> , it <b>includes all</b> . If the salesman was tracking key customer(s), he could enter those customers here.
<b>Ship To:</b>	Could be used to track new orders to a specific Ship-To location.
<b>Bill-To:</b>	Same as above.
<b>Ship-To Name:</b>	Same as above.
<b>Cust PO No:</b>	If a salesman enters the Customer's PO Number, he could be notified when that order has been entered. Useful for that special or exceptionally large order.
<b>Cust Ord No:</b>	This shows up here because it is part of the Event Literal and Variable sets that you can use in the e-mail message. Using this variable <b>in the e-mail</b> will let the Salesman know the order number.

#### Step 5. Click on E-Mail Folder and Create E-Mail Message



The screenshot shows a dialog box titled "Event Action Request: NEW" with a close button (X) in the top right corner. It has several tabs: "General", "E-mail" (which is selected), "Tickler", "Filters", "Alert", and "Expire". The "E-mail" tab contains four text input fields labeled "To:", "cc:", "bcc:", and "Subject:". Below these fields is a large, empty text area for the email body. At the bottom of the dialog, there are three buttons: "Save", "Cancel", and "Templates...". An arrow points from the "Templates..." button to the text below.

Since there will be several salesmen participating in the new order event notification and the information will be the same, this e-mail is a good candidate for a template.

**Click on Templates radio button.**



## Templates

In Template window click **New** and create your template.

### Completed Template Example:

Event Action Request: NEW

General Template Tickler Filters Alert Expire

Template: 000000008 Description: New Orders

Subject: New Orders Entered

Customer No.....@@REF-ID02@@  
Bill-To Name.....@@REF-ID04@@  
Ship-To Name.....@@REF-ID05@@  
Cust Po No.....@@REF-ID06@@  
Order No.....@@REF-ID07@@

Save Cancel

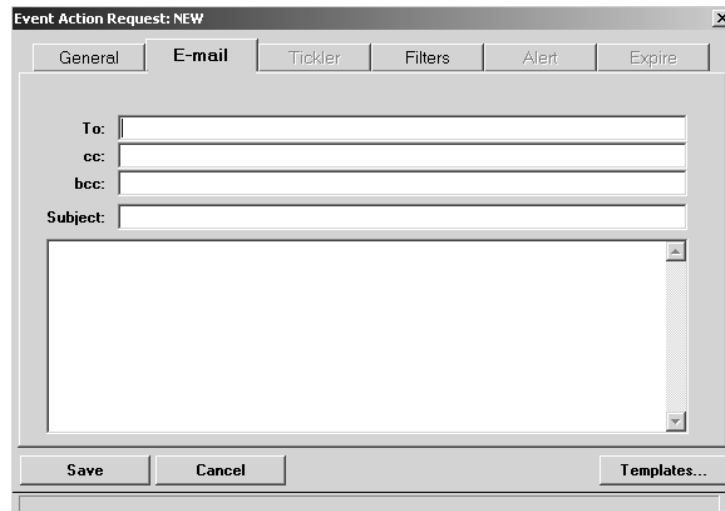
Template Literals  
(Field description)

Template Variables  
(Field values)


Right click the mouse to access literals and variables. Wherever you click, the literal or variable selected will be inserted.

## Save Template

After we create the e-mail message, we will show you how to create a new event for a different salesman using the above template.

**Step 5. Click on E-Mail Folder and Create E-Mail Message**

The dialog box titled "Event Action Request: NEW" has a tabbed interface with tabs for "General", "E-mail", "Tickler", "Filters", "Alert", and "Expire". The "E-mail" tab is selected. It contains fields for "To:", "cc:", "bcc:", and "Subject:". Below these fields is a large text area for the email body. At the bottom, there are buttons for "Save", "Cancel", and "Templates...".

**Click on Template Radio Button**

The dialog box titled "E-Mail Templates for CP0101 ADDORDSM" displays a table of templates. The first row is highlighted.

Creator	Description	Action-ID
SUPERVISOR	New Orders	000000008

Below the table is a text box containing the following text:

This is the template created in the previous page. You can have multiple templates per event, and also Template Variables, which are discussed in Advanced Features.

At the bottom of the dialog box are buttons for "Use Template", "New...", "Edit...", "Delete...", and "Cancel".

Highlight New Orders Template and **Click Use Template** radio button. This will take us back to the E-Mail Folder, next page.

**Complete To: E-Mail Address and Save**

The screenshot shows a dialog box titled "Event Action Request: 000000009" with a close button (X) in the top right corner. The dialog has several tabs: "General", "E-mail", "Tickler", "Filters", "Alert", and "Expire". The "E-mail" tab is selected. Inside the tab, there are input fields for "To:", "cc:", and "bcc:". The "To:" field contains the email address "joe@netcellent.com". Below these fields is a "Subject:" label followed by a text box containing "New Orders Entered". Underneath the subject field is a larger text area containing a list of order details: "Customer No.....@@REF-ID02@@", "Bill-To Name....@@REF-ID04@@", "Ship-To Name....@@REF-ID05@@", "Cust Po No.....@@REF-ID06@@", and "Order No.....@@REF-ID07@@". At the bottom of the dialog, there are three buttons: "Save", "Cancel", and "Templates...".

**Event Triggered and E-Mail Notification Received**

The screenshot shows an email notification window. The header bar contains the following information: "From: Joe Cabaza", "To: Joe Cabaza", "Subject: New Orders Entered", and "Cc:". Below the header, the email body contains the following text: "Customer No.....000100", "Bill-To Name.....John Q. Williams Company", "Ship-To Name.....John Q. Williams Company", "Cust Po No.....1234", and "Order No.....002047".

## Use Existing Template For A New Event

In the previous example we wrote an event that notifies Salesman 320 of new orders and created a template to use with e-mail for that event.

As stated earlier, an Event is a program and the type of program it is. What makes it Specific is tying it to a specific record in a sub-menu, hence the name Specific Event. In the previous scenario we used:

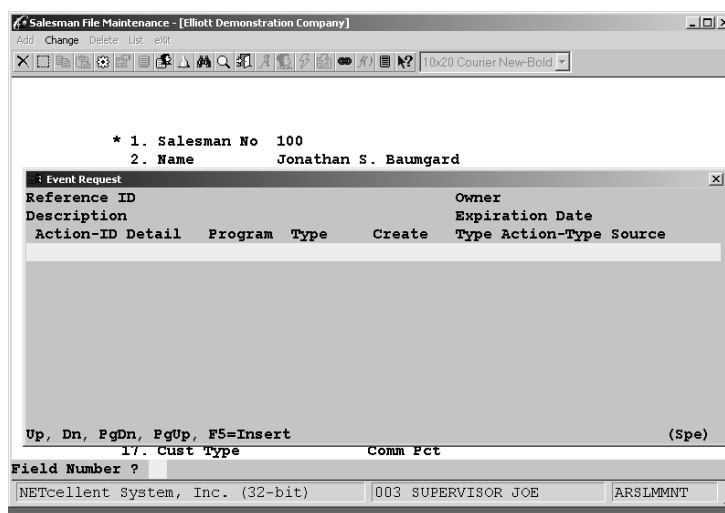
### SPECIFIC EVENT

Sub-Menu	Record	Program	Type	Description
ARSLMMNT	Salesman 320	CP0101	ADDORDSM	Add Orders for Salesman

### CREATE NEW SPECIFIC EVENT

Sub-Menu	Record	Program	Type	Description
ARSLMMNT	<b>Salesman 100</b>	CP0101	ADDORDSM	Add Orders for Salesman

From A/R Salesman File Maintenance, Change Mode, select Salesman 100 and then click the Specific Events Icon or Ctrl-E.



**Note that there are no Specific Events tied to Salesman 100**

Press **F5** to find, highlight and insert event **CP0101 Add Orders For Salesman**.

Event File Search			
Program	Type	Detail	Description
CP0101	ADDORDSM	ARSLMFIL	Add Order For Salesman
CP0101	CHGORDSM	ARSLMFIL	Change Order For Salesman
CP0101	DELORDSM	ARSLMFIL	Delete Order For Salesman
CPCNLORD	CNLORDSM	ARSLMFIL	Cancel Order For Salesman
CP02P1	PICORDSM	ARSLMFIL	Picking Ticket For Salesman
CPCNLPIC	CNLPICSM	ARSLMFIL	Cancel Picking For Salesman
ARSLMMNT	ADDSLMN	ARSLMFIL	Add Salesman
ARSLMMNT	CHGSLMN	ARSLMFIL	Change Salesman
ARSLMMNT	DELSLMN	ARSLMFIL	Delete Salesman

Up, Dn, PgDn, PgUp, Return=Select (Spe)

In the Event Action Request Window:

1. Click e-mail
2. Click recurring
3. Click Never Expires
4. Select Filters Folder

In the Filters Folder Window, Salesman Field:

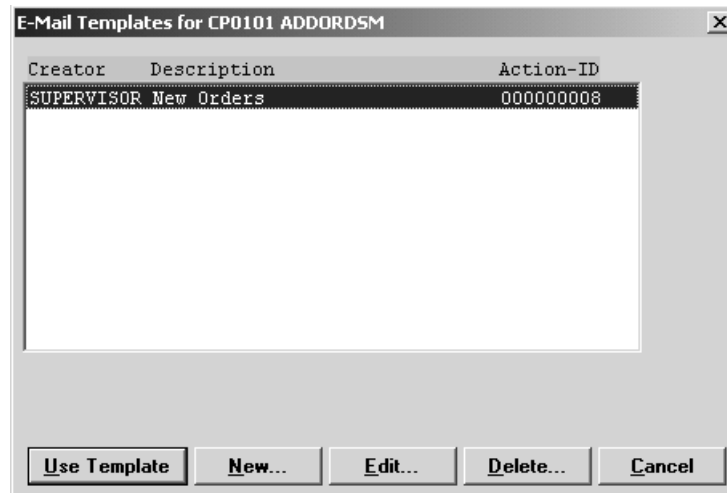
1. For Operator select "EQ" (Equal to)
2. For Rule Value enter 100
3. Leave all other fields blank since we want all orders for Salesman #100
4. Select E-Mail Folder (see screen window below)

The screenshot shows the 'Salesman File Maintenance - [Elliott Demonstration Company]' window. The 'Event Action Request: NEW' dialog is open with the 'E-mail' tab selected. A 'Template Hint' dialog box is overlaid on top, asking 'There is at least one template available to help you complete the information on this page. Would you like to use a template now?' with 'Yes' and 'No' buttons. The 'E-mail' tab contains fields for 'To:', 'cc:', 'bcc:', and 'Subject:'. Below these fields are 'Save', 'Cancel', and 'Templates...' buttons. At the bottom of the window, a table shows the 'Field Number' and 'Cust Type' for various fields.

Field Number	Cust Type	Comm Pct
17.	Cust Type	
NETcellent System, Inc. (32-bit)	003 SUPERVISOR JOE	ARSLMMNT

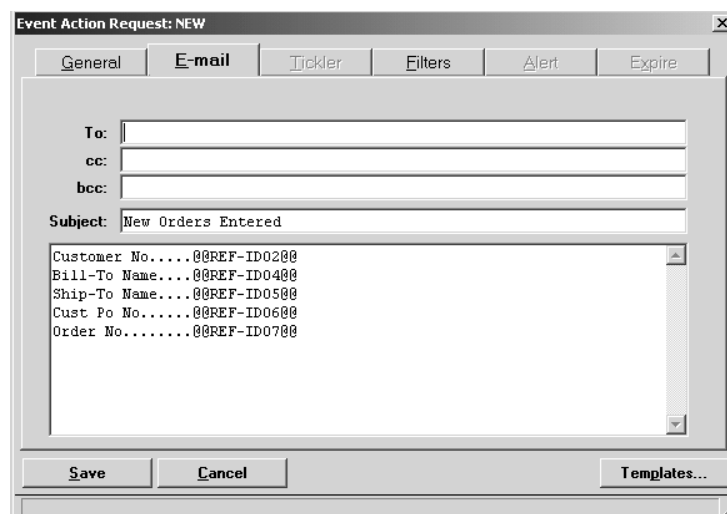
System notifies us that templates exist for Event **CP0101 Add Orders For Salesman**.

In the E-Mail folder Window, Select Yes to use a template.



**Highlight** Template to use and **Click** “Use Template”

Clicking “Use Template” adds the template content to your E-Mail Message



**Complete** “To: E-Mail Address” and **Save**.

Repeat the new event steps using the same e-mail template for other Salesmen as needed. Although you will use the same Event Name, **CP0101 Add Orders For Salesman**, each occurrence will be a **new Specific Event** because it is tied to a specific salesman record.

## Run Instructions: Buyer Notification

**Scenario:** Create an action to notify a buyer when an item's Quantity Available goes 0 or negative balance.

Since Qty Available (Qty On Hand – Qty Allocated) is a calculation performed by COP at order entry time, we will need to use the COP program **CPO0111 Add Order For Item** and tie it to the item record in the Inventory Item File where Qty On Hand and Qty Allocated fields are stored.

Rather than do a new event for all items, we will use the “**Subscribe To All**” feature that creates the event for all items and use “**Restrictions**” to minimize e-mail.

**Step 1.** In Inventory Item File Maintenance, Change Mode, open an item to create the Specific Event. In this scenario, we will use item CAS-1917 Leica.

**Click** the Specific Events Icon or press Ctrl-G to open the Event Request Window. **Use** the F5 Key to find and insert event **CP0111 Add Order for Item**.

**Step 2. General Window**

Select:

Action Type = e-mail

Disposition = Recurring

**Subscribe To All** = Click the box to activate all items - see below

Upper Portion of General Window

Event Action Request: NEW

General E-mail Tickler Filters Alert Expire

Program: CPO111 Created: 09/28/01 11:28pm  
By: SUPERVISOR

Type: ADDORDIT Add Order For Item

File/Reference: IMITMFIL CAS-1917 LEICA

Subscribe to All

The file we are using is IMITMFIL (Item file) and the record we are using is Item Number. When we click the **Subscribe To All** button, the system will select all records (Item Numbers) in the Item File (IMITML) as shown below.

Event Action Request: NEW

General E-mail Tickler Filters Alert Expire

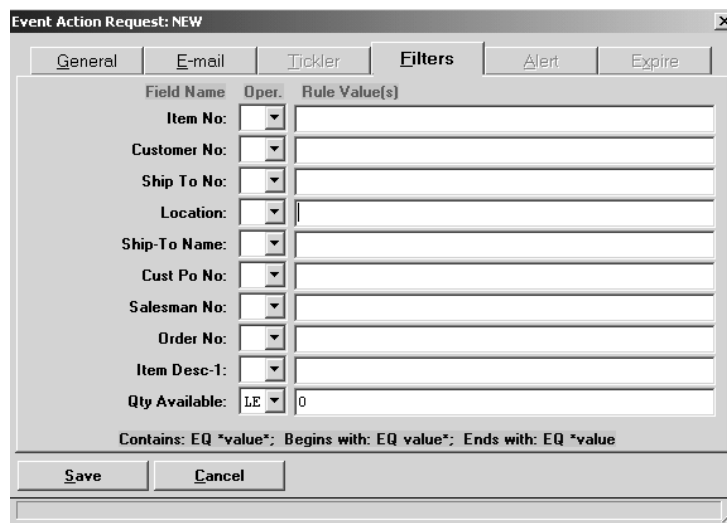
Program: CPO111 Created: 09/28/01 11:28pm  
By: SUPERVISOR

Type: ADDORDIT Add Order For Item

File/Reference: IMITMFIL <All>

Subscribe to All

All items in the Inventory File are now selected.

**Step 3. Click Filters Folder and Complete Filter Selections**


Field Name	Oper.	Rule Value(s)
Item No:		
Customer No:		
Ship To No:		
Location:		
Ship-To Name:		
Cust Po No:		
Salesman No:		
Order No:		
Item Desc-1:		
Qty Available:	LE	0

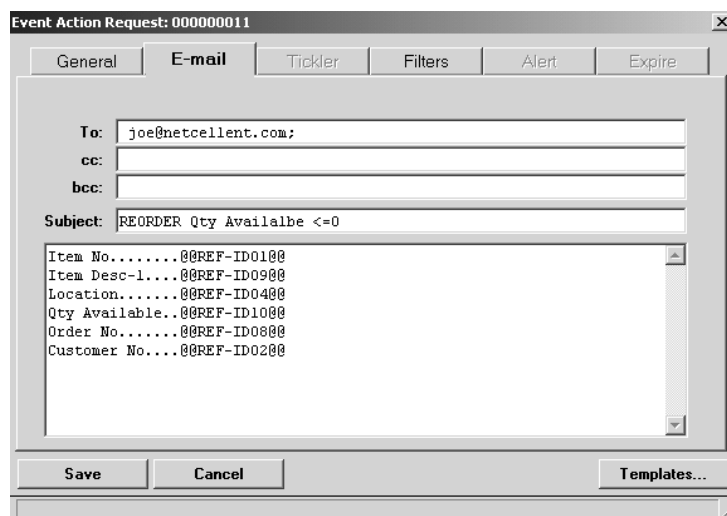
Contains: EQ \*value\*; Begins with: EQ value\*; Ends with: EQ \*value\*

Save Cancel

**Field Name      Operator      Rule Value(s)**

Location              (Blank = ALL)

Qty Available              LE (<=)      0

**Step 4. Click E-Mail Folder and Complete**


To: joe@netcellent.com;

cc:

bcc:

Subject: REORDER Qty Availalbe <=0

Item No.....@REF-ID0100  
 Item Desc-1....@REF-ID0900  
 Location.....@REF-ID0400  
 Qty Available..@REF-ID1000  
 Order No.....@REF-ID0800  
 Customer No....@REF-ID0200

Save Cancel Templates...

Note use of Event Literals and Variables. Although optional to make a buying decision, the Order Number and Customer Number can be used for tracking and Customer Service of item(s) that went <= 0.



## E-Mail Notification

<b>From:</b> Joe Cabaza	<b>To:</b> Joe Cabaza
<b>Subject:</b> REORDER Qty Availble <=0	<b>Cc:</b>
Item No.....CHINA CAT 0711	
Item Desc-1....PERS Model ABQ	
Location.....LA	
Qty Available...-24.000	
Order No.....002055	
Customer No....000300	

## Restrictions

The end purpose of this event is to place a Purchase Order for items that go 0 or negative balance. Once the P.O. arrives, you have adequate inventory for your re-ordering cycle, i.e. 30 days. However, anytime a customer order is placed for that item, the buyer will receive an e-mail until the item is received into inventory. In a hectic environment, it is possible to call a vendor and order the item every time the notification is received.

Knowing there will be enough inventory for at least 30 days once the item arrives, we can reflect this in the Specific Event to eliminate unnecessary e-mail and the possibility of extra P.O.'s.

## Restriction Added to Specific Event

- Step 1. Open Specific Event  
Available in any item because we used the Subscribe To All feature.
- Step 2. Click Restrictions Box
- Step 3. From Restrictions pop window  
Use top option to enter 20 days.
- Step 4. Save Restrictions
- Step 5. Save Event

### Synopsis:

Once we have received an e-mail notification for 0 or negative Qty Avl., we will not receive another until 20 days has passed since we were first notified.

The screenshot shows the 'Event Action Request: 000000011' dialog box. The 'General' tab is selected. The 'Program' is 'CP0111', 'Type' is 'ADDORDIT', and 'File/Reference' is 'IMITHFIL'. The 'Action Type' is 'E-mail'. The 'Disposition' is 'Recurring request'. The 'Restrictions' sub-dialog is open, showing the option 'Do not trigger this event unless the following number of days have passed since the last time this event was triggered' is checked, with the value '20' entered. The 'Source' is 'ELLIOTT'.

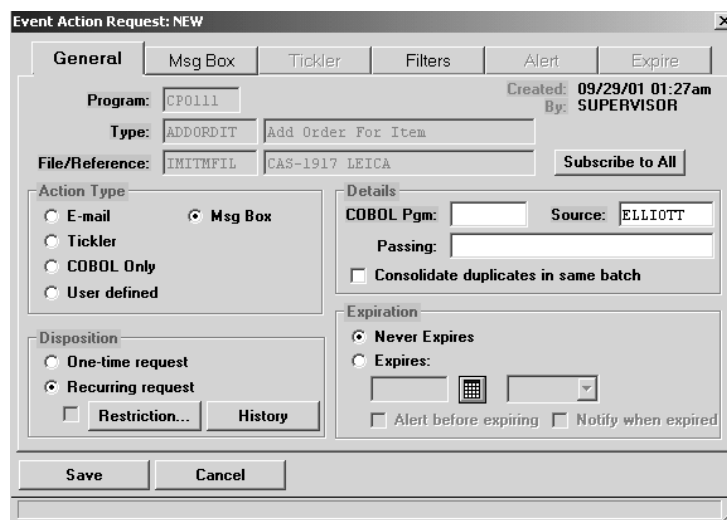
## Run Instructions: Sell More Notification

**Scenario:** Create an action to notify sales entry people to offer accessories for an item at time of order line entry.

In this scenario we will create an action that triggers a popup window listing any items that can be sold as an accessory to the item ordered. The advantage of a popup window is that it is immediate and appears on the screen rather than having the user disrupt what they are doing to read e-mail.

**Step 1.** In Inventory Item File Maintenance, Change Mode, open an item. For this scenario we will use item CAS-1917 Leica. If you were using the tutorial database for these exercises up to now, you will note that the Specific Events window is now Red. This indicates that a Specific Event exists for this item. An item can have as many specific events as you want to manage, (use **Elliott Popup Notes** to identify each Specific Event by what it does rather by Action ID).

**Click the Specific Events Icon** or press Ctrl-G to access the Event Request Window. In this window press F5 to find, highlight and select event **CP0111 Add Order for Item**. Once selected, the Event Action Request Window opens.



**Step 2. General Window**

Action Type = Msg Box (E-Mail Folder changed to Msg Box Folder)  
Disposition = Recurring

**Step 3. Click Msg Box Folder**

**Complete Message for Popup Window**

(Same procedures as for Message exercise in General Event)

**Step 5. Save**

**Synopsis:** Program **CP011 Add Order For Item** goes to the Item File to find an Item. If the item has a Specific Event tied to it that applies to the program, it will trigger that action. In this case, the **Message Box appears** after the item ordering steps have been completed. If the quantity ordered causes a negative or 0 Qty Available, it will also trigger the notification action we created in the last exercise.



Since this action is item specific, there is no need to use Item filters.

**Order Entry - [Elliott Demonstration Company]**

Order: 2064    Type: Order    Order Totals: 1 Lines    On Hand  
 Cust: 000500    Qty: 1.00    Excess  
 T-Shirts Unlimited    Amt: 0.00    Backorderable:

Item    Description

UM:

2. Qty Ordered  
 3. Qty To Ship  
 4. Unit Price  
 5. Discount  
 6. Unit Cost  
 7. Product Cate  
 8. Comm Pct/Amt

Ext Price =

Item	Description	Qty Ordered	UM	Extended Price
CAS-1917 LEICA	Leica M-5 Camera	1.00	EA	.00

F1=Prod Srch F2=Add Comment F3=Scroll F4=Inv Hist F5=Dsply Ord F7=Item Search

NETcellent System, Inc. (32-bit)    003 SUPERVISOR JOE    CP0100

**Elliott Event Message from SUPERVISOR**

! Sell Accessories - Make More money

Cancel  
Details

→ User finishes entering item, Msg Box pops up

**Order Entry - [Elliott Demonstration Company]**

Order: 2064    Type: Order    Order Totals: 1 Lines    On Hand  
 Cust: 000500    Qty: 1.00    Excess  
 T-Shirts Unlimited    Amt: 0.00    Backorderable:

Item    Description

UM:

2. Qty Ordered  
 3. Qty To Ship  
 4. Unit Price  
 5. Discount  
 6. Unit Cost  
 7. Product Cate  
 8. Comm Pct/Amt

Item    Description

CAS-1917 LEICA    Le:

Extended Price .00

F1=Prod Srch F2=Add Comment F3=Scroll F4=Inv Hist F5=Dsply Ord F7=Item Search

NETcellent System, Inc. (32-bit)    003 SUPERVISOR JOE    CP0100

**Elliott Event Message from SUPERVISOR**

! Sell Accessories - Make More money

Item No CAS-1917 LEICA Leica M-5 Camera has the following accessories:

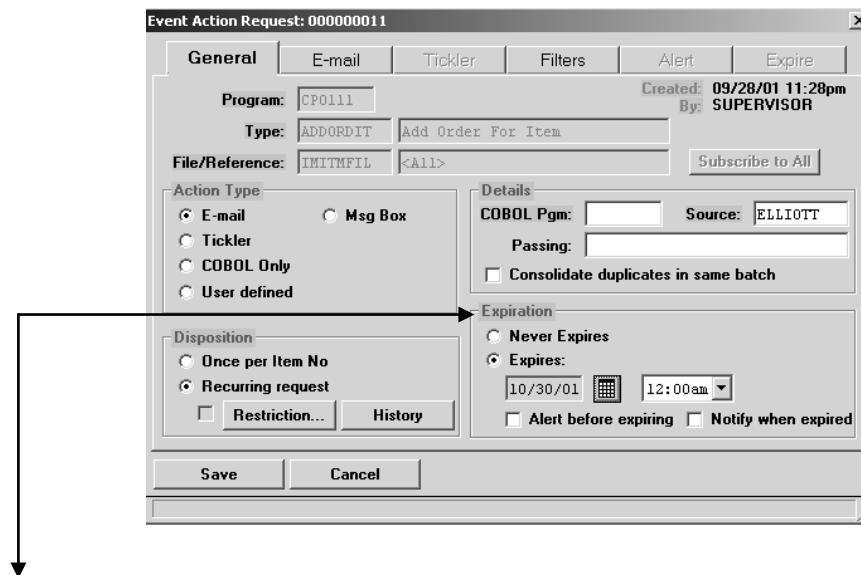
CAS-1917 Leather Case	Sell Price	89.99
CAS-1917 Canvas Case	Sell Price	39.99
TPD-9317 Leica Tripod	Sell Price	199.99
AC1-1917 M-5 Coffe Cup	Sell Price	9.99
AC2-1917 M-5 T-Shirt	Sell Price	19.99

Cancel  
Details

← User Clicks Details – detailed message opens



## Expiration



In the General Events Chapter we discussed how to set expiration date for an Event. Now that you have become comfortable with writing events, we need to present **Part II**.

After you have setup an Expiration Date, two Expiration options become available. They are:

1. **Alert before expiring**

If enabled, it will open the Alert Tab where:

- A: You create an Alert Message notifying the **event e-mail recipient(s)** that the event is due to expire in X number of days. X number of days being user defined prior to the expiration date.
- B. Extend the Expiration Date

2. **Notify when expired**

If enabled, it will open the Notify Tab where:

- A. You create an Expiration Message notifying the **event e-mail recipient(s)** that the event has expired.

## Consolidate Duplicates In The Same Batch

Event Action Request: 000000011

General E-mail Tickler Filters Alert Expire

Program: CP0111 Created: 09/28/01 11:28pm  
By: SUPERVISOR

Type: ADDORDIT Add Order For Item

File/Reference: IMITHFIL <All> Subscribe to All

Action Type  
☒ E-mail ☐ Msg Box  
☐ Tickler  
☐ COBOL Only  
☐ User defined

Disposition  
☐ Once per Item No  
☒ Recurring request  
☐ Restriction... History

Details  
COBOL Pgm: Source: ELLIOTT  
Passing:  
☐ Consolidate duplicates in same batch

Expiration  
☒ Never Expires  
☐ Expires:  
☐ Alert before expiring ☐ Notify when expired

Save Cancel

“Consolidate duplicates in same batch” applies to events that take place in a batch process mode such as PO Receiving.

General Example:

You have a Specific Event, e-mail type action, related to receiving an item into inventory. If this item appears 4 times on the vendors packing slip and each is received as a separate line receiving, four e-mails will be triggered when the batch has been posted. If the “Consolidate duplicates in same batch” is checked, the system will consolidate the 4 receivings into 1 e-mail.

## Template Variables

Template variables extend the flexibility of templates by allowing you to define **your own set of criteria** (template values) to be input before triggering the event. By example, we will create a template using variables and show you how to use it.

### Scenario:

A customer would like to be notified when an out-of-stock item is replenished, but does not have access to e-mail.

#### Step 1.

In Inventory Item File Maintenance, Change Mode, **open any item**. For this scenario we will use item “Clock.”

Click the Specific Events Icon or press Ctrl-E to open the Event Request Window.

Press **F5** to find, highlight, and insert Program **PO2002 Receive Item**. This opens the Event Action Request Window.

## Step 2.

### Event Action Request General Window

Action Type = E-mail  
Disposition = One-time Request  
Expiration = Never Expires

Click Subscribe To All

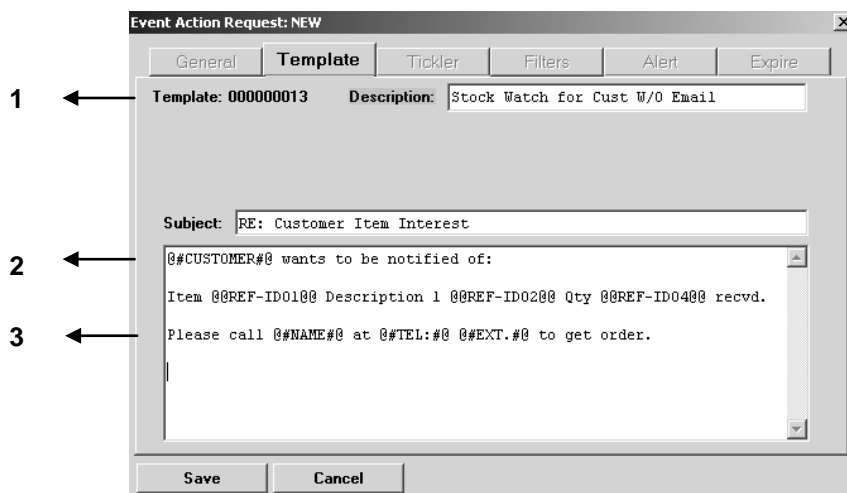
## Step 3.

### Open E-Mail Folder

#### Click Templates – Create New

If the system notifies you that one or more templates exist and asks if you wish to use one, answer "N".

#### Complete Template



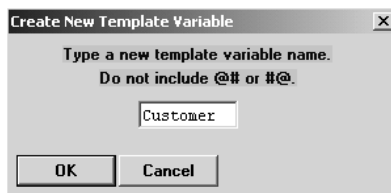
1. Template: 00000013 Description: Stock Watch for Cust W/O Email

2. Subject: RE: Customer Item Interest

3. @#CUSTOMER#@ wants to be notified of:  
Item @REF-ID01@ Description 1 @REF-ID02@ Qty @REF-ID04@ recvd.  
Please call @NAME@ at @TEL:@ @EXT.:@ to get order.

Save Cancel

1. Enter Description of Template
2. Right Click, select Template Variables, and define the template value.



Create New Template Variable

Type a new template variable name.  
Do not include @# or #@.

Customer

OK Cancel

#### For Reference Only

@@" - - - - "@@ = Event Variable

@#" - - - - "#@ = Template Variable

3. Repeat Step 2 for Name, Telephone, Extension, and any additional user defined prompts you may require.



**Step 4. Save Template****Step 5. Press Use Template**

The user-defined template values now appear. **Leave blank and Press Okay** because at this point we do not need to complete the prompts.

**Step 6.** Enter the To: e-mail address. This will be the person (order entry person, salesman, Admin Assistant, etc.) responsible for the action to take place.

**Step 7. Save**

**Using The Template Variable**

In COP or Sales Desk, whenever an item has insufficient quantity to ship, the user is alerted via a popup box. In this template variable example, we will be processing orders in Sales Desk.

united - Paint

File Edit View Image Colors Help

Sales Desk - [Elliott Demonstration Company]

Maintenance Inquiry Processing Reports Util-setup exit

10x20 Courier New-Bold

Caller Herbert Mandel Sim 320 Joe Cabaza

Customer No 000200 Cu

21ST Century Enterprises Ty Quantity Insufficient

San Francisco CA 95782 3/15 N/30 Limit 20,000

---

Item No	Item Description	WH	Qty	Your Price	ST
1	K-6INWRNCH	6" Wrench	1.00	2.8400	
2					
3					
4					
5					
6					

---

Quote No: 6 SUPERVISOR Stk/Sel UOM: EA EA

F3=Substitute Item F5=Options, F7=Multi-Location

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE CPSLSDSK

For Help, click Help Topics on the Help Menu.

As soon as the user is alerted, he may tell the customer, "We are out stock right now. Would you like me to notify you when it is available?"

If the customer says "yes," but does not have an e-mail address:

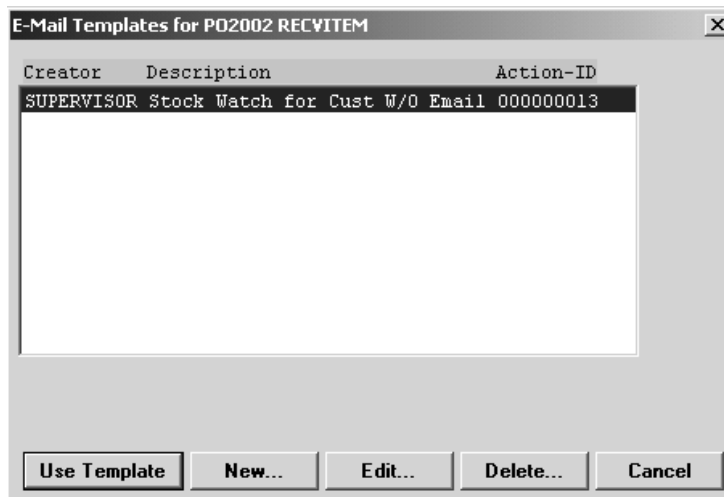
**Step 1.**

User presses the "Red" Special Events Icon to bring up the Specific Event. The Icon is red because when we setup the event action using the Clock Item Record, we subscribed to all items.

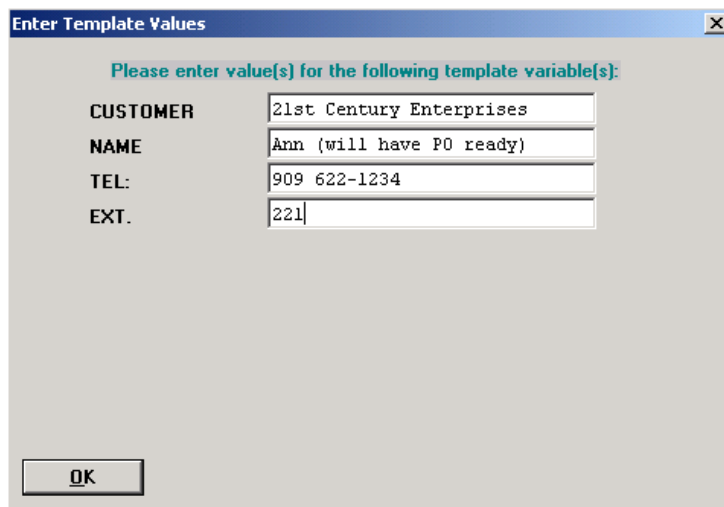
In the Event Request Window, the user presses the F5 key to find, highlight, and insert **PO2002 Receive Item**.

**Step 1.**

In the new Event Request Window, **click the E-Mail Folder** and answer say “YES” to use an existing Template.



Highlight the template we created, “Stock Watch for Cust W/O E-mail” and click the Use Template button. As soon as you do this, the template variable box appears for you to input the criteria (template Values) defined earlier. The figure below shows the box completed.



**Step 2.** Press OK

**Step 3.** Enter E-mail address and Save.

The next PO Receiving for this item will trigger an e-mail to notify the customer using the above template values in the body text.

## COBOL Only

“COBOL Only” means the Elliott Event Manager will call a COBOL program (coded with and compiled to the Elliott standard). The COBOL program is to be provided by the developer. The COBOL program can do anything. For example, when a stock watch event is triggered and processed (an item was out of stock and the user wants to know when you receive the item into inventory), it is possible to write a COBOL program to create an Elliott sales order. Then, you will define the event as “COBOL Only.” Put the COBOL program id in the event and specify the parameters. The parameters in this case will probably be the Customer# and Item#. Additional information is also passed over to the COBOL program automatically, including the file reference id. If the event subscription applies to all reference-id for the file (subscribe to all), then most likely you would want to use the information passed in the SYEVTQUE record instead of the passed parameters defined in the event subscription screen. It is the developer’s job to create this COBOL program that will take the passed parameters to create the proper Elliott order.

In the COBOL program, the developer will define the linkage section as following:

```
LINKAGE SECTION.  
  
COPY "NWSMEVFPF.WS"  
COPY "SYEVTQUE.FD"  
  
PROCEDURE DIVISION USING EVENT-PASSING-FIELDS,  
                        SYEVTQU2-RECORD.
```

Upon completion of your COBOL program, you should set the status of the execution result:

- Event-Pass-Success: This is the default. After exiting your COBOL code, the system will automatically delete the Event Queue record and properly dispose of the Event subscription in the Event Action table.
- Event-Pass-Delete: It will signal to system code to delete the Event Queue, but do not dispose of the Event Action table.
- Event-Pass-Reverse: It will reverse the Event Queue record as it was not processed yet, so it will be processed again next time. This may be a record lock situation.
- Event-Pass-Error: In this case, you should return the Event-Pass-Status-Code and Event-Pass-Msg. The system will keep the Event Queue record and mark it as an error. The user can process the event queue with an error condition again through the F4 key in the Event Request Window.

If you would rather call an EXE program (like Visual Basic), you can use the “EX” API call in this COBOL program to launch your EXE. In that case, the COBOL program will be a simple pass through program without much logic. Please refer to the developer reference section of this manual for more information on “EX” API call.

## User Defined

The “User Defined” event depends on an external Event Handler to monitor the Elliott Event Quote file. This external Event Handler is not provided by Elliott. Let’s presume this Event Handler is a Visual Basic program written by the developer, then we expect this VB program should be constantly running and polling Elliott Event Quote every once so often (like from a few seconds to 1 minute). Once the VB program found any user definable Events in the Event Queue, then it should process them, and when successfully completed delete it from the queue. It is important your external Event Handler should delete the user defined event from the queue to prevent the Elliott Event queue from becoming too big and thus affect the performance.

To implement the “User Defined” Event Handler might be a challenge because the developer needs to understand the data structure in Event Quote. The tables are SYEVTQUE (System Event Quote) and SYEVTQUD (System Event Queue Detail). They are defined in the Elliott DDF files.



**This Page Intentionally Blank**

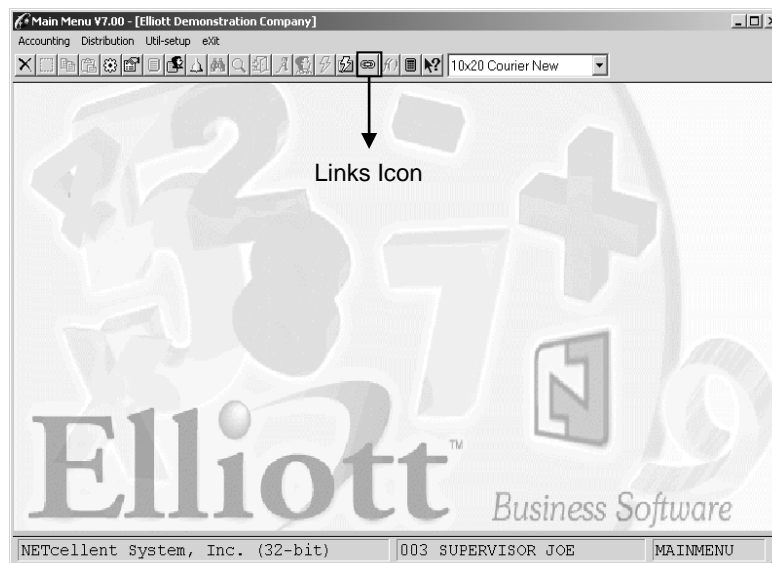
## Links

### Application Overview

Links allow you to launch any program in your system to open a file created by that program. However, that definition understates the power and flexibility of links because you can tie a link to a specific record, create system wide links available anywhere to all users and custom program links, such as Yahoo Maps for customer and vendor locations.

Typical links are images for inventory items, links to key customer or vendor documentation, URL access and links to Policies and Procedures manuals and knowledge databases.

### Run Instructions



Elliott Main Menu

For link access and management, links are identified by Type and how they are defined determines at which menu level they appear.

**Don't click icon yet.**

## Links Defined By:

### 1. User

These are links that attach to a master record, such as the Customer File. Wherever that customer record is open, e.g. Inquiries, Sales Orders, Customer File Maintenance, you have access to all links for that master record. In the tool bar, a red Link icon designates that a user link is available.

### 2. System

These are links designated by the user as "System." They are automatically available anywhere to all users in Elliott and designated by a yellow Link icon on the tool bar.

### 3. Program

These are links that require program modifications by Elliott or 3<sup>rd</sup> Party Developers. Elliott currently provides a Mapquest program type that lets you view a location map whenever an address is present in the master record.

## Link Type

A link type can be considered as the master record of a link. It contains all the information necessary to use the link. For your convenience, and to help you start using links quickly, we provide you with the following seven Pre-defined links:

1. CONTRC	= Contracts	(User Link)
2. ELL01	= Elliott home Page	(System Link)
3. IMAGE	= Images	(User Link)
4. FIMAGE	= Full Image	(User Link)
5. SOUND	= Sounds	(User Link)
6. SPEC	= Specifications	(User Link)
7. URL	= Home Page	(User Link)
8. YAHOOM	= Mapquest	(Program Link)

## Managing Links

Since User Links are at the master record level, we will go directly to Customer File Maintenance, open a customer file and click the Links Icon. From here, we will **define** the Link fields; **create User Links** and a **System Link**.

A/R Main Menu → Maintenance → Customer file → Change

Customer File Maintenance for Customer # 300, **click the Links Icon** to access the screen below.

Customer Hot Links Screen

\* Customer No 000300 1. Bill To No  
 2. Sort Name Brooks and Johnson, LTD  
 3. Correspondent  
 4. Address-1  
 5. Address-2  
 6. City  
 7. State  
 8. Zip Code  
 9. Country  
 10. Contact  
 11. Phone No  
 12. Fax No  
 13. Acct Date  
 14. Cust Type  
 15. Bal Metho  
 16. Stmt Fre  
 17. Crdt Limi  
 18. Crdt Rate

00000  
 - Trade  
 Freight  
 Due 15t

Description	Key	Link
Elliott Home Page		http://www.elliott.com
Yahoo Map	Alt-Y	http://maps.yahoo.com/py/map.py?BFCat=&...

Link New... Edit... Delete... Types... Exit

Two links currently exist because:

1. First link is a System Link that is automatically available anywhere to all users in Elliott.
2. Second link is a Program Link that appears when an address is available in a master record.

## Understanding Link Types

Make sure you do not have a link highlighted\* and **Click Types**. This is the procedure to add, delete, or edit **Link Types**.

Define Link Type

Type:

Defined by: ☒ User ☐ Program ☐ System

Description:

Hot-Key:

Template:

Variable Desc:

File Extensions:

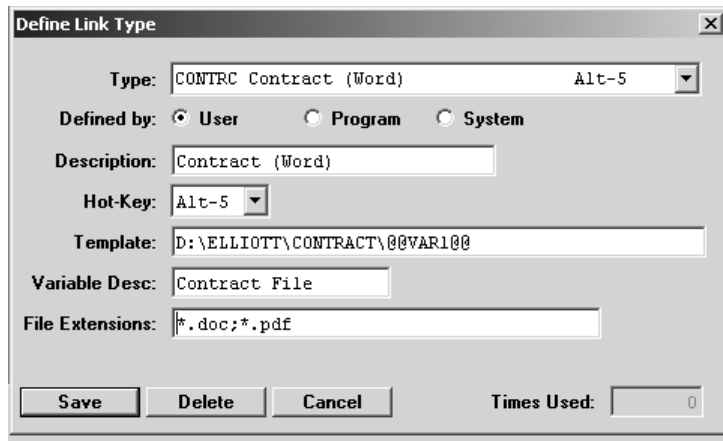
Save Delete Cancel Times Used: 0

Link New... Edit... Delete... Types... Exit

In the Types field, press the down arrow (▼) to view Types available and select CONTRC Contract.

\* In addition to the Link button, when you have a link highlighted or double click, it will execute the link. If highlighted and <Enter> is pressed, it will open the link in edit mode.





The 'Define Link Type' dialog box contains the following fields and controls:

- Type:** A text field containing 'CONTRC Contract (Word)' and a dropdown menu showing 'Alt-5'.
- Defined by:** Three radio buttons labeled 'User' (selected), 'Program', and 'System'.
- Description:** A text field containing 'Contract (Word)'.
- Hot-Key:** A dropdown menu showing 'Alt-5'.
- Template:** A text field containing 'D:\ELLIOTT\CONTRACT\@@VAR1@@'.
- Variable Desc:** A text field containing 'Contract File'.
- File Extensions:** A text field containing '\*.doc;\*.pdf'.
- Buttons:** 'Save', 'Delete', and 'Cancel' buttons at the bottom left.
- Times Used:** A label 'Times Used:' followed by a text field containing '0' at the bottom right.

## Entry Field Descriptions

Name	Description
Type	6 character field After you complete the fields below, the system inserts the description and Hot-key if applicable in this field for easier identification.
Defined By:	Determines where the link appears User      Link appears when the master record is open (being used). Program   Link appears when an address is available in the master record. System:   Automatically appears in all menus and to all users in Elliott.
Description	User defined
Hot-Key	Starts link without having to access the Links Icon. Hot-Keys available are from Alt1 – Alt0 and AltA – AltZ. Hot-Keys only apply at the master record level.  <b>NOTE:</b> Elliott Menu commands use the Alt+underscore letter. This sequence will take precedence over the Links Hot-Key having the same sequence.
Template	This is the path to the file you want to link to. The @@VAR1@@ (variable command) is required for the link to work.  <b>Note:</b> Elliott provides you with 7 predefined link types. During the Elliott installation these predefined links are installed automatically, the directories are created, and all field information, including templates, is updated for you based on the drive you install to.  It is recommended that you use these directories for better control of your files and links. If you store your documents and spreadsheets in the My Documents folder and that folder gets reorganized, you will have to change every related link type and hot link variable for the link to work properly.

Name	Description
Variable Description	User Defined – Used to identity your hot link
File Extensions	Used in the Browse window when you go to link a file. For example; *.DOC *.PDF would only bring up these type files to link to, *.html would only bring up HTML files, etc.

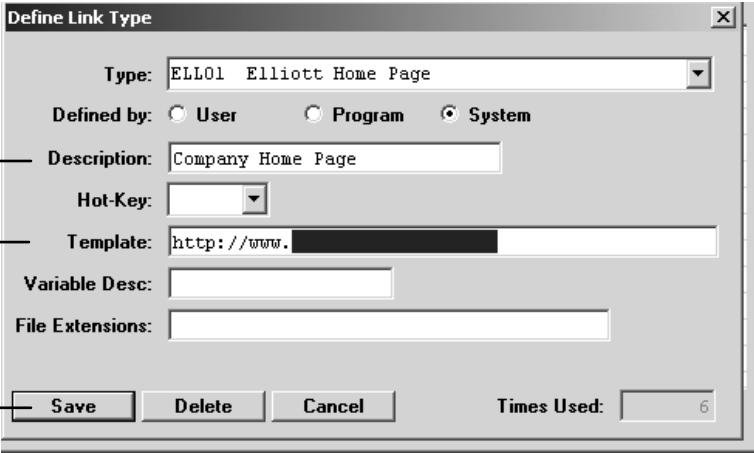
## Editing and Deletion Issues

All Types may be edited. All Types may be deleted, if not in use with a Hot-Link.

If you deleted the Pre-Defined ELL01 System Type (Elliott Home Page) or the Predefined YAHOOM Program Type, they will automatically be recreated the next time you start Elliott.

If you erroneously edit the YAHOOM Type; delete it and exit Elliott. When you start Elliott again it will recreate the Link Type for you.

**To reflect your Home Page in ELL01:** Click Types, down arrow (▼) to highlight and select ELL01



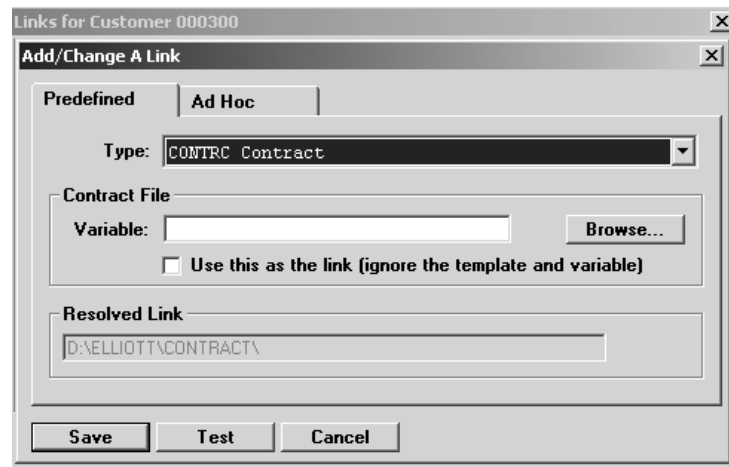
The screenshot shows the 'Define Link Type' dialog box. On the left, three arrows point to specific fields with labels: 'Change Description' points to the 'Description' field, 'Enter Company URL' points to the 'Template' field, and 'Save' points to the 'Save' button. The dialog box contains the following fields and controls:

- Type:** A dropdown menu showing 'ELL01 Elliott Home Page'.
- Defined by:** Three radio buttons: 'User', 'Program', and 'System' (which is selected).
- Description:** A text box containing 'Company Home Page'.
- Hot-Key:** A dropdown menu.
- Template:** A text box containing 'http://www.' followed by a blacked-out section.
- Variable Desc:** An empty text box.
- File Extensions:** An empty text box.
- Buttons:** 'Save', 'Delete', and 'Cancel' at the bottom.
- Times Used:** A label next to a text box showing the number '6'.

## Creating a User Hot Link

In Company File Maintenance open a customer record and click the Links icon or press Ctrl-L.

In the Links for Customer xxxxx window, **press New** and use the down arrow (▼) to select CONTRC as show below. **Pressing New only applies to User type links.** Program, System, and Predefined Types are maintained by clicking the Types button.



### Click the Predefined or Ad Hoc tab

**Predefined:** This is a link based on a predefined Link Type where the Template, Description, Browse File Types, and Hot-Key have already been defined.

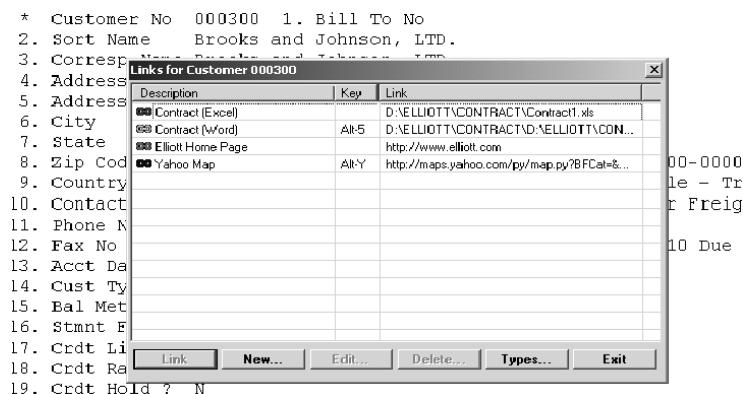
When you click the Browse button, it will use the path from the Template to open the folder where files (@@VAR1@@) are located to let you browse by File Extensions selected. **For convenience**, we went ahead and selected file Contract1.doc.

**NOTE:** If we had already created the link and were in edit mode to select a different file or path, the system would provide an option to use this as the default link, regardless of the template and previous variable.

**Ad Hoc:** There can only be one Hot Link for each User Link Type. If we had several documents that we needed to link to this customer, we would need a Link type for each document or we could use Ad Hoc Links.

When you click the browse button, you can select any file regardless of directory, folder or drive. **For convenience**, we selected an Excel file in the same folder.

**NOTE:** You are provided with a Test Button to test your link before you save it.

**Predefined and Ad Hoc User Links in Customer Links Window**

Since accessing a Word document is based on a Predefined Link type, we can Hot-Key from anywhere the customer file is being used and open the document rather than having to click the Link Icon and selecting it.

To use the Ad Hoc file, we have to click the Link icon, select the file and close the Customer Links Window after we are finished with the file.

## User Links With Images

At the master record level, images are normally associated with inventory items and employees. In this example we will use the inventory item NS-1 (Nautilus Shell 1).

From the master record, Inventory Item NS-1, click the Link Icon and the Links For Item window appears.

Item File Maintenance - [Elliott Demonstration Company]

Base Data

\* 1. Item No NS-1 UPC Code

2. Description Nautilus Shell 1

3. Prod Category

4. Code A

5. Def Or Mfg Loc LA

6. Activity Code A

7. Purch Or Mfg ? P

8. Stocked Flag Y

9. Controlled Flag Y

10. Substitute Item

11. Stocking U Of M EA

12. Purchase U Of M EA

13. Pur To Stk Ratio 1.00

14. Selling U Of M EA

15. Sel To Stk Ratio 1.00

16. Selling Price 65.0

17. Backorderable ? Y

18. Taxable ? Y

19. Bin No/Pick Seq

36. Sales Last Yr 0.00

Field Number ?

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Click New, Predefined, and use the Variable Browse button to select image.

Item File Maintenance - [Elliott Demonstration Company]

Links for IMITMFI NS-1

Add/Change A Link

Predefined Add Hoc

Type: IMAGE Image ALT-I

Image File

Variable: shell3.jpg Browse...

☐ Use this as the link (ignore the template and variable)

Resolved Link

C:\elliott\7\image\shell3.jpg

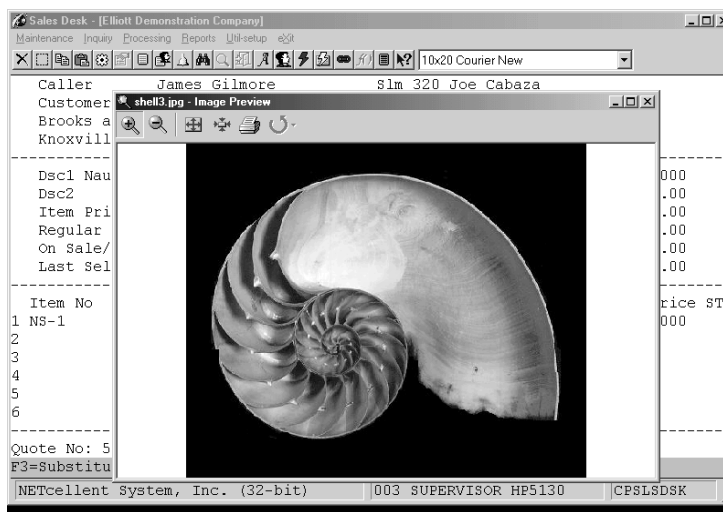
Save Test Cancel

Field Number ?

NETcellent System, Inc. (32-bit) 003 SUPERVISOR HP5130 IM0101

Click Test, if link works click Save.

**Remember:** A User type link can be accessed anywhere the master record is open.

**User Link w/Image Accessed at Order Line Item Entry**

**Note:** Since we used the Link Type IMAGE with Alt-I as the Hot-Key; at any master record where an image is linked all we need to do is press the Hot-Key.

The Image Preview program is the Windows System default program to open graphics images. The link used this program because a link is basically "start name.extension." It is the same command used when we click to open a file in Explorer.

Since the Image Preview program displays the image name Shell3.jpg and we know our default template location of images is C:\Elliott7\Images, we could click the eContacts icon and e-mail the customer the inventory item image. In most businesses, that is called Advanced Customer Relationship Management.

## User Links w/URL's

Many times it is necessary to access a customer or vendor web site to access or download information. More often than not, we have to interrupt what we are doing to find the URL address. Well, why not attach a user link to their master record with their URL?

The screenshot shows a dialog box titled "Add/Change A Link". It has two tabs: "Predefined" (selected) and "Ad Hoc". Under "Predefined", there is a "Type" dropdown menu with "URL" selected. Below this is a "URL Address" section containing a "Variable:" text box with the value "http://www.bjld.com". A checkbox labeled "Use this as the link (ignore the template and variable)" is present. Below that is a "Resolved Link" section showing the resulting URL "http://http://www.bjld.com". At the bottom of the dialog are three buttons: "Save", "Test", and "Cancel".

Customer URL Address link created at time of Order Entry

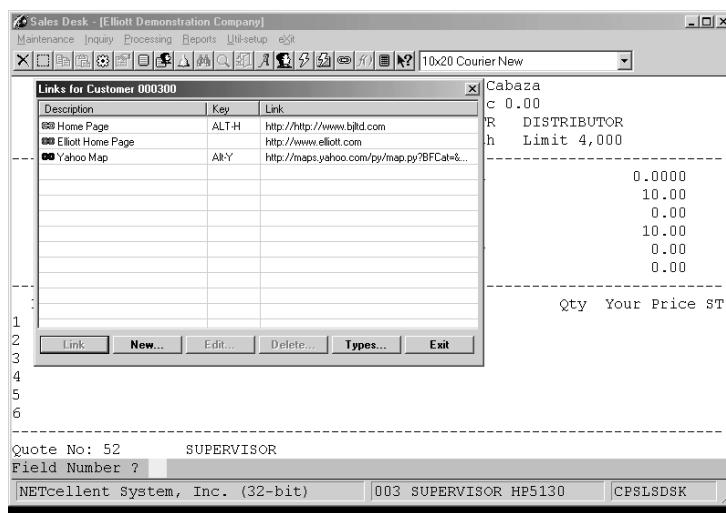
### Required Steps:

1. Click Links Icon
2. Click New
3. Select URL Type
4. Type in Customer URL
5. Save

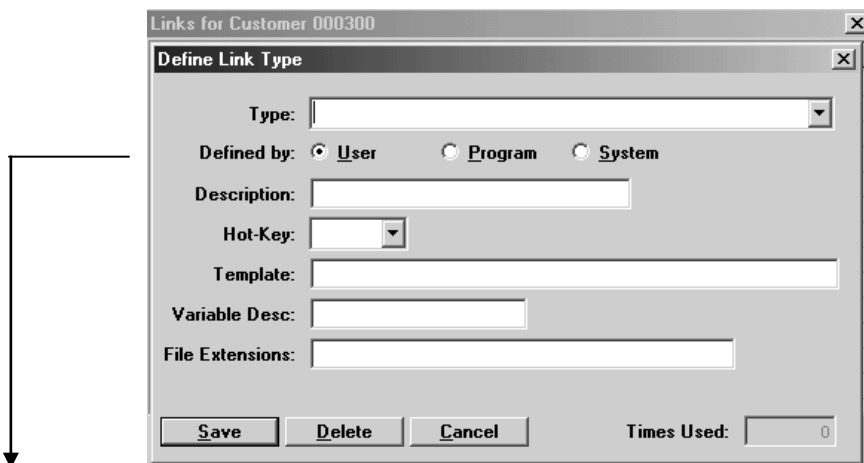
## Creating A System Link

Since "System" links are accessible anywhere to all users in Elliott; Employee Handbooks, Policy and Procedure Manuals, and many Company Publications are ideal candidates for links as they inform and can increase user productivity.

At any menu level **click the Link Icon** and the Links window will open as shown below:



**Do not click New**, this is for User Type Links only. Instead, make sure no links are highlighted and **click Types**. This will open a Blank type Window as shown below.



Click the **System** button and complete as shown on next page.



**Define Link Type**

Type: EMPHEK Employee Handbook Alt-B

Defined by: ☐ User ☐ Program ☒ System

Description: Employee Handbook

Hot-Key: Alt-B

Template: C:\Elliott7\Docs\00VAR100

Variable Desc: Employee Handbook

File Extensions: DOCS |\*.PDF; \*.HLP; \*.CHM; \*.DOC

Save Delete Cancel Times Used: 0

Pre-Check Writing Report - (Elliott Demonstration Company)

Print edit

10x20 Courier New

Description	Key	Link
Elliott Home Page		http://www.elliott.com
Employee Handbook	Alt-B	C:\Elliott7\Docs\
Yahoo Map	Alt-Y	http://maps.yahoo.com/py/map.py?BFCat=6...

Link New... Edit... Delete... Types... Exit

NETcellent System, Inc. (32-bit) 003 SUPERVISOR HP5130 AP08S1

Employee Handbook Link in A/P Pre-Check Writing Report

## Special Functions

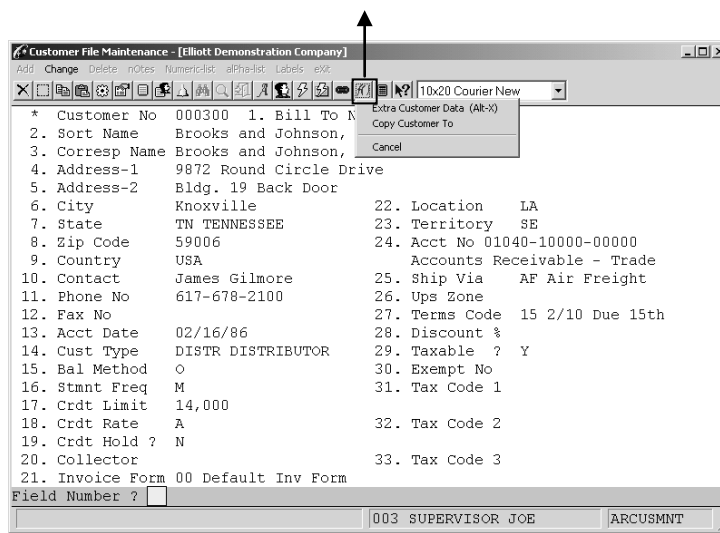
### Application Overview

Special Functions provide you with Tool Bar access to Customer, Vendor, Employee and Item information related to the literal fields defined in A/R, A/P/, P/R and I/M setup. Additionally, Special Functions allows you to copy a customer to another company and provide you with an Item History Report in Inventory Item File Maintenance.

### Run Instructions

A/R Main Menu → Maintenance → Customer File → Change

Special Functions Icon



## Extra Customer Information

**Customer File Maintenance - [Elliott Demonstration Company]**

1. Bill To No

2. Sort Name Brook

3. Corresp Name Brook

4. Address-1 9872

5. Address-2 Bldg.

6. City Knoxv

7. State TN TE

8. Zip Code 39006

9. Country USA

10. Contact James

11. Phone No 617-6

12. Fax No

13. Acct Date 02/16

14. Cust Type DISTR

15. Bal Method o

16. Stmt Freq M

17. Crdt Limit 14,000

18. Crdt Rate A

19. Crdt Hold ? N

20. Collector

21. Invoice Form 00 Default Inv Form

Field Number ?

**Customer Notes**

Customer No 000300 Brooks and Johnson, LTD.

Cell Phone 617-678-2189

Alt e-mail jamesg@aol.com

#Employees 18

#Slsmen 6

Reviewed Credit Limit (Added \$10,000)

ReviewDate 10/01/01

Balance 5,732.00

Any Change ? ☒

30. Exempt No

31. Tax Code 1

32. Tax Code 2

33. Tax Code 3

003 SUPERVISOR JOE ARCUSMNT

A/R Setup User Defined Literals

User Maintained: Extra Customer Information Hot Key = Alt X

## Copy Customer To

**Customer File Maintenance - [Elliott Demonstration Company]**

1. Bill To No

2. Sort Name J&C Ltd.

3. Corresp Name J&C Ltd.

4. Address-1 1917 West 42nd

5. Address-2

6. City Elliott VZ.X.001

7. Stat Path For Move To Company

8. Zip D:\ELLIOTT\DATA

9. Coun

10. Cont Are You Sure (Y/N) ? ☒

11. Phone No 505-299-1234

12. Fax No

13. Acct Date 04/22/98

14. Cust Type DISTR DISTRIBUTOR

15. Bal Method o

16. Stmt Freq M

17. Crdt Limit

18. Crdt Rate

19. Crdt Hold ? N

20. Collector

21. Invoice Form 00 Default Inv Form

Field Number ?

26. Ups Zone

27. Terms Code C COD

28. Discount %

29. Taxable ? Y

30. Exempt No

31. Tax Code 1 CA

Sales Tax - California

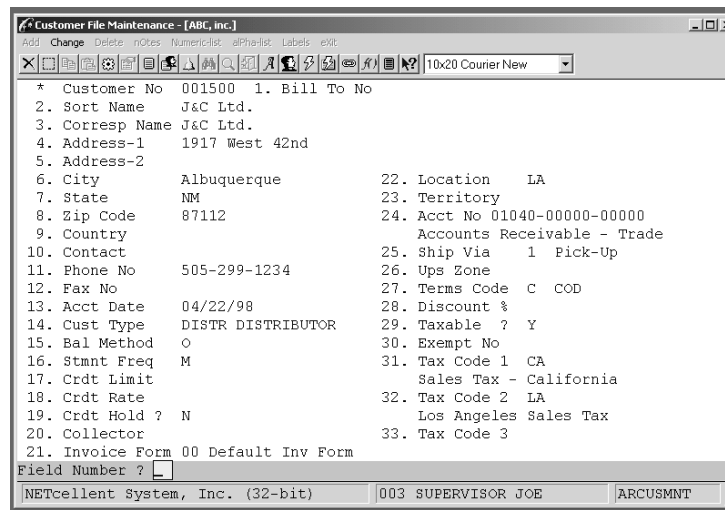
32. Tax Code 2 LA

Los Angeles Sales Tax

33. Tax Code 3

003 SUPERVISOR JOE ARCUSMNT

D:\ELLIOTT\DATA = Directory for Company ABC, Inc.



\* Customer No 001500 1. Bill To No  
2. Sort Name J&C Ltd.  
3. Corresp Name J&C Ltd.  
4. Address-1 1917 West 42nd  
5. Address-2  
6. City Albuquerque 22. Location LA  
7. State NM 23. Territory  
8. Zip Code 87112 24. Acct No 01040-00000-00000  
9. Country Accounts Receivable - Trade  
10. Contact 25. Ship Via 1 Pick-Up  
11. Phone No 505-299-1234 26. Ups Zone  
12. Fax No 27. Terms Code C COD  
13. Acct Date 04/22/98 28. Discount %  
14. Cust Type DISTR DISTRIBUTOR 29. Taxable ? Y  
15. Bal Method O 30. Exempt No  
16. Stmt Freq M 31. Tax Code 1 CA  
17. Crdt Limit Sales Tax - California  
18. Crdt Rate 32. Tax Code 2 LA  
19. Crdt Hold ? N Los Angeles Sales Tax  
20. Collector 33. Tax Code 3  
21. Invoice Form 00 Default Inv Form  
Field Number ?   
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Customer Copied to Company ABC, Inc.

**Note:** Copy To will also copy:

1. Notes
2. Extra Customer Information

Copy To will not copy:

1. eContacts
2. Attributes
3. Events

## Master File – Inventory Item History Special Function

Item File Maintenance - [Elliott Demonstration Company]

Add Change Delete n/otes List alpha-list print label purge exit

10x20 Courier New

Base Data

\* 1. Item No CLOCK UPC Code 654321200023

Item History Inquiry

Item #: CLOCK

Period	Ptd Qty Sold	Ptd Sales Amt	Ptd Usage	Ptd Cost Amt
1	.00	.00	.00	.00
2	.00	.00	.00	.00
3	.00	.00	.00	.00
4	.00	.00	10.00	.00
5	.00	.00	.00	.00
6	.00	.00	.00	.00
7	.00	.00	.00	.00
8	.00	.00	.00	.00
9	.00	.00	.00	.00
10	.00	.00	.00	.00
11	.00	.00	.00	.00
12	.00	.00	.00	.00

Esc-Exit

19. Bin NO/ Pick Seq 317 JJJ-A 30. Sales Last Yr 0.00

Field Number ?

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE IM0101

## Printing System

### Printing

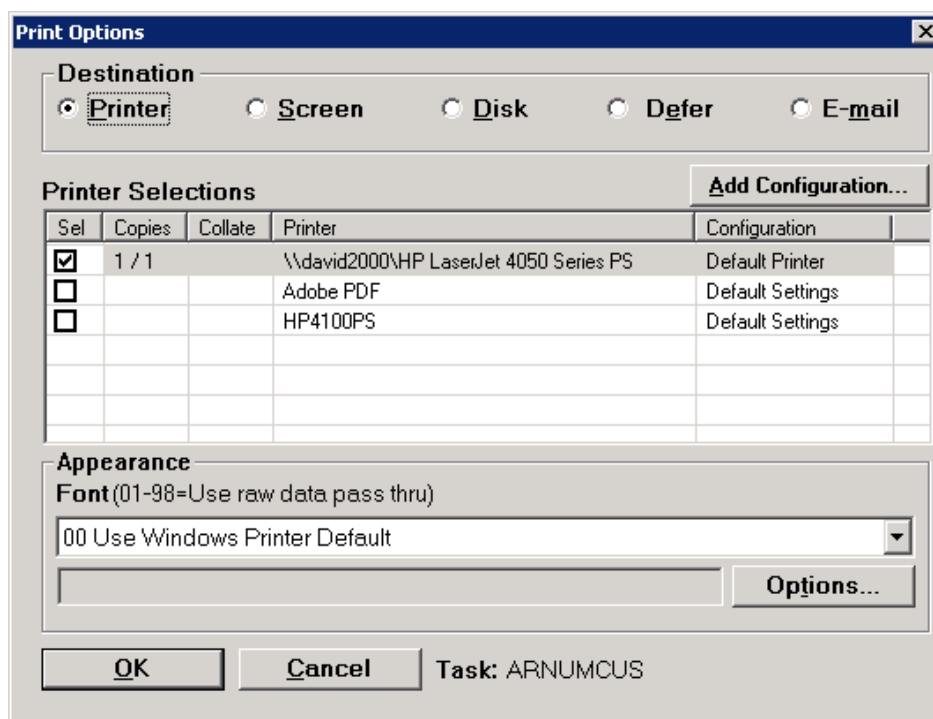
#### Application Overview

ELLIOTT allows you to use virtually any Windows-enabled printer, including fax and PDF writer. It also prints any job that traditionally only worked well in MS-DOS mode through "Raw Data Pass Through" support. Additionally, you may specify your own preferences for the printer including paper size, orientation, the number of copies, font and collating sequence for each report or printed form. Elliott will remember these defaults each time the report or form is printed. This function can save you a great deal of time and help ensure consistent printed output.

For example, you may have a specific printer that you use for printing invoices, where special invoice forms are always loaded. Once you have specified this printer for printing invoices, it will always default to that printer – this will prevent you from accidentally sending invoices to the wrong printer!

#### Run Instructions

The following screen is the print options window that will display every time a report is printed:



The Print Options dialog box is shown with the following sections:

- Destination:** Radio buttons for Printer (selected), Screen, Disk, Defer, and E-mail.
- Printer Selections:** A table with columns Sel, Copies, Collate, Printer, and Configuration.
 

Sel	Copies	Collate	Printer	Configuration
<input checked="" type="checkbox"/>	1 / 1		\\david2000\HP LaserJet 4050 Series PS	Default Printer
<input type="checkbox"/>			Adobe PDF	Default Settings
<input type="checkbox"/>			HP4100PS	Default Settings
- Appearance:** A section with a label "Font (01-98=Use raw data pass thru)" and a dropdown menu showing "00 Use Windows Printer Default".
- Buttons:** OK, Cancel, and an Options... button.
- Task:** ARNUMCUS

The first time the Print Option Window is displayed for each report, the default printer for this workstation will be selected. You may use this default or change it by putting a checkmark in the appropriate box in the Select column. Subsequently, each time you choose this report for printing, these selections will be used by default. If you wish to print the report to another tray on the printer or to another printer that is not listed, then you can click the Add Configuration button to add another printer with the desired properties.

#### Printing Destination

In the **Destination** group, users can choose between four different printing destinations:

**Printer** – Send printed output to a Windows printer or port.

**Screen** – Display printed output to the screen.

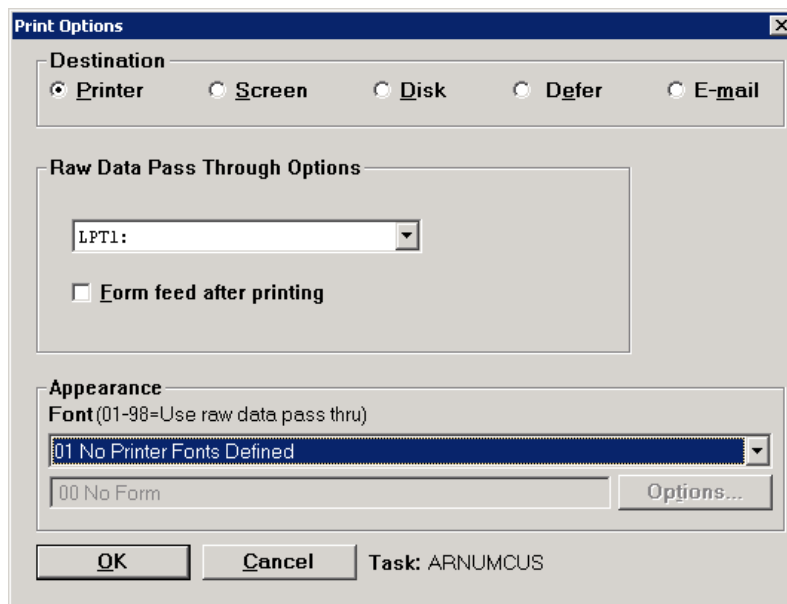
**Disk** – Spool printed output to disk.

**Defer** – Defer this print job and define start date and time.

**E-mail** – Send the output directly to the e-mail client.

### Choose A Different Printer or Port

When you choose to print to a printer, depending on the font you choose, either the default Windows printer, or default port will display. If you choose font 0 or 99, then a Windows printer will be used. If you choose font 1 – 98, then the printer port will be used (Raw Data Pass Through).

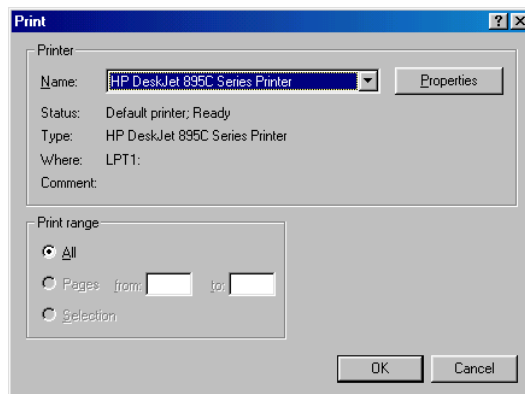
The image shows a 'Print Options' dialog box with a blue title bar and a close button. It contains three main sections: 'Destination' with radio buttons for Printer (selected), Screen, Disk, Defer, and E-mail; 'Raw Data Pass Through Options' with a dropdown menu showing 'LPT1:' and a checkbox for 'Form feed after printing'; and 'Appearance' with a label 'Font (01-98=Use raw data pass thru)', a dropdown menu showing '01 No Printer Fonts Defined', a text field with '00 No Form', and an 'Options...' button. At the bottom are 'OK', 'Cancel', and 'Task: ARNUMCUS' buttons.

By using the Raw Data Pass Through method, you can only choose LPT1, LPT2 or LPT3 as a destination. If the printer is attached directly to the workstation on one of the LPT ports, then the output will be sent to that port. If the printer is a network printer, then you can map the LPT port by using the port capture in Windows 95/98. If you are using Windows 2000 or higher you will discover that Microsoft has discontinued the port capture feature. You will either have to attach a printer directly to the workstation or use the Windows printer option (Font 00). For this reason we are recommending that all checks, invoices, picking tickets and other forms be printed on a laser printer. Printing to a laser printer does not require the output to be sent directly to the printer and will prove faster and less expensive in the long run. Netcellent has significantly improved the capability and support for laser printers in Elliott.

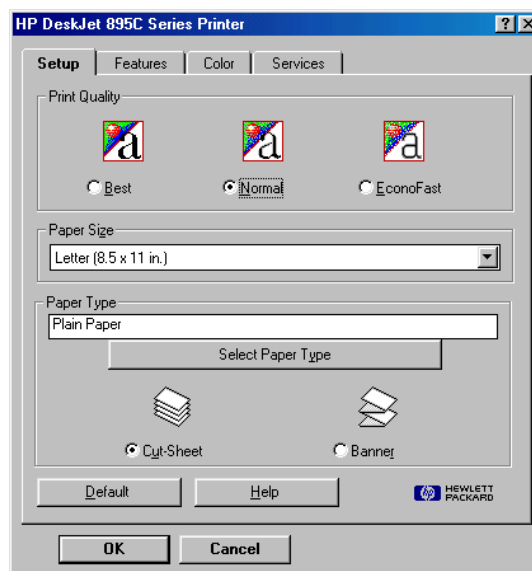
By using the Windows Printer method, you have more options and flexibility. Output can be sent to more than one destination and each destination can have its own print properties.

### Sel - Select

This column allows you to select which printer you wish to print your form or report. You can place a checkmark in more than one box to select multiple destinations. If you do not see the printer you wish to print to, you can add the printer to your list by clicking the Add Configuration button. This will bring up the print dialog window and allow you to choose a printer that exists on the system.



When you click on the “Properties” button, you will be able to make additional selections on a printer’s specific features:



More and more high-end printers are adding unique new features. Some allow for such things as two-up and four-up printing, duplex printing, special watermarks for official documents, choosing the default bin for paper source, landscape or portrait printing, and so on. ELLIOTT now allows you to save these settings as a configuration. You can even create multiple configurations for the same printer.

### Copies/Collate

You can print up to 9 copies of the same report to each configuration. You can choose to collate your output when you print multiple copies of a report. For a print job of 3 pages printing two copies, to collate means to print pages 1-2-3-1-2-3. Not to collate means print pages 1-1-2-2-3-3. The collate function is supported in Elliott by opening the output as multiple print jobs with the same content. If you do not collate the output, then the support of multiple copy printing comes from the printer hardware. Usually a laser printer has enough memory to hold a full page and allow printing of multiple copies while a dot matrix printer may not be able to. Therefore, to print multiple copies on your dot matrix printer, you most likely need to choose the “collate” option.

To choose the “non-collate” option will disable the Elliott laser form “copy” function. Since the “non-



collate" function is supported through printer hardware and the copy content has to be identical, it is not possible to print "Copy 1" on the 1<sup>st</sup> copy and "Copy 2" on the 2<sup>nd</sup> copy.

## Font

For the font selection box, we suggest you choose font "00" for "Use Windows Printer Default" unless the printing output is incorrect. Choosing font "00" implies that (1) you want to use a Windows printer and use Windows printing conventions. (2) You will let Elliott determine what font to use to produce the best output on the printer you choose.

For example, when you try to print a 132-column report on a HP LaserJet with 8 ½" x 11" paper, Elliott knows to choose a compressed font so that the 132-column printing result will fit on the letter size paper. On the other hand, if you print an 80-column report (i.e. Picking Ticket), the system knows the regular 10 pitch font will fit, and does not use the compressed font. Since this is determined by Elliott automatically, the user does not need to know what font to use for a particular print job.

Beginning with Elliott 7.4, you can specify a font in the printer configuration. You can save this configuration and select it for printing instead of using the font dialog, which will prompt you for the font each time you print.

## Raw Data Pass Through

Letting Elliott choose the best-fit font usually produces the best result. However, in some situations, you may want to control the font yourself instead of letting Windows figure it out for you. This may happen in the following two situations: (1) The printing slows down significantly on a dot matrix printer, (2) The alignment is incorrect with form printing such as: invoices, POs, checks, statements, etc.

When you use a font between "01" to "98", this will tell Elliott not to use a Windows printer. Instead, it sends printing output to port LPT1 – LPT3. This is called the "**Raw Data Pass Through**" method. Since this bypasses the Windows printer driver and sends output directly to a port, it will produce identical output and results as in the DOS print environment.

By default, When the system uses the Raw Data Pass-Through method no form feed characters will be sent to the printer port at the end unless it is a report. The system determines whether a print job is a report or a form by checking (1) If any form feed characters are sent, (2) if any page breaks are encountered. If either of these two conditions are met, the print job is assumed to be a report. Otherwise, it will assume the print job is a form. Since form printing uses line feed to control advancing pages and controls line-count manually to prevent automatic form feed (where the page heading will be printed), this method will work well. If for any reason you need to print an extra page at the end of printing, you can mark the check box "**Form feed after printing**". This box is only available if you use "Raw Data Pass Through". When printing to a network printer, your windows/network client setting will also determine whether or not an extra form feed character will be sent at the end of your print job.

If you need to send the output to a network printer, you must capture your local port to a network printer first. To capture a local port in Windows 95/98 OS, you go to printer setup and choose properties for the printer. At the "Detail" tab, choose "Capture Printer Port".

## Draft Mode with Dot Matrix Printer

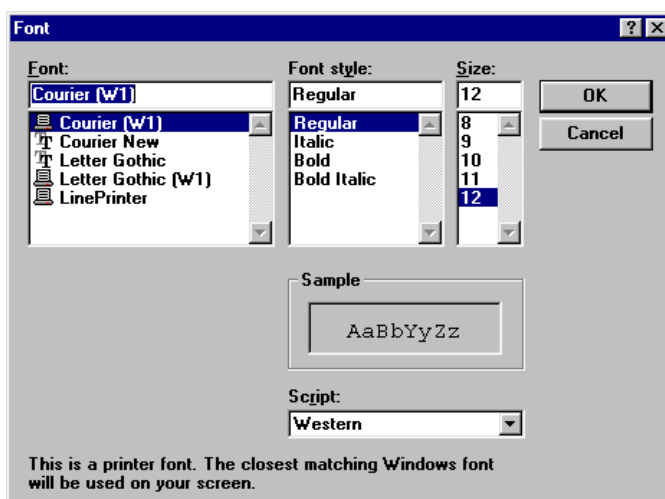
The Raw Data Pass Through method works well with Windows 3.1/3.11, Windows 95 and 98. It can work for a Windows NT/2000 Workstation's local printer. However, it won't work for a Windows NT/2000 workstation trying to print to a network printer. To print to a network printer on a Windows NT workstation, you must use the Windows printer conventions (font 0 or 99). Make sure to keep your Windows NT/2000

workstation's printer name under 15 characters to avoid potential printing problems.

If you need to print to a dot matrix printer from Windows NT, 2000 or XP workstation, you probably want to setup your printer driver to print in "Draft mode" to speed up the printing. To do so, you can go to "Start" -> "Settings" -> "Printers". Right click on the printer you need to configure and choose "Properties". In General Tab, you can find "Printing Preferences" button and click on it. Click on the "Advanced" button in Printing Preference window. Change the Print Quality to "Draft". Click "OK" button to exit and save.

The use "Draft Quality" for dot matrix printer driver is also applicable to Windows 95/98 machine. The procedure is different from Windows 2000 machine: First you will choose "Start" -> "Settings" -> "Printers" and right click on the printer you need to configure and choose "Properties". Choose "Device Options" tab and change "Print Quality" to Draft. Click "OK" button to exit and save.

## Font Dialog



You may choose to let Elliott prompt you with a font dialog box before printing starts. To do so, choose font '99'. Before the printing starts, the previous font dialog box will display:

Users can then pick the desirable font, style and size for this print job. The highlighted font style and size is the best-fit font selected by Elliott. When you use Font 99, you may see a font with "TT" beside it, which means this is a true type font (soft font). If you see a "Printer" icon beside it, it means this is a printer built-in font. By default, Elliott will pick built-in fonts over true type fonts since true type fonts are a soft font and may take longer to print. Typically, with laser printers, the speed difference between a true type font and printer built-in font is not significant. However, with dot-matrix printer, there may be significant performance differences.

Font 99 is a good tool to diagnose printing problems when the print result is incorrect or slow. Understanding why the best-fit font picked by Elliott does not produce the correct results can often help forge a solution to the problem.

## How does Elliott pick the best-fit font?

When you use font 00, Elliott will pick the best font for the print job. It will first query the print driver to see if there are any built-in fonts for this printer. If there are, then it will use the best-fit built-in font for the report. The system picks built-in fonts over soft-fonts (like True Type fonts) because built-in fonts are typically faster than soft-fonts. This is especially important for dot-matrix printing. A built-in font will have a symbol of a printer beside the font name in the Font Dialog Box.

When there are no built-in fonts available, Elliott will pick the best-fit soft-font available. By looking at the font dialog box (using font 99), we will discover the available fonts (including built-in and soft font) and size for this printer driver and many times discover the reason why Elliott can not produce the right result.

Many times when the print output is incorrect, it is the result of the printer driver. A typical solution is either to download the latest driver from the printer's manufacturer website, or to use a different, but compatible, printer driver. If none of these methods work, your last resort is to use "Raw Data Pass Through".

## Font Selection for Dot-Matrix Printers

Generally speaking, dot-matrix printers are relatively slow. Therefore, it is desirable to select a "built-in font", which is a fast font for printing. Most of the time, Elliott will select a "built-in" font automatically. Sometimes, however, Elliott will select a slower font that is technically a better fit than any "built-in" font. If it is a long report, you may wish to override the font that Elliott selects. Of course, you can select the "Use Font Dialog for More Options" and select the desired font yourself each time.

Elliott provides another way to help ensure that fast, "built-in" fonts are selected automatically. You may supply a file named DOTMATRX.CFG in the \NSI or \ELLIOTT root directory with the following information:

**Line 1:** A number from 1 to 10. This number indicates the relative importance of this list over Elliott's internal font-selection algorithms. The higher the number, the more likely this list will be used. You might wish to try and initial value of 3 and raise it as necessary to get the desired result. Some examples of the meaning for different number are: "9" means use this font if all possible unless it is a true type font. "10" means us this font if all possible even if it is a true type font.

**Line 2:** Entries comprised of two columns. The first column contains the first few characters of the name of a printer (e.g., "Oki" or "Okidata" for Okidata printers and "Epson" for Epson printers). The second column contains the first few characters of the desired font name (e.g., "Line" for "Linedraw"). The first and second columns are separated by one or more spaces.

When this file is present and Elliott selects a font for a dot-matrix printer, it will search this file for an entry that matches the selected printer in column one and an available font from column two. When such an entry is found, it will override the "best-fit" font that Elliott would otherwise select, if the priority number from line one is high enough. You might need to experiment to get these entries to select the desired fonts. Once set, Elliott will automatically select the desired fonts for your dot-matrix printers. The following is an example of how this file may look:

```
=9
Panasonic Draft 10cpi
```

This is a typical setting to use with wide green bar paper (14" x 11") and Draft is the typical font to allow printer print in the fast mode. To use wide green bar paper, you should also choose the paper size as "Custom" and define the size of the paper as 14" x 11". The font you choose in DOTMATRX.CFG file should be a printer built-in font. However, "Script" font will never be used. Soft Fonts, like True Type fonts, will be ignored because of the speed problem. To find out what is a printer built-in font versus a True Type font, print a short document and select font 99 to activate font dialog. In the font dialog, the font with a printer icon is a printer built-in font. The font with a "TT" icon is a True Type font (soft font). Only define those fonts with a printer icon in DOTMATRX.CFG file.

In most situations, you do not have to pick the specific font size and system is intelligent enough to pick to correct font to fit print on the paper you specify, therefore, you can make DOTMATRX.CFG file look like following:

=9

Panasonic Draft

In certain situations, the printer driver you use may have definition problem and may cause the system not to use the Draft font you try to select (for example Panasonic 118 drivers for Win95/98). You may try the following with DOTMATRX.CFG file:

=9

Panasonic Draft|\*

The vertical symbol “|” should follow “Draft” immediately. This means even if the vertical height of the font is defined incorrectly, the system will be forced to select it. The Panasonic 1180 printer driver for Win95/98 mistakenly defines the vertical height as 33 dots where it should really be 24 dots. According to driver definition, there are 144 dots in an inch and therefore  $144/33 = 4.36$  lines/inch. This font won't be able to support the 6 lines per inch requirements by Elliott and therefore will not be selected unless you specify the “|\*” symbol. You may also try “|33=24” to be more specific in overriding the 33 dots to 24 dots. Since most users won't have this kind of technical knowledge, the easier solution to try is “|\*”.

## Report Width

In order for Elliott to correctly pick the best-fit font, it has to know the number of columns on the report to be printed. The report width is determined by looking at the 1st line of the report at the time of printing. In most situations, the 1st line of a report is the line with a page number, which is also the widest line of the whole report. Therefore, the system can correctly determine the report width in terms of number of columns and set up the correct font and size to accommodate the report.

For example, when users wish to print a 132-column report on a HP LaserJet in portrait mode, the system will automatically determine that we need a 16.67 point pitch font to fit the 132- column report on 8-1/2” paper. If users choose to print Landscape, it will choose a different pitch because the paper is now wider.

However, in some situations, the 1st line may be blank, or it may not be the widest line of the whole report. This may be the case when you print an invoice, a check, a label, or GL financial statements. An invoice may begin with a few line feeds first. If the first line is blank, the system will assume it is an 80-column report. When the system prints the GL financial statement, the system automatically assumes it is a 132-column report. However, if this assumption is not correct, users can set up the EL700U.CFG file specify the actual length of the report and override the system defaults. The following is a sample EL700U.CFG file:

```
[Reports-Width]
CPINVPRT=132
PLSTMT=175
```

The EL700U.CFG file should be placed in the \Elliott7 directory or whichever directory you install Elliott. In the same directory, there is an EL700S.CFG file that serves the same purpose. However, the EL700S.CFG file is a standard file distributed by NETcellent and users should not change the content of the file. Anything specific to the user should be put into the EL700U.CFG file.

In the above example, CPINVPRT is the printing program for COP Invoices. The spooled report will be using the same name. Entering a line CPINVPRT=132 indicates that the COP Invoice is 132 columns wide instead of the 80 columns that the system normally assumes (because the first few lines are probably a line feed). The next example, PLSTMT=175 indicates that the profit and loss statement is a 175-column wide report. By default, the system assumes all financial statement reports to be 132

columns. PLSTMT is the spooler name, not the actual print program name.

More than 95% of the time, the spool report name is the print program name. There are some exceptions when the report name is the Spooler name as in V6.x DOS mode. You can find the spool report name by printing the report to disk and the system will show you the name of the spooled report at the bottom of the screen. This is the name you want to use when entering it into the EL700U.CFG file to indicate a different length than the system default.

## Margins

Each user may set its default printing margin by going to "Print etc." tab in "Setup/Preference" toolbar. These value are saved in user's registry area. The following are system default values if user do not set custom value:

```
[Laser-Printers]
Top-Margin=0.50
Bottom-Margin=0.50
Left-Margin=0.25
Right-Margin=0.25
```

```
[Non-Laser Printers]
Top-Margin=0.00
Bottom-Margin=0.00
Left-Margin=0.00
Right-Margin=0.00
```

You will notice there are separate sections for laser printers and non-laser printers. Do not change the laser printer margin to zero as no laser printer can print a page without any margins. If the above section is not in your NSI.INI file yet, it means you have not printed any reports yet. Simply sending a report to the printer will create these sections with the default values.

## Page Length

Since users can determine the paper size with Elliott, the number of lines per page is really dependent on the paper size users select. The system assumes 6 lines per inch. By removing the top and bottom margin defined, the system can predict how many lines exist per page.

However, you should be aware that there are certain print programs that have 60 lines per page hard coded and therefore will not work correctly with this assumption.

Most of these programs are form printing programs like invoices or pick tickets. We suggest you print the form using Raw Data Pass Through. The alignment may not work correctly if you do not use the "Raw Data Pass Through" option when you print a form. If you do not wish to use the "Raw Data Pass Through" option with forms, then you must go to the Windows printer setup and set up a custom form for the printer that matches the length and width of the form (i.e. checks).

The reason we support the Raw Data Pass Through feature is to support Form Printing. Since users do not need form feed with form printing, and the printing position of data on the form needs to be accurate, it is best if the data is sent to the printer directly (Raw Data format) without any manipulation by the Windows printer driver to distort the true position.

To use the Raw Data Pass Through feature for form printing, choose a font between 01 and 98; this will tell ELLIOTT to print directly to the printer port without any printer driver manipulation. If you choose font 00, it tells ELLIOTT to choose the best-fit font automatically and send the output to a Windows printer.

If you need to send the printout to a fax modem, the Raw Data Pass Through feature will not work.

## Windows NT, 2000 or XP Workstation's printing

If you use a Windows NT, 2000 or XP workstation, you need to know that it will not support capture of the LPT1- LPT3 printer ports. This means you cannot print to a network printer with the Raw Data Pass Through feature (which is the default method of printing with Elliott). If you need to print to a network printer, then you will need to use the Windows printing method by choosing the font '00'. The Windows printing method may have alignment issues with checks, statements or invoices. Therefore, you may need to consider printing to a local printer for printing these types of forms when using a Windows NT workstation.

## Laser Form Support

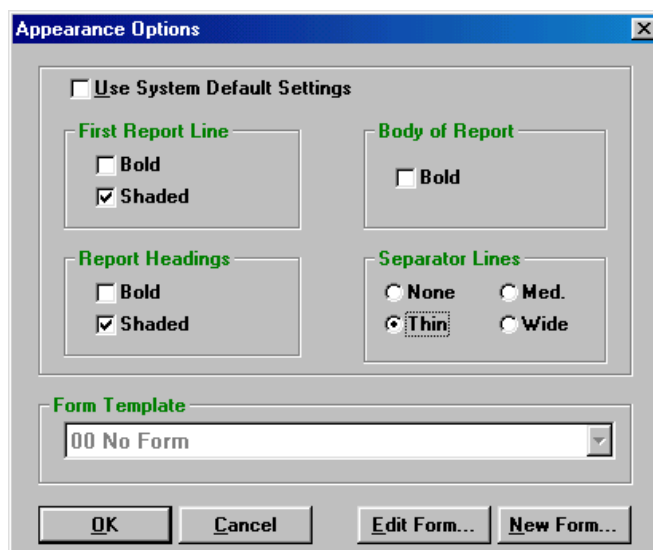
If you want a complete Windows printer solution without using the Raw Data Pass Through method, you should look at the **Laser Form Printing and Designer** in chapter 9. This will help you with form printing in two ways: (1) Print laser forms without alignment issues. (2) Setup a template with number of columns, page length, and margin pre-set to produce a correctly aligned form.

## Option Button

If you wish to change printing output and make it appear more professional, you can do the following:

- Shading your report heading
- Put a separator line between the heading and body
- Make a report bold

Click on "Option" button of the "Print Option" window and the following will display:



The image shows a dialog box titled "Appearance Options". It contains several sections for configuring the report's appearance. At the top, there is a checkbox for "Use System Default Settings". Below this, there are four main sections: "First Report Line", "Body of Report", "Report Headings", and "Separator Lines". Each section has a "Bold" checkbox and a "Shaded" checkbox. The "Form Template" section at the bottom has a dropdown menu currently showing "00 No Form". At the bottom of the dialog are buttons for "OK", "Cancel", "Edit Form...", and "New Form...".

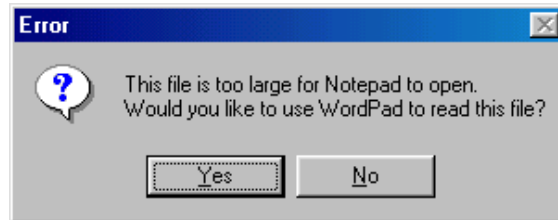
Section	Option	Value
First Report Line	Bold	<input type="checkbox"/>
	Shaded	<input checked="" type="checkbox"/>
Body of Report	Bold	<input type="checkbox"/>
	Shaded	<input type="checkbox"/>
Report Headings	Bold	<input type="checkbox"/>
	Shaded	<input checked="" type="checkbox"/>
Separator Lines	None	<input type="radio"/>
	Med.	<input type="radio"/>
	Thin	<input checked="" type="radio"/>
	Wide	<input type="radio"/>
Form Template	Dropdown	00 No Form

Try the various options and see what happens to your report. The Form Template combo box, Edit Form and New Form buttons are for Laser Form Printing and Design. Refer to chapter 9 for more information.

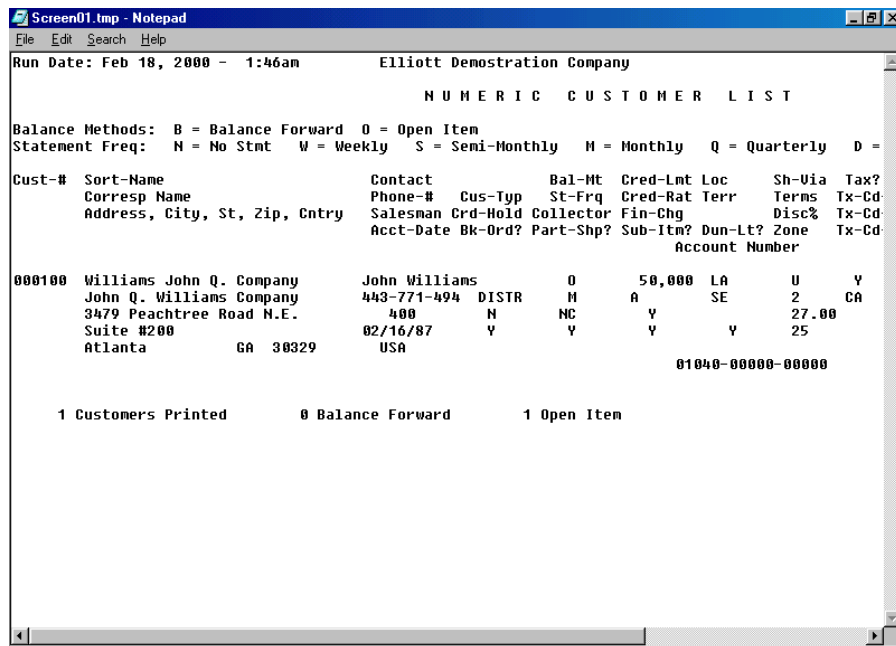
The default report print format can be setup with EL700CF. The value is stored in EL700.CFG file (under \NSI or \ELLIOTT).

## Print to Screen

When you choose to print to screen, Elliott will utilize notepad by default to display your output. You may choose your favorite editor to display the screen output. A good choice will be WordPad, which does not have any limitations on the size of the print job. When you use notepad, you might encounter a message indicating that the output is too large for notepad to open it and would you like to use WordPad instead if you should answer "Yes".



If you would like to avoid seeing this message in the future, you can change your default editor to WordPad in preference setup. The following is a sample of a report that was sent to screen by using notepad for viewing.



Please be aware that even though notepad will let you print the output to the printer, it will not produce the right result (i.e. it will not compress the 132-column report).

If your notepad displays the output with incorrect alignment, chances are you are using the word wrap feature. Turn off word wrap feature by going to the "Edit" menu and selecting "Word Wrap" in Notepad. Incorrect alignment may also be caused by an incorrect font. Normally, notepad will use a mono spacing font. However, if you choose a proportional spacing font, then it may cause an alignment issue.



## Temporary Directory for Print to Screen (and E-mail Attachments)

Reports that are printed to screen, as well as e-mail attachments, are first written to a temporary file, then opened by your editor, (or sent by your E-mail package). The directory where the temporary file is written is determined as follows:

1. If the environmental variable TMP is set and points to an existing directory, this directory is used.
2. If TMP does not work and an environmental variable TEMP is set and points to an existing directory, that directory is used.
3. If neither TMP nor TEMP work, the Windows System directory with \TEMP attached is tried.
4. If none of the above work, the normal data directory for the current company is used.

## Defer To Disk

Deferred processing is a powerful tool in Elliott to automate daily or month end routines. All deferred requests must be spooled to disk. This is because in a Windows environment, there is no way to guarantee that the deferred processing machine will have the same printer driver as the request machine. Therefore, all deferred processing has to be spooled to disk.

When you choose to defer a report to disk, a “Defer Print Option” window will pop up and ask for the following information:

- **Starting Date/Time:** This is the date and time when this report will be executed. The Deferred Processing Server will execute this report at the time specified if the Defer Server is not processing any other request. If the Defer Server is processing other requests at the specified date and time, then this request will wait in the queue along with any other requests that may be waiting until the Defer Server is available to process the request. For more information on the Defer Server, refer to the Chapter 8, “Defer Report Processing Manager”.
- **Batch Code:** This is a user definable field where any value can be entered. During deferred report processing, users can specify to process a specific batch code. One reason for using a batch code is to have multiple deferred processing servers to improve the throughput. Each deferred processing server can handle certain batch codes to distribute the load.
- **Recurring Frequency:** This can be as a one time defer request, or it may recur on a daily, weekly or monthly basis. For example, any daily postings to the journal can be deferred and recur on a daily basis. This means you will set up the defer request one time and the defer server will perform the posting for you automatically on a daily basis. During the weekend, there may not be any need to post and you can stop the deferred processing server. The next time the defer server is started it will only process the daily defer request and skip the missing days. Monthly defer processing is usually setup for the month end process. By using the recurring method, users can make deferred processing a powerful automation tool with minimum user intervention.
- **Description:** The description specifies how you want this defer request to be read by the “Defer Report Processing Manager”. This is important information, do not leave it blank.

## When Things Go Wrong

Most of the time, printing within Elliott is convenient and straight-forward. This is especially true with printing to screen or disk. However, you may encounter issues when you try to print a hard copy report. If you are having some difficulty with Elliott's printing. Consider the following:

- **Use the Latest Printer Driver**



ELLIOTT uses advanced printer driver capabilities to provide you with the best output with the least intervention on your part. Sometimes, this makes Elliott more particular than software packages like Microsoft® Word or Excel. If the printer driver does not match the printer capabilities correctly, was installed improperly, or has been replaced by the printer manufacturer since it was installed on your computer, you may need to reinstall the printer driver. By far, an incorrect printer driver is the single most common cause of printing problems with Elliott. The first thing to do when experiencing printing problems with Elliott is to download and reinstall the appropriate printer driver. This usually resolves most printing problems.

- **Try Printing with WordPad, Word, or Notepad**

If you are not able to print correctly from these Microsoft programs, you are likely to experience problems printing from Elliott as well. Once you resolve any problems printing from these programs, you should be able to print from Elliott too.

- **Print a Test Page from Windows Printer Properties**

If you cannot successfully print a test page from Windows Printer Properties, then this is not a Windows compatible printer and you will not be able to print with Elliott by using the Windows printing method either.

- **Use Font Dialog**

Choose font 99 and the system will display the font dialog before printing starts. The font dialog will display the available fonts for this printer driver and highlight the font and size that Elliott believes to be the “best-fit.” By seeing all the available fonts, you might discover the reason why the printing result is incorrect.

- **Use Raw Data Pass Through**

By selecting a font between 1 and 98, you are using Raw Data Pass Through. Raw Data Pass Through always works, except this method of printing in Windows is being phased out. Raw Data Pass Through is fully supported with Windows 3.1/3.11 and Windows 95/98. Raw Data Pass Through may work with Windows NT and Windows 2000 local printers. However, Raw Data Pass Through will not work with Windows NT/2000 workstation on network printers.

- **Create a Printer Log File**

If you have to use the Windows Printer and you cannot get it to work right, you should contact your technical support representative. He or she may ask you to produce a Printer Log file for remote analysis. To do this, you need to go to preference setup, under the diagnostic tab check “Log Next Print Job”. The next time you print from Elliott, instead of producing a hard-copy, two files will be created in your \ELLIOTT root directory:

WINCOMPR.LOG  
WINCOMPR.OUT

You may return to your preference setup, under the diagnostic tab, right click the file path and name beside “Log Next Print Job”. Click OK on the next screen and the system will start to perform an analysis and return the analysis results in notepad. Either e-mail the result or fax the output to your technical representative for further analysis.

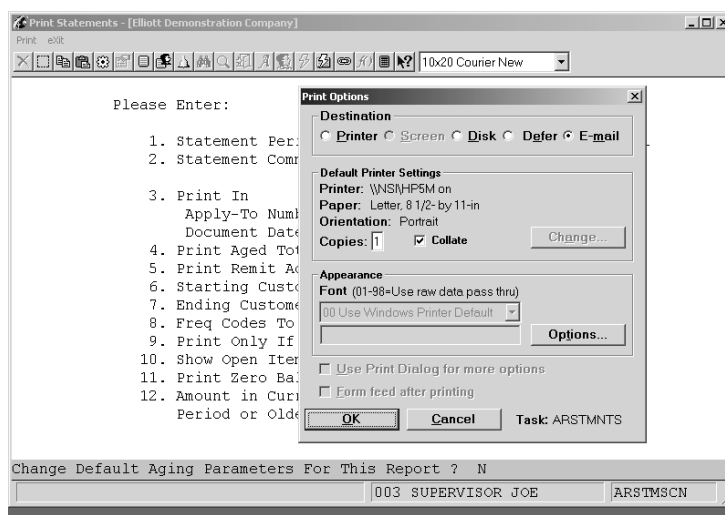
## E-mail w/Printing

### Application Overview

Elliott gives you the flexibility and power to e-mail a text version (\*.txt) of virtually anything you can print in the system. Useful e-mails could be price lists, invoices and statements to customers, purchase orders to vendors, sales reports to managers and salesmen, and even financials to your CPA or banker.

### Run Instructions

When you are ready to print, select E-Mail from the Print Dialog Box as shown below.



Number of Copies = additional attachments to the e-mail.

Press **Okay** and the E-Mail Options screen will appear as shown on the next page.

**E-mail Options**

**To:** Joe Cabaza;

**cc:**

**bcc:**

**Subject:** Account Statement As Per Your Request

☐ Interact with the E-mail package before sending...

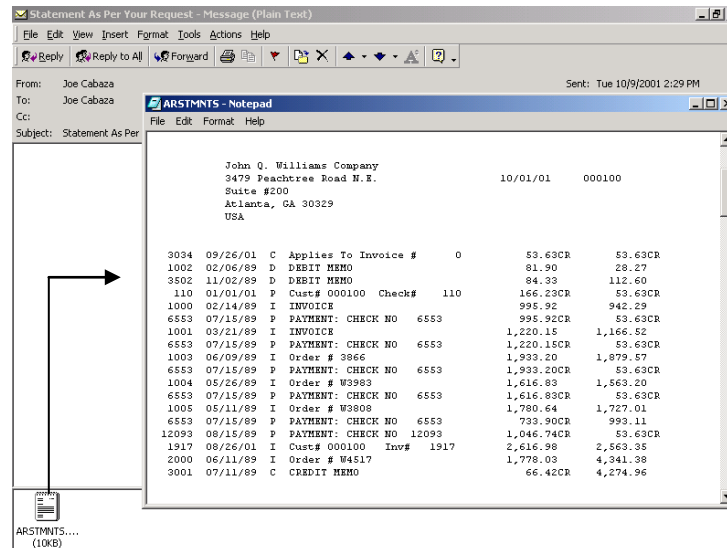
☐ Request return receipt

**Setup...**

**Send** **Cancel** **Clear Content** **Clear All**

Field	Description
To:	Recipient(s)
cc:	Carbon Copy
bcc:	Blind Carbon Copy: Used for multiple addresses when you do not want all names to appear on the e-mail.
<b>NOTE:</b>	When you click To:, cc: or bcc:, your operating system takes over and takes you to your default e-mail program to get the address list.
Subject	Subject of e-mail
Body text	Insert additional information. The report you are printing (e-mailing) will be attached as a text file.
Interact with . . . before sending	Takes you to your default e-mail program when you press send.
Send	Sends e-mail as it appears on the screen
Request return receipt	Use as needed (May not work with Outlook Express)
Clear content	Clears the content in the text body area.
Setup	Allows you to insert signature line
Clear All	Erases e-mail and returns a blank screen

## Received e-mail with attachment opened



**Note:** Disregard and just press enter when the print subject requires a form and you are prompted to mount forms

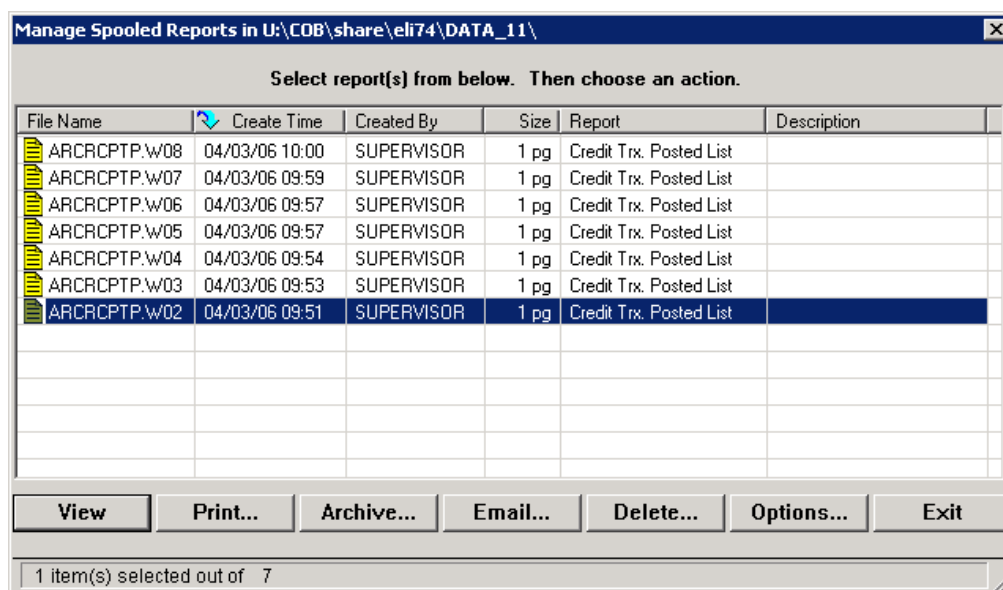
**This Page Intentionally Blank**

## Spool Report Manager

### Application Overview

Spooled Report Printing is a total redesign from the V6.x DOS version. It supports the paperless office concept by providing archive and retrieve functions. It has a better user interface and is much easier to operate. Because Windows Spooled Reports List provides more information than the DOS version does, the Windows Spooled Reports catalog is stored in the file **SPOOLWIN** which is different than DOS's **SPOOLFIL**. The **SPOOLWIN** file is created when a user first spools a report in Elliott.

The naming convention for the spooled file is also different. DOS uses a hard-coded 6-digit spooled report ID for each report. Elliott uses the 8-digit report task id as the spooled report name and marks the extension as **W??** where ?? ranges from 01 to 99. For this reason, the reports spooled in Elliott can only be viewed in Elliott while the reports spooled in DOS can only be viewed in DOS. The following is the Spooled Reports Print Screen:



In the list box, you can either use the cursor key for up and down, or press the space key for selection. You may also use the mouse click to make a selection as well. To select multiple reports, you can hold down the shift key and click the mouse button. You can also use the click and drag technique for selecting a range of reports. To unselect a report, you can hold down the control key and press the mouse button (or click and drag for a range of reports).

This screen by default will only show the reports that belong to the current user. You can optionally see other users reports if you have the security clearance (V6.7 and Elliott users only). Additional information like number of pages and the name of the report are added for easy reading.

If for some reason, SPOOLWIN file is corrupted, you may re-initialize it by simply deleting it from the data directory. The next time you spool another report to disk, the file will be created automatically. However, after you initialize the SPOOLWIN file, you will not see previously spooled reports in the list box, even though they are physically on your hard disk, because they are not in the SPOOLWIN catalog file. To view previously spooled reports, you can click the "Option" button, and check "Show All Users", box (if

you have the security clearance). Security clearance is setup in V6.7 Main Menu -> "Util-Setup" -> "Enhancement Setup" -> "System" -> "Printing Enhancement". By requesting to see all users, the Spooled Report Manager will show all files in the data directory (or current directory) with a W?? extension. The report name and user ID will not display since that information has to come from the SPOOLWIN file.

Elliott 7.4 has added a new description column to the Print Spooled Report Manager. The data in this description column comes from the Deferred Processing Description or a manual entry by the user for each spooled report.

This feature will make the Print Spooled Report Manager easier to use since it now offers more information about a spooled report. For example, you may want to spool a Commission Due report for each salesman and email it to them. In the past, all of the spooled report entries would show up as "Commission Due Report," but you didn't know which report was for which salesman. With Elliott V7.4, you have the option to specify which salesman the Commission Due Report is for upon setting up the deferred report or when you spool the report to disk.

To enable the description prompt when spooling a report to disk, each user can go to Setup Preference on the toolbar, choose the Print tab and turn on the "Enter descriptions for spooled reports" check box. Once this is done, each time the user spools a report to the disk, the system will prompt for the description of the report.

## Run Instructions

By selecting one more spooled report, you can click the "Print" button and print the selected reports to your desired printer:

The **Print Options** dialog box contains the following sections:

- Option:** A checkbox for "Delete report(s) after printing".
- Printer Selections:** A table with columns: Sel, Copies, Collate, Printer, and Configuration.
 

Sel	Copies	Collate	Printer	Configuration
<input checked="" type="checkbox"/>	1 / 1		\\david2000\HP LaserJet 4050 Series PS	Default Printer
<input type="checkbox"/>			Pan1624 (from RSS2K) in session 13	Default Settings
<input type="checkbox"/>			HP4100PS	HP collated
<input type="checkbox"/>			HP4100PS	Configuration 1
<input type="checkbox"/>			HP4100PS	HP Landscape
<input type="checkbox"/>			Microsoft Office Document Image Writer	Configuration 1
- Appearance:** A section with a label "Font (01-98=Use raw data pass thru)" and a dropdown menu currently showing "00 Use Windows Printer Default".

Buttons at the bottom include **OK**, **Cancel**, and **Options...**. The **Task** is listed as AP02P1.

This screen is very similar to the Print Options Windows except that you do not have the choice to print to screen, disk or defer. You do, however, have the option to delete the spooled report after printing it.

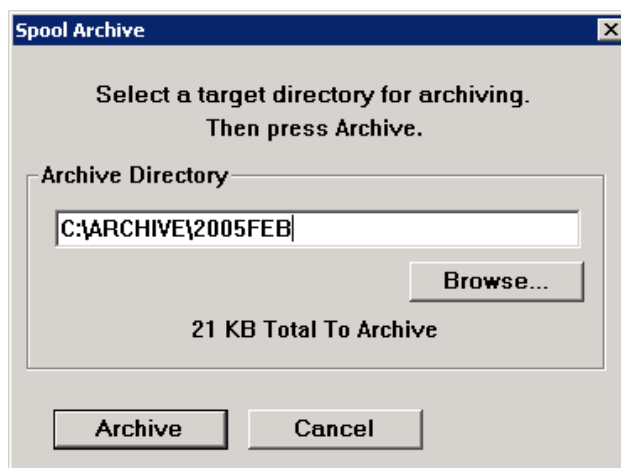
## View

Elliott will use the default editor (notepad) to view your spooled reports. This is identical to printing a report to screen. You can change your preferred editor by clicking on the preference setup toolbar button.

## Archive And Paperless Office

By design, each type of spooled report (i.e. COP Sales Journal) can spool up to 99 copies. If you post COP invoices every day and spool to disk, after 3-4 months, you will run out of space for further spooling. If you continue to spool, it will override your existing spooled reports. Three to four months is not sufficient for users who wish to store reports on disk for historical auditing. Your auditor may audit your books once per year and when the IRS audits you, they can ask for up to three years of information. For these reasons, users would still need to print the hard copy of the posting journal and store it for future audits.

The Archive function was developed to make the paperless office concept possible. What we envision is at the end of each month (during month end processing), you will select all the spooled posting journals for this month and archive them to either (1) a network directory, or (2) a local storage device. This will remove the spooled reports from your spooled report list. However, they can still be retrieved by simply pointing to the archive directory with the "Option" button. This way, archiving is possible without printing the spooled reports, but instead storing an electronic copy of the reports on the storage device.



When you choose the Archive function, the system will prompt you for the drive and directory that you wish to archive to. You can use the browse function if you are not sure of the drive or directory. The archive function does not allow duplicate reports to be archived into the same directory. Therefore, you should choose a different directory or use a different removable media next month when you archive again.

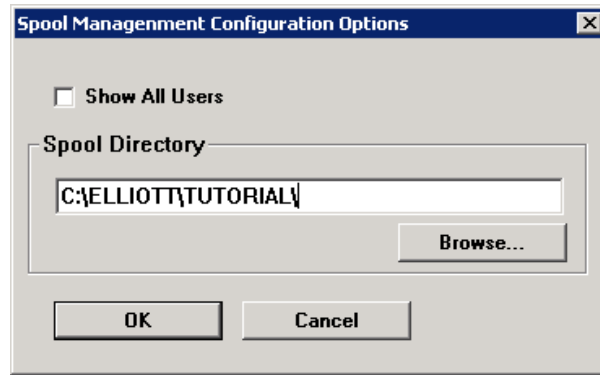
## Delete

You can highlight one or more reports and click the "Delete" button to delete them.

## Options

The "Option" button allows you to change the sorting sequence of the spooled reports, choose to see other users' reports if security clearance is allowed (security control applies to V6.7 or higher users only), or retrieve spooled reports from a different directory (retrieve archived reports).





For V6.7 and higher, if you are setup as a spooled reports supervisor in the Elliott global security, then you will be able to check the "Show All Users" box. Otherwise, the check box will be grayed out and you will not have the opportunity to see other users' reports.

## Exit

If you need to exit out of this screen, simply click on the "Exit" button, or press the ESC key to exit.

## Deferred Report Processing

### Overview

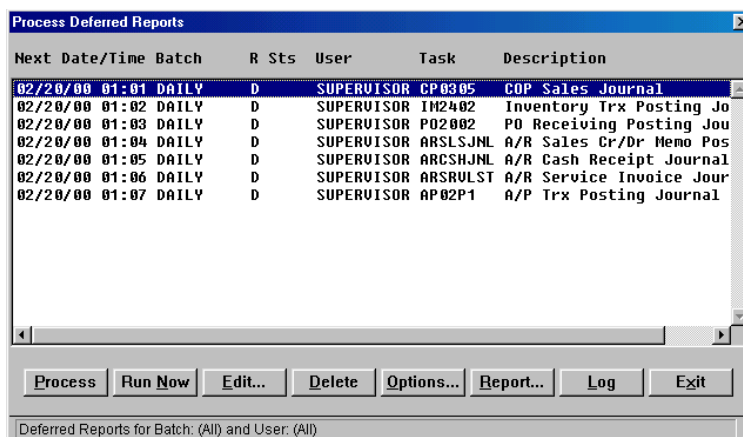
Deferred Report Processing is a re-design from the V6.X DOS deferred processing user interface. Many new features were added in Elliott for Deferred Processing and a different file, DEFERWIN, was needed to store the deferred requests, which is different from DOS's DEFERRPT file. For this reason, the deferred requests made in Elliott can only be managed by Elliott's deferred processing, while the deferred requests made in DOS can only be managed by DOS's deferred processing. The DEFERWIN file will be created upon the first use of deferred processing in Elliott.

To ensure a deferred process that runs after business hours has completed successfully, events can be triggered when a deferred report has not finished in 4 hours, 1 day, 2 days, 3 days, etc. An administrator or deferred process operators can subscribe to such events to monitor any incomplete deferred process.

Deferred Processing also supports an event when there is a file access error. Therefore, an administrator can be notified when the deferred process has stopped due to a file access error.

### Run Instructions

#### Deferred Report Processing Manager

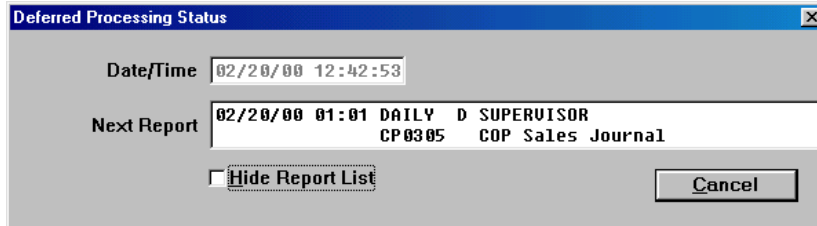


The deferred request that users make during the printing process will be sent to a deferred queue. You can display this queue by going to the Main Menu -> Util\_Setup -> Defer Processing. You will then see the above screen.

### Process

When you click the "Process" button, you make this machine a "Defer Processing Server". It will constantly monitor to see if there are any tasks in the queue that are ready to be processed against its internal system clock. When a task becomes ready, Elliott will display a pre-processing count down window to indicate the process is about to begin. It is displayed for 10 seconds before the final action

occurs. If your machine has a sound card and speakers, the system will make a count down sound and give you an audio indication. You still can cancel the deferred processing during the count down period if you click on the cancel button.



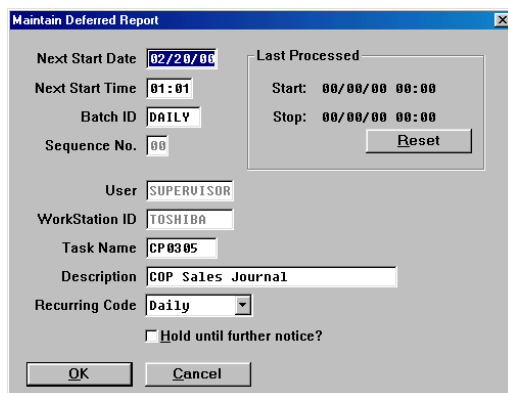
If you want to exit the Deferred Processing Server mode, you can simply click on the "Cancel" button to exit.

## Run Now

Sometimes, the user may want to run a deferred task even though it is not the specified date and time. You can highlight the tasks that you wish to run now and click on the "Run Now" button to immediately execute the selected tasks.

## Edit

This function is very useful for making adjustments to deferred tasks in the queue. This may be a result of an incorrect request in the first place or the deferred task's starting time needs to be rescheduled. Sometimes, you may even want to put a deferred task temporarily on hold until further notice.



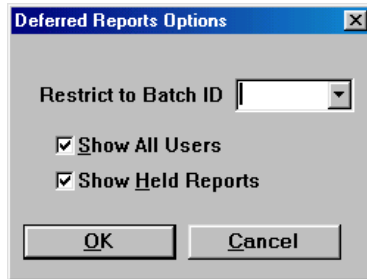
## Delete

You can highlight one or more tasks and press the "Delete" button to delete them from the defer task

queue.

## Options

As we discussed in the chapter “Spooled Reports Manger”, you can have multiple deferred processing servers to distribute the load. This can be done by specifying a batch code for each different deferred processing server. By specifying a batch code in the Options window, only the deferred tasks with that code will be displayed. Only the tasks that display in the list box will be processed by the deferred processing manager.



## Report

If you wish to print a list of Deferred Tasks, you can choose this option to print a list. Only the deferred tasks that appear in the list box will be printed.

## Log

Once processed, all deferred tasks will be logged in a history file. If you choose to see the processing status of the deferred task, this is the function you will need. The log function will provide information about the last 400 processed deferred tasks.

## Exit

You can either click on the “Exit” button to exit the Deferred Report Processing Manager screen, or press the “ESC” key.

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## ***Laser Form & Designer***

### **Application Overview**

**Elliott Laser Form supports form printing on blank paper with professional output.** Elliott supports user definable form printing. This includes invoices, purchase orders and pre-defined laser printer forms. Other forms, like statements and picking tickets, although non-user definable, are still supported for laser printing. However, in the past, to print these documents on a laser printer, you would need pre-printed laser forms. If you were printing on blank paper, the output would not look professional since only text is supported for printing. This is where Elliott Laser Form printing support becomes valuable as it allows the printing of lines, boxes, shaded areas, text, color and bitmap images. This makes the output look professional when printing on blank paper. Elliott Laser Forms does not support printing checks on blank paper because of the micro coding required for bank routing and the necessity for account and check numbers.

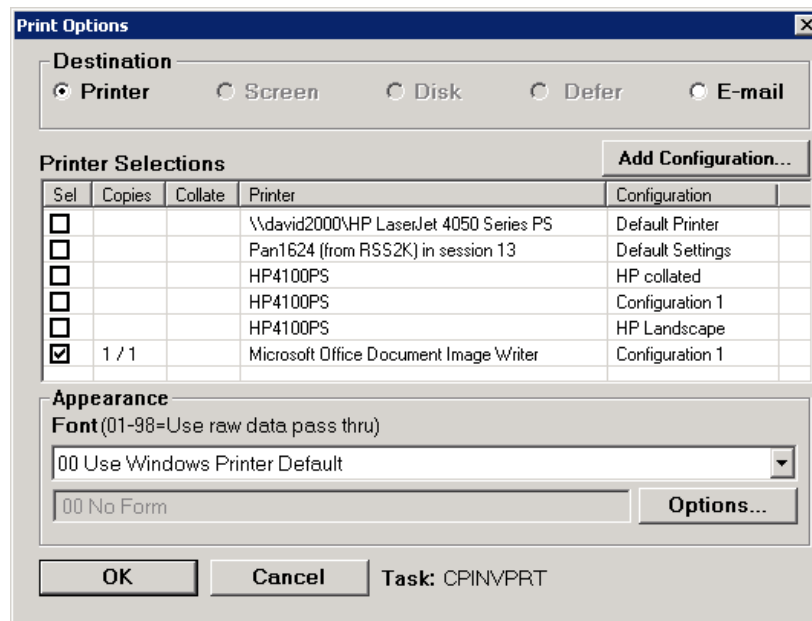
Starting with V6.X.009, Elliott began supporting Laser Form printing. Starting with V6.X.054, Elliott began supporting bar code printing with Laser Forms. As of the writing of this document, the standard laser form has been defined for COP and AR invoices, Order Acknowledgements, Order Quotes, Sales Desk Quotes, Picking Tickets, Packing Lists, Purchase Orders and AR statements. Even though A/P and P/R Check printing still require pre-printed forms for laser printing, multiple pre-defined laser form templates have been defined to allow A/P and P/R laser checks to align correctly when printing on a laser printer.

The sample logo and address bitmaps that print make up the NETcellent logo. You can delete these bitmap files from your data directory, (COMPLOGO.BMP and COMPADDR.BMP). Alternatively, you can substitute the bit map with your own company logo. You may also change the standard laser form layout to fit your needs. The following chapter serves as necessary technical information for you to design a laser form yourself.

### **Run Instructions**

#### **Concept**

The traditional Elliott printing programs output text data to the printer. However, if users choose laser forms on the Print Options window, which provides line drawing, shading and images for the laser form, then the system will merge the text and laser form together to print on your printer. **The printer can be any kind of printer and is not limited to a laser printer.** For example, you can print to a color inkjet printer and have beautiful output since Elliott Laser Form printing supports color. You can also print to a dot matrix printer. However, the dot matrix will be too slow to make it practical. Although the color inkjet printer will achieve great output, it is also slow for line drawing, shading and image printing. Laser printers are fast even with line drawing, shading and image printing, and therefore are a practical solution if you intend to print forms, like invoices, on blank paper.



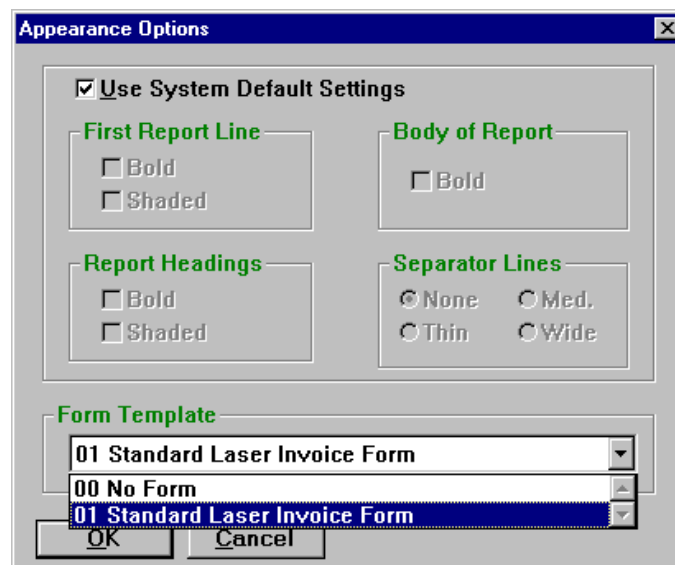
The **Print Options** dialog box is shown. It has a **Destination** section with radio buttons for **Printer** (selected), **Screen**, **Disk**, **Defer**, and **E-mail**. Below is the **Printer Selections** section with an **Add Configuration...** button. It contains a table with columns: **Sel**, **Copies**, **Collate**, **Printer**, and **Configuration**.

Sel	Copies	Collate	Printer	Configuration
<input type="checkbox"/>			\\david2000\HP LaserJet 4050 Series PS	Default Printer
<input type="checkbox"/>			Pan1624 (from RSS2K) in session 13	Default Settings
<input type="checkbox"/>			HP4100PS	HP collated
<input type="checkbox"/>			HP4100PS	Configuration 1
<input type="checkbox"/>			HP4100PS	HP Landscape
<input checked="" type="checkbox"/>	1 / 1		Microsoft Office Document Image Writer	Configuration 1

Below the table is the **Appearance** section with a **Font** label (01-98=Use raw data pass thru). It has a dropdown menu showing "00 Use Windows Printer Default" and a text field showing "00 No Form". An **Options...** button is to the right. At the bottom are **OK**, **Cancel**, and **Task: CPINVPRT** buttons.

Elliott will support Laser form printing by using the Windows Printer driver. Therefore, you must make sure the specified font in the Print Options Window is either "00" or "99". At the Print Options Window, click the "Options" button to display the Options Windows and select the desired laser form template that you wish to use. The Pre-defined Laser Form templates include COP Invoices, Order Acknowledgements, Order Quotes, Sales Desk Quotes, Picking Tickets, Packing Lists, Purchase Orders, A/R Statements, Service Invoices, and A/P and P/R Checks.

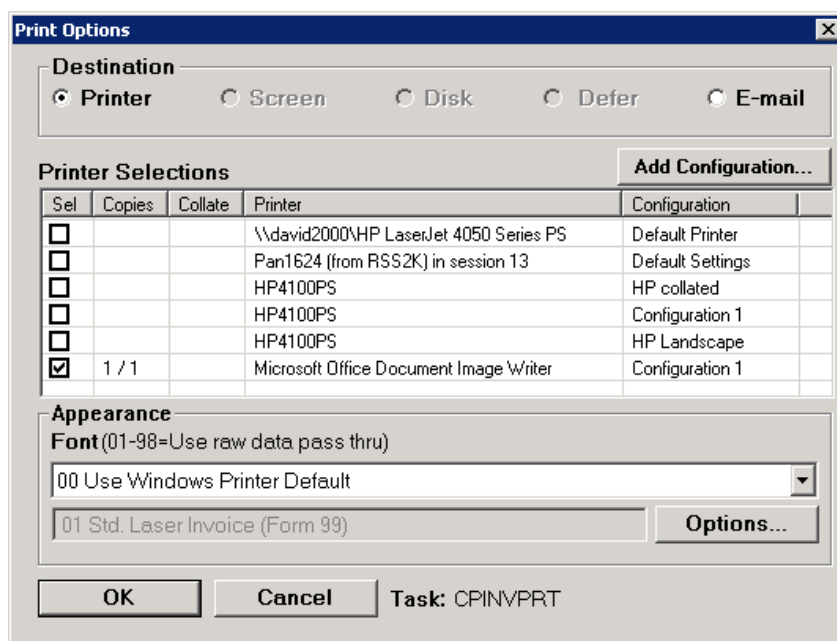
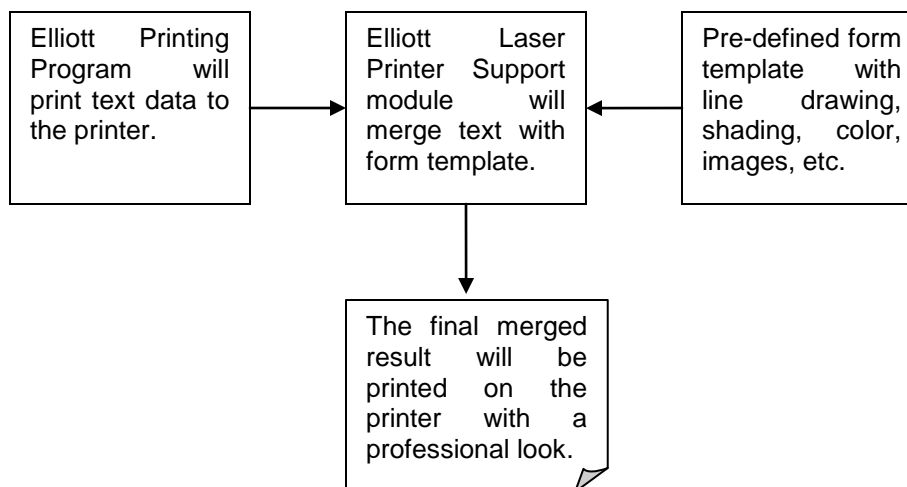
The following screen is the "Options Window" that allows you to select the appropriate Laser Form Template. for the "Options Windows".



The **Appearance Options** dialog box is shown. It has a **Use System Default Settings** checkbox which is checked. Below are four sections: **First Report Line**, **Body of Report**, **Report Headings**, and **Separator Lines**. Each section has checkboxes for **Bold** and **Shaded**. The **Separator Lines** section also has radio buttons for **None**, **Med.**, **Thin**, and **Wide**. At the bottom is the **Form Template** section with a dropdown menu showing "01 Standard Laser Invoice Form", "00 No Form", and "01 Standard Laser Invoice Form". **OK** and **Cancel** buttons are at the bottom.

The following diagram outlines the basic concept of how Elliott supports Laser Form printing.

### Elliott Laser Form Support Diagram



**Print Options**

**Destination**

☒ Printer ☐ Screen ☐ Disk ☐ Defer ☐ E-mail

**Printer Selections** Add Configuration...

Sel	Copies	Collate	Printer	Configuration
<input type="checkbox"/>			\\david2000\HP LaserJet 4050 Series PS	Default Printer
<input type="checkbox"/>			Pan1624 (from RSS2K) in session 13	Default Settings
<input type="checkbox"/>			HP4100PS	HP collated
<input type="checkbox"/>			HP4100PS	Configuration 1
<input type="checkbox"/>			HP4100PS	HP Landscape
<input checked="" type="checkbox"/>	1 / 1		Microsoft Office Document Image Writer	Configuration 1

**Appearance**

Font (01-98=Use raw data pass thru)

00 Use Windows Printer Default

01 Std. Laser Invoice (Form 99) Options...

**OK** **Cancel** **Task:** CPINVPR

Once the proper item in the form template is selected, the combo box beside the Options button will show the template form you chose. The system will then print the text data and merge it with the template form to produce a professional looking form. From this point on, your print options window will remember the form template you chose the last time and use it as the default form.



## Setup Elliott to Use Standard Laser Forms

In Elliott, the application by default will assume the printing of a form is on a dot matrix printer with 66 lines per page. However, laser printers usually print 60 or 62 lines of text and may or may not have the same length as regular forms. Therefore, the user is required to setup Elliott to tell the system that you are using laser forms. The following are steps required to setup each form to print on a laser printer:

### COP Invoice

- COP Main Menu -> Util\_Setup -> Invoice Form Setup -> Reset -> Laser Invoice
- COP Main Menu -> Util\_Setup -> COP Setup -> 14. Default Invoice Form -> 99
- COP Main Menu -> Util\_Setup -> COP Setup -> 21. Print On Laser Forms -> I or B

### COP Order Acknowledgement

- COP Main Menu -> Util\_Setup -> Invoice Form Setup -> Reset -> Laser Order Ack.
- Main Menu -> Util\_Setup -> Global Setup -> COP-Func -> Print Order/Quote Ack. -> 5. Print Order Acknowledgement with Form -> Y -> Order Acknowledgement Form Number -> 98

### COP Order Quote

- COP Main Menu -> Util\_Setup -> Invoice Form Setup -> Reset -> Laser Order Quote
- Main Menu -> Util\_Setup -> Global Setup -> COP-Func -> Print Order/Quote Ack. -> 6. Print Order Quote with Form -> Y -> Order Quote Form Number -> 97

### COP Sales Desk Quote

- COP Main Menu -> Util\_Setup -> Invoice Form Setup -> Reset -> Laser Sales Desk Quote
- Main Menu -> Util\_Setup -> Global Setup -> COP-Func -> Print Order/Quote Ack. -> 7. Print Sales Desk Quote with Form -> Y -> Sales Desk Quote Form Number -> 96

### COP Picking Ticket

- COP Main Menu -> Util\_Setup -> COP Setup -> 19. Print Pick Tic On Forms ? -> Y
- COP Main Menu -> Util\_Setup -> COP Setup -> 20. Print Co Name On Pic Tic -> N
- COP Main Menu -> Util\_Setup -> COP Setup -> 21. Print On Laser Forms? -> P or B

### COP Packing List

- Main Menu -> Util\_Setup -> Global Setup -> COP-Func -> Pick Ticket/Ship Label -> 16. Print Packing Slip on Laser Form ? -> Y

### AR Service Invoice

- AR Main Menu -> Util\_Setup -> Invoice Form Setup -> Reset -> Laser
- AR Main Menu -> Util\_Setup -> A/R Setup -> 37. Default Invoice Form -> 99
- AR Main Menu -> Util\_Setup -> A/R Setup -> 48. Print On Laser Forms? -> I or B

### AR Statement

- AR Main Menu -> Util\_Setup -> A/R Setup -> 17. Print Co Name On Stmt? -> N
- AR Main Menu -> Util\_Setup -> A/R Setup -> 48. Print On Laser Forms? -> S or B

### PO Purchase Order

- PO Main Menu -> Util\_Setup -> P/O Form Setup -> Reset -> Laser
- PO Main Menu -> Util\_Setup -> P/O Setup -> 12. Default PO Form Number -> 99

- PO Main Menu -> Util\_Setup -> P/O Setup -> 20. Print PO's On Laser ? -> Y

### **PR Check**

Even though Elliott does not support the printing of checks on blank paper, (because of the micro code issue), it does support printing pre-printed PR Laser Checks. One of the issues related to PR Laser Check printing is the margins and line spacing, which must be set up correctly for the laser check to align correctly. One way you can set the margin is through the preference setup. However, the margins you set will affect all printing for that workstation. Therefore, we have introduced two PR Check Laser Form Templates, one for Elliott Form LC111 and one for Elliott Form LC111 New, with the margin and line spacing pre-set correctly. These two templates do not print any lines, shading or bitmaps. The only thing the template does is set the proper margin and line spacing for the associated form. To print a payroll check on a laser printer, follow these steps:

- PR Main Menu -> Util\_Setup -> P/R Setup -> Last Screen -> 10. Print Checks On Laser? -> Y

### **AP Check**

Similar to PR Check, we have introduced one AP Check Laser Form Template. The purpose is to set the proper margin and line spacing. The template does not print any lines or shading. To print an AP check on laser printer, follow these steps:

- AP Main Menu -> Util\_Setup -> A/P Setup -> 34. Print Checks On Laser? -> Y

### **PR W2 Laser Form**

There is nothing you need to set up in order for you to print PR W2 Laser Form. All you have to do is to make sure to select the PR W2 Laser Form template when printing W2's. The proper margin will be set. The PR W2 Laser Form can be purchased at office supply stores.

### **AP 1099 Laser Form**

There's nothing you need to setup in order for you to print AP 1099 Laser Form. All you have to do is to make sure to select the AP 1099 Laser Form template and the proper margin will be set. The AP 1099 Laser Form can be purchased at office supply stores.

## Customize the Sample Laser Form

The sample laser form templates in Elliott use two bitmap files:

COMPADDR.BMP  
COMPLOGO.BMP

These two bitmap files reside in the \NSI or \ELLIOTT directory, or whatever your Elliott startup directory may be. When Elliott accesses a company for the first time, it will check for the necessary bitmap files to print the pre-defined forms that exist in the data directory. If the images are not found, the system will copy them from the \NSI or \ELLIOTT directory to the appropriate data directory.

The sample laser form is a pre-defined form. The easiest way to print a laser form is to use the sample form provided and modify it as needed. However, the bitmap it prints is for "NETcellent System, Inc." The easiest way to prevent these images from being printed on your Laser Form is to delete these two bitmap files from the data directory after Elliott accesses it for the first time. Then during the printing, if the system can't find these two bit map files, it simply does not print any bitmap images. One option for using your own company logo on the laser form is to have letter head pre-printed with your company name and logo for the laser printing purpose.

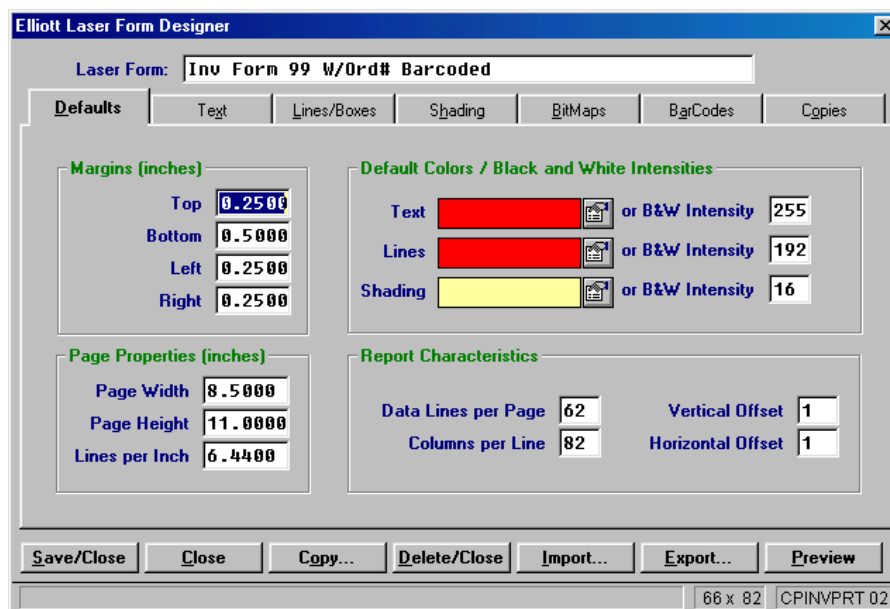
The second option you have is to modify the existing bitmap image in your data directory, or create your own. You can use a tool like Paint, which comes with the Windows Operating System, to make the necessary changes. The size of the bitmap file does not have to be identical to the sample that Elliott provided. As long as your bitmap file ratio is identical or very close to our sample bitmap, the bitmap should print reasonably well. The following is the ratio of the two bit map files:

File	Ratio Width:Height
COMPADDR.BMP	7.25:2
COMPLOGO.BMP	1:1

If you would like to change the template beyond just making simple changes to the bitmap files, you will need to continue reading for more information.

## Laser Form Designer

The Laser Form Designer is supported after the release of Elliott V6.X.056. Currently, the Laser Form Designer is supported in 32-bit only. Most likely, the only changes you might need to make to the sample laser form are the bit map images. But if you require further alteration, the Laser Form Designer provides an easy, and yet complete, method for changing the sample laser form. It also allows users to easily create a new laser form starting from scratch or copying from an existing template. To change an existing laser form, you must login to Elliott as "SUPERVISOR". Click the "Option" button on the "Print Option" Window, then the Option window will display. Highlight the form you wish to change in the combo box, then click the "Edit Form" button. You will see the editing screen of Laser Form Designer as shown below:



The designer is broken down into 7 different tabs for different types of data:

**Defaults:** This is the header data. Information on this tab affects the entire form.

**Text:** Items on this tab are used to print literals on the form.

**Lines/Boxes:** Items on this tab are used to print lines and boxes on the form.

**Shading:** Items on this tab are used to create shading effects on the form.

**Bit Maps:** Items on this tab are used to control bitmap images like the company logo.

**Bar Codes:** Bar Codes can be printed on laser forms. This tab controls what types of barcodes and specifies the data source for the barcodes.

**Copies:** You may wish to print multiple copies of a laser form. For example, users may need to have one copy of a laser form sent to the Customer and a 2<sup>nd</sup> copy to keep for in-house records. The copies tab lets users specify the identifier literal and position for each copy (i.e. "Customer Copy", "Accounting Copy", etc.).

The following buttons will help you achieve the changes you need to make to your Laser Form Template:

**Save/Close:** By clicking this button, all the changes you make in the design screen will be saved and the designer window will be closed.

**Close:** By clicking on this button, the designer window will be closed. The system will give you an option to save the changes before you exit.

**Copy:** Allows you to copy the current design to a new form. Before you start to make major changes to an existing laser form template, it is a good idea to copy to a new form and change the new form without affecting the original form data.

**Delete/Close:** This will delete the current form and exit out of the designer.

**Import/Export:** If you are a developer, this is a useful function to let you export your design to a text file. Send this text file to your users, and they can import the text file and use your design on their system. The export function can also serve as a backup function before you make major changes to the existing form layout.

**Preview:** If you wish to see how the form layout will look, you can choose this function to preview the form. In the Preview screen, if you notice any changes are required, you can conveniently click on the object in the Preview Screen and make changes directly. The preview screen also allows you to choose sample data from a spooled file to display directly on the form template. Subsequently, you will be able to preview not only the form template, but also how the form will look with data in it.

The following detailed descriptions of each tab of information in the Laser Form Designer will aid you in creating your Laser Form Template.

## Default

- **Margin:** The margin you specified here will override the default margin you specify for the workstation. This information is very critical for printing forms like A/P and P/R Checks.
- **Page Properties:** This includes the page width and height. The "lines per inch" control the vertical spacing and is critical to A/P and P/R Check printing.
- **Default Color:** This will be the default color for text, line and shading when printing the laser form. The black and white value (between 1 and 255) is used to control the intensity when printing on a black and white printer (a laser printer).
- **Line Per Page:** Since the form printing program typically does not perform form feed, (it uses line feeds to control advancing to the next page), it is important for the Elliott Laser Form program to know how many lines per page a form is so the system will perform a form feed at the correct position.
- **Columns Per Page:** This value should include the form border and is important to the printing program so it knows what type of font and horizontal spacing to use when printing.
- **Vertical and Horizontal Offset:** You need to use this because your application programs start to print from row 1 and column 1. For example, if you want to draw a box around the outside border of your form, and row 1 and column 1 is on the line, then you can specify the offset for the text printing portion so the text won't overlay with the line. If you need a border, it is typically it is offset by a value of 1 for row, and/or, column.

## Text

Text is used to print literal information like field headings. You may specify the position, (after the vertical and horizontal offset is added), where you want the text and the text information to be printed.

- **Starting Position:** Specify starting position row and column after the vertical and horizontal offset is added. This is where the text will be printed on the form.
- **Color:** Specify the color of the text, or simply indicate the default color to use as specified in the default tab.
- **Description:** The text you wish to print at the Starting Position.

- **Bold/Italic:** You can make the text bold or italic. However, you can't choose your own fonts and size. All fonts and size must be identical on the page. If you wish to have different font and size, then you should use the Bitmap option.

## Lines/Boxes

For Elliott Laser Forms, lines and boxes are the same type of object. When you specify a starting position and ending position, if they form a box (the ending row and column are both different then starting row and column), then it is a box. If they form a line, then it is a line. Only vertical and horizontal lines are supported.

One of the important concepts that you need to know is called "**Sub Cell**". A Sub Cell is used in Elliott Form Design to better control the exact position of certain objects. The internal data of a sub cell is from 1 to 9. The following diagram shows the position of each sub cell value. By default, the system will use sub cell 5 (center position of a cell) to draw a line or box from a starting position to an ending position. However, sometimes this is not accurate enough and potentially may waste space.

1 2 3

4 5 6

7 8 9

Sometimes you will need to draw a horizontal line between two consecutive rows of data. Using the default sub cell 5 will not work. This is one reason why users may need to use sub cell to more accurately position the object. The current cell's sub cell position 2 is physically in the same position as the above cell sub cell position 8. With the same principle, the current cell's sub cell position 4 is physically in the same position as the left cell sub cell position 6.

- **Starting/Ending Position:** This includes the column and row position, as well as the sub cell position. You will specify the sub cell position, from 1 to 9, by clicking on one of the squares in the cell.
- **Color:** You can either use the default color or pick your own color for this object.
- **Line Thickness:** It can be thin, medium or thick.

## Shading

Shading is necessary to make a laser forms look professional. Shading usually will make a box that contains a field heading literal look better. You may also apply shading to different columns in the line item areas to clearly separate one column from another.

- **Starting/Ending Position:** Shading must cover an area (box). Therefore, the starting and ending position can not form a line. The sub cell concept has been explained in the previous subject (lines/boxes). Please refer to that subject if you have more questions.

- **Color:** The default color of the shading.
- **Black and White Intensity:** The shading intensity when printing on a black and white printer such as a laser printer.

## Bitmaps

Bitmaps are used in Elliott Laser Form to print a company logo or any kind of special font or text size that is different from the default. The default bitmaps distributed with the sample laser form are NETcellent's company logo and address. Therefore, to use a sample Elliott form, you must first change the bitmap files to match your company.

- **Starting/Ending Position:** Like Boxes or Shading, the starting and ending position need to form an area for the bit map image. You should not encroach upon other objects on your form with your bit map. Also, the area you specify for the bitmap may not be the exact size and proportion for the bit map file. Subsequently the image may appear stretched.
- **Use Absolute Path:** By default, the system will use a relative path to retrieve bit map images like "\$DATA\COMPLOGO.BMP". This tells the Elliott Laser Form to look in the data directory for COMPLOGO.BMP file. If you are using a multiple company option, your COMPLOGO.BMP file may be different for different companies. For multiple companies, all you have to do is change the COMPLOGO.BMP file under each data directory to reflect the proper logo and all companies can share the same laser form template. You can also use an absolute path like

M:\ELLIOTT\DATA\COMPLOGO.BMP

Obviously, if you use an absolute path, you probably won't be able to share the same design among different companies.

- **Stretch:** Since the area you specify for the bitmap may not match exactly with the bitmap file itself, there is a potential presentation issue. To avoid presentation issues we provide the following four different types of options:
  - **Do Not Stretch:** This is usually not a good choice because often the system will not produce the right size bitmap on your printer. However, since there is no stretch, there is no distortion of the image.
  - **Stretch to Fit:** This will allow the bitmap to occupy the full space as specified in the design area. Provided that the bitmap file's horizontal to vertical ratio is similar to the area designated, this can produce good results.
  - **Use Proportional Stretch:** Stretch the bitmap image proportionally and not to exceed the size of area designated for the bitmap. This will not distort the image, and will occupy most of the space in the designated area.
  - **Integral Stretch:** Stretch the bitmap image with an integral multiple (1, 2, 3...). It may not occupy the entire designated area. However, it will have the least distortion because of the integral stretching. If your bitmap size is bigger than the actual space reserved, then it can be a problem. Since an integral shrink means each size will be multiplied by zero, the image will simply disappear. This situation may happen for certain low resolution printers like a dot matrix printer or Adobe Acrobat Writer. When this happens, we suggest you use "Proportional Stretch" instead. For example, if you design a bitmap and it prints well on a 600dpi laser printer and you print the same design on a dot matrix printer or Adobe Acrobat Writer (image resolution at 96 dpi), the resolution is significantly lower and you may experience the disappearing image problem. On the other hand, Adobe Distiller uses a higher resolution and will work better.
- **Edit:** If you wish to change the bitmap file, you can click on the "Edit" button and the system will launch the Paint program automatically (or whichever application you register as the default

program for Bitmap files). You can make changes as necessary and save and exit Paint to return to the designer mode.

**Tips for editing a bitmap:** When you edit a bitmap image for an Elliott Laser form, leave as little border space as possible.

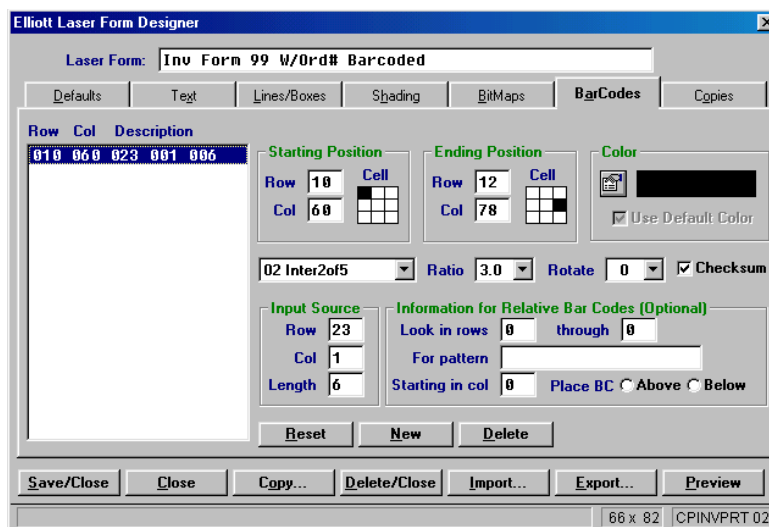
## Barcodes

Starting with Elliott V6.X.054, Laser Forms supports Barcode Printing. This is for both 16-bit and 32-bit versions. There are two types of barcodes on the Laser Forms: (1) Absolute position barcode; (2) Relative position barcode. Absolute position barcodes are used for header information such as the order number on an invoice or picking ticket. Relative position barcodes are used for line item information such as the item number, even if the position of the item number is not known until the time of printing. Relative barcodes require a data pattern to identify the line item and produce a barcode relative to the data pattern line.

Most of the one-dimensional barcodes are supported with Elliott Laser Forms. Two-dimensional barcodes (a barcode you can scan from any direction and still results in a good read), like UPS's MaxiCode, are not supported at this time.

### Absolute Position Barcode

The following is an example of an absolute position barcode:



In the above example, a barcode will be printed from row 10 column 60 to row 12 column 78 (right above the shipping address area) on the invoice form. The source of the data will come from row 23, column 1 (this is the position before the offset is added) for 6 digits. In this case, it will print a barcode of the order number of the invoice. It will use "Interleave 2 of 5" as the symbol for the barcode. The ratio by default should be 1:3. The following is an explanation of each field:

**Starting/Ending Position:** The starting and ending position is the area where the barcode will be printed.

**Color:** By default, the barcode color will be black.



**Barcode Type:** The type of barcode you should choose depends on the kind of information you want to encode, the printing space available, the degree of readability needed, and the scanning equipment you use.

When choosing a barcode type, make sure that your barcode reader has the ability to read it. The type of barcode reader you use is a major factor when considering problems and read-errors. Barcodes are also more prone to read-errors as they get very large or very small. The starting row/column/sub cell and the ending row/column/sub cell determines the size of the barcode. This is the maximum area that the barcode will print and usually the width will be somewhat smaller than the area designated.

If the system detects there is an error when printing the barcode and it cannot create the barcode, it will print an error number in the position where the barcode should print. For a complete list of barcode print code error numbers and explanations, please see the appendix.

The Elliott Laser Form Print routine supports the following types of barcode symbology:

Barcode Type	/	Encodes *	Char per inch **	Comment
Code 39 Full (Extended Code 39)	2 – 50	U-L-D-C	3.3	Code 39 only supports 43 characters. However, it can be extended to a 128 character symbology (full ASCII) by combining one of the special characters (\$, /, %, +) with a letter (A-Z) to form the characters that are not present in the standard Code 39 symbology. For example, in standard Code 39 a lowercase "a" cannot be represented. In Code 39 Full ASCII, however, "a" is represented as "+A".
Interleave 2 of 5	2 – 50	D	11	Interleaved 2 of 5 is a variable length, even numbered, numeric barcode. It is typically used in industrial and master carton labeling. The symbology uses bars to represent the first character and the interleaved (white) spaces to represent the second character. Each character has two wide elements and three narrow elements. A check digit is supported. However, if the checksum is added, the input string needs to be odd (the checksum adds one character, making it even).
Codabar	2 – 50	D	9	Codabar is a variable length symbology capable of encoding 16 characters within any length message. Codabar can encode six

				special alphanumeric characters, capital letters A through D, and all numeric digits. Codabar symbology for any new application today should not be considered except under unusual circumstances.
MSI Plessey	2 - 50	D	8.3	MSI Plessey is a variable length numeric symbol. Each character consists of four bars with intervening spaces for each encoded digit, one or two symbol check digits, and a reverse start code. MSI Plessey is primarily used in marking retail shelves.
Code 93 Full (Extended Code 93)	2 – 50	U-L-D-C	5.6	Code 93 encodes the full 128 ASCII character set using 9 modules arranged into 3 bars with adjacent spaces. Two of the characters are check characters. Code 93 is similar to Code 39 but encodes more characters per inch. Code 93 is not quite as easy for barcode readers to read because of the way it is encoded. Code 93 encodes the full 128 ASCII character set and is encoded similarly to the extended Code 39.
UPC-A	11, 13, 16	D	14	UPC-A (Universal Product Code-A) is a fixed length barcode and is the most common UPC barcode for retail product labeling and is seen in most grocery stores across the United States. The symbology encodes a 12-digit numeric only number. The first six digits are assigned from the Uniform Code Council (UCC) in Dayton, Ohio. The next five digits are assigned by the manufacturer and the final digit is a modular 10 check digit. The nominal height for the UPC-A bar code is one inch. The reduced size is 80% of the nominal size.
UP-E	11, 13, 16	D	25	UPC-E (Universal Product Code-E) is also a fixed length barcode and is a compressed six digit code used for marking small packages, including magazines and paperback books. UPC-E symbols are UPC-A symbols that have been zero suppressed (i.e. consecutive zeros are not included in the symbol). The printed value of the UPC-E code is a twelve digit code. The nominal height for the UPC-A bar code is one inch. The reduced size is 80% of the nominal size.
PostNet	5, 9, 11	D	4.2	Postal Numeric Encoding Technique is used to encode zipcode information on letter mail. PostNet utilizes

				redundant information within a compact barcode format to provide error detection capability and a significant degree of error correction capability. The check digit is always enabled.
EAN/JAN-8	7, 9, 12	D	14	The EAN/JAN-8 is a fixed length barcode and is similar to the UPC-E code, but includes two more digits for the country code. The nominal height for the EAN/JAN-8 bar code is one inch. The reduced size is 80% of the nominal size.
EAN/JAN-13	12, 14, 17	D	14	The EAN/JAN-13 is a fixed length barcode and is similar to the UPC-A symbology, but encodes a 13th digit. The 12th and 13th digits define the country code. The code 00-04 and 06-09 are assigned to the United States. The nominal height for the EAN/JAN-13 barcode is one inch. The reduced size is 80% of the nominal size.
Code 128	2 – 50	U-L-D-C	9	Code 128 is variable length and encodes the full 128 ASCII character set. Each character is represented by 11 modules that can be one of four bar widths. Code 128 is the most easily read code with the highest message integrity due to several separate message check routines.  Of all the common linear symbologies, Code 128 is the most flexible. It supports both alpha and numeric characters easily, has the highest number of characters per inch, and is variable length. <b>Code 128 is usually one of the best choices when implementing new symbology.</b>
Code 39 Standard	2 - 50	U-D	6.7	Code 39 is variable length and is <b>the most frequently used symbology in industrial barcode systems today</b> . The principal feature is to encode messages using the full alphanumeric character set. Standard Code 39 contains only 43 characters (0-9, A-Z, \$, /, %, +). Check digit is supported.

\* U = uppercase, L = lowercase, D = digits, C= control characters

\*\* Based on a 100 dpi resolution printer and the narrowest bar is 1 dot wide.

**Ratio:** This is a two-digit numeric field value from 2.0 to 3.0. It represents the ratio between the wide bar's width and the narrow bar's width. The default is 3.0 to 1.

**Checksum:** You may optionally add a checksum digit to certain barcode symbologies. Entering a value 0 means no Checksum and 1 means add the checksum digit.

**Rotation:** This is a 1 digit numeric field. You would normally print a barcode horizontally from left to right. However, you may rotate it with the following value in this field:

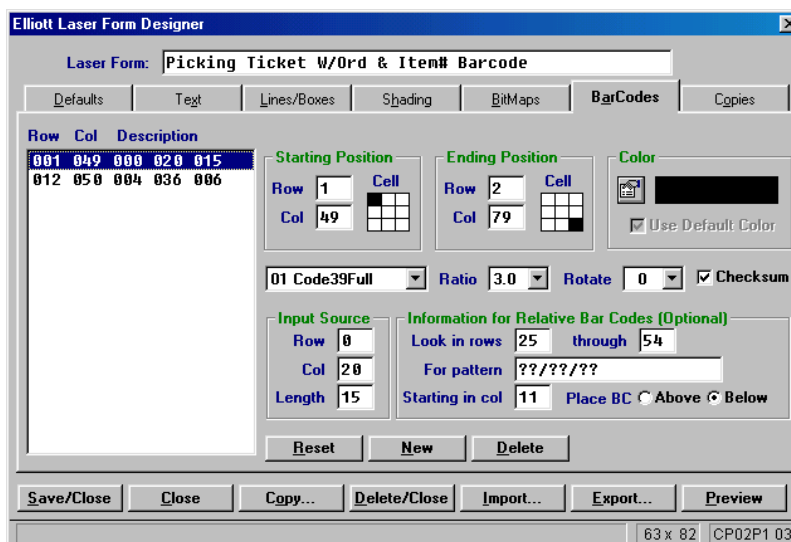
- 0 – No rotation
- 1 – Rotate 90 degrees counter clockwise
- 2 – Rotate 180 degrees counter clockwise
- 3 – Rotate 270 degrees counter clockwise

**Input Row/Column:** The input row/column/length identifies the source of the string required to produce the barcode. If it is for a relative position barcode, then this field is insignificant because the input row has to be the same row as the system row to find the pattern specified. The source may be an order number, PO number, item number or customer number. The form may be shifted horizontally and vertically to accommodate borders. The row/column entered should be the original row and column of data before it is shifted. You can get this information by printing the document you need to disk. View the spooled form with an editor and you should be able to determine the exact position of your input data. Keep in mind that we currently may not be able to support barcoding a line item if its position is not fixed relative to the beginning of the page.

**Input Length:** See Input Row. You need to make sure the length you choose can be supported by the barcode type you choose. Certain barcode types are a fixed length and have a required number of input digits.

### Relative Position Barcodes

Relative position barcodes are used to print information like item numbers in the line item area. Usually multiple barcodes per page are need and the position (in terms of rows) is uncertain. Therefore, we can't use a simple input row and column to identify the source for the barcode data. A data pattern is used to identify the line where the data source resides. From there, we can determine whether or not the barcode will be printed. The following is an example of a relative position barcode:



The screenshot shows the 'Elliott Laser Form Designer' window with the 'BarCodes' tab selected. The 'Laser Form' is 'Picking Ticket W/Ord & Item# Barcode'. The 'BarCodes' tab is active, showing a table of barcode data and configuration options.

Row	Col	Description
001	049	000 020 015
012	050	004 036 006

Configuration options for the barcode:

- Starting Position:** Row 1, Col 49
- Ending Position:** Row 2, Col 79
- Color:** Use Default Color (checked)
- Barcode Type:** 01 Code39Full
- Ratio:** 3.0
- Rotate:** 0
- Checksum:** Checked
- Input Source:** Row 0, Col 20, Length 15
- Information for Relative Bar Codes (Optional):**
  - Look in rows: 25 through 54
  - For pattern: ???/??/?
  - Starting in col: 11
  - Place BC: Above (selected), Below

Buttons at the bottom: Save/Close, Close, Copy..., Delete/Close, Import..., Export..., Preview.

In the above example, the system will search for a data pattern ???/??/? (a date pattern) starting from row 25 and not exceeding row 54. The data pattern can be found starting in column 11. Once this row is identified, it looks for the same data line in column 20 for 15 digits to find the data source (in this case, the item number). The barcode will be printed one line below in the position of Row 1 (the relative position), Column 49 to Row 2, Column 79.

**Relative Pattern:** If you leave this field blank, it indicates to the system that the barcode is an absolute position barcode for the whole page. Specifying a pattern here indicates this is a relative position barcode. For example, to print a barcode for an item number on a picking ticket, the system first needs to know how to find the line where the item number prints. Usually, there is some kind of pattern you can specify to let the system search for. For example, you may specify the following pattern:

??/??/??

Where ? will match any character.

For example, we know on each line item, a request date will be printed at column 10. Therefore, whenever the system finds this pattern in a page at column 10, then the system will know this is the line item row. From there, we can find the item number and print a barcode.

**Relative Pattern Column:** This field indicates the relative pattern will start in the specified column. You do not need to specify a length because length is implied by the pattern you specify.

**Relative Starting/Ending Rows:** The relative position barcode is used mostly for line items. Therefore, the system should not search in the header and footer area for the pattern. These two fields are used to specify the range of rows for the line items to find the pattern.

**Place BC Above or Below:** When you are trying to print a relative position barcode, the starting row and ending row you specify is relative to the pattern line you find. You can print the barcode below or above the pattern line. The starting row number indicates the relative number of lines above or below the pattern line where the barcode will be printed. The same principle applies to the ending row.

When you place a barcode on a page, keep in mind that you can have a maximum of 80 barcodes on a page.

## Copies

This is used to specify the reference identifier for each copy of the laser form when multiple copies are printed. If you are only printing one copy, you do not need to specify anything here.

**Starting Position:** Specify the starting position where each copy's information will be printed.

**Color:** You can either use the default color, or specify a color when printing the copy's information.

**Copy:** A value from 1 to 9 to indicate the reference value of Copy 1, Copy 2...Copy 9.

**Description:** A literal description of each copy. For example, "Customer Copy", "Salesman Copy", etc.

**Bold/Italic:** Make the text bold or italic.

## Preview

The preview function is a WYSIWYG implementation of the Elliott Laser Form Designer. It allows you to easily view the design result on the screen before it is printed. You can change the design easily by using the mouse and clicking on the object you intend to change and making the necessary modifications.

It is very helpful to include the printing data on the preview screen as well. To accomplish this, we suggest you spool the output of the form to disk first. In the preview screen, you can identify which spooled report is to be merged with the template from the "Data" drop down menu at the top of the preview screen. This will present a complete view of the laser form output:

**Laser Form Design Preview**

Close Data CP02P1.W02 Row/Col 47 42 ☒ Show Grid

**NETcellent System, Inc.**

3090 Temple Avenue, Pomona, CA 91768  
 tel: (909) 622-5009 fax: (909) 622-5119

**PICK TICKET**

Order#	Order-Dt	Cust#	Cust P0#	Job#	Page
001012	10/25/89	000400			1

Ship Via/Terms	Ship-Dt	Shipping Instructions	Location
Federal Express	R.S.A.P.		LA
2/10 N/30			Los Angeles

SOLD TO: Beverly Supply Company  
 2500 New Hampshire Mall  
 Hampton, NH 01279  
 USA

SHIP TO: Beverly Supply Company  
 2500 New Hampshire Mall  
 Hampton, NH 01279  
 USA

QUANTITY ORDERED	REQUEST DATE	ITEM NO./DESCRIPTION	PICK SEQUENCE	UOM	QUANTITY TO SHIP	PICK
4.00	08/31/89	PC-386 386 Personal Computer Customize During Order Entry		EA	4.00	.....

\*\*\*\*\* Warning: Duplicate Pick Ticket \*\*\*\*\*

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## Customer Relationship Management

### Notes & Ticklers

#### Application Overview

Notes are a global function that let users enter additional notes for any master record like a customer, item, vendor or order record. Unlimited amounts of information can be entered for each master record. Notes can be used in conjunction with a note type and can be controlled with security, or even behave like a database. Notes can be specified to print on a particular document. Notes can also be grouped into folders or used as a knowledge base with search capabilities.

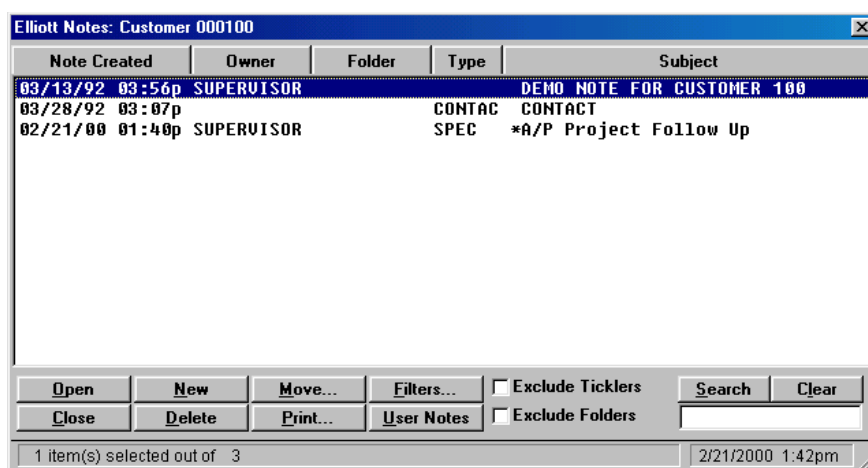
Elliott provides a Graphical User Interface for Note functions, support of note folders, the ability to handle large amounts of notes, and knowledge base search capabilities.

Ticklers are an extension to notes. When you have a note in the system, you can designate the note as a tickler also. By designating a note as a tickler, you will be reminded on a certain date and time that a task/tickler is due. Ticklers are a standard feature in Elliott and there is an automatic reminder function where users will be alerted of the tickler at the pre-set remind date and time. In addition, the system separates the remind date/time from the due date/time. Also, ticklers can now be designated as a recurring tickler.

Ticklers are not only useful as self-reminders, but also a very useful management tool. By setting up a company hierarchy structure in Elliott, supervisors will be allowed to view the ticklers of his/her subordinates. If a subordinate is a supervisor as well, further drill downs can be allowed. A supervisor can also assign a tickler (task) to a subordinate.

#### Notes

The system will bring up a list box of all the notes for the current reference. If there is only one note for this reference, the system will open and display the note automatically. If there's no note for this reference, the system will automatically go into the add mode of a note. The following is how the list box looks when you display a note in the customer file maintenance screen:



The traditional list box user interface is used to highlight a note – arrow key up, down, or page up, page down. Use the mouse or use scroll bar when there's more than one page of data. If the note has an "\*" in front of the subject area this indicates that the note is a tickler. You may sort notes by any of the



columns by clicking on the column heading. By default, they are sorted by the date/time sequence.

Once a note is highlighted, you can click on the “Open” button or press the Enter key to display the note detail. You can also double click on the note in the list box to display the note detail. The following options are available in the list box:

**Open:** Open the note that is highlighted.

**Close:** Close the note window and return to the application.

**Delete:** Delete the current note that is highlighted.

**New:** Create a new Note.

**Print:** You can print either the highlighted notes or all the notes in the list box.

**Move:** Move a note from one folder (or blank folder) to another folder.

**Filters:** By default, all notes for the current reference (i.e. Customer 000100) will display in the list box. You may choose to narrow it down or expand it. For example, if you wish, you can see all notes for all customers in the list box. There is a limitation of 1,000 notes in the list box. You probably will need to use other criteria to narrow your list if your list exceeds 1,000 notes. Using Filters in conjunction with the “Search” function makes notes a powerful knowledge base tool.

**User Notes:** User notes are a special kind of note. It refers to a note that is attached to the current user (instead of the current reference). User notes are often used for tickler purposes.

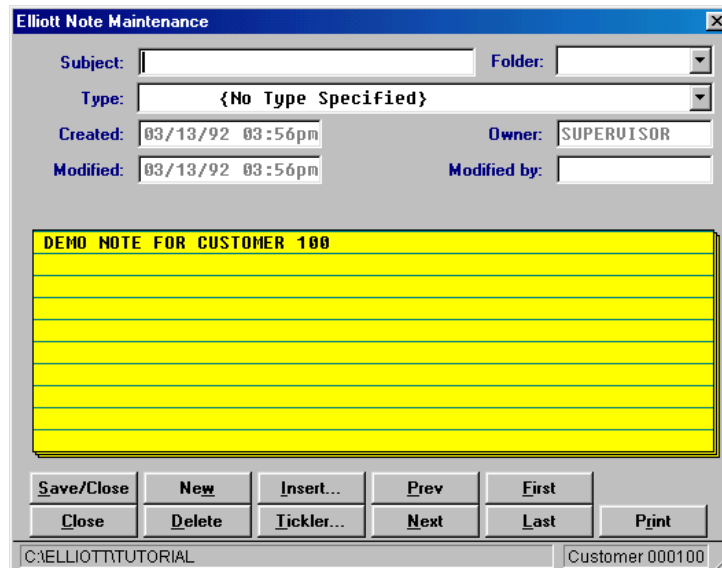
**Exclude Ticklers:** If this box is checked, then tickler notes won’t display in the list box.

**Exclude Folders:** If this box is checked, then ticklers that have been moved to a folder will not display in the list box.

**Search/Clear:** This is to search for a specific text string. For example, if you have hundreds of notes for a customer and you are trying to find the cellular phone number for one of the customer contacts, enter “Cell” as the search string and click on “Search.” The system will then only display notes for this customer that contain the text “Cell”. Using this tool in conjunction with the “Filter” function, you can search the entire note database for certain key words. Searching for multiple key words with an “And” condition is also allowed and makes the notes function not only a database, but also a knowledge base.

## Sorting of Notes in List Box

By default, the notes will be sorted by ascending sequence based on the creation date. However, you may click on any column of the list box to instruct the system to sort the note by that column sequence. If you wish to sort the note by the descending sequence of a column, then simply use must to click on the heading of the column twice.



Above is a sample note. This is a regular note without a note type. You can enter up to 10 lines with 60 characters per line of information. If additional information is needed, you can simply add another note and continue to enter more information. As long as each note in the same reference is one second apart, you can continue to add additional notes without any limitations.

## Context Menu

When your cursor is at the content area (yellow pad), you may right click the mouse and bring up a context menu for the following:

- **Upper Case:** Convert the entire line to upper case.
- **Lower Case:** Convert the entire line to lower case.
- **Proper Case:** Convert each word with a leading upper case for the entire line.
- **Insert a line:** Insert a blank line at the current position and push the other lines down by one line. This function will only work if the note type is blank or the note type does not contain any literals.
- **Delete a line:** Delete the current line and pull subsequent lines up by one line. This function will only work if the note type is blank or the note type does not contain any literals.
- **Copy:** Copy the content of current line.
- **Paste:** Paste the clipboard content to current line.
- **Cancel:** Abort all changes and exit the context menu.

## Note Type

Before you can begin using note types, you must define (set up) the note type in:

**Main Menu → Util-Setup → Notes Processing → Note Type**

In some situations, further customization of notes may be necessary. This may be true if: (1) you want to make the notes like a database; (2) you want to add security to the notes; (3) you want to control printing characteristics. You may want to define the different note types in advance to accomplish such tasks.

When setting up a note type, a specific field name (literal name) for each line in the note can be defined as shown below. When entering a note, you have the option to choose a note type. As a result, the note screen will display the name of the note type and the note will be saved as the specified type, making it similar to a database. This can be helpful in collecting information because the information will be entered in a fixed position and a report writer can be used to print this data. With Design Your Own Form (invoice, picking ticket, orders, etc.), users can also print a specific line of the note on the form and make this an extension of the database.

The screenshot shows the 'Elliott Note Maintenance' window. It has a title bar with a close button. The window contains several input fields: 'Subject' with the value 'CONTACT', 'Folder' with a dropdown arrow, 'Type' with the value 'CONTAC CONTACT' and a dropdown arrow, 'Created' with the value '03/28/92 03:07pm', 'Owner' with an empty field, 'Modified' with the value '03/28/92 03:07pm', and 'Modified by' with an empty field. Below these fields is a large yellow rectangular area containing the following text: 'Name: David S. Johnson', 'Home Address: 1234 Lewis Ave, Los Angeles, CA 90024', 'Home Phone: 213-258-9874', 'Home Fax: 213-258-8899', 'E-mail: DSJohnson@AOL.COM', 'Birthday: Jan 25', 'Spouse: Linda', and 'Hoby: Fishing, Golf'. At the bottom of the window is a row of buttons: 'Save/Close', 'New', 'Insert...', 'Prev', 'First', 'Close', 'Delete', 'Tickler...', 'Next', 'Last', and 'Print'. The status bar at the very bottom shows 'C:\ELLIOTT\TUTORIAL' on the left and 'Customer 000100' on the right.

In the above example, a note type "CONTAC" is specified. The note content area displays the field name (literal name) for each line. This is a powerful extension to Elliott's database, because any information that you wish to collect for a customer, vendor, item or order can be entered in a note working in conjunction with the note type.

## Folder

The Notes folder is intended to make notes more manageable. Consider this, you have hundreds of notes for a customer. Some of them need to be accessed frequently, but many of them are more or less historical information and probably can be set aside. Because there are hundreds of notes, it is difficult to find the note that you need to access frequently.

One option to resolve the issue is to move the notes that are not needed frequently to a folder. Categorize your infrequently used notes by folder type. Leave those notes that are frequently used in the blank folder. Then, when you bring up a note, you can do one of two things: (1) Exclude notes in the folder by checking "Exclude Folders"; or (2) Sort by Folder by clicking on the "Folder" heading. This way you can quickly locate your note without navigating through hundreds of them.

## Tickler

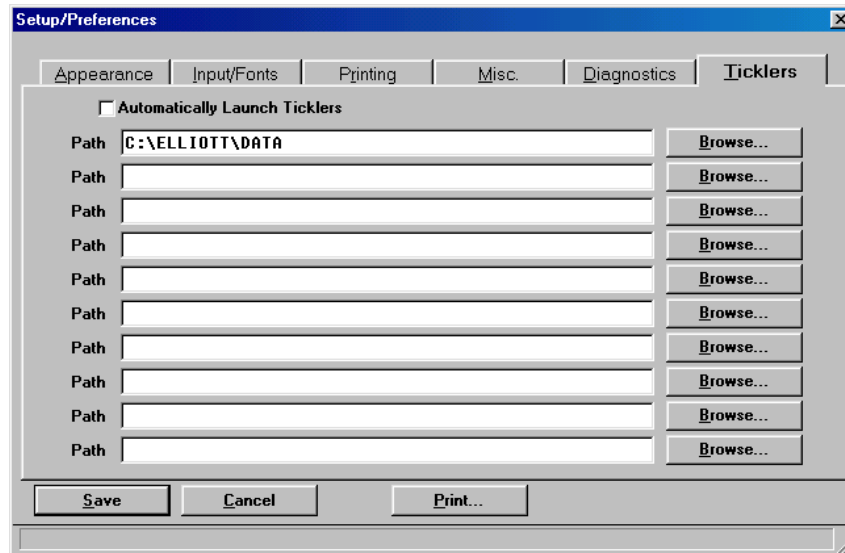
Tickler is a standard feature in V6.7 of Elliott. The previous tickler function, before V6.X.056, would require checking for ticklers by manually using the notes reporting function. With V6.X.056, Elliott warns you about ticklers that are due. The Audio effect is available only if user has a sound card and speakers with their system. The automatic tickler reminder can be started in one of two ways: (1) Launch the tickler reminder function when Elliott is started; (2) Launch the tickler reminder independently of Elliott.

Ticklers are more than a to do list or a reminder, they are also a very powerful management tool. One of the steps required to set up ticklers is to define the organization's hierarchy structure. Not only can supervisors assign tasks to themselves, they can also assign tasks to subordinates. Supervisors can also view and manage the tasks (ticklers) that have been assigned to subordinates. By fully implementing ticklers in your organization, you can better manage your company.

## Setting up the Tickler Function

The first step to setting up the tickler function is to go to "preference setup" (toolbar button) and indicate the directory where you want to scan for ticklers. Elliott supports the multi-company option, therefore you can have multiple notes and tickler databases in different directories. Chances are if a tickler becomes due in any one of the data directories, you want to know about it. The tab "Tickler" in the preference setup screen allows users to set up the directory where the note and tickler database resides. You can define up to 10 directories. By default, it will use the DATA (Company 1) directory to look for tickler information. Even though the system will search multiple companies for the tickler information, only the first company's users and hierarchy structure are used to determine the security information.

The preference setup **only affects the local workstation**. Therefore, you should setup each workstation that will use the tickler function. The setup information is stored in the NSI.INI file in the C:\WINDOWS or C:\WINNT directory.



## Launch Tickler Reminders with Elliott

In the previous setup screen, if you check the box “Automatically Launch Tickler”, then the tickler reminder function will start automatically when Elliott is started. Once the tickler reminder is started, it will stay active even if you exit Elliott. The only time it will be closed is if you shut down the system or manually close the tickler reminder by right clicking on the tickler icon in the task bar, usually on the bottom right of the screen.

## Setting up the Organization’s Hierarchy Structure

The tickler function can be used once you set up the tickler tab in preference setup. However, to get the best use of the tickler, especially for the manager, you should define the organization hierarchy by following these steps:

- Make sure passwords are turned on. To turn on passwords, go to Password setup and choose “Turn On Password”.
- Make sure each potential user of the tickler function has been set up with a user name and password in the “Password Setup” function.
- Go to the Main Menu, Util-Setup, System File Maintenance, Choose “User File”. Use the “Add” function to define all users’ full names, positions, departments and extensions.
- Go to the Main Menu, Util-Setup, System File Maintenance, Choose “User Supervisor File”. Use the “Add” function to define the supervisor and subordinate relationship. You can define as many hierarchy levels as you like. Use the edit list to verify that the hierarchy structure is correct.

## Launch Tickler Reminder Independently

The Elliott installation program installs the “Tickler” Icon in the “Elliott” group for the workstation where the installation program was run. On a network, this icon is not created for workstations.



Tickler

If you need to manually add this icon to the workstation, you can simply set up a shortcut by specifying the following in the command line:

F:\ELLIOTT7\EL700TK.EXE

**Note:** Substitute with the proper drive letter and directory to match your installation.

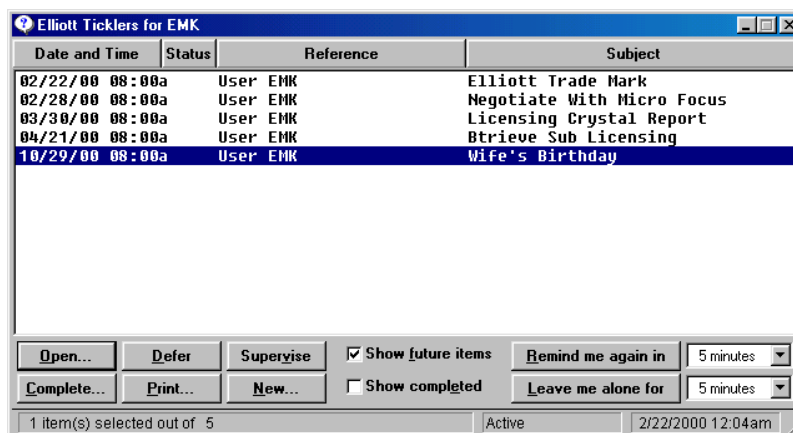
By clicking on this icon, the system will launch the tickler reminder function. This is the preferred method of starting the tickler, rather than the automatic method where ticklers launch automatically with Elliott. If you want to launch ticklers automatically when you start your computer, simply copy and paste the tickler icon to your “Start Up” folder.

If the tickler is started before Elliott, the system will ask you to login with a user name and password. Then, if the tickler is still running when you start Elliott, the system will not prompt for a user name and password.

Once the tickler is running, the tickler icon will appear on the right side of your task bar. This icon will stay there even if all your Elliott sessions are closed. This icon is the tickler monitor. It will scan all ticklers (once per minute) for the user and remind the user of any tasks when the remind date and time is due. It is suggested that you have a sound card and speakers so you can get the audio effect for reminders. If you wish to see the outstanding ticklers or add a new tickler, you can click on this icon and the user interface for the tickler function will display. You may manually remove the tickler monitor function by right clicking the icon on the right side of the task bar and choosing “Close”.

## Tickler List Box

When you click on the tickler icon on the right side of the task bar, the following list box window will display:



The items that display in this window depend on the two check boxes:

**Show Future Items:** By default, this window will only show the past due (past remind date and time) items. However, you may also want to see the items that will be due in the future. In that case you can check this box.

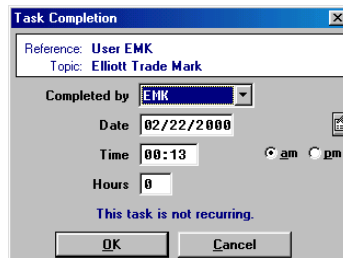
**Show Completed:** By default, this window will not show any items that are marked as completed. However, if you wish to see them, you can check this box.

The following is a brief explanation of each function in the window:

**Sorting:** By default, the items in the list box are sorted by the date/time field. You may click on any of the headings in the list box to sort the items by that field.

**Open:** This will open the currently highlighted tickler and display the detail window.

**Complete:** This will complete the currently highlighted tickler by prompting for the following information:

A screenshot of a 'Task Completion' dialog box. It has a title bar with 'Task Completion' and a close button. Inside, there are two text fields: 'Reference: User EMK' and 'Topic: Elliott Trade Mark'. Below these is a 'Completed by' dropdown menu with 'EMK' selected. Then are 'Date' (02/22/2000) and 'Time' (00:13) fields, with 'am' and 'pm' radio buttons. Below that is an 'Hours' field with '0'. A line of text says 'This task is not recurring.' At the bottom are 'OK' and 'Cancel' buttons.

The hours field is for reference purposes and you may wish to add up the total hours you spent working on this task as a performance measurement tool.

**Defer:** Defer instructs the tickler reminder “not to remind me” about this item for today (as long as the tickler reminder remains in memory without being closed).

**Print:** This will allow you either to print the highlighted tickler or all the ticklers in the list box.

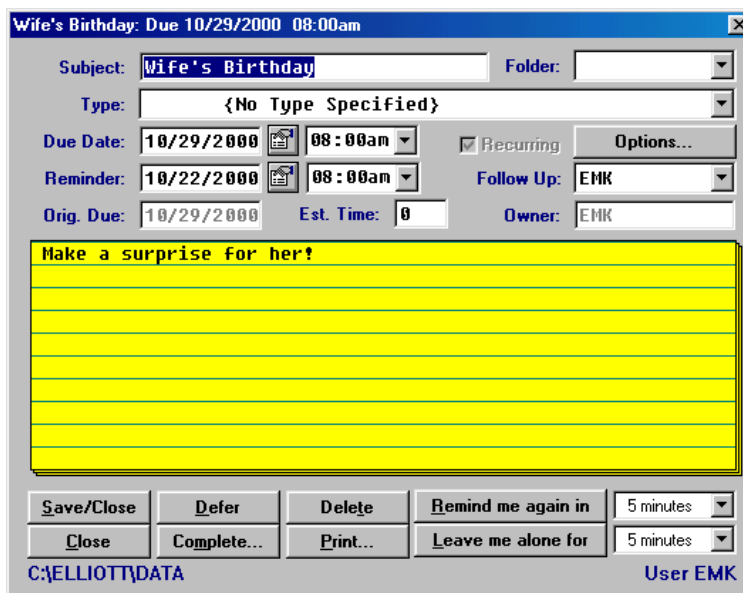
**Supervise:** This button will only display if you are a supervisor. It allows you to drill down to subordinate’s ticklers to review their progress with their tasks. There is more information about this function later in the chapter.

**New:** Click on this button to create a new tickler. A tickler is also a note. The new tickler that is created will be recorded as a user note.

**Remind Me Again in:** When a tickler becomes due, you may not have time to deal with it at that moment. Using this option will allow you to tell the system to remind you again sometime in the future. You can ask the system to remind you at another time, in as little as 5 minutes or up to 1 year. This changes the remind date and time and does not affect your due date and time.

**Leave Me Alone for:** When you start the tickler function, there may be a long list of ticklers that are due and waiting your attention. If you know you will be busy for a while and do not wish to be disturbed by the tickler reminders, you can choose “Leave Me Alone for” from 5 minutes to 4 hours. This will stop the tickler reminder function for that period of time. Once you decide that you need to enable the tickler checking again, you can click on the button at the same position for “Resume Tickler Checking”.

## Tickler Detail Window



The screenshot shows a window titled "Wife's Birthday: Due 10/29/2000 08:00am". The fields are as follows:

- Subject:** Wife's Birthday
- Folder:** (empty dropdown)
- Type:** {No Type Specified}
- Due Date:** 10/29/2000 (with a calendar icon)
- Time:** 08:00am (dropdown)
- Recurring:** ☒ Recurring
- Options...** (button)
- Reminder:** 10/22/2000 (with a calendar icon)
- Time:** 08:00am (dropdown)
- Follow Up:** EMK (dropdown)
- Orig. Due:** 10/29/2000
- Est. Time:** 0
- Owner:** EMK

Below the fields is a large yellow text area containing the text "Make a surprise for her!".

At the bottom are several buttons: Save/Close, Defer, Delete, Remind me again in (5 minutes dropdown), Close, Complete..., Print..., and Leave me alone for (5 minutes dropdown). The status bar shows "C:\ELLIOTT\DATA" and "User EMK".

The tickler detail window by design is very similar to the notes detail window. A tickler is also a note. To create a tickler, you can do one of two things (1) Create a note and make the note a tickler, (2) Add a new tickler in the tickler list window (the new tickler will be a note attached to the user). The following are items on the tickler window that you should be aware of:

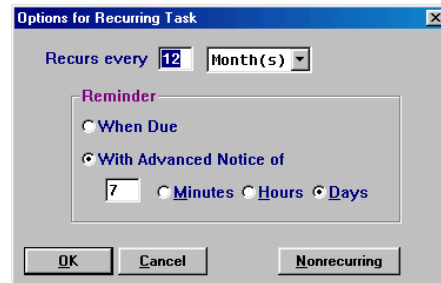
**Due Date/Time:** This is the date and time when this tickler will become due. You may click on the icon beside the date field and a calendar will display to help you to identify the due date. In the calendar screen, the dates that are bold are either company holidays or your personal vacation days, as specified in the CALENDAR.CFG file.

**Reminder Date/Time:** By default, the reminder date and time will be the same as the due date and time. However, you may choose to let the system remind you one week before the due date. Or you may choose to let the system to remind you 15 minutes prior to your appointment. The reminder date/time can be after the due date/time if you are behind with your tasks.

**Original Due:** When you are behind with your tasks, you may choose to extend your due date and time. However, the original due date (the due date when tickler was first created) will not be changed even if you change your due date. You can't change original date field. This serves as a performance measurement for how well you complete your tasks on time.



**Options:** A tickler can be recurring. For example, performance reviews of employees are usually done on a yearly basis and a supervisor should know when an employee should be reviewed again. A reminder for a birthday could be a recurring tickler on a yearly basis. The “Options” button is to setup recurring ticklers:



You may choose the frequency with which you want the task to recur. Also, you may choose to be reminded again with advance notice of the due date. In the above example, the tickler will recur once a year. The reminder date will be 7 days before the due date. When you complete a recurring tickler, Elliott will mark that tickler as completed, and create a new tickler with the same content for the new recurring date.

**Est. Time:** This is a reference field and is used to estimate how much time is required to complete this task. This can be used as a performance measurement tool.

## Supervisor's Function

If you are a supervisor based on the User Supervisor File (not based on being logged in as “SUPERVISOR”) and are in a Tickler List Window, you should see a “Supervise” button. If you click on this button, you should see a window similar to the following:

User ID	User Name	Position	Department	Ext.
* EMK	EDWARD M. KWANG	PRESIDENT	ADMIN	101
ATL	ANTHONY T. LE	SUPPORT MANAGER	SUPPORT	109
+ CWC	CLAYTON CHEN	R&D MANAGER	R&D	103
ELM	ELLEN L. MCNAUGHTON	ACCOUNT EXECUTIVE	SALES	110
RSS	ROGER S. SUENG	VICE PRESIDENT	ADMIN	102
TW	TERESA WU	ACCT/OPER MANAGER	ADMIN	

This is a list of users that you directly supervise. Users with a “+” symbol beside the user ID are also supervisors. When you click on this type of user, you will further drill down to the users they supervise. At the end, when you click on the final user, you will be able to see the tickler list window for that user. There is no limitation for how many levels you can drill down to.

This is a useful function for seeing the outstanding tasks of your subordinates. It can be used to manage

your department or your company. If you can ensure that all the tasks a user needs to complete are entered into the tickler, then this tool can be used to manage not only the tasks you assign to your subordinates, but it will also give you a good idea what your subordinate is working on. By understanding whether your subordinate prioritizes the tasks correctly, you can take necessary management actions to correct any potential problems.

## **Security Issue**

Supervisors can create ticklers and assign them to themselves or to their subordinates. Subordinates can create ticklers and assign them to themselves, but can not create a tickler and assign it to their supervisor.

The user who created the tickler will have full rights to that tickler, including add, change, delete, complete, defer and any other actions that can be done with a tickler.

The user may or may not have full rights to the tickler that is assigned by his/her supervisor, depending on the note type. Previously in this chapter, we discussed that a note type can be used to control security by setting the flags for sharable read, change and delete. If the tickler does not have a note type, then there will be no security limitation to the user who has been assigned to the tickler. If the note type is defined and the note type specified is not shareable for read, change or delete, the user being assigned to the tickler will still have the minimum rights to read and complete the tickler. This is obvious, for the supervisor must intend to at least let the user read and complete that tickler when the tickler is assigned to that user.

Supervisors always have full rights to the ticklers created by their subordinates. If necessary, supervisors can also reassign a tickler to another user that they supervise.

## Notes And Printing

### Application Overview

Printing notes in selected documents is controlled by two related setup procedures.

#### 1. Global Setup/System/Note Function

This setup flag determines which of the following notes can be copied (Y), not copied (N) or printed without copying (P).

Notes From Customer To Order Header	Y	N	P
Notes From Item To Order Line Item	Y	N	P
Notes From Ship-To To Order Header	Y	N	P
Notes From Vendor To PO Order Header	Y	N	P
Notes From Item To PO Order Line Item	Y	N	P
Notes When Copy BOMP Structure	Y	N	P
Notes From Item To BOMP Structure	Y	N	P
Notes From Item To BOMP Production Order	Y	N	P
Notes From BOM To Shop Floor Control			

If a note can be copied, the system will prompt you if you wish to copy, e.g., Customer Notes to Order Header. If the note is to be printed without copying, there will be no prompt.

What actually determines if a note will be printed and on which document it will be printed is determined by the Note Type setup.

#### 2. Notes Processing/Note Type

The Note Type “Y” or “N” flag determines on which documents this note type will be printed. Print document destinations available are:

Customer Invoices	Y or N
COP Order Acknowledgments	Y or N
Purchase Orders	Y or N
COP Quotes	Y or N
COP Picking and Packing Slips	Y or N
Accounts Receivable Aging Report	Y or N
BMOP Work Orders	Y or N
SFC Shop Orders	Y or N

**Notes Printing Rule #1:** One setup procedure does not take precedence over another. Rather, they work together in an “AND” relationship. Examples:

(C) Copy Customer Notes to Order Header and (Y) Print Note Type on Invoice = Note will print on Invoice.

(P) Print without copying Customer Notes to Order Header and (N) Print Note Type on Invoice = Note will not print

**Notes Printing Rule #2:** Blank/Generic notes will never print on documents, only user defined Notes Types can print.

**Notes Printing Rule #3:** Know your Note Function and Note Type default setups.

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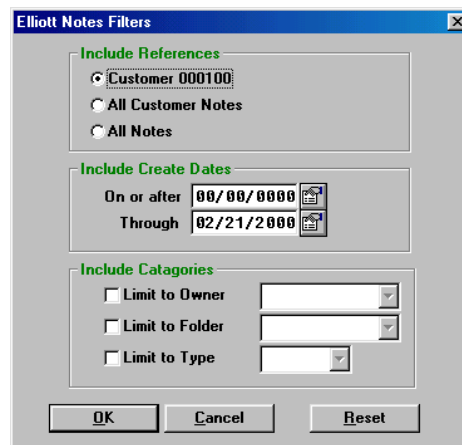
## Knowledge Base

### Application Overview

In the notes file there is a wealth of user, customer, vendor, item, contact management, and even human resource management information that the user can use as a knowledge base.

### Run Instructions

To use the “**Knowledge Base**” function of Notes, you would use both the “**Search**” and “**Filter**” functions in the note list box window.

The screenshot shows a dialog box titled "Elliott Notes Filters". It contains three main sections: "Include References" with radio buttons for "Customer 000100" (selected), "All Customer Notes", and "All Notes"; "Include Create Dates" with date pickers for "On or after" (00/00/0000) and "Through" (02/21/2000); and "Include Categories" with checkboxes for "Limit to Owner", "Limit to Folder", and "Limit to Type", each followed by a dropdown menu. At the bottom are "OK", "Cancel", and "Reset" buttons.

Let's take an engineering company, for example. This engineering company has a customer technical support help desk where the representatives have the responsibility of answering customer's technical questions when they run into difficulty. This company has a policy of logging every single help desk call as a sales order and keeping track of the content of the conversation as a note that is attached to the order.

As a new support representative, it is very helpful to search other representatives' help incident information to learn about similar situations and how the problem was solved. This is one situation where the knowledge base becomes very helpful. The support rep needs to bring up the note list box window first. Then, identify one or more key words of the problem and enter them in the search box. Click on the "Filter" box, choose to search "All Notes" and click "OK" on the Filter Window. The system will start to search all the records in the notes database for the key words entered. If you enter more than one key word, the system will use the "AND" condition. That is, a note must contain both words in order for the note to be found. You may want to start with one key word first. If this results in too many matched records, you can consider limiting it further by entering the second keyword. Enter the additional keyword after the first keyword with a space and start search again. The system has the intelligence to know that it does not need to go through the entire note database again. Instead, it will search the current result set to narrow down the list. This results in a much faster search when entering the second keyword.

Narrowing down the search criteria also speeds up the search process. For example, choose notes for a table such as "All Customer Notes" or "All Order Notes" rather than "All Notes". You can also speed up the search by limiting the date criteria to a certain date range. For example, you might decide not to search for notes that are more than six months old.

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## **Application Overview**

### **Who can use the Note Function?**

Salespersons, technical support people, purchasers, assembly staff and system personnel can use notes to enhance Customer Relationship Management.

#### **Sales Department:**

When dealing with customers, it is always useful to record key conversation issues. Later, if the customer calls and the salesperson is not at their desk, other sales personnel can assist this customer by accessing the note window to review prior meetings or conversations with the client. For that extra “Personal Touch” a salesperson can record the customer’s personal information, such as spouse’s name, hobby, birthday, anniversary date, etc. Imagine calling a vendor and they say “Happy Birthday” to you.

Security can also be established when using the Note Function. If implemented, only those who have permission to access the notes can read the notes. Please refer to Note Security in Notes Processing – Note Type.

#### **Technical Support Department:**

It might be useful for technical support people to record the problems a client has each time he calls. By reading the customer’s troubleshooting log, the technical support person can have a better understanding of the client’s system and nature of the problems. Therefore, more effective and accurate solutions can be achieved. In another case, where some items need more detailed information for support purposes, a note window can be attached to those item records for easy access to that piece of information.

#### **Purchasing Department:**

Purchasing staff can use note windows to record the specifications or requirements for purchasing items, or any important information about vendors. In the former example, the purchasers can attach a specification note to an item and print it on the purchase order for the vendor at the point of doing the purchase order entry. All this information can definitely assist the purchasers in accomplishing their work in a more accurate way. Assembly staff: There are certain products (parent items) that need instructions for assembly. In this case, comments in the note window can be used in the production workorder of BOMP as instructions.

#### **Personnel Department:**

Notes can also be used as a human resources management tool. Any additional information about an employee that you would like to track can be put into Note Windows. This includes, but is not limited to, emergency contact, phone number, blood type, spouse’s name, insurance information, etc.

#### **System Users:**

The Note Window is a very versatile and generic tool; the applications are unlimited for all users in the

system.

## Run Instructions

### Accessing Notes

The Note Window can be accessed by clicking the Notes icon or by pressing the **F6** key at different menu levels. Due to the fact that each note is attached to a specific record in a specific file, the locations for accessing the Note Windows are distinct. The following page displays a table listing all locations where general notes and Note Types can be used:

Access At	Note Attached To	File Name
G/L Chart of Account Maintenance	G/L Account File	GLACTFIL
General Ledger Account Inquiry	G/L Account File	GLACTFIL
G/L Account File Inquiry	G/L Account File	GLACTFIL
A/R Customer File Maintenance	Customer File	ARCUSFIL
A/R Customer Account Inquiry – Customer Number Field	Customer File	ARCUSFIL
A/R Customer Account Inquiry – Open Items	A/R Open Item File	AROPNFIL
A/R Customer File Inquiry	Customer File	ARCUSFIL
A/R Summary Account Inquiry – Customer Number Field	Customer File	ARCUSFIL
A/R Summary Account Inquiry – Open Items	A/R Open Item File	AROPNFIL
A/R Salesman File Maintenance	Salesman File	ARSLMFIL
A/R Open Item File Maintenance	A/R Open Item File	AROPNFIL
A/R Job Code File Maintenance	Job Code File	JOBFILE
A/R Carrier File Maintenance	Carrier File	ARCARFIL
A/R Carrier Mode File Maintenance	Carrier Mode File	ARCARMOD
Sales & Cr/Dr Memo Processing	Sales Transaction File	ARSLSTRX
Cash Receipts Processing – Customer Number Field	Customer File	ARCUSFIL
Cash Receipts Processing – Open Items	A/R Open Item File	AROPNFIL
A/P Vendor File Maintenance	Vendor File	APVENFIL
A/P Job Code File Maintenance	Job Code File	JOBFILE
A/P Vendor Account Inquiry – Vendor Number Field	Vendor File	APVENFIL
A/P Vendor Account Inquiry – Open Items	A/P Open Item File	APOPNFIL
A/P Vendor File Inquiry	Vendor File	APVENFIL
A/P Transaction Processing	A/P Transaction File	APTRXFIL



Access At	Note Attached To	File Name
Payroll Employee File Maintenance	Employee File	EMPFIL
Payroll Employee File Inquiry	Employee File	EMPFIL
P/R Job Code File Maintenance	Job Code File	JOBFILE
I/M Item File Maintenance	Item File	IMITMFIL
I/M Location File Maintenance	Location File	IMLOCFIL
Product Category File Maintenance	Product Category File	IMCATFIL
I/M Job Code File Maintenance	Job Code File	JOBFILE
User Def Code File Maintenance	User Def Code File	IMUSRDEF
I/M Item File Inquiry	Item File	IMITMFIL
I/M Item File Stock Status Inquiry	Item File	IMITMFIL
I/M Inventory Transaction Processing	Item File	IMITMFIL
I/M Inventory Transfer Processing	Transfer Batch File	IMTSFBAT
Change Bin No/Pick Seq	Item File	IMITMFIL
C/P Ship To File Maintenance	COP Ship To File	CPSHPFIL
Contract Pricing Maintenance	Contract Pricing File	CPCONHDR
C/P Order Header Screen	Customer File	ARCUSFIL
C/P Order Line Item Screen Before an Item is Entered	Order Header File	CPORDHDR
C/P Order Line Item Screen After an Item is Entered ( flag "I" on)	Item File	IMITMFIL
C/P Order Line Item Screen After an Item is Entered (flag "L" on)	Order Line Item File	CPORDLIN
C/P Order Inquiry Before an Order is Entered	Customer File	ARCUSFIL
C/P Order Inquiry After an Order is Highlighted	Order Header File	CPORDHDR
C/P Order History Inquiry Before an Order is Entered	Customer File	ARCUSFIL
C/P Order History Inquiry After an Order is Highlighted	Order History Header File	CPHODHDR
C/P Customer Account Inquiry After a Customer is Entered	Customer File	ARCUSFIL
C/P Customer Account Inquiry When an Open Item is Highlighted	AR Open Item File	AROPNFIL
C/P Customer Account History Inquiry After a Customer is Entered	Customer File	ARCUSFIL
C/P Customer Account History Inquiry When an Open Item is Highlighted	AR Open Item History File	ARHISFIL
C/P Stock Status Inquiry After a Customer is Entered	Customer File	ARCUSFIL
C/P Stock Status Inquiry After an Item is Entered	Item File	IMITMFIL
C/P Invoice History Inquiry by Invoice After a Customer is Entered	Customer File	ARCUSFIL
C/P Invoice History Inquiry by Invoice After an Invoice is Entered	Invoice Header File	CPINVHDR
C/P Invoice History Inquiry by Customer Referral After a Customer is Entered	Customer File	ARCUSFIL
C/P Freight Calculation Inquiry	AR Carrier Mode File	ARCARMOD
C/P Ship-To Inquiry	COP Ship-To File	CPSHPFIL

Access At	Note Attached To	File Name
C/P Billing Order Header Screen	Order Header File	CPORDHDR
C/P Billing Line Item Screen After an Item is Entered	Order Line Item File	CPORDLIN
Consolidate/Close Customer Order – Consolidate only	Order Header File	CPORDHDR
C/P Activate Blanket Order - Header Screen	Order Header File	CPORDHDR
Sales Desk – After a Customer is Entered	Customer File	ARCUSFIL
Sales Desk – After an Item is Entered	Item File	IMITMFIL
Shipping Verification	Order Header File	CPORDHDR
Recurring Order Header Screen	Recurring Order Header File	CPRECHDR
Recurring Order Line Item Screen Before an Item is Entered	Recurring Order Header File	CPRECHDR
Recurring Order Line Item Screen After an Item is Entered	Recurring Order Line Item File	CPRECLIN
Recurring Order Inquiry – After a Customer is Entered	Customer File	ARCUSFIL
Recurring Order Inquiry – After an Order Number is Entered	Recurring Order Header File	CPRECHDR
Recurring Order Inquiry – When a Line Item is Highlighted	Recurring Order Line Item File	CPRECLIN
Copy Order Header Screen – Before a Customer is Entered	Order Header File	CPORDHDR
Copy Order Header Screen – After a Customer is Entered	Customer File	ARCUSFIL
Copy Order Line Item Screen Before an Item is Entered	Order Header File	CPORDHDR
Copy Order Line Item Screen After an Item is Entered	Order Line Item File	CPORDLIN
Release Held Order	Customer File	ARCUSFIL
Release Held Order – Through Information Window	Order Header File	CPORDHDR
Shipping Confirmation – Header Screen	Customer File	ARCUSFIL
Shipping Confirmation – Billing Screen	Order Header File	CPORDHDR
Void Invoice	Order Header File	CPORDHDR
Cancel Order	Order Header File	CPORDHDR
Cancel Order – Through Option Window	Customer File	ARCUSFIL
Cancel Picking Ticket	Order Header File	CPORDHDR
Cancel Picking Ticket – Through Option Window	Customer File	ARCUSFIL
P/O Ship To File Maintenance	PO Ship To File	POSHPFIL
P/O Vendor Service Address File Maintenance	Vendor File	APVENFIL
P/O Order Header Screen	Vendor File	APVENFIL
P/O Order Line Item Screen Before an Item is Entered	P/O Header File	POORDHDR
P/O Order Line Item Screen After an Item is Entered	Item File	IMITMFIL
P/O Receiving Processing	Item File	IMITMFIL
P/O Order Inquiry	P/O Header File	POORDHDR
B/M Product Structure File Maintenance – After Parent Item is Entered	Item File	IMITMFIL
B/M Job Code File Maintenance	Job Code File	JOBCODE

Access At	Note Attached To	File Name
B/M Production Order Entry Screen	B/M Order File	BMORDFIL
COP Feature Item and Copy to BOMP	B/M Order File	BMORDFIL
B/M Item File Inquiry	Item File	IMITMFIL
B/M Stock Status Inquiry	Item File	IMITMFIL
J/C Job Entry	Job Cost File	JCCSTFIL
S/F Order Entry	Shop Floor Order File	SFORDFIL
S/F Order Status Inquiry	Shop Floor Order File	SFORDFIL
S/F Item File Inquiry	Item File	IMITMFIL
S/F Stock Status Inquiry	Item File	IMITMFIL
S/F Stock Status Inquiry	Item File	IMITMFIL
S/C Cost Master File Maintenance	Cost Master File	SCCSTFIL
S/C Cost Master File Inquiry	Cost Master File	SCCSTFIL

## Attributes

### Application Overview

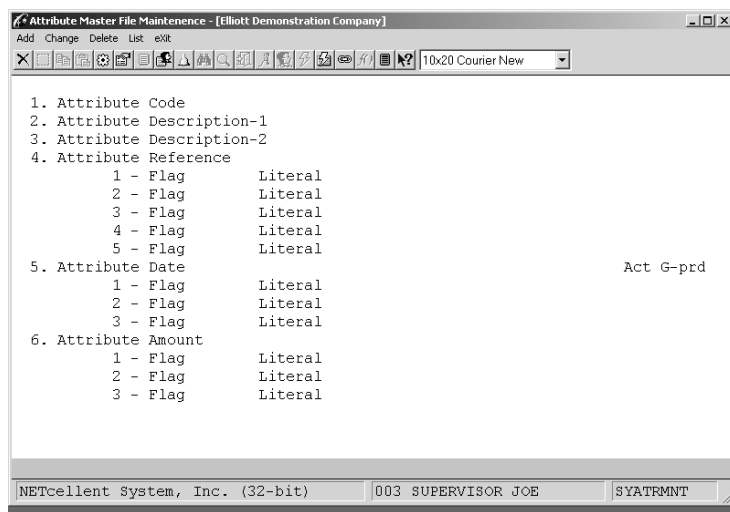
Attributes are database extensions or controls that can be attached to any master record. They are normally used to track information that is outside of the master record and in some cases for control purposes to meet restrictions and regulations that affect how you do business.

In a marketing environment, attributes can track participants and their individual results of a marketing promotion or advertising campaign. In a service environment, they can track service contracts, expiration dates and amount of contract. In regulated business, they can track licenses, requirements, as well as business restrictions by geographical area.

### Run Instructions – Information Attributes

These are extensions to a master record to track information not available within the system. Unlike Notes, which are free-form text, attributes are structured to standardize the information from master record to master record.

**Elliott Main Menu → Util-Setup → System File Maintenance → Maintenance → Master Attribute File**



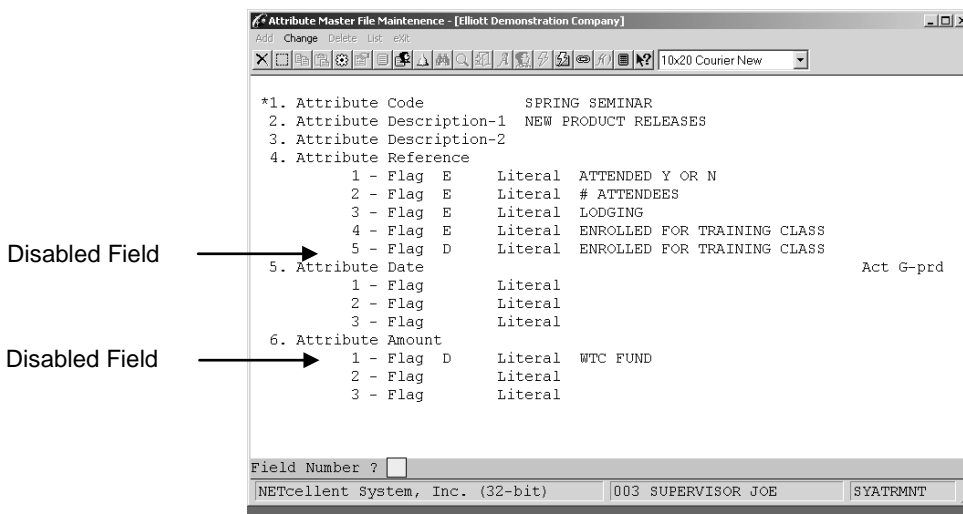
The screenshot shows a window titled "Attribute Master File Maintenance - [Elliott Demonstration Company]". The window has a menu bar with "Add", "Change", "Delete", "List", and "Exit". Below the menu bar is a toolbar with various icons. The main area of the window displays a list of attributes and their flags:

Attribute	Flag	Value
1. Attribute Code		
2. Attribute Description-1		
3. Attribute Description-2		
4. Attribute Reference		
1 - Flag	Literal	
2 - Flag	Literal	
3 - Flag	Literal	
4 - Flag	Literal	
5 - Flag	Literal	
5. Attribute Date		Act G-prd
1 - Flag	Literal	
2 - Flag	Literal	
3 - Flag	Literal	
6. Attribute Amount		
1 - Flag	Literal	
2 - Flag	Literal	
3 - Flag	Literal	

At the bottom of the window, there is a status bar with the following text: "NETcellent System, Inc. (32-bit) | 003 SUPERVISOR JOE | SYATRMNT".

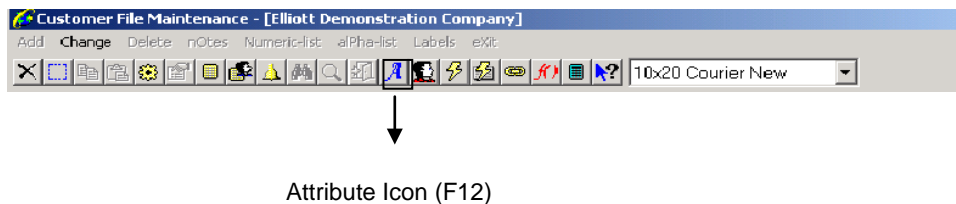
## Field Entry Descriptions

Name	Description
FYI	Fields should not contain a period ("."), especially if you want to access field information for reporting issues. See topic Attribute Reporting
Attribute Code	15 alphanumeric character This field is the equivalent of a customer, Item or Vendor Number
Attribute Description 1	30 alphanumeric character field
Attribute Description 2	30 alphanumeric character field
Attribute Reference	5 Flags of user defined fields for user input when needed.  E = Enable user input display D = Disable user input display Space = Delete field
Attribute Date	3 Date field flags with user defined literals for user input when required.  E= Expiration Date Act = Action Type S is stop order of item Act = Action Type H is put order on hold G-Prd = Grace period for expiration date  R= Reference Only D= Disable A = Activation Date Space = Delete field  For "Information Attributes" it is best to use Attribute Type "R" as most of the others primarily apply to order processing
Attribute Amount	3 Amount field flags with user defined literals for user input when needed.



## Attaching Attributes

To attach an attribute, open the master record, click the Attribute Icon or press F11.



1. Answer "Y" to Add New Attribute
2. Use the F7 Search Key to find the Master Attribute
3. Highlight and press <Return> to select

Customer File Maintenance - [Elliott Demonstration Company]

Add Change Delete notes Numericlist alpha-list Labels exit

10x20 Courier New

\* Customer No 000300 1. Bill To No  
2. Sort Name Brooks and Johnson, LTD.  
3. Cor : 000300  
4. Add Attribute Code : SPRING SEMINAR  
5. Add Description : NEW PRODUCT RELEASES  
6. Cit  
7. Sta ATTENDED Y OR N : Y  
8. Zip # ATTENDEES : 3  
9. Cou LODGING : HILTON INN  
10. Con ENROLLED FOR TRAINING CLASS : OHSA REQUIREMENTS  
11. Pho  
12. Fax  
13. Acc  
14. Cus  
15. Bal  
16. Stm  
17. Crd  
18. Crd Any Change ? N  
19. Crdt Hold ? N  
20. Collector 33. Tax Code 3  
21. Invoice Form 00 Default Inv Form

Field Number ?

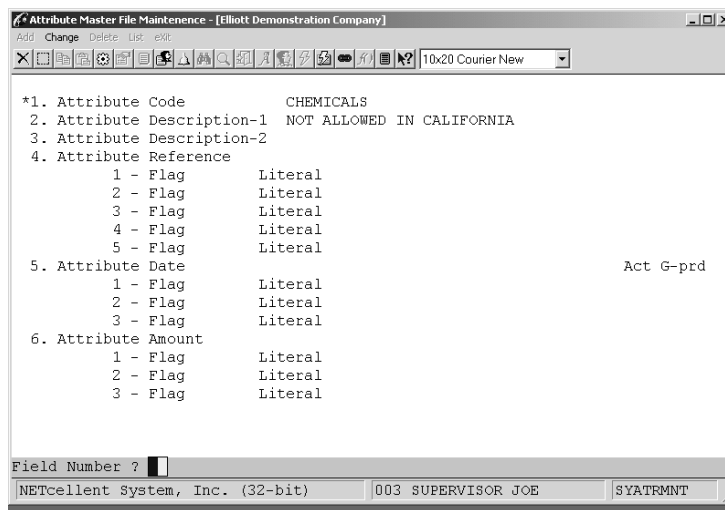
NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE ARCUSMNT

Customer Attributes for Spring Seminar

## Run Instructions – Control Attributes

The first step is to define an Attribute Master File. This defines the attribute for use at the master record level. The second step is to define the Restricted Attribute File. This controls how the attribute is restricted. In our first scenario we are a Master Distributor with certain items that cannot be sold into the State of California.

**Elliott Main Menu → Util-Setup → System File Maintenance → Master Attribute File**



Attribute Master File Maintenance - [Elliott Demonstration Company]

Add Change Delete List Exit

10x20 Courier New

\*1. Attribute Code CHEMICALS  
2. Attribute Description-1 NOT ALLOWED IN CALIFORNIA  
3. Attribute Description-2  
4. Attribute Reference  
    1 - Flag Literal  
    2 - Flag Literal  
    3 - Flag Literal  
    4 - Flag Literal  
    5 - Flag Literal  
5. Attribute Date Act G-prd  
    1 - Flag Literal  
    2 - Flag Literal  
    3 - Flag Literal  
6. Attribute Amount  
    1 - Flag Literal  
    2 - Flag Literal  
    3 - Flag Literal

Field Number ?

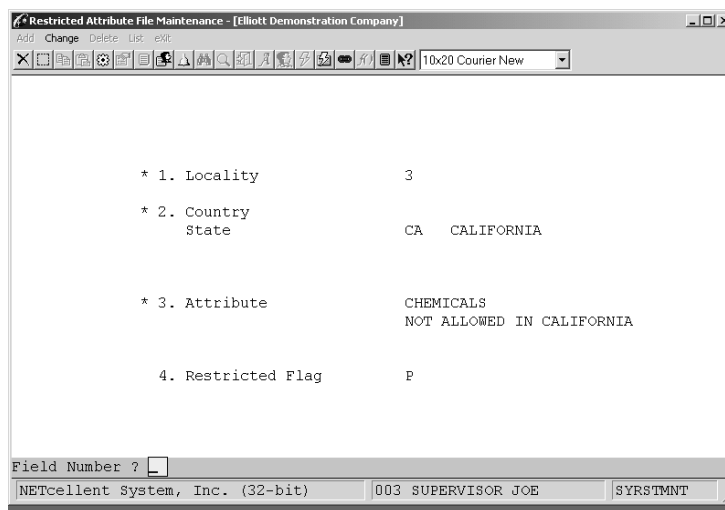
NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE SYATRMNT

Master Attribute File Setup Screen



## Entry Field Descriptions – Master Attribute File

Name	Description
FYI	Fields should not contain a period ("."), especially if you want to access field information for reporting issues. See topic Attribute Reporting
Attribute Code	15 alphanumeric character  This field is the equivalent of a customer, Item or Vendor Number.
Attribute Description 1	30 alphanumeric character field
Attribute Description 2	30 alphanumeric character field
Attribute Reference	5 Flags of user defined fields for user input when needed.  E = Enable user input display D = Disable user input display Space = Delete field
Attribute Date	3 Date field flags with user defined literals for user input when required.  E= Expiration Date Act = Action Type S is stop order of item Act = Action Type H is put order on hold G-Prd = Grace period for expiration date  R= Reference Only D= Disable A = Activation Date Space = Delete field
Attribute Amount	3 Amount field flags with user defined literals for user input when needed.

**Elliott Main Menu → Util-Setup → System File Maintenance → Restricted Attribute File**

**Field Entry Descriptions – Restricted Attribute File**

NOTE:	Restrictions applied at time of COP or Sales Desk line item entry and the Master Attribute must be attached to the Customer and Item attribute file.
1. Locality	1 = Worldwide 2 = National (allows input to Country) 3 = State 4 = City 5 = ZIP Code (starting and ending ZIP Code – useful for defining Counties or zoned areas)
2.	Depends on selection from above
3. Attribute	Enter attribute to define restrictions for
4. Restrictions	<p>P = Restricted When Present</p> <p>When this attribute is attached to the master record, it will not allow the sale of the item.</p> <p>R = Restricted When Not Present</p> <p>If this attribute is not attached to the master record, it will allow the sale of the item.</p> <p><b>When using Expiration Dates in Restrictions, you must use Type "R" restrictions.</b></p> <p>Since our "By Example" restriction is for California only, it was much easier to use type "P" since "R" would have required us to enter the other 49 states. When attaching attributes to inventory items, it is much easier to attach them to a product category rather than item-by-item. The same applies to Customer Type for customers.</p>

Since we do not have our A/R Customers in a category (Type) for California, we must attach the attribute to each California customer.

Now the system knows not to sell an item into California but does not know what item. To do this, we can do it by product category and then make sure saleable items to California are not in this category. If the number of Items Not For Sale is insignificant, it might be better to attach the attribute item by item. When attaching the attribute to an inventory item, **it is not necessary** to complete the Attribute Fields.

## Attaching Attributes

To attach an attribute, open the master record and click the Attribute Icon or press F11.

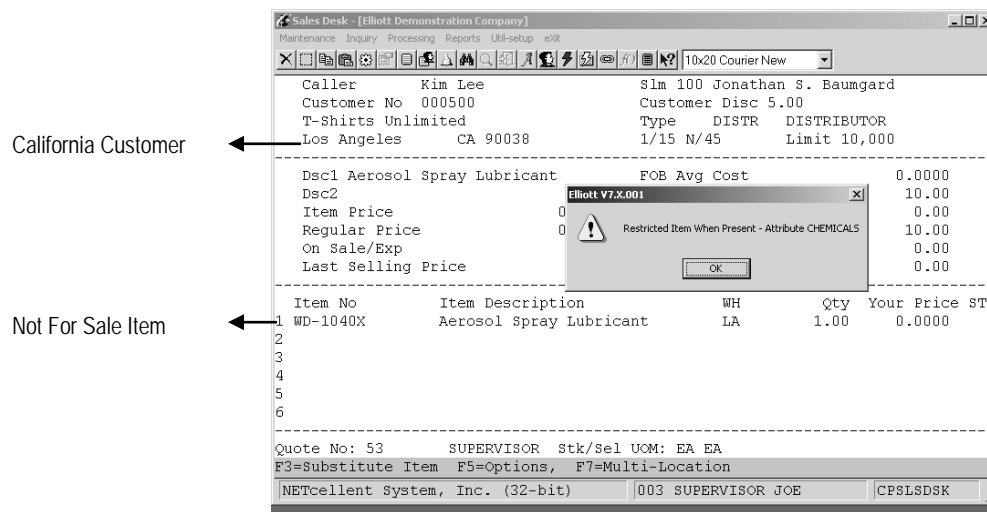


Attribute Icon (F12)

4. Answer "Y" to Add New Attribute
5. Use the F7 Search Key to find the Master Attribute
6. Highlight and press <Return> to select

### Review:

1. We have created a Master Attribute File and then placed restrictions for it in the Restricted Attribute File.
2. We attached the attribute to the California Customers, (Customer Attribute File), and the Not for Sale items in California, (Inventory Item Attribute File).

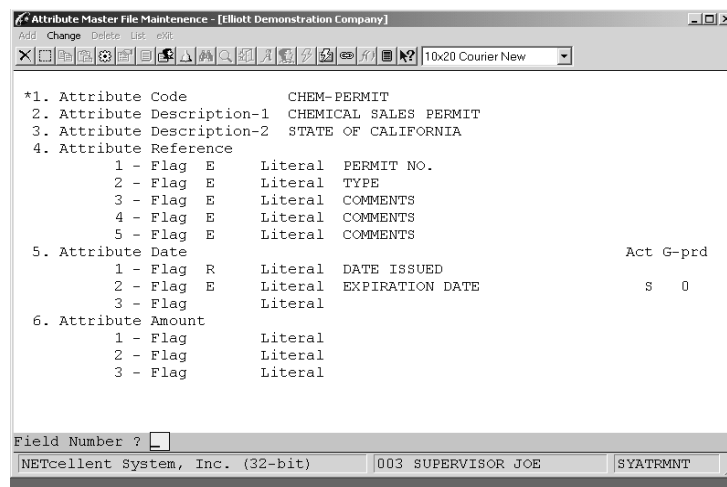


Screen showing the system restricting the sale of an item into California

## Scenario 2

In many regulated businesses a license or permit is normally required to do business. In this scenario we will show you how to track licenses/permits, prohibit processing sales orders if the license/permit has expired or if the customer does not have a permit.

**Step 1: Elliott Main Menu → Util-Setup → System File Maintenance → Master Attribute File**



```

*1. Attribute Code          CHEM-PERMIT
2. Attribute Description-1  CHEMICAL SALES PERMIT
3. Attribute Description-2  STATE OF CALIFORNIA
4. Attribute Reference
   1 - Flag E      Literal PERMIT NO.
   2 - Flag E      Literal TYPE
   3 - Flag E      Literal COMMENTS
   4 - Flag E      Literal COMMENTS
   5 - Flag E      Literal COMMENTS
5. Attribute Date
   1 - Flag R      Literal DATE ISSUED
   2 - Flag E      Literal EXPIRATION DATE
   3 - Flag E      Literal
Act G-prd
6. Attribute Amount
   1 - Flag      Literal
   2 - Flag      Literal
   3 - Flag      Literal
Field Number ? 
NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE SYATRMNT
  
```

Fields	Description
4. Attribute Reference	<p>Flags 1 and 2 are how the user will update the Customer Rile (database extension).</p> <p>Flags 3 –5 are optional and only included should the user wish to track additional information.</p>
5. Attribute Date	<p>Flag 1 = R (Reference)</p> <p>Flag 2 = E (Expiration Date)</p> <p>Act = Action Type S is stop order of item</p> <p>Act = Action Type H is put order on hold</p> <p>G-Prd = Grace period for expiration date</p>

## Scenario 2

Step 2: Elliott Main Menu → Util-Setup → System File Maintenance → Restricted Attribute File

\* 1. Locality 3

\* 2. Country CA  
State CALIFORNIA

\* 3. Attribute CHEM-PERMIT  
CHEMICAL SALES PERMIT  
STATE OF CALIFORNIA

4. Restricted Flag R

Field Number ?

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE SYRSTMNT

**Note:** Restricted flag, Field 4, **must be R** to verify expiration date in the attribute file.

Since "R" = Restricted When Not Present, any California Customer who does not have this attribute attached to his file will be prohibited from buying the item, regardless of expiration date.

Step 3: Attach attribute to inventory items by Product Category or individually

Step 4: Attach Attribute to California Customers

\* Customer No 000500 1. Bill To No

2. Sort Name T-Shirts Unlimited

3. Corresp Name T-Shirts Unlimited

4. Address-1 5729 Hollywood Blvd.

5. Address-2

6. City

7. State

8. Zip

9. Country

10. Contact

11. Phone

12. Fax

13. Account

14. Customer

15. Balance

16. Status

17. Credit

18. Credit

19. Credit

20. Collection

21. Invoice

Attribute Code : CHEM-PERMIT

Description : CHEMICAL SALES PERMIT

PERMIT NO. : 1234-5678-ABC-CA

TYPE : MANUFACTURING/ASSEMBLY

COMMENTS : NO RESELL ALLOWED

DATE ISSUED : 10/01/00

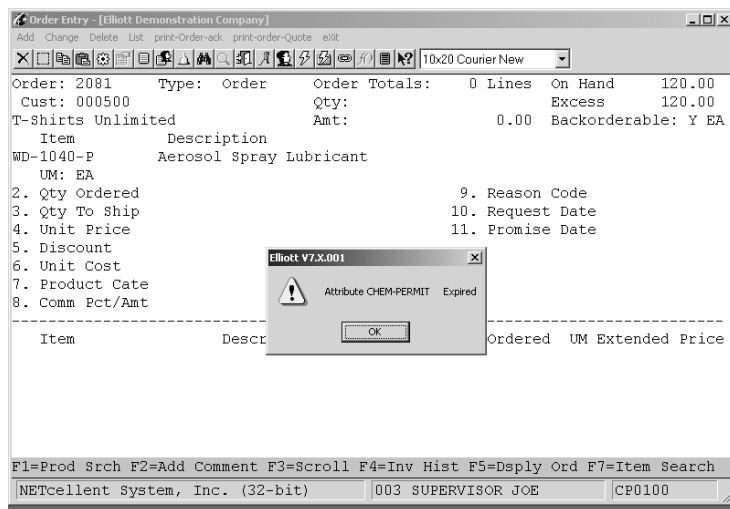
EXPIRATION DATE : 10/01/01

Any Change ? Y

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE ARCUSMNT

**Note:** Customers permit has expired.

## How An Attribute Is Used In COP Add Orders



Order Entry - [Elliott Demonstration Company]

Add Change Delete List print-Order-ack print-order-Quote exit

10x20 Courier New

Order: 2081 Type: Order Order Totals: 0 Lines On Hand 120.00  
Cust: 000500 Qty: Excess 120.00  
T-Shirts Unlimited Amt: 0.00 Backorderable: Y EA

Item Description  
WD-1040-P Aerosol Spray Lubricant  
UM: EA

2. Qty Ordered 9. Reason Code  
3. Qty To Ship 10. Request Date  
4. Unit Price 11. Promise Date  
5. Discount  
6. Unit Cost  
7. Product Cate  
8. Comm Pct/Amt

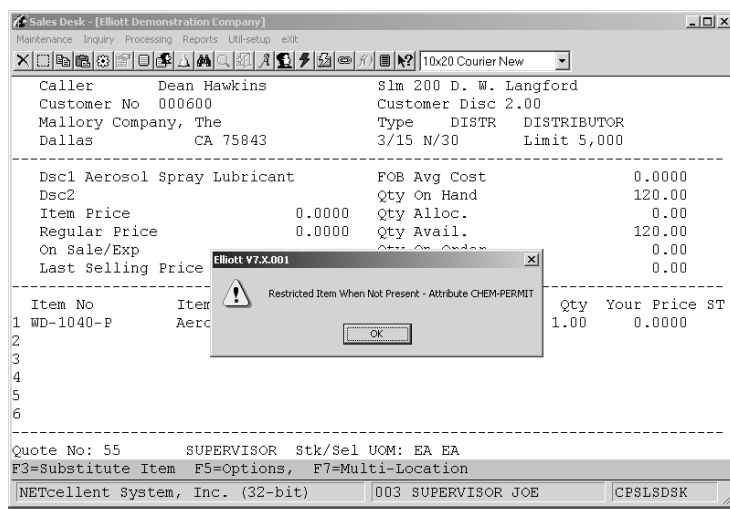
Item Descr Ordered UM Extended Price

F1=Prod Srch F2=Add Comment F3=Scroll F4=Inv Hist F5=Dsply Ord F7=Item Search

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE CP0100

**Elliott V7.X.001**  
Attribute CHEM-PERMIT Expired  
OK

California Customer With Expired Permit



Sales Desk - [Elliott Demonstration Company]

Maintenance Inquiry Processing Reports Util-setup exit

10x20 Courier New

Caller Dean Hawkins SIm 200 D. W. Langford  
Customer No 000600 Customer Disc 2.00  
Mallory Company, The Type DISTR DISTRIBUTOR  
Dallas CA 75843 3/15 N/30 Limit 5,000

Dsc1 Aerosol Spray Lubricant FOB Avg Cost 0.0000  
Dsc2 Qty On Hand 120.00  
Item Price 0.0000 Qty Alloc. 0.00  
Regular Price 0.0000 Qty Avail. 120.00  
On Sale/Exp Qty On Order 0.00  
Last Selling Price 0.00

Item No Item Qty Your Price ST  
1 WD-1040-P Aerc 1.00 0.0000

Quote No: 55 SUPERVISOR Stk/Sel UOM: EA EA  
F3=Substitute Item F5=Options, F7=Multi-Location

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE CP5LSDSK

**Elliott V7.X.001**  
Restricted Item When Not Present - Attribute CHEM-PERMIT  
OK

California Customer with no permit (attribute not attached)

**Note:** Depending on the Attribute Default Action Type, S or H, the item may not be added to the order or the whole order will be put on hold.

## Attribute Reporting

Since attributes are extensions and/or controls to a master record, there are no pre-defined reports. However, you can compile reports with a report writer or use the Mass E-Mail program to access the data and move it to a CSV format file.

For Example:

**Report Required:** Customers who have a permit to sell chemicals in California.

### In Mass E-Mail Select Tab

Customer Fields:	Attribute Code	= CHEM-PERMIT
eContact Relationship Fields	Primary Contact	= Y

### In Mass E-Mail Process Tab

1. Get Records = screen shown below

Reference	Name	EMail	File
000400 Beverly Supply Company	June Richardson	jrichards@bsc.com	Customer
000500 T-Shirts Unlimited	Kim Lee	kimlee@aol.com	Customer

Get Records Delete Options... Test send Send now Export ASCII...

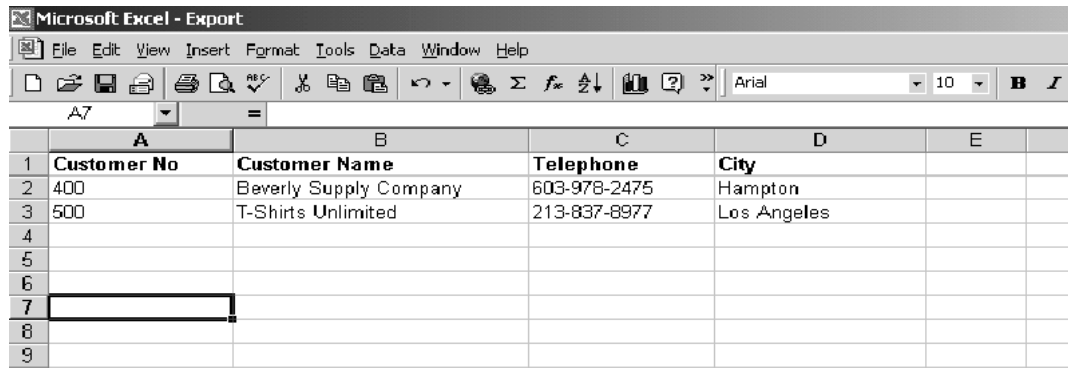
Exit ☐ Interact with Email client New Templates...

2 of 10 records matched...

2. Export ASCII

Select company Fields	Customer Number
	Customer Name
	Phone
	City

### Exported CSV File in Excel



	A	B	C	D	E	F
1	<b>Customer No</b>	<b>Customer Name</b>	<b>Telephone</b>	<b>City</b>		
2	400	Beverly Supply Company	603-978-2475	Hampton		
3	500	T-Shirts Unlimited	213-837-8977	Los Angeles		
4						
5						
6						
7						
8						
9						

If needed, we could have also exported:

Permit Number  
Expiration Date



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## eContacts

### Application Overview

eContacts is a CRM database designed for e-mail programs and web site authentication. Management and system users can easily and efficiently develop a feature rich and robust user database for their web site and use it with 3<sup>rd</sup> party applications, Elliott Software and Elliott Web Solutions.

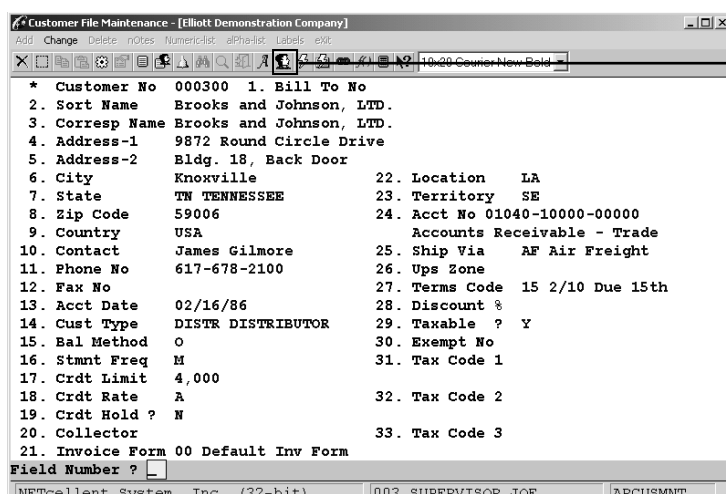
The eContacts database is divided into four areas of information for each contact. These sections are available by tab menus for each contact. These tabs menus consist of (1) Identification, (2) Web Access, (3) Billing and Credit Information, and (4) Relationships.

eContacts will integrate with the Elliott Software, Elliott Shopping Cart, Notes, and is the database for the Mass E-Mail program. The only requirement to using eContacts is a contact e-mail address. The **advantages and rewards of eContacts are further enhanced** by the Mass E-Mail Program. Users should read the Mass E-Mail chapter to better appreciate this CRM database and it's structuring.

### Run Instructions

Any master record can have an eContact and can be accessed anywhere you have access to Elliott Notes, e.g., order entry, Vendor File, order inquiry. Since the most frequently used master record for eContacts is the Customer File, go to:

A/R Main Menu → Maintenance → Customer File



Customer File Maintenance - [Elliott Demonstration Company]

Add Change Delete Notes Numeric-list Alpha-list Labels Exit

1. Bill To No  
2. Sort Name Brooks and Johnson, LTD.  
3. Corresp Name Brooks and Johnson, LTD.  
4. Address-1 9872 Round Circle Drive  
5. Address-2 Bldg. 18, Back Door  
6. City Knoxville  
7. State TN TENNESSEE  
8. Zip Code 59006  
9. Country USA  
10. Contact James Gilmore  
11. Phone No 617-678-2100  
12. Fax No  
13. Acct Date 02/16/86  
14. Cust Type DISTR DISTRIBUTOR  
15. Bal Method O  
16. Stmt Freq M  
17. Crdt Limit 4,000  
18. Crdt Rate A  
19. Crdt Hold ? N  
20. Collector  
21. Invoice Form 00 Default Inv Form  
22. Location LA  
23. Territory SE  
24. Acct No 01040-10000-00000  
Accounts Receivable - Trade  
25. Ship Via AF Air Freight  
26. Ups Zone  
27. Terms Code 15 2/10 Due 15th  
28. Discount %  
29. Taxable ? Y  
30. Exempt No  
31. Tax Code 1  
32. Tax Code 2  
33. Tax Code 3

Field Number ?

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE ARCUSMNT

eContacts Icon (F12)

**Click Add New**

### Contacts Window for Customer 300

**Click Add New**

eContact Information

ID Web Billing Rel. Notes Links Attr. Activity Ord. Inv.

E-MAIL:

Basic Information

Name:  Position:

☐ Link to 21st Century Enterprises

Company:

Address:

City:  State:  Zip:

Country:

☐ Link phone... ☐ Link to fax of 21st Century Enterprises

Phone:  x  Fax:

Home:  Birthday:

Mobile:

Save Delete Cancel E-mail...

Contact ID:  0

**Field Entry Descriptions – Identification Screen**

Name	Description
E-Mail	Contact's email address. This is how a contact is identified.
Name	Contact Name.
Position	15 alphanumeric characters.
Link to <customer name>	Click this box to use the name and address from the customer record. Leave it blank to use another name and address.
Company Address City State Zip Country	If you checked the "Link to" box above, then these fields will be populated with values from the Customer File and entry is not permitted. If you wish to fill in these fields, uncheck the "Link to" box above.
Link Phone...	Click this box to use the phone number from the customer record. Leave it blank to use another phone number.
Phone x	If you checked the "Link Phone" box above, then the phone field will be populated with the phone number from the Customer File and entry is not permitted. If you wish to fill in the phone number, uncheck the "Link Phone" box above.  The extension field can be filled in regardless if the "Link Phone" button is checked or not.
Link to fax of <customer name>	Click this box to use the fax number from the customer record. Leave it blank to use another fax number.
Fax	If you checked the "Link to fax of..." box above, then the fax field will be populated with the fax number from the Customer File and entry is not permitted. If you wish to fill in the fax number, uncheck the "Link to fax of..." box above.
Home	Contact's home telephone number.
Birthday	Contact's birthday.
Mobile	Contact's Mobile number.

**Web Access Screen**

This screen stores contact information for authentication, web access, e-mail management, and permission rights. Permission rights are based on a user defined **"Role"** assigned to the contact.


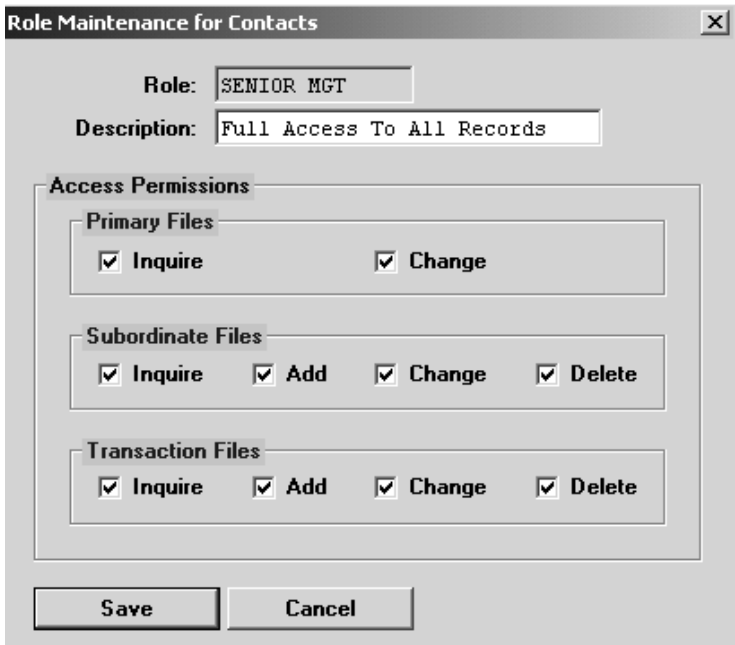
The screenshot shows a software window titled "eContact Information" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a tabbed interface with tabs for ID, Web, Billing, Rel., Notes, Links, Attr., Activity, Ord., and Inv. The "Web" tab is currently selected. The main content area is divided into two sections: "E-MAIL:" and "Web Access Information". Under "E-MAIL:", there is a "Name:" label. The "Web Access Information" section contains several fields: "Password:" (text box), "Confirm Password:" (text box), "Password Hint:" (text box), "Hint Value:" (text box), a "Role:" dropdown menu, a checkbox for "Block Web Access", a "Reason:" text box, and a "Date:" field with a calendar icon. Below this is the "E-Mail Details" section, which includes a checkbox for "Do not send E-mail", a checkbox for "Accepts HTML content", a "Date:" field with a calendar icon, a "+" button, a text box containing "0", and a label "BounceBacks". At the bottom of the window are buttons for "Save", "Delete", "Cancel", and "E-mail...", followed by a "Contact ID:" label and a text box containing "0".

## Entry Field Descriptions – Web Access Screen

This screen is divided into two sections, Web Access Information and E-Mail Details.

The Web Access Information fields only apply if you are using Elliott Web Solutions (Shopping Cart) or if you have a 3<sup>rd</sup> Party Shopping Cart that honors the access rights defined by the eContacts Role, (see next page).

The E-Mail Details applies to all Elliott Software users.

Web Access Information	Description
Password	Contact's password used when a login is required
Confirm Password	Used to confirm a newly added or changed password.
Password Hint	Additional verification such as "Mother's Maiden Name" Not currently implemented
Password Value	Answer to Password Hint
Block Web Access	Click to deny user access to web site areas where login is required
Reason	State why user was blocked
Date	Date user was blocked
Role	User Defined for <b>permission rights</b> to Elliott Software
<p><b>Define Roles:</b></p> <p>  </p> <p>Type in Role Name Click Role button Screen to right appears</p> <p><b>Primary Files:</b> This is the file that the contact is attached to; in this case it is the Customer file.</p> <p><b>Subordinate Files:</b> Files attached to the Customer File, e.g., Ship-To, eContacts File, Invoice History Inquiries, etc.</p> <p><b>Transaction Files:</b> Enter orders, apply cash receipts, etc.</p> <p>If "Add" is flagged, "Change" will be flagged automatically. If "Change" is flagged, "Add" is not automatic.</p> <p>If "Delete" is flagged, "Change" and "Inquire" are flagged automatically.</p>	
<b>Remember:</b>	You are not giving the eContacts rights to access these files, only permission to what they can do. Access to the files is determined by what you make available from your web site.
<b>In-house Salesman</b>	For <b>your salesmen</b> to view their customer records, add orders, etc., you would open the Salesman file and add them as an eContact. As a result, the Salesman File becomes the primary file and the Customer File and any transaction files are subordinates.
<b>NOTE:</b>	Roles are based by <b>Relationship</b> and are not universal. Roles only apply to the eContact and the record they are attached to in the relationship.

E-Mail Details	Description
Do Not Send E-Mail	Click Box to remove eContacts from the Mass E-Mail Program
Date	Date applied to above
Accepts HTML content	Click if eContact accepts HTML content
BounceBacks	Used to manually update how many e-mail messages have been returned due to delivery error. If count is high, user may consider removing the contact from the e-mail list.

## Entry Field Descriptions - Billing/Credit Window

Although the Billing/Credit folder applies to the Elliott Web solution System, it can also be used as a convenient way to store customer credit card information.

eContact Information for Edward M. Kwang of Netcellent System Inc.

Link Billing To: ☐ None ☐ Contact ☒ TESTING

Company: TESTING

Address:

City: HACIENDA HEIGHT State: CA Zip: 91745

Country:

Type	Card Number	Expires	Name	Primary
AMEX	*****1003	04/06	Edward M. Kwang	Yes

Open New Delete Payment Primary

Save Delete Cancel E-mail... Contact ID: 36

A lot of security is built into Elliott to protect sensitive information entered into Elliott. The credit card number is encrypted and will only display stars (\*) except for the last four digits. A workstation must be preauthorized before a user can charge a credit card. This authorization takes place from the Utilities menu in Global Setup. A credit card can be charged from the COP Payment Window, in Accounts Receivable and here in the eContact window. When the Payment button is pressed, Elliott will prompt for an amount and will charge the credit card that was highlighted.

Here are some notes to help you maximize your credit card processing:

- To qualify for a better rate when processing Visa cards, always pass the Zip Code (even if it is incorrect). Then the transaction category is CPS NO Card. For CMP, the rate is 1.99% in this category.

- If you don't pass the Zip Code, then the transaction will be considered as EIRF. For CMP, the rate is 2.29%.
- If you don't settle the same day, then the transaction will be considered as EIRF. For CMP, the rate is 2.29%.
- MasterCard does not care about the Zip Code. The standard Merit I rate for CMP is 2.03%.
- If it is a Corporate MasterCard (like a government or Ford issued card for an employee), then the DATA Rate I is 2.63%
- If you pass the customer number field for a Corporate MasterCard card, then you are in DATA Rate II which is 1.93%.
- **Therefore, the rule is (a) Always pass the Zip Code (for VISA); (b) Always pass the Customer Code (for Corporate MasterCard); (c) Always settle the same day (use Auto Settle).**
- Visa Check Card does not like AVSONLY (an authorization with \$0.00 amount). An alternative way of doing AVSONLY is to do an authorization of \$1.00 and never come back to perform the FORCE transaction.
- For some reason American Express does not validate the CVV2 value.
- For some reason, American Express only validates on the Zip Code and does not bother with the street address.

### Entry Field Descriptions – Billing/Credit Window

Name	Description
Link Billing To	You can link the name and address used in credit card authorization to the contact's name and address, the customer's name and address or not linked to either so that the name and address can be entered manually.
Company Address City State Zip Country	If the "Link Billing To" selection is "None," then the user can enter these fields. Otherwise, they are populated with information from the customer or the contact.

Multiple credit cards can be entered for each contact. The following fields detail the credit card information:

Name	Description
Type	Enter the credit card type (Visa, MasterCard, American Express, etc.).
Card Number	Enter the credit card number.
Expires	Enter the expiration date.
Name	Enter the the name that appears on the credit card.
Primary	Indicate if this is the primary credit card to use when charging this contact.



## Relationships Window

An eContact may have many relationships; the contact may work for two companies, a salesman may be the owner of another company, the customer is also a vendor, etc. Elliott eContacts tracks and manages these relationships for you.

When you open eContacts for a record, it will display all the associated eContacts as shown below. From this window we can edit, add new contacts, make a contact the primary contact in this relationship or delete a contact record.

Name	Phone	Position	E-mail	Primary
Joe Cabaza	909 622-5009 x 221	Consultant	joe@netcellent.com	No
Janet Fitzgerald	617-678-2100 x 300	Sales Rep	jef@bjltd.com	No
James Gilmore	617-678-2100 x 100	President	jamesg@bjltd.com	Yes

Edit... New... Make Primary E-mail... Delete... Exit

If an eContact has several relationships, you can view these by clicking on the contact's Relationships Tab as shown below.

**eContact Information for John Williams of TESTING**

**Rel.** | ID | Web | Billing | Notes | Links | Attr. | Activity | Ord. | Inv.

E-MAIL: john.william@earthlink.net  
Name: John Williams

An eContact can be related to more than one record.  
However, its address information can only be linked to its PRIMARY record.  
If the address of the PRIMARY relationship record changes,  
and this contact's address is linked to it, this address also will be changed.

Type	Reference	Location	Relationship
Customer	000100 TESTING	HACIENDA HEIGHT...	PRIMARY
Invoice	003034 John Q. Williams Company	Atlanta, GA	Transaction
Invoice	003035 John Q. Williams Company	Atlanta, GA	Transaction
Invoice	003037 John Q. Williams Company	Atlanta, GA	Transaction
Invoice	003038 John Q. Williams Company	Atlanta, GA	Transaction
Invoice	003059 John Q. Williams Company	Atlanta, GA	Transaction
Invoice	003064 John Q. Williams Company	Atlanta, GA	Transaction
Quote	00050486	.	Transaction

Make Primary Delete Relationship(s) ☐ Exclude transaction relationships  
Limit transactions to first: 100

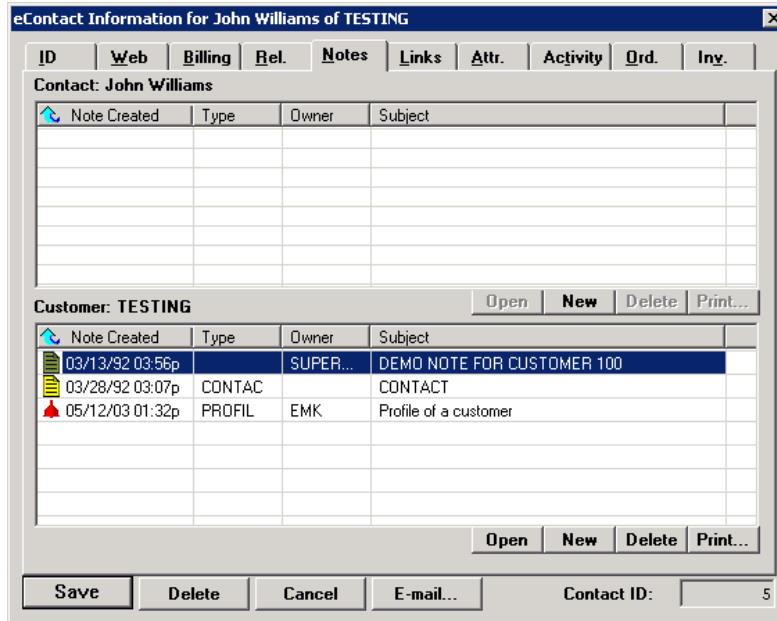
Save Delete Cancel E-mail... Contact ID: 5

In any Relationship there can only be one Primary Record, normally this is the file the eContact is attached to. This can also determine how the eContact's address information is managed from

relationship to relationship.

## Notes Window

The Notes tab will display all of the notes for the contact and the customer.



The screenshot shows a software window titled "eContact Information for John Williams of TESTING". It has a tabbed interface with tabs for ID, Web, Billing, Rel., Notes (selected), Links, Attr., Activity, Ord., and Inv. The "Notes" tab is active, showing two sections: "Contact: John Williams" and "Customer: TESTING". Each section contains a table with columns for Note Created, Type, Owner, and Subject. The "Customer: TESTING" table has three rows of data. At the bottom of the window are buttons for Save, Delete, Cancel, E-mail..., and a Contact ID field with the value 5.

Note Created	Type	Owner	Subject
03/13/92 03:56p		SUPER...	DEMO NOTE FOR CUSTOMER 100
03/28/92 03:07p	CONTAC		CONTACT
05/12/03 01:32p	PROFIL	EMK	Profile of a customer

You can add, change and delete the notes from here.

## Links Window

The Links tab will display all of the links for the contact and the customer.

The screenshot shows the 'eContact Information for John Williams of TESTING' window with the 'Links' tab selected. The window has a menu bar with 'ID', 'Web', 'Billing', 'Rel.', 'Notes', 'Links', 'Attr.', 'Activity', 'Ord.', and 'Inv.'. Below the menu bar, there are two sections: 'Contact: John Williams' and 'Customer: TESTING'. Each section contains a table with columns 'Description', 'Link', and 'Created'. The 'Contact' section has one row with 'Mapquest' and a URL. The 'Customer' section has two rows, one for 'Contract' and one for 'Mapquest'. At the bottom, there are buttons for 'Save', 'Delete', 'Cancel', 'E-mail...', and a 'Contact ID' field with the value '5'.

Contact: John Williams		
Description	Link	Created
Mapquest	http://www.mapquest.com/maps/map.adp?coun...	11/08/2005

Customer: TESTING		
Description	Link	Created
Contract	\\acct\acct\ELLIOTT\CONTRACT\license...	00/00/0000
Mapquest	http://www.mapquest.com/maps/map.adp...	11/08/2005

You can add, change and delete the links from here.

## Attributes Window

The Attributes tab will display all of the attributes for the contact and the customer.

The screenshot shows the 'eContact Information for John Williams of TESTING' window with the 'Attr.' tab selected. The window has a menu bar with 'ID', 'Web', 'Billing', 'Rel.', 'Notes', 'Links', 'Attr.', 'Activity', 'Ord.', and 'Inv.'. Below the menu bar, there are two sections: 'Contact: John Williams' and 'Customer: TESTING'. Each section contains a table with columns 'Attribute', 'Detail 1', 'Detail 2', 'Updated', and 'By'. The 'Contact' section is empty. The 'Customer' section has three rows: 'ABC', 'M1QTY', and 'M1QTYEXCEED'. At the bottom, there are buttons for 'Save', 'Delete', 'Cancel', 'E-mail...', and a 'Contact ID' field with the value '5'.

Contact: John Williams				
Attribute	Detail 1	Detail 2	Updated	By

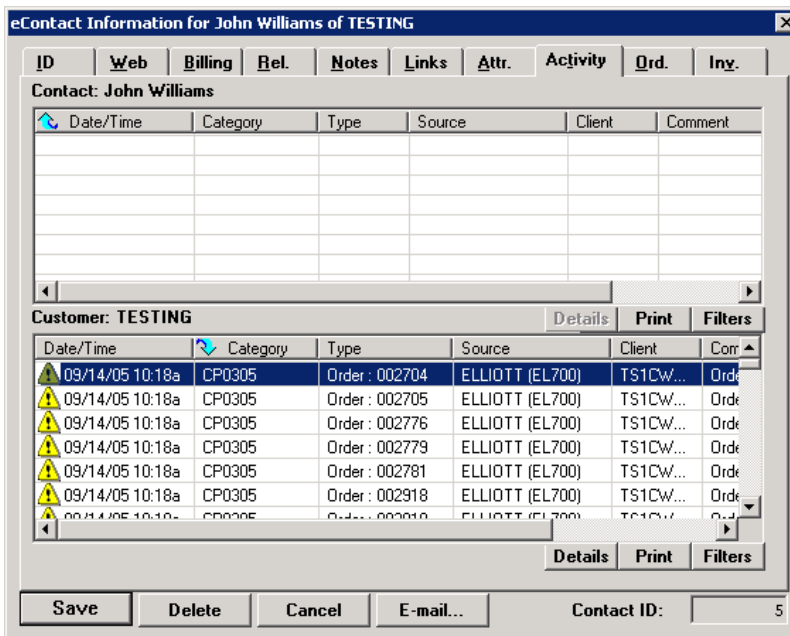
  

Customer: TESTING				
Attribute	Detail 1	Detail 2	Updated	By
ABC			01/08/04	SUPER...
M1QTY	M1 Qty		10/24/05	SUPER...
M1QTYEXCEED	M1 Qty Exceed		10/24/05	SUPER...

You can add, change and delete the attributes from here.

## Activity Window

The Activity tab will display some of the activity for the contact and the customer.



The screenshot shows the 'eContact Information for John Williams of TESTING' window with the 'Activity' tab selected. The window has a tabbed interface with 'Web', 'Billing', 'Rel.', 'Notes', 'Links', 'Attr.', 'Activity', 'Ord.', and 'Inv.'. The 'Activity' tab displays a table with columns: Date/Time, Category, Type, Source, Client, and Comment. Below this, the 'Customer: TESTING' section is visible, showing a list of orders with columns: Date/Time, Category, Type, Source, Client, and Comment. The orders listed are:

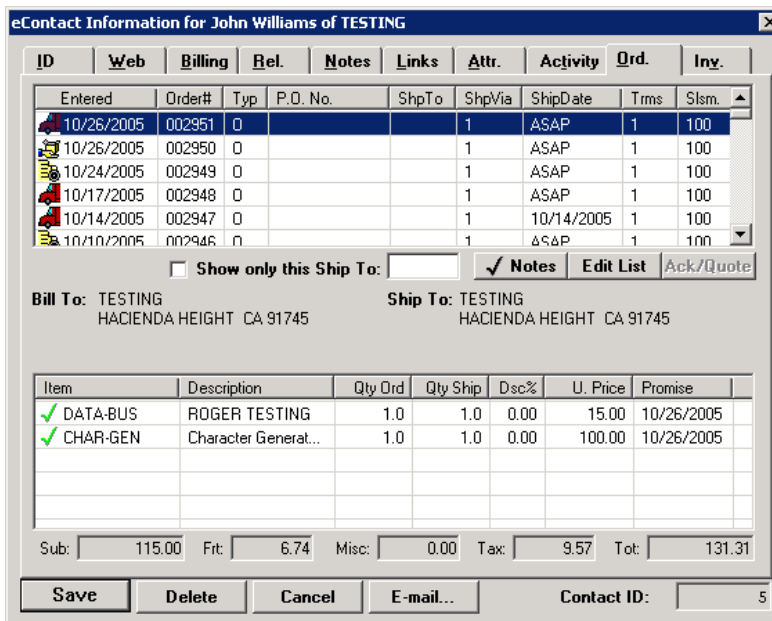
Date/Time	Category	Type	Source	Client	Comment
09/14/05 10:18a	CP0305	Order : 002704	ELLIOTT (EL700)	TS1CW...	Order
09/14/05 10:18a	CP0305	Order : 002705	ELLIOTT (EL700)	TS1CW...	Order
09/14/05 10:18a	CP0305	Order : 002776	ELLIOTT (EL700)	TS1CW...	Order
09/14/05 10:18a	CP0305	Order : 002779	ELLIOTT (EL700)	TS1CW...	Order
09/14/05 10:18a	CP0305	Order : 002781	ELLIOTT (EL700)	TS1CW...	Order
09/14/05 10:18a	CP0305	Order : 002918	ELLIOTT (EL700)	TS1CW...	Order

At the bottom of the window, there are buttons for 'Save', 'Delete', 'Cancel', and 'E-mail...', and a 'Contact ID:' field with the value '5'.

You can print and filter the information displayed.

## Orders Window

The Orders tab will display all of the orders and their line items for the customer.



The screenshot shows the 'eContact Information for John Williams of TESTING' window with the 'Orders' tab selected. The window has a tabbed interface with 'Web', 'Billing', 'Rel.', 'Notes', 'Links', 'Attr.', 'Activity', 'Ord.', and 'Inv.'. The 'Orders' tab displays a table with columns: Entered, Order#, Typ, P.O. No., ShpTo, ShpVia, ShipDate, Trms, and Slsm. The orders listed are:

Entered	Order#	Typ	P.O. No.	ShpTo	ShpVia	ShipDate	Trms	Slsm
10/26/2005	002951	O			1	ASAP	1	100
10/26/2005	002950	O			1	ASAP	1	100
10/24/2005	002949	O			1	ASAP	1	100
10/17/2005	002948	O			1	ASAP	1	100
10/14/2005	002947	O			1	10/14/2005	1	100
10/10/2005	002946	O			1	ASAP	1	100

Below the table, there are buttons for 'Show only this Ship To:', 'Notes', 'Edit List', and 'Ack/Quote'. The 'Bill To' and 'Ship To' information is displayed as:

Bill To: TESTING  
HACIENDA HEIGHT CA 91745

Ship To: TESTING  
HACIENDA HEIGHT CA 91745

Below this, there is a table with columns: Item, Description, Qty Ord, Qty Ship, Dsc%, U. Price, and Promise. The items listed are:

Item	Description	Qty Ord	Qty Ship	Dsc%	U. Price	Promise
✓ DATA-BUS	ROGER TESTING	1.0	1.0	0.00	15.00	10/26/2005
✓ CHAR-GEN	Character Generat...	1.0	1.0	0.00	100.00	10/26/2005

At the bottom of the window, there are buttons for 'Save', 'Delete', 'Cancel', and 'E-mail...', and a 'Contact ID:' field with the value '5'. The summary section shows: Sub: 115.00, Frt: 6.74, Misc: 0.00, Tax: 9.57, Tot: 131.31.

You can sort the information displayed by clicking on the header of each column.

## Invoices Window

The Invoices tab will display all of the invoices and their line items for the customer.

eContact Information for John Williams of TESTING

ID	Web	Billing	Rel.	Notes	Links	Attr.	Activity	Ord.	Inv.
Invoiced	Inv. #	Typ	P.O. No.	ShpTo	ShpVia	ShipDate	Trms	Slsm.	
08/31/2005	003241	O			1	ASAP	1	100	
07/19/2005	003240	C			1	ASAP	1	100	
06/28/2005	003239	O			1	ASAP	1	100	
06/27/2005	003238	O			1	ASAP	1	100	
06/27/2005	003237	O			1	ASAP	1	100	
06/27/2005	003236	O			1	ASAP	1	100	

☐ Show only this Ship To:  ☒ Notes

**Bill To:** TESTING  
HACIENDA HEIGHT CA 91745

**Ship To:** TESTING  
HACIENDA HEIGHT CA 91745

Item	Description	Qty Ord	Qty Ship	Dsc%	U. Price	Promise
DATA-BUS	ROGER TESTING	10.0	10.0	0.00	15.00	08/31/2005

Sub: 150.00    Frt: 7.91    Misc: 0.00    Tax: 12.47    Tot: 170.38

**Contact ID:** 5

You can sort the information displayed by clicking on the header of each column.

## Managing eContact Information

The purpose of relationships is to have one eContact record that can be maintained throughout the system. If you change the eContact information in the **Identification Screen**, it will update that eContact wherever he has a relationship.

**Exception to The Rule** The **Position Field** is unique to a relationship. Changes in one relationship will not update other relationships.

If you flag **Use Address of . . . .**, **Use Phone**, or **Use Fax of . . . .** then changes cannot be made to these fields.

If eContact is using the above address information of the Primary record, then whenever changes are made to this record (Customer File in our example) it will update the eContact information globally. **Address information can only be linked to One Primary record throughout the system.**

If an eContact requires a different address for different relationships, do not flag the **Use “ . . . . ”** fields.

**Web Access Information** Unique to the relationship. Changes in one relationship will not update other relationships.

**Billing/Credit Information** Unique to the relationship. Changes in one relationship will not update other relationships.

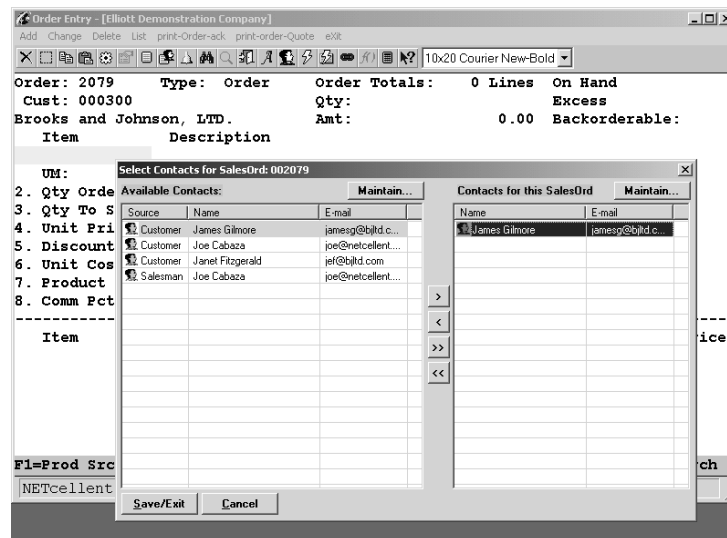
**E-Mail Address** This is the eContact identifier. If you change this e-mail address in another relationship, the system will create a new eContact.

## Using eContacts in COP

The following are just a few examples of how you can use eContacts to improve Customer Service and user productivity:

### Change Primary Contact For Order

Open eContacts in either the order header, line item entry or billing screen. This will open the contacts available for the order customer of record and show the Primary Contact. Notice that contact window displays: **Select Contacts for SalesOrd: 002079**.



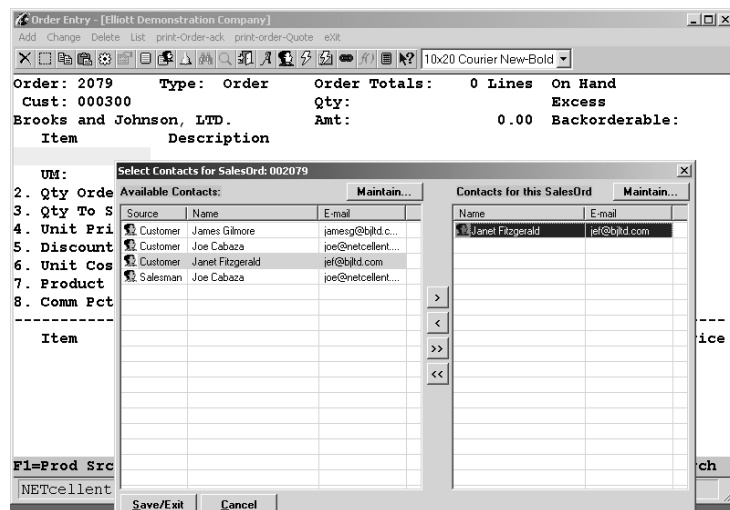
To Change Order Contact: Highlight eContact (left window) and click the right caret icon (>) or double click to add. Double right caret (>>) Adds All

To Remove Previous Contact: Highlight eContact (right window) and click the left caret icon (<) or double click to remove. Double left caret (<<) Removes All

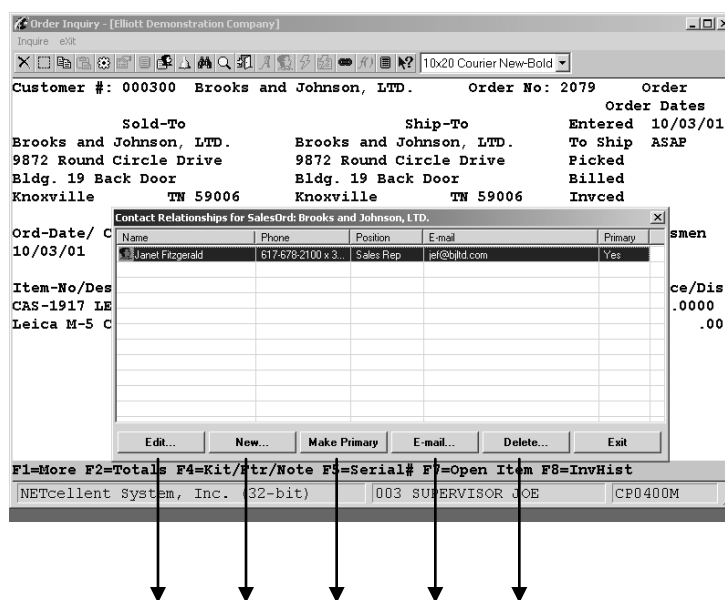
New Order Contact Added  
Old Contact Removed

**Maintain:** Allows maintenance to the eContact records, add a new record, send e-mail, add notes and view attributes.

**NOTE:** The right window will be the contacts available for SalesOrd: 002079 (see next page).



## Order Inquiry: Order 002079



Even in Inquiry Mode, all eContacts functions are available.

## eContacts Review

An eContact record is its own entity. If it does not belong to or part of any master record, it is only linked to a master record; in our examples presented, a Customer File and Sales Order. In each relationship, the contact's Position, Web Access, and Billing/Credit information are unique to that relationship.

Any notes you create for an eContact, regardless of where they were created, will be available globally for that contact.

The e-mail address is the eContact identifier. If you change the e-mail address, the system creates a new eContact for that e-mail address.

eContacts authenticates a contact and allows you to grant them Inquiry, Add, Change, and Delete permissions to files you make available on your web site.

eContacts integrates to the Elliott Software and Elliott Web Solutions. The **biggest advantage** of eContacts in the Elliott Software is **quick access to contacts** in a relationship with a master record and **immediate e-mail capabilities** from the eContact record. They can improve user productivity and enhance Customer Relationship management.



## Mass E-Mail

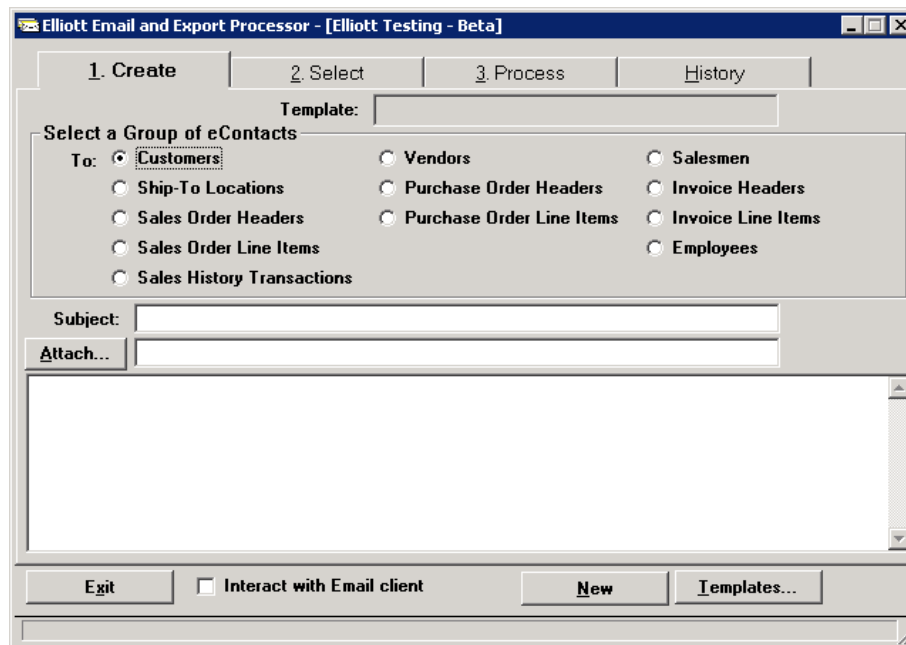
### Application Overview

Mass E-Mail is designed to give you great flexibility and usability in creating and managing outgoing e-mail. Integrated with Elliott Software, eContacts and Elliott Web solutions, Mass E-Mail allows you to group your mailings by up to **twelve categories** (Customers, Vendors, Salesmen, etc.) and gives you **10 “And/Or” selection filters based on any field in a master record**, such as Customer File and Vendor File.

With the template feature, you can use variables to access fields in the master record and tailor the Mass E-Mail message with information that applies only to each individual recipient. Another plus feature is that you can export a mailing list to an ASCII CSV file format for use with other software programs.

### Run Instructions

Mass E-Mail is a stand-alone module that uses the **Elliott eContacts File** as its database for e-mail addresses. Open the Elliott desktop folder and click Mass E-Mail. Alternatively, you may create a short cut or use the start command **\*:\*\*\EL700ME.EXE** from the Run window or command prompt, (\* is the disk drive where Elliott is installed and \*\* is your Elliott directory).



Elliott Mass E-mail Processor Screen

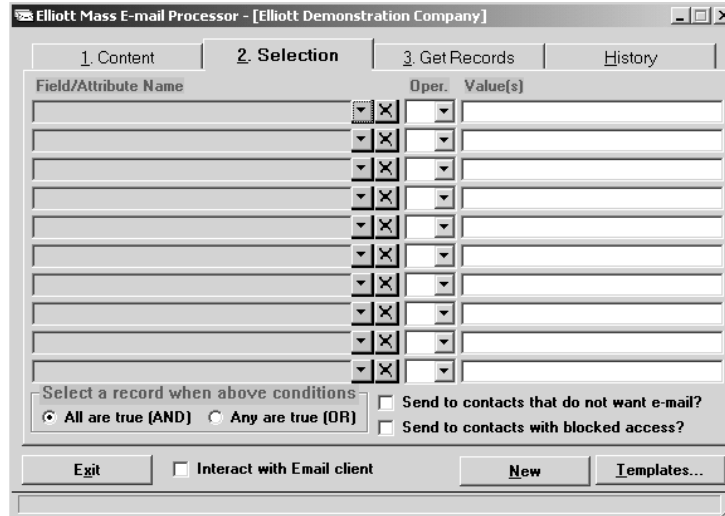
## Entry Field Descriptions – Content Tab

Field	Description
Select Group of Contacts	<p>Customers: eContacts in A/R Customer file (ARCUSFIL)</p> <p>Ship-To Locations: eContacts in COP Ship-To File (CPSHPFIL)</p> <p>Sales Order Headers: eContacts in COP Order Header File (CPORDHDR)</p> <p>Sales Order Line Items: eContacts in COP Order Line Item File (CPORDLIN)</p> <p>Sales History Transactions: eContacts in COP Order History File (CPHSTTRX)</p> <p>Vendors: eContacts in A/P Vendor file (APVENFIL)</p> <p>Purchase Order Headers: eContacts in PO Header File (POORDHDR)</p> <p>Purchase Order Line Items: eContacts in PO Line Item File (POORDLIN)</p> <p>Salesman: eContacts in A/R Salesman file (ARSLMFIL)</p> <p>Invoice Headers: eContacts in Invoice Header File (CPINVHDR)</p> <p>Invoice Line Items: eContacts in Invoice Line Item File (CPINVLIN)</p> <p>Employees: eContacts in employee files (PREMPFIL)</p> <p><b>Only one Group</b> type can be selected per mass mailing. <b>However</b>, in the tab “2. Selection”, the eContact record and additional master records are available.</p> <p><b>NOTE:</b> We listed the master record file name because all fields from this file are available as selection criteria, as well as the fields in the additional master records.</p>
Subject:	Mass E-Mail subject
Attach	Attach document if needed
Interact with E-Mail Client	<p>Click to use your default e-mail program</p> <p><b>Note:</b> Differences between the Elliott E-mail Processor and other e-mail programs will be discussed when we build a template.</p>
Templates	Click to use or create template. Building templates will be discussed later.

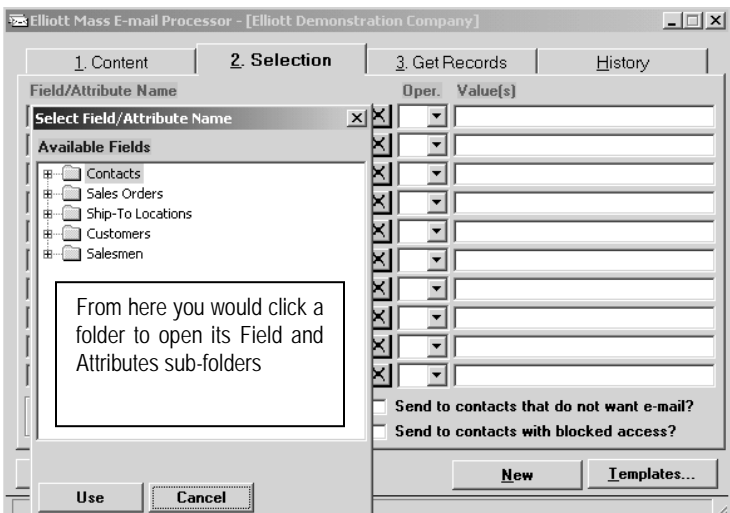
## Field Entry Descriptions – Selection Tab

This screen allows you to filter search criteria down to a specific field name within a master record. To further enhance the program, we include additional master records to sub-define additional fields not in the main master record. For example:

Mass E-Mail to customers (ARCUSFIL) who have not placed an order in the last 90 days (CPHDRFIL) for selected Salesman Territories (ARSLMFIL).



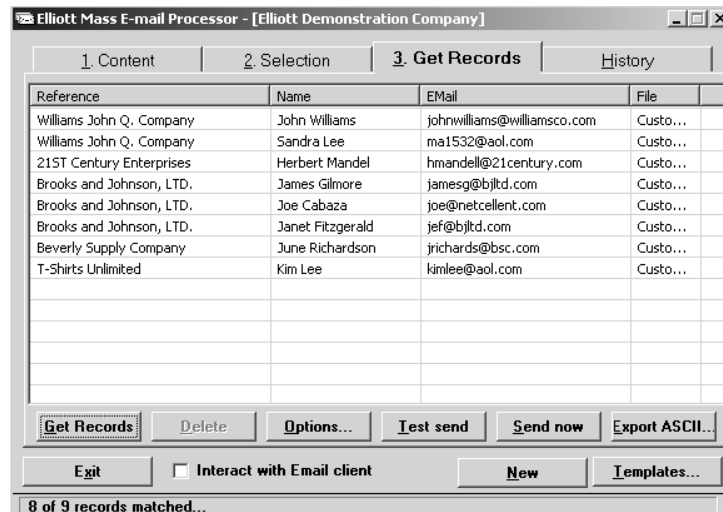
Elliott Mass E-mail Selection Screen

Field	Description
Field/Attribute Name	<p>Click the down triangle (▼) to access fields and attributes within master records. For example: For Sales Order Contacts, the following master records are available:</p> 

<b>NOTE:</b>	To delete a Field/Attribute Name from your selection, click the X Box.
Oper.	<p>Operators Available:</p> <p>EQ Equal To</p> <p>NE Not Equal To</p> <p>GT Greater Than</p> <p>GE Greater Than or Equal To</p> <p>LT Less Than</p> <p>LE Less than or Equal To</p> <p>BT Between</p>
Value(s)	<p>Value for the Field/Attribute Name.</p> <p><b>NOTE:</b> If Value is entered as 123 ABC the space could indicate “OR” or “BETWEEN” depending on the operator used. If Value is entered as “123 ABC” the quotation marks make it a string, (one word).</p> <p>Examples = 123 ABC means Equal to 123 or ABC  ≠ 123 ABC means Not Equal to 123 or ABC  BT 123 ABC means Between 123 and ABC  = “123 ABC” means Equal to 123 ABC</p> <p><b>Date format</b> = YEARMMD  LE 20010705 means less than or equal to (on or before)  July 5, 2001</p>
All are True <b>(AND)</b> Any are True <b>(OR)</b>	<p>Applies to column of the Field/Attribute Names selected.</p> <p>You can only choose one statement.</p>
Send to contacts that do want e-mail?	If clicked, this would override eContact records that have checked “Do not send Mass E-Mail”.
Sent to contacts with blocked access?	If clicked, this would override the eContact records that have checked “Block Web Access.”
Interact with E-mail Client	The user has the option of using their default e-mail program such as Outlook or using the Elliott E-mail Processor. The difference between Elliott and others are detailed at the end of this chapter.
Use Templates	See Templates Topic in this chapter for a better understanding of what can be done.

## Field Entry Descriptions – Get Records


When you first go to Tab 3. Get Records, you will have an empty screen and must click the Get Records box in lower menu. This will bring up the Contact Group records from Tab 1 that meet the selection criteria in Tab 2.



Get Records Screen – Completed

**NOTE:** After you complete “Get Records”, the system will display the number of records matched in the lower left screen. An eContact with more than one relationship will be **consolidated** into one record to **avoid duplicate e-mails**. In the above figure, one eContact had two relationships and that is why the figure displays “8 of 9 records matched.”

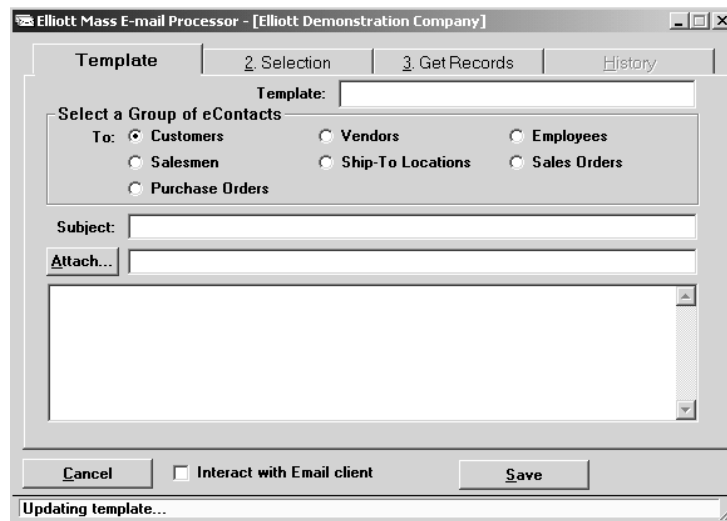
## Field Entry Descriptions – Get Records

Field	Description
Reference	Company Name listed in default order by Customer Number. In the Reference column bar, left click mouse to sort alphabetically in ascending order and left click mouse again to sort in descending order.
Name	eContact name Same sort features in Name Menu Bar
E-mail	eContact e-mail address Same sort features in E-mail Menu Bar
File	Master record of eContact source
Get Records	
Delete	When you highlight a record, you can use this button to delete it. This is an additional way to edit your e-mail list beyond the criteria you selected.
Options	Gives you the option to specify a short delay between outgoing email messages to minimize the burden on your network.
Test Send	Allows you to send a test e-mail to preview the outgoing message. This is very useful for editing, proofing and finalizing. To “ <b>Test Send</b> ” you must be logged into your e-mail program as you will be asked for an email address.
Send Now	Click this button to send your Mass E-Mail. To send, you must be logged into your e-mail program. When you use “ <b>Send Now</b> ”, the system will prompt you with a Confirmation Message as to the number of messages you are sending out and if you want to continue.
Export ASCII	 <p>Allows you to select fields from all master records available. Click folder to open, open Fields folder, highlight field, drag and drop into Fields To Export window or click the Right caret (&gt;). After you have selected the fields you want to export, define the drive and file name you want to <b>Export To</b> and then click <b>Export</b>.</p> <p>Clicking the Rolodex Icon will select all fields from the Contact File for Export.</p>

## Creating Mass E-Mail Templates

Templates allow you to design a message that you intend to use repeatedly with minor changes at each mailing. The beauty of Elliott Mass E-Mail Templates is that they let you use data fields from the master record via the use of variables. **Variables are available in each field of each master record.** This lets you use information that is unique to each e-mail recipient and construct a more meaningful message.

**Step 1.** From the Elliott Mass E-Mail Processor window → Click Templates → Click New

The screenshot shows a software window titled "Elliott Mass E-mail Processor - [Elliott Demonstration Company]". It has four tabs: "Template", "2. Selection", "3. Get Records", and "History". The "Template" tab is active. Inside, there's a "Template:" text box. Below it, a section "Select a Group of eContacts" contains radio buttons for "Customers" (selected), "Vendors", "Employees", "Salesmen", "Ship-To Locations", "Sales Orders", and "Purchase Orders". There are also text boxes for "Subject:" and "Attach:". At the bottom, there are "Cancel" and "Save" buttons, and a checkbox for "Interact with Email client". A status bar at the very bottom says "Updating template...".

Enter Template Name: This should be related to the mailing.

Select Group of eContacts: What audience is the e-mail designed for.

Enter Subject: Subject that will appear in your e-mail. This can be edited as needed.

Attach: Attach documents when necessary. Attachments can be changed as needed.

**Step 2.** Complete Body Text

See next page for **Using Variables**.

**Step 3.** Save

Remember, a template is a basic design that is going to be used repeatedly. Other than the template name, it can be edited as needed.

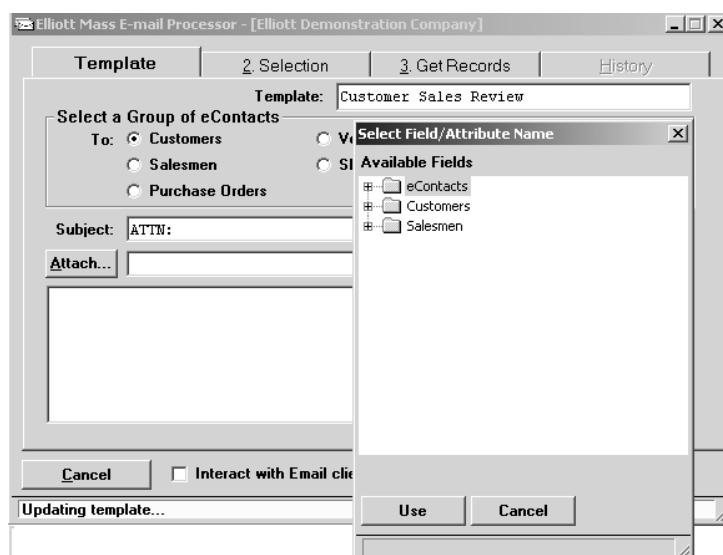
## Using Variables

Variables allow you to insert master record fields into the Subject Line and text body that personalize and make the mass e-mail unique to each recipient.

For this example, we will build a template using variables to serve a three-fold purpose:

1. Enhance Customer Relationship Management
2. Create an opportunity to sell more product and services
3. Review Account Balances with customers

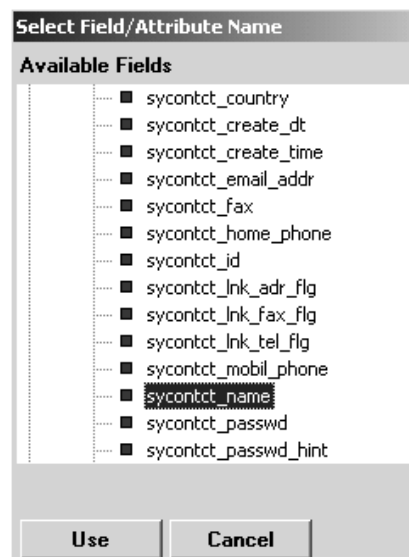
Since this e-mail will contain sensitive information, we could filter it to Primary Contact or Position titles, (Field 3 in the Identification screen for eContacts), such as President, Controller, VP Finance, etc.



In the area where you need to insert a variable, **right click your mouse to access the master file** where the field you need is located. Since we want to use the eContacts name and not the Primary Contact in the A/R Customer File, we would open the eContact's master record.

Click the eContacts folder icon to access and open field names folder. Find and highlight the contacts name field, and click Use. This will insert the name in the space where you right clicked to access the master files.

(What could have more impact or be more personalized than seeing your name in the Subject line?)





## Variables Used

Subject: ATTN: @@CU.sycontct\_name@@

Attach...

Customer . . . . . @@CU.cus\_name@@  
Purchases YTD . . . . @@CU.cus\_sales\_ytd@@  
Purchases PTD . . . . @@CU.cus\_sales\_ptd@@  
Invoices YTD . . . . @@CU.cus\_inv\_ytd@@  
Last Purchase Date. . @@CU.cus\_last\_sale\_dt@@  
Current Balance . . . @@CU.cus\_balance@@  
Avg. Days To Pay . . . @@CU.cus\_avg\_pay\_ytd@@

Although it is not a good idea to e-mail sensitive information, we only selected these fields to show you the power and flexibility of using variables. Also note, **we accessed two master files** to get the field names; the eContact file and the A/R customer file.

## Test Send E-Mail

From: Joe Cabaza To: Joe Cabaza  
Subject: ATTN: John Williams Cc:

We pride ourselves in Customer Service and would like to briefly review your account with you. We will be contacting you soon to see how we can be of better service to you.

Customer . . . . . Williams John Q. Company  
Purchases YTD . . . . .44,759.86  
Purchases PTD . . . . .21,848.97  
Invoices YTD . . . . .20  
Last Purchase Date. . .1,255.22  
Current Balance . . .4,412.44  
Avg Days To Pay . . . .66

## Elliott E-mail Processor Versus Default E-Mail Client

1. Elliott does not support text formatting.
2. Elliott uses "Bcc" Blind Carbon Copy, which uses 1 address in the email "To:" field and hides all the other addresses. Not all e-mail programs support this feature.
3. Using variables for Elliott field names that appear in the e-mail is **unique only to Elliott**.

Get Records Delete Options... Test send Send now Export ASCII...

Exit ☐ Interact with Email client New Templates...

The default value is Elliott Email Processor. Click to use your e-mail client.

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## E-Mail & CRM

### Application Overview

During the development of our Web Solutions Programs we recognized that not all businesses have the need or budget to implement a full scale Web accounting and distribution system. It is because of those businesses that we included our eContacts and Mass E-Mail as standard bundles to Elliott Software. This allows businesses to use many of our Web features to improve their functionality, enhance Customer Relationship Management and eventually migrate to our Web solutions programs as needed.

Our Customer Order Processing module has many web related features, some of which are obvious while others are salient. It is for two of those salient features that we would like to show you how you can add that extra touch to your Customer Relationship Management practices.

### Order Acknowledgement

Imagine how a customer perceives you, your company and your service when they receive an e-mail confirming their order, especially when the e-mail contains the items, quantities and prices. Elliott makes the e-mail possible for you, automatically or in batch mode.

The screenshot displays the 'Order Entry - [Elliott Demonstration Company]' window. It features a menu bar with 'Add', 'Change', 'Delete', 'List', 'print-Orderack', 'print-order-Quote', and 'exit'. Below the menu is a toolbar with various icons and a printer icon. The main area contains the following order details:

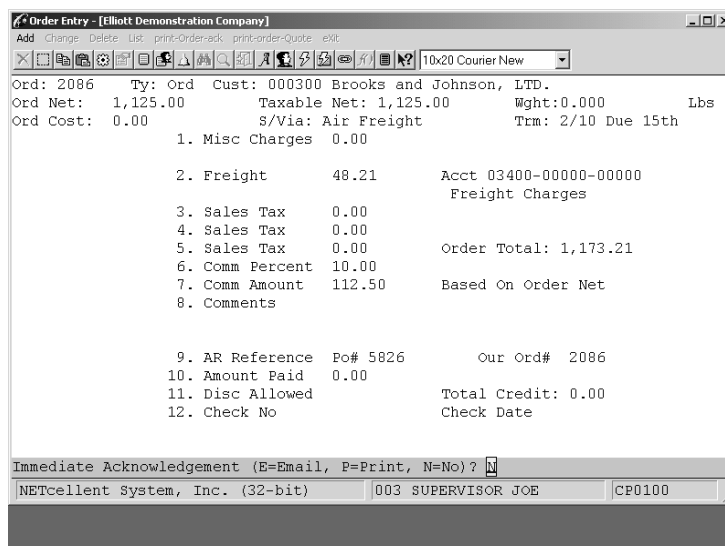
* Order No	2086		
1. Order Date	10/09/01	2. Order Type	O
3. Cust Po No	5826	19. Salesmen:	Phantom N
4. Cust No	000300	19. No	100 Pct Comm 100.00
5. Brooks and Johnson, LTD.			Jonathan S. Baumgard
6. 9872 Round Circle Drive		19. No	Pct Comm
7. Bldg. 19 Back Door			
8. Cty Knoxville	St TN	19. No	Pct Comm
Zip 59006	Ctry USA		
9. Ship-To No	Same	Contact:	Joe Cabaza
10. Brooks and Johnson, LTD.		20. Tax Cd 1	0.0000
11. 9872 Round Circle Drive		21. Tax Cd 2	
12. Bldg. 19 Back Door		22. Tax Cd 3	
13. Cty Knoxville	St TN	23. Disc Pct	0.00
Zip 59006	Ctry USA	24. Job No	
14. Ship Date	A.S.A.P.		
15. Ship Via	AF Air Freight	25. Whse Loc	LA Los Angeles
16. Terms	15 2/10 Due 15th	26. Taxable?	Y
17. Frt/Ord St			
18. Ship Instr			

Field Number ?

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Order Entry Header Screen

For convenience we have completed the order and in the Billing Screen we have pressed Enter to save and start another order. See next page.



Order Entry - [Elliott Demonstration Company]

Ord: 2086 Ty: Ord Cust: 000300 Brooks and Johnson, LTD.  
Ord Net: 1,125.00 Taxable Net: 1,125.00 Wght:0.000 Lbs  
Ord Cost: 0.00 S/Via: Air Freight Trm: 2/10 Due 15th

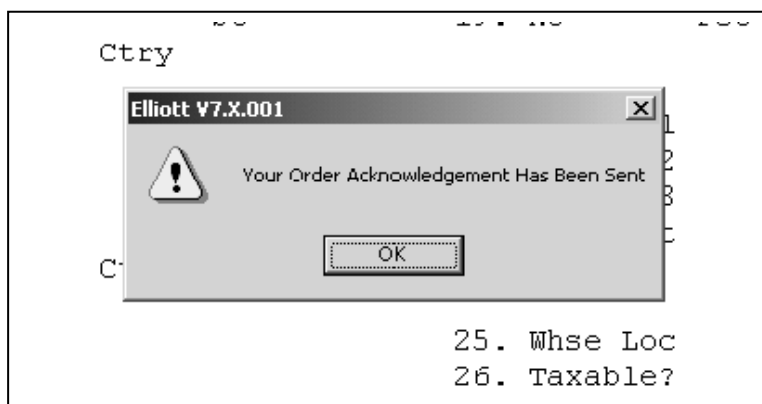
1. Misc Charges 0.00  
2. Freight 48.21 Acct 03400-00000-00000  
Freight Charges  
3. Sales Tax 0.00  
4. Sales Tax 0.00  
5. Sales Tax 0.00 Order Total: 1,173.21  
6. Comm Percent 10.00  
7. Comm Amount 112.50 Based On Order Net  
8. Comments  
9. AR Reference Po# 5826 Our Ord# 2086  
10. Amount Paid 0.00 Total Credit: 0.00  
11. Disc Allowed  
12. Check No Check Date

Immediate Acknowledgement (E=Email, P=Print, N=No)? ☒ E

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Send Immediate Acknowledgement: Default flag in COP Global Setup.

**Select E=Mail** to send an Order Acknowledgement. The system will verify the Contact's e-mail address from the Order Header screen and send an e-mail to that address. During Add Order or Change Order modes, you can click the eContact Icon to change the contact for the order.



Confirmation that the e-mail has been sent.

## Batch Mode E-Mail Order Acknowledgement

COP Main Menu → Processing → Order Processing → Print Order Acknowledgement → E-Mail

The screenshot displays the 'Order Entry - [Elliott Demonstration Company]' window. The main menu bar includes 'Add', 'Change', 'Delete', 'List', 'print-Order-ack', 'print-order-Quote', and 'exit'. The toolbar contains various icons for file operations and a dropdown menu set to '10x20 Courier New'. The main data area lists order fields: 1. Order No, 2. Order Type, 3. Cust Po No, 4. Cust No, 5., 6., 7., 8. Cty, 9. Ship-To, 10., 11., 12., 13. Cty, 14. Ship Date, 15. Ship Via, 16. Terms, 17. Frt/Ord \$, 18. Ship Instr, 19. Salesmen: No, and Pct Comm. A 'Phantom' label is visible in the top right. Overlaid on this is the 'Print Order Acknowledgments' dialog box, which contains the following fields: 'Starting Order No' (with a text input field), 'Ending Order No', 'Starting Entry Date', 'Ending Entry Date', 'Correspondence Address', 'Correspondence Phone #', and 'Send Duplicate Email ?'. The status bar at the bottom reads 'NETcellent System, Inc. (32-bit) | 003 SUPERVISOR JOE | CP0100'.

### E-Mail selection Options

**Note:** Same CRM functionality also available in Sales Desk.

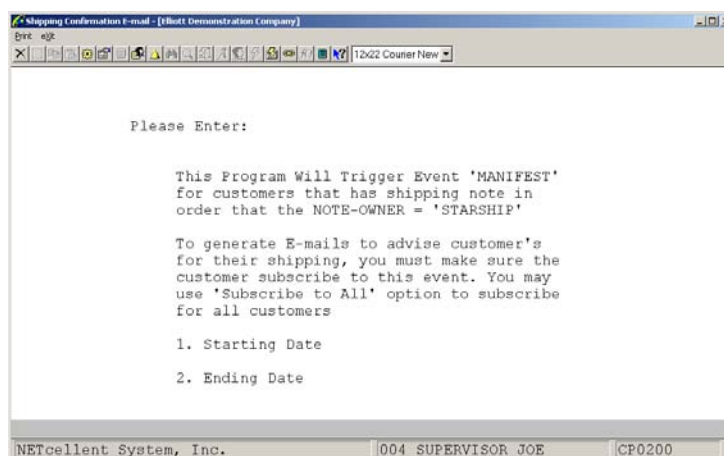
## E-Mail Shipping Acknowledgment

This feature allows you to batch e-mail customers notifying them that their order has shipped. The only requirement to use this feature is:

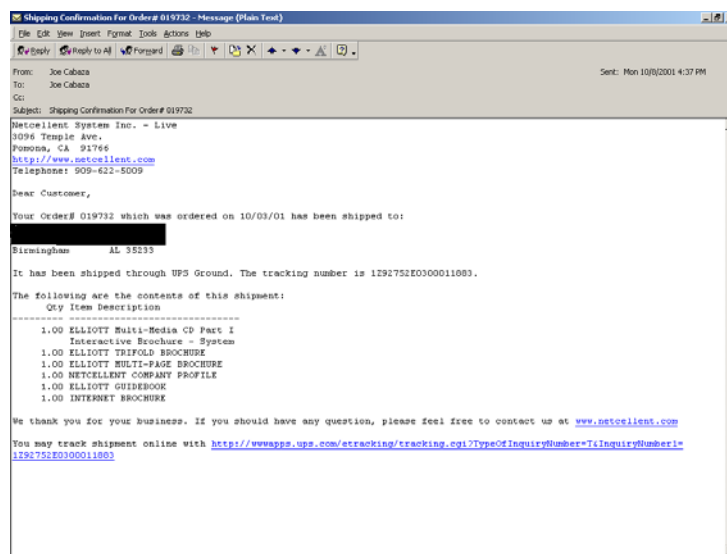
1. Starship Manifest Module or third party manifest program that can write to an Elliott note. Alternatively, the user can write a Manifest Note where the owner is "Starship."

### Run Instructions:

COP Menu → Processing → Pick/Pack Tickets & Ship Labels → Print → Shipping E-Mail



The system will select all orders based on what you defined Pick/Pack & Ship tickets in global Setup.



Auto generated e-mail message with links to track the shipment online at UPS

## Enhanced CRM: Customer calls to inquire on order shipping status

**Step 1.** From COP Order inquiry open Starship/Elliott Note Attached to Order

**Elliott Note Maintenance**

Subject: SHIPMENT+1461 Folder:   
 Type: SHIP StartShip   
 Created: 10/03/01 11:55am Owner: STARSHIP   
 Modified: 10/03/01 11:55am Modified by: STARSHIP

Ship Date:	10/3/2001
Pkg#:	1
ShipVia:	UPS Ground
Track#:	1292752E0300011883
Weight:	2
Freight:	4.27

Buttons: Save/Close, Close, New, Delete, Insert..., Tickler..., Prev, Next, First, Last, Copy..., Print

D:\ELLIOTT\DATA\_02 Order 019732

**Step 2.** Right click on Notes Tracking Number – Go to UPS Web Site from COP Note

**Elliott Note Maintenance**

Subject: SHIPMENT+1461 Folder:   
 Type: SHIP StartShip   
 Created: 10/03/01 11:55am Owner: STARSHIP   
 Modified: 10/03/01 11:55am Modified by: STARSHIP

Ship Date:	10/3/2001
Pkg#:	1
ShipVia:	UPS Ground
Track#:	1292752E0300011883
Weight:	2
Freight:	4.27

Buttons: Save/Close, Close, New, Delete, Insert..., Tickler..., Prev, Next, First, Last, Copy..., Print

D:\ELLIOTT\DATA\_02 Order 019732

Right-click context menu options: Online with UPS, UpperCase, LowerCase, ProperCase, Insert Line, Delete Line, Copy, Clear, Cancel

Order No: 19732

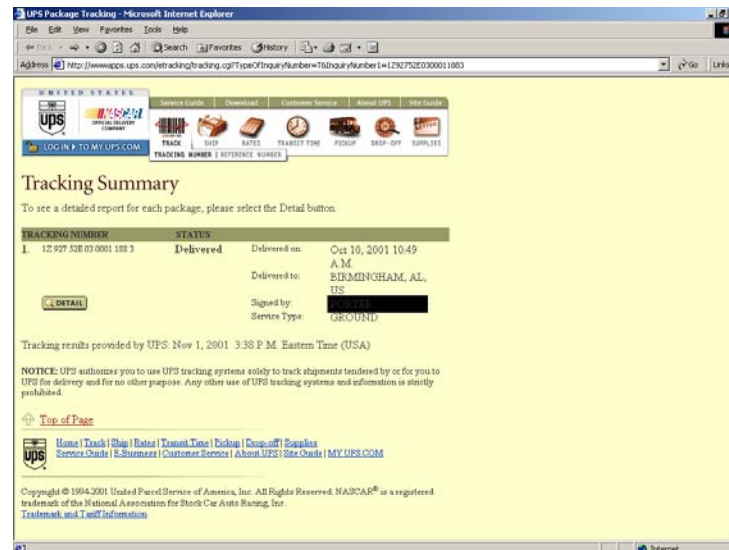
Item	Quantity	Unit	Price
Media	1.00		.00
D BROC	1.00		.00
PAGE B	1.00		.00
PANY P	1.00		.00
BOOK	1.00		.00
PURE	1.00		.00

Total Order Amount: .00

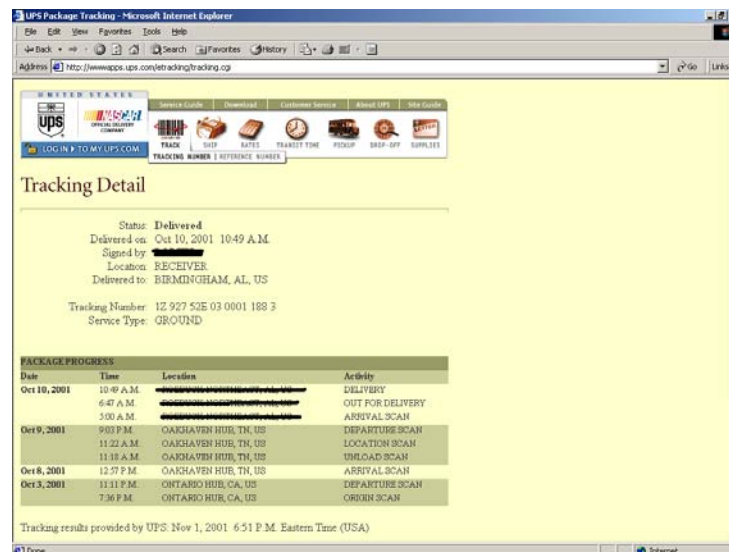
F1 = Next Page Return = Specify Order No Esc = End

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### Step 3. Give Customer Tracking Summary for his order



### Step 4. Give Customer Tracking Detail – Return to COP Order Inquiry



### Step 5. Ask customer for new order.



## Stock Watch

Stock Watch is an automatic and easy to use feature in Sales Desk that notifies customers when an out of stock item they ordered, or are interested in, has been received into inventory. In its purest form, all the user has to do is answer Yes or No if the customer wants to be notified and the system handles the rest of the process automatically.

The level of automation (user input) is determined by the Stock Watch setup. To use Stock Watch you must first enable it and set your default values. See System Global Setup (Events Handling) of this manual.

## Using Stock Watch

**Fully Automatic Setup:** In order line entry, when an item has insufficient quantity available ( $\leq 0$ ), the user will be asked if the customer wants to be notified when the item is received. If the customer says yes, Stock Watch will trigger an e-mail to the customer when the item is received into inventory from a Purchase Order and also alert you if the customer does not have an e-mail address in the Customer File. For these No E-Mail situations, you can use Template Variables as discussed in the Advanced Features of Specific Events.

Customer No 000300	Cu	NETcellent Windows System
Brooks and Johnson, LTD.	Ty	Quantity Insufficient
Memphis TN 38106	2/10 Due 15th	Limit 4,000
-----		
:1 25 Meg Clock For Mother Board	FOB Avg Cost	12.81
:2 Clock - 25M	Qty On Hand	83
am P Elliott V7.X.001		5
jula Would You Like To Be Notify When We Receive The Item ?		2
	Qty On Order	20
	Qty BO	0

Sales Desk Screen Section – Notify Customer

**Semi-Automatic Using All Features:** This gives the user control over the information displayed. Here the user can verify information and make adjustments as needed. **Setup controls the features and fields appearing in the Stock Watch Confirmation Box** below. Additionally, Setup can include any of the fields below in the text of the e-mail message.

Elliott V7.X.001	
Salesman E-mail	joe@netcellent.com
Customer E-mail	jamesg@bjltd.com
Admin E-mail	amy@netcellent.com
Contact	James Gilmore
Phone	617-678-2100
Customer Name	Brooks and Johnson, LTD.
* RATE OUR CUSTOMER SERVICE 1-10	9
* RATE OUR WEBSITE 1-10	7
* FUTURE FEATURE WISH LIST	website w/shopping cart
Any Change ?	N

\* User Defined Fields w/customer response in the next column

**Manually Using Stock Watch:** The default value can be set **not to prompt** the user with the customer notification. If the customer wants to be notified, the user can press the **F5 Options Key**, select Stock Watch and process the customer's request.

Another application of the F5 Options Key is if there is **Qty Available > 0**, the Qty Ordered creates an Insufficient Quantity Available warning. The user could then use the F5 Key to select Stock Watch if the customer requires a notification.

Stock Watch is a powerful feature that can greatly improve your Customer Service and returns on Customer Relationship Management. The default values and setup should be reviewed thoroughly.

## **Web Stock Watch**

You can send the Stock Watch flag through eOrders or eStore to Elliott. As long as the customer placing the request has an e-mail address in Elliott, then the Stock Watch feature can work for them.

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## ***Links & CRM***

### **Application Overview**

Links allow you to open any file on your system, as well as going directly to a URL address. The advantage of links is that they are tied to a master record, which means you do not have to leave your screen (exit your application) to access the document or URL address.

Not only do links make it easier to enhance Customer Relationship Management, they also improve productivity and make life easier for the user. Some typical examples of applying links are:

- Accessing Quotes

- Accessing Correspondence

- Accessing Contracts

- Yahoo Maps

  - Pinpoint locations for salespeople

  - E-mail the consumer a map for the nearest dealer

- Maintain inventory item graphics

  - Give a detailed description of the item to the customer

  - E-mail the customer a graphic of the item

- Link to Customer's Website

  - Know the customer better

  - See what is new with the customer

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## ***Events & CRM***

### **Application Overview**

Events are actions that take place in Elliott allowing you to know what is going on or what has happened. As a Customer Relationship Management tool they can serve as the process to contact the customer when something specific to their needs has occurred.

Common CRM events are:

- Notify customers when an item they are interested in has been received.

- Notify customers when an order on credit hold has been released.

- At the time of “Back Room” order entry, notify customers if a backorder situation exists.

- Alert the customer at the time of “Live – on the phone” order entry when special pricing exists for an item.

- Notify salespeople when an order has been placed by one of their customers.

**Bottom Line:** Events give you access to anything that is going on within your system. The use of events is almost unlimited.

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## ***User Notes & CRM***

### **Application Overview**

Basically, **User Notes** and **Note Types** (templates) allow you to build a report and management system based on the information within your Elliott System.

Popular CRM Uses:

Print pertinent customer information on key documents such as invoices, packing slips, and order acknowledgements to enhance Customer Relationship Management.

Access notes from previous conversations to be better informed and up to date for the customer.

From a marketing standpoint, you could use Note Types as a template for customer surveys and even telemarketing scripts.



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## ***Ticklers & CRM***

### **Application Overview**

Ticklers are your management tool for what to do, when to do it, and even how to do it.

Customers appreciate when you provide a service on their behalf and on time, i.e. it reminds you to keep a promise or to complete a task.

**Bottom Line:** Keeping and completing a promise is what Customer Relationship Management is all about.

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## Util-Setup

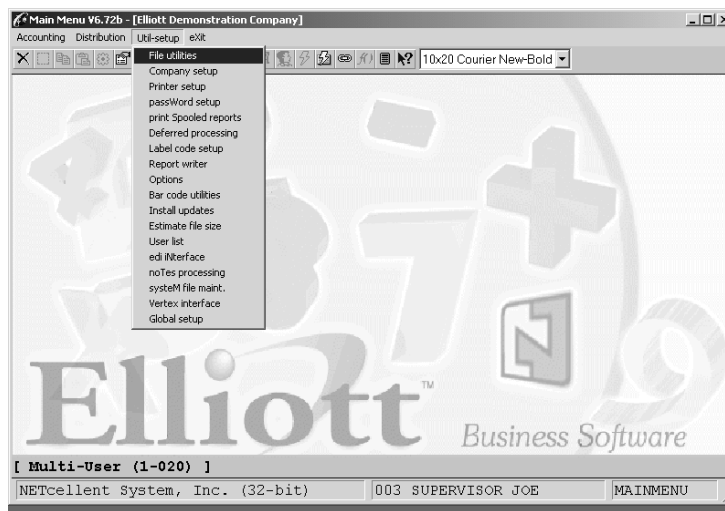
### *File Utilities*

## Application Overview

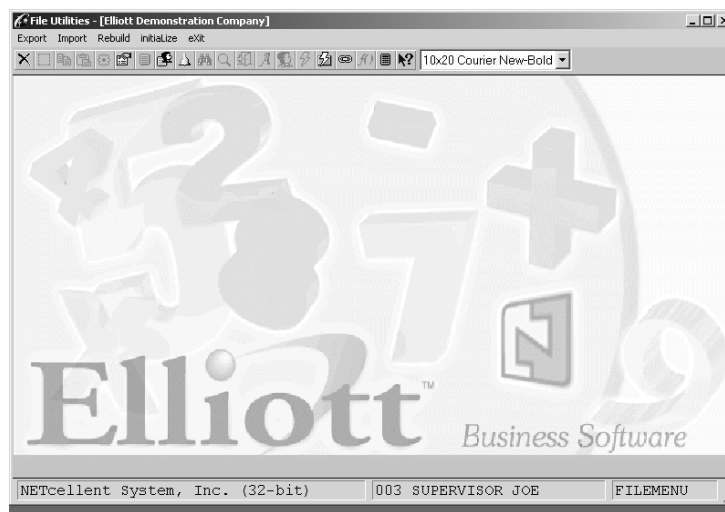
The **File Utilities** application allows you to rebuild corrupted data files, initialize new data files, export **Elliott** indexed files to ASCII files and import ASCII files to **Elliott** indexed files.

## Run Instructions

At the **Elliott Main Menu** → **Util-Setup** → **File Utilities**.



Util-Setup Pull-Down Menu



The File Utilities Menu

## File Utilities Menu Options

### *Exporting*

When **Exporting** a file, the system will sequentially read the selected data file and display the number of records being exported. This will create an ASCII file with the same base name, but an extension of .TXT; i.e., exporting the Customer File will create an ASCII file with the name ARCUSFIL.TXT. When the **Export** is complete, press any key to return to the package **Export** menu.

### *Importing*

When **Importing** a file, the system will sequentially read the selected data file name with a file extension of .TXT and create an indexed Elliott data file, i.e. importing the Customer File is done by reading ARCUSFIL.TXT (an ASCII file) and creating ARCUSFIL.BTR (a Btrieve file). The number of records imported is displayed in a pop-up window. When the import is complete, press any key to return to the package **Import** first menu.

**Warning:** The ASCII file (.TXT extension) **MUST** exist before the file can be imported. **Importing a file, which has no associated .TXT file, will erase all records in that data file.**

If you are using Pervasive, then you must make sure you are importing to an initialized file. If the file contains records, then those records will not be overwritten, even if you choose "C" for "Create." If the initialized file does not exist, then you will receive a Btrieve error.

### *Rebuild*

To fix a corrupted file you can select **Rebuild**. If you select **Rebuild**, a window will appear displaying all of the **Elliott** packages. After selecting the package you are working in, a window will appear displaying the files for that package. Select the files you wish to **Rebuild**.

If you choose to **Rebuild** corrupted data files, the system will begin processing that file, displaying the number of records processed. When the **Rebuild** is complete, press any key to return to the package **Rebuild** first menu. Since no further maintenance is needed, you can now return to the **Elliott** main menu selecting **X** for **EXIT**.

If you are using Pervasive, then this rebuild function is functionless. We recommend exporting the data file, initializing the Btrieve file and importing from the ASCII. This will insure that the file is rebuilt according to Pervasive specifications. You can also use the Rebuild function built into Pervasive.

### *Initialize*

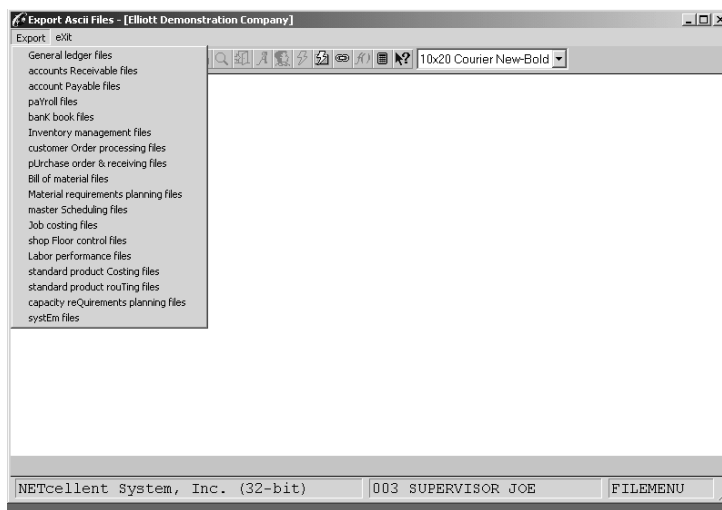
All necessary system files are initialized during installation. When you add a new company and tell the system which packages you are installing in Company File Maintenance, the system will initialize the files for you. If you initialize an existing file, the initialize file process will have no effect. If you need to clear out a file and start new, rename that file in the correct data directory and then run the initialization process.

**NOTE:** If on a network, make sure no one is using the file you are trying to **Rebuild**, **Export** or **Import** as maintenance on a file in use by another user may cause critical file errors.

## Export

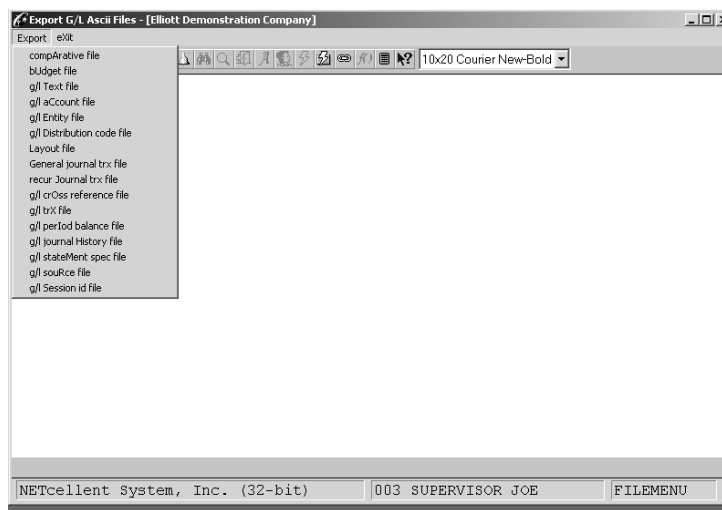
Select **Export ASCII File** from the **File Utilities** menu bar.

The next screen to appear will be the **Export ASCII Files** screen that displays all the packages. From this window, select the package that contains the file you wish to Export.



Export ASCII Files (Package List)

For example, if you select **G/L**, the next screen that will appear is the **Export G/L ASCII Files** menu. You may select any file from this window or use the arrow key to move to the second menu where applicable.



After selecting the file to be exported, you will be prompted with **(C)reate File, (A)ppend File, (Q)uit**. If you select **(C)reate File**, the program will **delete** the existing **ASCII** text on the hard drive and **create a new file**.

If you select **(A)ppend File**, this will add to the end of the existing ASCII text file.

If you select **(Q)uit**, the program is terminated and you are returned to the window.

The Export process displays the file name and number of records Exported. When the Export is complete, press any key to continue. This will take you back to the **Export Data Files** menu.

## Import

Select **Import ASCII File** from the **File Utilities** menu bar.

This is the same process as Export:

1. Select Package
2. Select File to Import

After selecting the file to be imported, you will be prompted with **(C)reate File, (A)ppend File, (Q)uit**. If you are not using Pervasive and select **(C)reate File**, the program will delete the existing data file and create a new file from the **ASCII** text file on the system. If you are using Pervasive, you will need to rename the Btrieve file, initialize the file and then run the import.

If you select **(A)ppend File**, this will add to the existing data file.

If you select **(Q)uit**, the program is terminated and you are returned to the window.

The **Import** process displays the file name and number of records Imported. When the **Import** is complete, press any key to continue. This will take you back to the **Import ASCII Files** menu.

## Rebuild

Select **Rebuild corrupted data files** from the **File Utilities** bar menu.

This is the same process as Export:

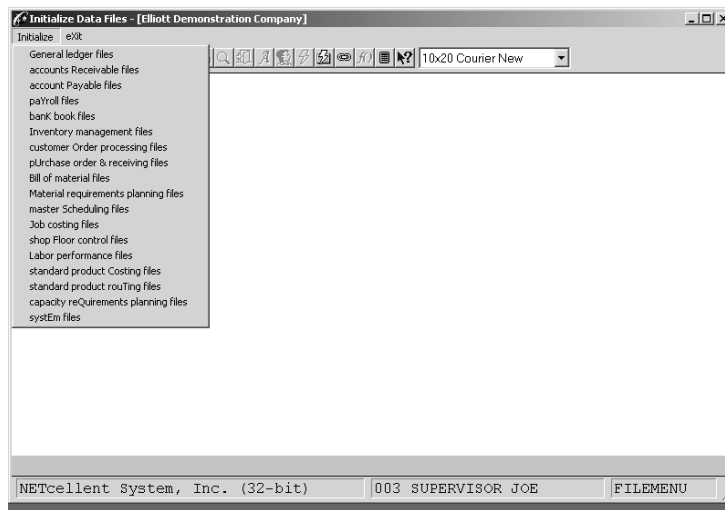
3. Select Package
4. Select File to Rebuild

After selecting the file to be rebuilt, you will be prompted with a **“Are You Sure”** question. Answer **Y** or **N**. If you answer **Y**, the program will begin the Rebuild Process displaying the file name and number of records rebuilt.

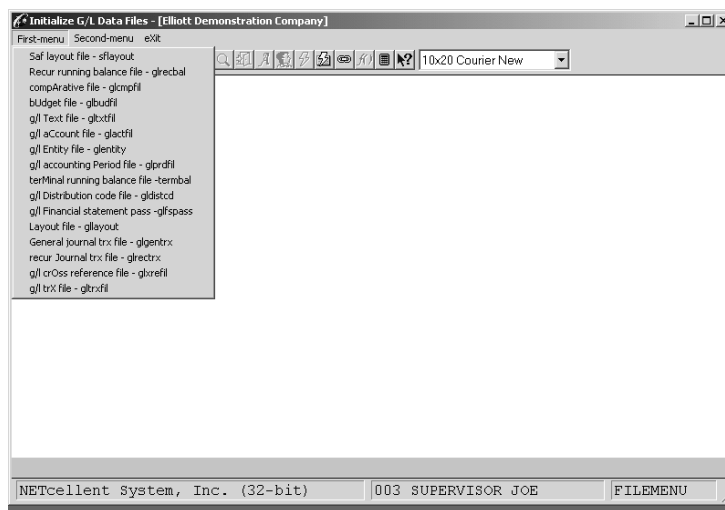
When the Rebuild is complete, press any key to continue.

## Initialize

Used to create a new file for a file you have renamed or deleted. If you initialize this file a second time, there will be no affect on the file and the data it contains.



Click **Initialize** and from the Drop Down select the package for the file(s) you wish to initialize.



From the First-Menu, Second-Menu, or Third-Menu, (in some cases), select the file individually to initialize.



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## Company Setup

### Application Overview

**Company Setup** is not an application that you will be running frequently. Once you have your system running the way you want, you may never run **Company Setup** again.

This application allows you to enter some basic information about your company. For example, if you want to have your own company name print at the top of every report, this application allows you to enter the name you want to print on your reports. You can also enter your company's address so it will print on Statements and other forms.

One of the important decisions you must make during **Company Setup** is how to structure your **G/L** account. These accounts are given specific numbers to keep them separate. **Elliott** uses an account number that is broken down into three parts: a main account number and two sub-account numbers. One sub-account is for profit centers and the other is for departments. The account number maximum is 15 characters with a maximum length of 8 for the main, profit center or department. The main account number is intended to signify the major category of the account, such as assigning a main account number of 5000 to all your Office Expense accounts. The profit center number can be used to designate the department.

A profit center is some portion of your company for which you want to keep a separate record of income and expenses. For example, let us say that your company is large enough to require a separate office staff to handle the sales of two different product lines. You probably will want to keep track of how much income each of these two profit centers, such as 100 for one and 200 for the other, generate. Using the main account number we assigned above to be Office Expenses, the **General Ledger** account number for profit center 100 would become 5000-100 and for profit center 200 would be 5000-200.

A department is some portion of your company for which you want to track your revenue for separate reporting. An example of this account format may look as follows: A main account number of 5000, a profit center account number of 100, and a department number of 101 would be 5000-100-101.

Different companies are going to be of different sizes and will have different numbers of accounts that they want to track. For this reason, you are provided with the ability to specify how many digits or alphanumeric characters are going to be in the main account number and the two sub-account numbers of your **G/L** account number.

The account numbers given as examples above would have 4 digits in the main account number, and 3 digits in the two sub-account numbers. If you were a larger company and you expected to need more accounts and profit centers or departments than this scheme would allow, you might specify five digits for main account numbers and five digits for each sub-account numbers.

Later on, in the data entry programs that ask you to enter a **G/L** account number, the format of the entry will be modified automatically by the programs to match the number of digits you enter in the **Company Setup**. For example, if you set your **G/L** account number format as in our first example above, when you enter an account the program would ask for it in the format **XXXXX-XXX-XXX**. All the programs that print out **G/L** account numbers will also automatically print them in the format you specify here.

Other information you have to enter in **Company Setup** defines which **Elliott** packages you are currently using and on what drive letter the data files are located. Some of these packages are set up to operate all by themselves, if you want to run them that way. But several of them can also transfer data back and forth to provide you with more up-to-date and more complete reporting. Your answers to these questions about which packages you are using will affect what sort of interaction occurs between the packages.

For example: You have both the **Accounts Receivable** and the **General Ledger** packages and one of your customers sends in a payment toward something he or she had purchased. The payment would be entered into the package through a program in **Accounts Receivable**, but some of the accounts in the **General Ledger** would also be affected by the transaction. This interaction between these two packages would only occur if you had indicated in **Company Setup** that both packages were being used.

## Run Instructions

At the **Elliott Main Menu** → **Util\_Setup**.

- \* If this is the first time you have run **Company Setup**, the program will ask you to enter data for all of the fields on the screen. However, if you have run **Company Setup** previously, the data you entered last time will be displayed, and you will be able to change those fields that need changing.
- \* When you have finished entering all the requested data and made any needed corrections, the program will return to the **Company Setup** first screen. Select **eXit** to return to the **Elliott** main menu.

Company Setup - [Demo Company]

Change eXit

1. Company Report Name

2. Company Display Name

3. Address Line 1

4. Address Line 2

5. Address Line 3

6. Phone Number

7. Company Date Format

8. G/L Account Format

Level	Type	Digits
1	Main	
2	Profit Center	
3	Department	

9. Number Of Decimals For Qty ?

10. Number Of Decimals For Accum ?

NETcellent System, Inc. 009 SUPERVISOR TS1MAD CMPMNT

Company Setup Screen #1

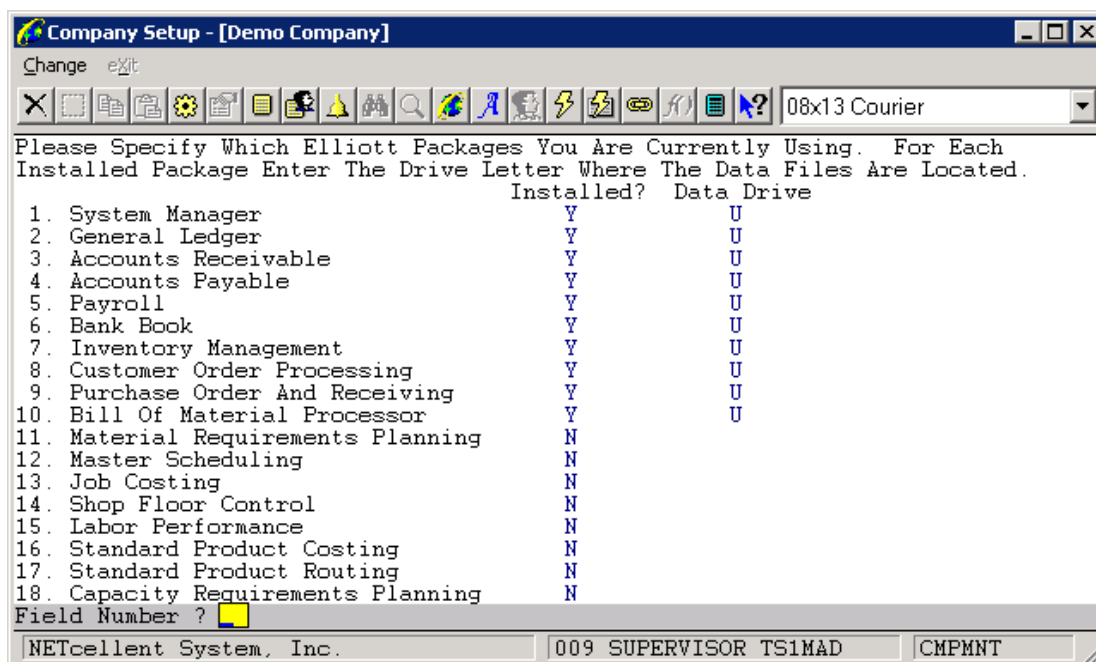
## Entry Field Descriptions

### Screen 1 Entries

Name	Type and Description
1. Company Report Name	<p>50 characters of alphanumeric data.</p> <p>This is the name that will be printed at the top of all reports. Center the name within the 50 characters allowed so that the company name will be centered on the reports. The reports will look better this way.</p>
2. Company Display Name	<p>30 characters of alphanumeric data.</p> <p>The company name you enter here will display in the upper right-hand corner of all data entry screens. The company name is displayed there so you will know what company you are processing at that time.</p> <p>This field defaults to the Company Report Name.</p> <p>The screens will look better if you right-justify the name in this field.</p>
3. Address Line 1 4. Address Line 2 5. Address Line 3	<p>30 characters of alphanumeric data.</p> <p>These three lines of address information are printed on statements and certain other printed forms. The address lines do not necessarily have to appear on your printed forms. You will be allowed the option of whether or not you want this to be done within each package.</p>
6. Phone Number	<p>12 characters of alphanumeric data.</p> <p>This information is not currently used by any of the programs, but it will be presented in the company record if you ever decide that you want to print it on forms or use it in some other way.</p>
7. Company Date Format	<p>A= American (MM/DD/YY)</p> <p>E= European (DD/MM/YY)</p>
8. G/L Account Format	<p>1 digit of numeric data.</p> <p>Level-1 Digits Main Level-2 Digits Profit Center Level-3 Digits Department</p> <p>Enter the number of digits or characters that you want to be in the main account number and the two sub-account numbers of your G/L account number.</p> <p>For example, if you would like your G/L account number to be formatted like this, XXXXX-XXXXX-XXXXX, enter 5 as the number of level-1 digits, 5 for the number of level-2 digits, and 5 for the number of level-3 digits. The main, or level-1 digits, must be at least one. The profit center and department may have zero digits. You can use up to 8 digits for the main number and 7 digits for the profit center for a maximum of 15 digits total. Throughout this manual, all examples are given in the format XXXXX-XXXXX-XXXXX. If you have defined your G/L account number to be of some different format, the entry screens and reports will still</p>

Name	Type and Description
	reflect that properly.
9. Number Of Decimals For Qty ?	<p>1 digit of numeric data.</p> <p>Must be 0, 1, 2 or 3.</p> <p>Enter the number of digits that you want to have in your Inventory Item Quantity fields. The quantity entry format will be one of the following:</p> <p>0 Decimal – 999,999,999</p> <p>1 Decimal – 9,999,999.9</p> <p>2 Decimal – 999,999.99</p> <p>3 Decimal – 99,999.999</p> <p>Refer to <b>Inventory Quantity Fields</b> in the <b>System-Wide Features</b> section of this manual for more information.</p>
10. Number of Decimals For Accum ?	<p>1 digit of numeric data.</p> <p>Must be 0, 1, 2 or 3.</p> <p>Enter the number of digits that you want to have in your <b>Inventory</b> item Quantity Accumulator fields. See field above for entry format.</p>

## Screen 2 Entries



	Installed?	Data Drive
1. System Manager	Y	U
2. General Ledger	Y	U
3. Accounts Receivable	Y	U
4. Accounts Payable	Y	U
5. Payroll	Y	U
6. Bank Book	Y	U
7. Inventory Management	Y	U
8. Customer Order Processing	Y	U
9. Purchase Order And Receiving	Y	U
10. Bill Of Material Processor	Y	U
11. Material Requirements Planning	N	
12. Master Scheduling	N	
13. Job Costing	N	
14. Shop Floor Control	N	
15. Labor Performance	N	
16. Standard Product Costing	N	
17. Standard Product Routing	N	
18. Capacity Requirements Planning	N	

Field Number ?  

NETcellent System, Inc.      009 SUPERVISOR TS1MAD      CMPMNT

Company Setup (Screen #2)

Answer **Y** or **N** to specify whether or not you are using that package. You will also be asked to enter the drive letter where the data files are located. Data drive letters for the tutorial data directory are ignored as the system assumes the tutorial data directory is located on your current drive.

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## ***Printer Setup***

### **Application Overview**

See chapter titled Printing System



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## ***Password Setup***

### **Application Overview**

The Elliott password system is a multi-level system that uses five related types of password protection. This application also provides for user maintenance and adding new users. Understanding the types and relationships can provide you with pinpoint control for security and user access rights. The five types of protection are:

#### **1. Menu Level Control**

This application allows you to assign user name/password restrictions by company, by package, and by application. Each pull-down menu selected can be fully or partially restricted. If the user does not have access to a menu selection then that section will not be viewable.

#### **2. Global Security Control**

These are default controls for features that are not accessible as a menu choice and for the COP functions of "Create Credit Memo" and "Delete Orders."

#### **3. User Global Security Controls**

These controls are at the user level and designed to override Global Security controls.

#### **4. Supervisory Relationships**

This establishes an organizational tree by supervisor and allows certain user access rights to flow upward to the supervisor.

#### **5. Event Security**

These security controls apply to Template Maintenance and adding New Event Subscriptions.

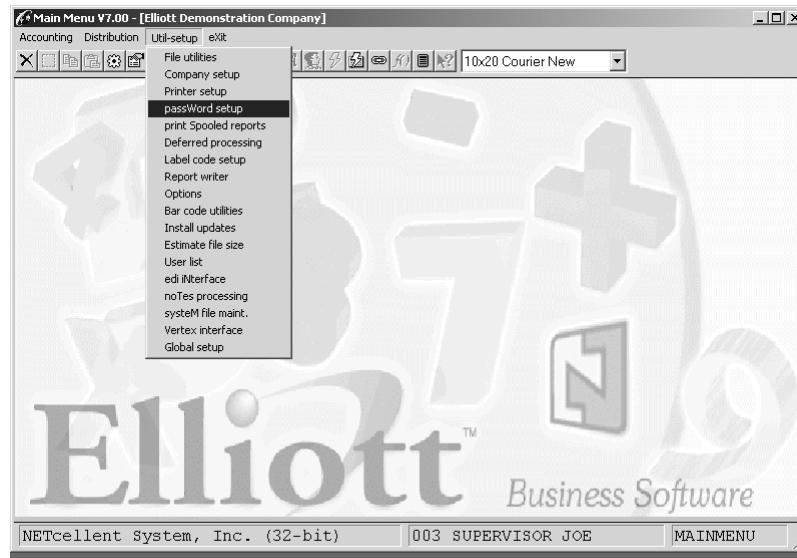
When you receive your Elliott software, the system has no passwords. Passwords may be enabled or disabled at any time. When the password system is enabled for the first time, a new password file will be created with only one user, **SUPERVISOR**. SUPERVISOR is given a **blank password** and access to all packages in the system. **Initially**, only the User Name **SUPERVISOR** will be allowed to add, change, or delete passwords from the system. For this reason it is important that you enter a password for **SUPERVISOR**. It is also important that the User Name **SUPERVISOR** and the password be restricted to only those with authorization to maintain passwords until you refine your password system. If using Multi-Companies, passwords may be assigned to all companies or to individual companies.

By default, only "SUPERVISOR" can access the "Password Setup" function. As needed, **key users** may be given the rights to maintain and assign passwords and make themselves as a supervisor equivalent. For non-supervisor users, when they access "Password Setup" on the main menu means this user intends to change their password. A window will pop up that prompts the user for the old and new passwords. Once the old password is confirmed, the password is changed for the user.

## Run Instructions

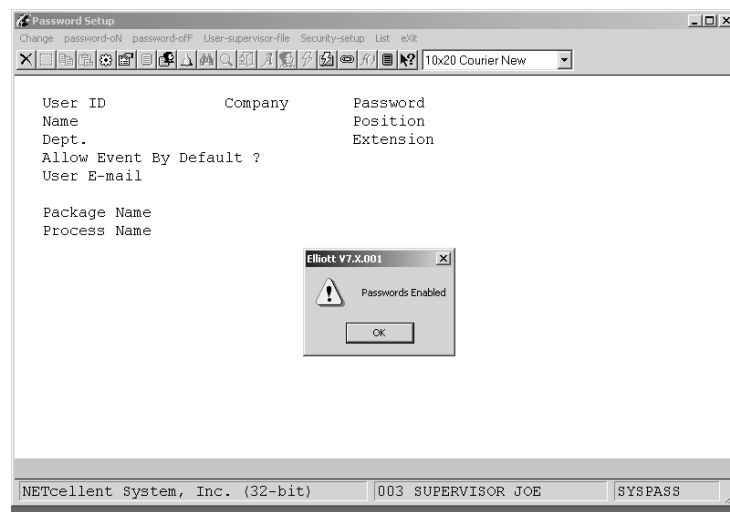
### Enabling/Disabling Passwords

The **Password On** and **Password Off** capabilities are controlled from the **Password Setup** application in the **Util-Setup** pull down window. Select **Password Setup** from the following screen:



Select Password Setup

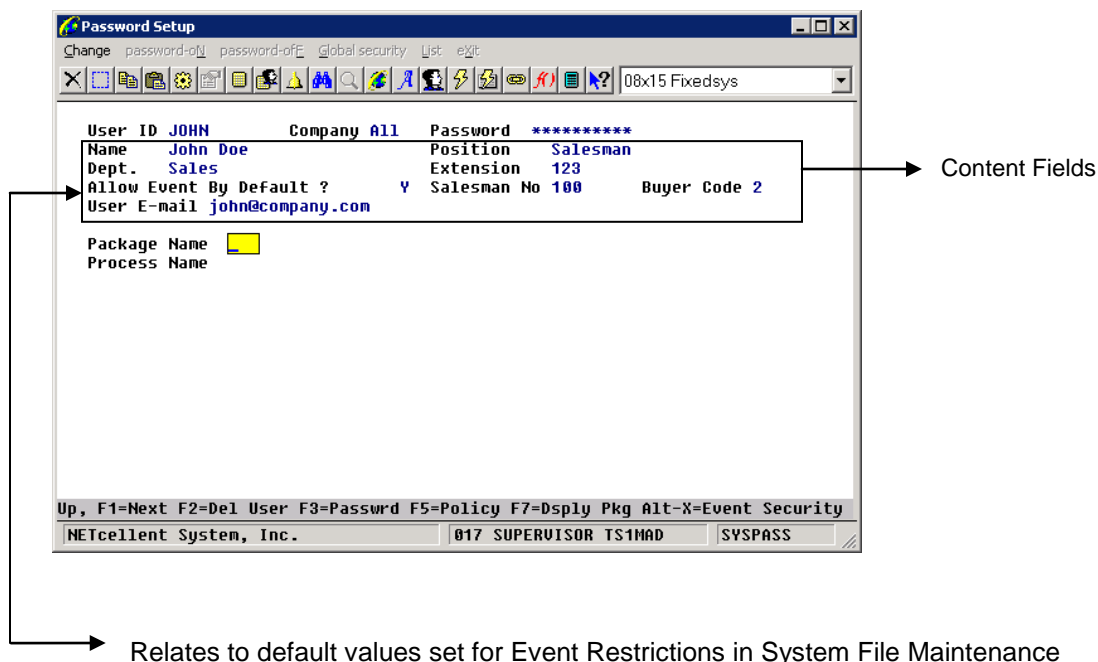
From the Password Menu select **Password On** to enable passwords.



Password Enabled Confirmation

You are now ready to add users and assign rights by User Name. This User Name may be a department, a specific application, or an individual. Select **Change** mode and enter the User Name. If the User Name is not found, you will be prompted to add this user. Answer **Y** to add. Additionally, you can use the **F2 Key to copy** from Supervisor to user and as users are added, copy from user to user. If you are using multiple companies, then the **F3** key will allow you to copy password information for a user from one company to another. The **F7** key will bring up a search window.

Next, enter the Company Number that the User Name will be assigned access privileges. Either a single Company Number may be entered or press **RETURN** for **All** companies. Assign a password associated with this User Name and complete the user profile information (Content Fields). If no password is required, press **RETURN** when the prompt is at Password. This can be changed as often as needed.



### Function Keys:

- |                 |   |
|-----------------|---|
| <b>F1</b>       | Display Next Pkg to which user has rights. Does not apply in initial user set up.   |
| <b>F2</b>       | Delete User.  |
| <b>F3</b>       | Change Password.  |
| <b>F5</b>       | Policy – allows changes to password policy for this user.   |
| <b>F7</b>       | Display Packages – used to select module for which you want to define passwords.  |
| <b>Up-Arrow</b> | This allows change to the user content fields.  |
| <b>Alt-X</b>    | User level security control for access to Events. This level overrides Global Security Setup and the “Y” or “N” flag in the user profile information field. |
|                 | Alt-X will be discussed in Event Security.  |

**NOTE:** The user **SUPERVISOR** cannot be deleted from the password system. If you are working in the tutorial company, passwords are never in effect.

## Entry Field Descriptions

Name	Type and Description
User ID	10 alphanumeric characters.  Enter the User ID or press <b>F7</b> to see a list of users. You may also press <b>F2</b> here to copy one user's password records to another user (See <b>COPY USER</b> below). If the User Name you entered does not exist, the system will prompt you with "User Not Found-Do You Wish To Add User?". Answer Y if you wish to add the user. If you add a new user, you will be allowed to enter a password at that time. If you are using multiple companies, you can press <b>F3</b> to copy password information for a user from one company to another.
Company	Enter the company number. Press <b>RETURN</b> to default to <b>All</b> companies.
Password	10 alphanumeric characters.  Enter the user's password. If a user's password is blank, the operator will not be prompted for a password entry when accessing the system.  <b>NOTE:</b> For increased security, the password field will be masked with asterisks until you access the password field for change.
Name	20 alphanumeric characters.  Enter a name for this user. A name must be entered and can not be left blank.
Position	20 alphanumeric characters.  Enter the position this person has within the company. You can leave this field blank.
Dept.	15 alphanumeric characters.  Enter the department for this user. You can leave this field blank.
Extension	7 alphanumeric characters.  Enter the telephone extension for this user. You can leave this field blank.
Allow Event By Default?	Y or N  You can specify the default whether this user should be allowed events.
Salesman No	3 alphanumeric characters.  This field ties the user to a Salesman Number within Elliott. The code entered will be verified against the AR Salesman File. You can leave this field blank.
Buyer Code	2 alphanumeric characters.  This field ties the user to a Buyer Code within Elliott. The code entered will be verified against the PO Buyer Code File. You can leave this field blank.
User E-mail	60 alphanumeric characters.  Enter the email address for the user. This email address will appear in the Contact Manager so that users can be emailed quickly and easily. You can leave this field blank.

## Copy User Entry Fields

Name	Type and Description
Copy From User	10 alphanumeric characters.

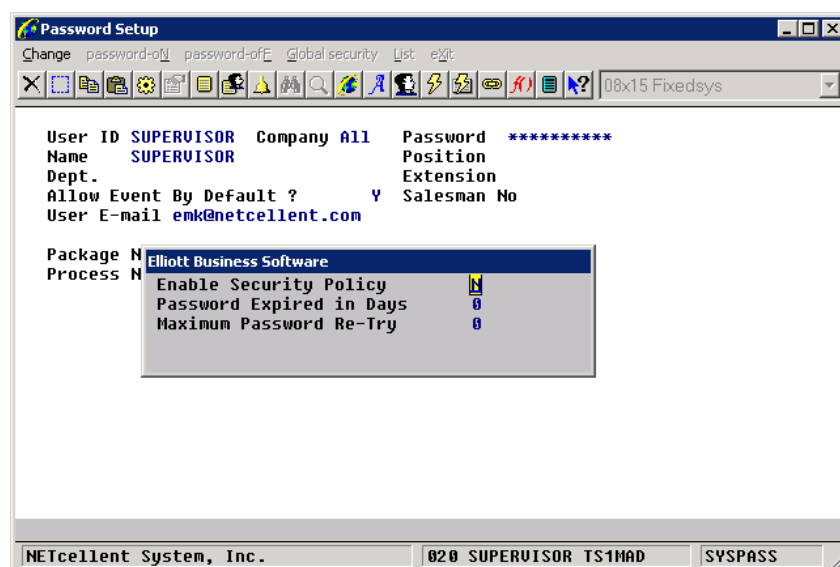
	Enter the user you wish to copy from. You may press <b>F10</b> or <b>ESC</b> to stop the copy operation. The Copy From User must be a valid user.
Copy To User	<p>You may press <b>F7</b> to search for a valid user.</p> <p>10 alphanumeric characters.</p> <p>Enter the user you wish to copy to. You may press <b>F10</b> or <b>ESC</b> to stop the copy operation. The Copy To User must <b>NOT</b> exist in the Password File.</p>

### Copy User Company Entry Fields

Name	Type and Description
Copy From User	<p>10 alphanumeric characters.</p> <p>Enter the user you wish to copy from. You may press <b>F10</b> or <b>ESC</b> to stop the copy operation. The Copy From User must be a valid user.</p> <p>You may press <b>F7</b> to search for a valid user.</p>
Copy From Company	<p>2 numeric characters.</p> <p>Enter the company you wish to copy from. You may press <b>F10</b> or <b>ESC</b> to stop the copy operation. The Copy From Company must be a valid company and must have password information for the Copy From User.</p>
Copy To Company	<p>2 numeric characters.</p> <p>Enter the company you wish to copy to. You may press <b>F10</b> or <b>ESC</b> to stop the copy operation. The Copy To Company must <b>NOT</b> have password information for the user.</p>

### User Security Policy

In order to activate the Security Policy, you must bring up SUPERVISOR in change mode and press F5.



Once this has been enabled, then you can set the security policy for individual users.

**Password Setup**

Change password-on password-off Global security List exit

User ID **JOHN** Company **All** Password **\*\*\*\*\***  
 Name **John Doe** Position **Salesman**  
 Dept. **Sales** Extension **123**  
 Allow Event By Default ? **Y** Salesman No **100**  
 User E-mail **john@company.com**

Package **N** Elliott Business Software  
 Process **N**

Use Default Security Policy **N**  
 Password Expired in Days **90**  
 Maximum Password Re-Try **3**  
 Date Last Password Changed **04/28/04**  
 Any Change ? **N**

NETcellent System, Inc. 020 SUPERVISOR TS1MAD SYSPASS

### User Password Policy Fields

Name	Type and Description
Use Default Security Policy	Y or N.  By indicating "Y," Elliott will use the default security policy settings. The next two fields will be skipped. A "N" will indicate that you want to specify your own settings.
Password Expired in Days	4 digit numeric from 0 to 9,999.  Enter the number of days before the password expires for this user.
Maximum Password Re-Try	1 digit numeric from 0 to 9.  Enter the number of times the user can try to enter the correct password before the account is locked. Once the account is locked, an authorized user must change the password for this user.
Date Last Password Changed	Date field.  This is the date the password was successfully changed for this user.

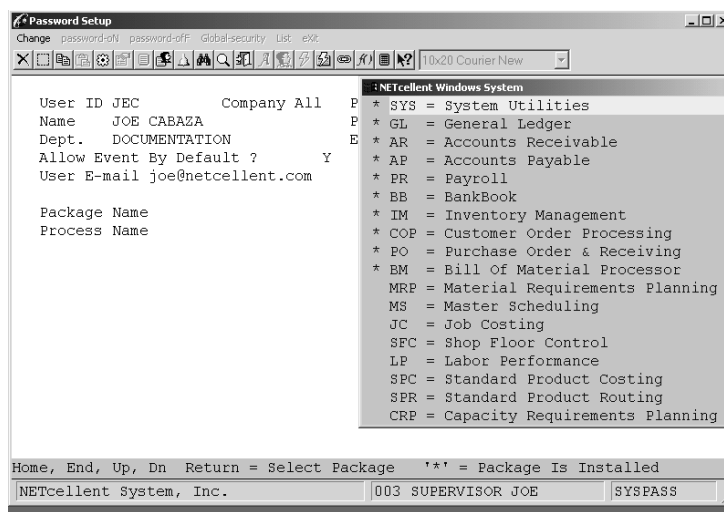
### Salesman Security

See the section titled Salesman Security in V7.3.

## Menu Level Security Control

For User Name **SUPERVISOR**, all flags for menu items are set to **Y**. At this point, **SUPERVISOR** is the only person that can add, change, or delete password information.

Users must have **SYS** rights before they can access any of the individual packages. Select **System Utilities**. At the **Package Name** prompt, press **F7** and the following screen will appear:



The screenshot shows the 'Password Setup' window with the following fields and values:

User ID	JEC	Company	All
Name	JOE CABAZA		
Dept.	DOCUMENTATION		
Allow Event By Default ?	Y		
User E-mail	joe@netcellent.com		
Package Name			
Process Name			

A list box titled 'NETcellent Windows System' is open, showing the following options:

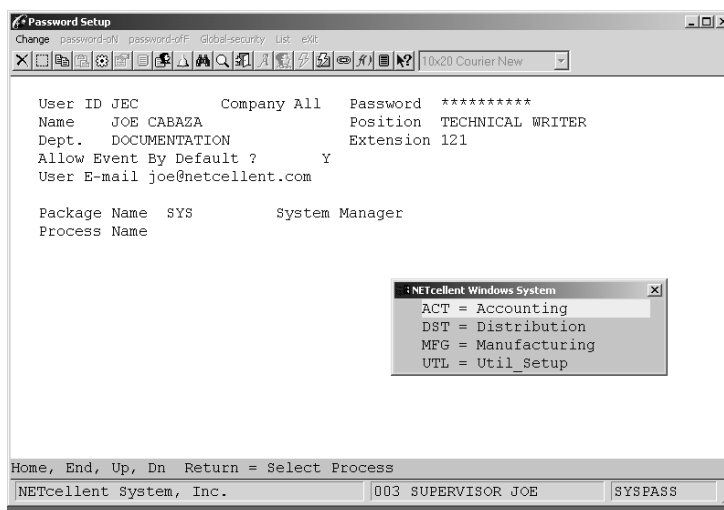
- \* SYS = System Utilities
- \* GL = General Ledger
- \* AR = Accounts Receivable
- \* AP = Accounts Payable
- \* PR = Payroll
- \* BB = BankBook
- \* IM = Inventory Management
- \* COP = Customer Order Processing
- \* PO = Purchase Order & Receiving
- \* BM = Bill Of Material Processor
- MRP = Material Requirements Planning
- MS = Master Scheduling
- JC = Job Costing
- SFC = Shop Floor Control
- LP = Labor Performance
- SPC = Standard Product Costing
- SPR = Standard Product Routing
- CRP = Capacity Requirements Planning

At the bottom, the status bar shows: 'NETcellent System, Inc. | 003 SUPERVISOR JOE | SYSPASS'

Select a Processing Application

### Select System Utilities

At the **Process Name** prompt, press **F7** and the following screen will appear:



The screenshot shows the 'Password Setup' window with the following fields and values:

User ID	JEC	Company	All	Password	*****
Name	JOE CABAZA			Position	TECHNICAL WRITER
Dept.	DOCUMENTATION			Extension	121
Allow Event By Default ?	Y				
User E-mail	joe@netcellent.com				
Package Name	SYS			System Manager	
Process Name					

A list box titled 'NETcellent Windows System' is open, showing the following options:

- ACT = Accounting
- DST = Distribution
- MFG = Manufacturing
- UTL = Util\_Setup

At the bottom, the status bar shows: 'NETcellent System, Inc. | 003 SUPERVISOR JOE | SYSPASS'

By selecting **Accounting**, the system will display the five accounting packages: General Ledger, Accounts Receivable, Accounts Payable, Payroll, and Bank Book. At this time, the user has full rights to the Accounting (**ACT**) packages as shown on the next page.



Change password-off password-off Global-security List exit

User ID JEC Company All Password \*\*\*\*\*  
 Name JOE CABAZA Position TECHNICAL WRITER  
 Dept. DOCUMENTATION Extension 121  
 Allow Event By Default ? Y  
 User E-mail joe@netcellent.com

Package Name SYS System Manager  
 Process Name ACT Accounting  
 1. Y General Ledger  
 2. Y Accounts Receivable  
 3. Y Accounts Payable  
 4. Y Payroll  
 5. Y BankBook

F4 = Change Flags To 'N' F5 = Change Flags To 'Y' Return = Continue

NETcellent System, Inc. 003 SUPERVISOR JOE SYSPASS

### Function Keys:

- F4** Change Flags (1–5) to N
- F5** Change Flags (1-5) to Y
- Return** Allows you to continue and change flags 1-5 individually.

If all rights to the accounting packages are intended, then further definition of access privileges by package is not necessary.

If further restrictions are needed, enter the package name. For example, if you had entered AR for the Package Name prompt and pressed F7, the processes available will be displayed as shown below.

Change password-off password-off User-supervisor-file Security-setup List exit

User ID JEC Company All Password \*\*\*\*\*  
 Name JOE CABAZA Position TECHNICAL WRITER  
 Dept. DOCUMENTATION Extension 121  
 Allow Event By Default ? Y  
 User E-mail joe@netcellent.com

Package Name AR Accounts Receivable  
 Process Name

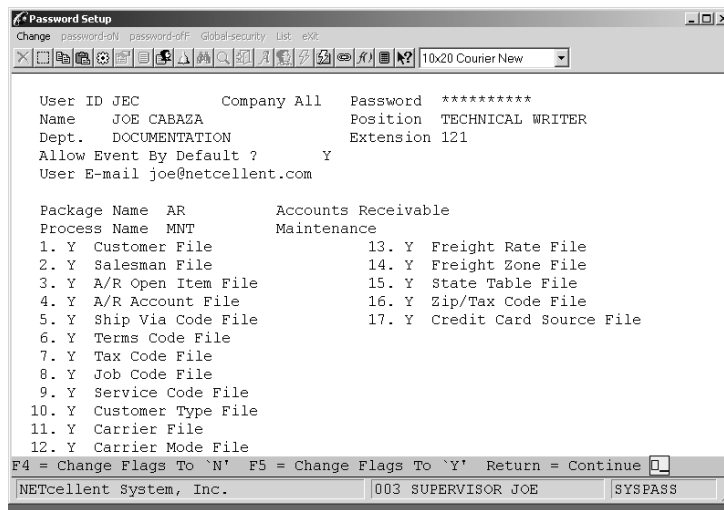
NETcellent Windows System

- MNT = Maintenance
- INQ = Inquiry
- PRC = Processing
- RPT = Reports
- GPH = Graphs
- UTL = Setup\_Util

Home, End, Up, Dn Return = Select Process

003 SUPERVISOR JOE SYSPASS

The rights for this User Name may now be tailored by **Maintenance, Inquiry, Processing, Reports, and Utilities**. By selecting Maintenance, the following screen will appear:



The screenshot shows a 'Password Setup' window with a menu bar (Change, password-off, password-off, Global-security, List, exit) and a toolbar. The main area displays user and package information:

```

User ID JEC      Company All   Password *****
Name  JOE CABAZA      Position  TECHNICAL WRITER
Dept.  DOCUMENTATION      Extension 121
Allow Event By Default ?      Y
User E-mail joe@netcellent.com

Package Name  AR      Accounts Receivable
Process Name  MNT      Maintenance
1. Y Customer File      13. Y Freight Rate File
2. Y Salesman File      14. Y Freight Zone File
3. Y A/R Open Item File  15. Y State Table File
4. Y A/R Account File    16. Y Zip/Tax Code File
5. Y Ship Via Code File  17. Y Credit Card Source File
6. Y Terms Code File
7. Y Tax Code File
8. Y Job Code File
9. Y Service Code File
10. Y Customer Type File
11. Y Carrier File
12. Y Carrier Mode File
  
```

At the bottom, there are instructions: 'F4 = Change Flags To `N` F5 = Change Flags To `Y` Return = Continue' and a status bar with 'NETcellent System, Inc.', '003 SUPERVISOR JOE', and 'SYSPASS'.

### Maintenance Application Names for A/R

You may press the **F4** key to change all flags to **No**, press the **F5** key to select all as **Yes** or press **RETURN** to individually select flag status.

Finally, at the User Name entry field you may press the **F3** key to change the user password or press the **F2** key to delete the User Name from the password system.

### Password Setup Process

1. Add User
2. Select System Utilities
3. Select as Required
  - a. Accounting
  - b. Distribution
  - c. Util-Setup
4. Select Package as Required
5. Select Process as Required
  - a. Maintenance
    - Select Rights
  - b. Inquiry
    - Select Rights
  - c. Inquiry
    - Select Rights
  - d. Processing
    - Select Rights
  - e. Reports
    - Select Rights
  - f. Util-Setup
    - Select Rights

## Salesman Security in 7.3

To enable Salesman Security in Elliott, you need to perform the following setup:


1. Identify the user as a salesman in Password Setup for that user. If you leave the Salesman No blank, then it implies this person is not subject to salesman security. (For example, this maybe an accounting person who needs to access all salesman records).

**Password Setup**

Change password-on password-off Global security List exit

08x15 Fixedsys

User ID **ATL** Company **All** Password **\*\*\*\*\***  
Name **Anthony Le** Position  
Dept.  
Allow Event By Default ? **Y** Extension  
User E-mail **atl@netcellent.com** Salesman No **ATL**

Package Name   
Process Name

Up, F1=Next F2=Del User F3=Passwrd F5=Policy F7=Dsply Pkg Alt-X=Event Security

NETcellent System, Inc. 040 EMK TS1EMK SYSPASS

2. Determine whether there should be a house account that all Salesmen can access in Global Setup for eContact Manager. A house account is usually a customer that doesn't have a specific salesman and any salesman can go after the house account. As of this writing (05/12/05), the house account logic only applies to eContact Manager, eContact Processor and Export Processor. We plan to apply the House Account logic to A/R and COP as well.

Global Setup V7.35.401 - [Netcellent System Inc. - Live]

System Acct Dist cop-Ctl cop-Func add-Ons Utilities eXit

08x15 Fixedsys

**eContact Manager**

1. Use eContact Manager	Y
2. Next eContact ID	1761
3. Assign Random Password If No Password Assigned	Y
4. Pool Salesman Id That All Salesman Can Access	<input checked="" type="checkbox"/>
5. Is Salesman Name Mostly Company or Person Name?	P
6. Next Contact Category ID	600000070
7. Enforce Valid Credit Card Number	Y

NETcellent System, Inc. 040 EMK TS1EMK NSCTLMN1

3. The following flag is for Global eContact Manager. You need to determine if a particular salesman is subject to the Salesman Security in eContact manager.

Password Setup

Change password-on password-off Global security List eXit

08x15 Fixedsys

**Global Security Setup** Screen 1

Default Access Right For Following Features	Allowed ?
1. Maintain Users And Password	N
2. Access Other Users' Spooled Reports	N
3. Access Other SIm's Contact in Global eContact	<input checked="" type="checkbox"/>
4. Access All Events & Bypass Supervisory Chain	N
5. Maintain Event Template	N
6. Allow 'Subscribe to All' in Event	Y
7. Allow Manually Triggering An Event	Y
8. Allow Editing eContact	Y
9. Allow Maintaining eContact Roles	N
10. Allow Add/Update Credit Card No. in eContact	N
11. Allow View Credit Card No. in eContact/Log	Y
12. Allow eContact/Export Processor	Y
13. Disable Interaction w/ eContact & Export Proc	N
14. Change Others' Template in Export Processor	N
15. Disable Using Others' Template in Export Proc	N
16. Allow E-Mail Report Through Printing	Y
17. Allow Maintain Link Type	N
18. Allow Maintain Laser Form	N
19. Access Database Activities Window Ctl-Shift-D	N

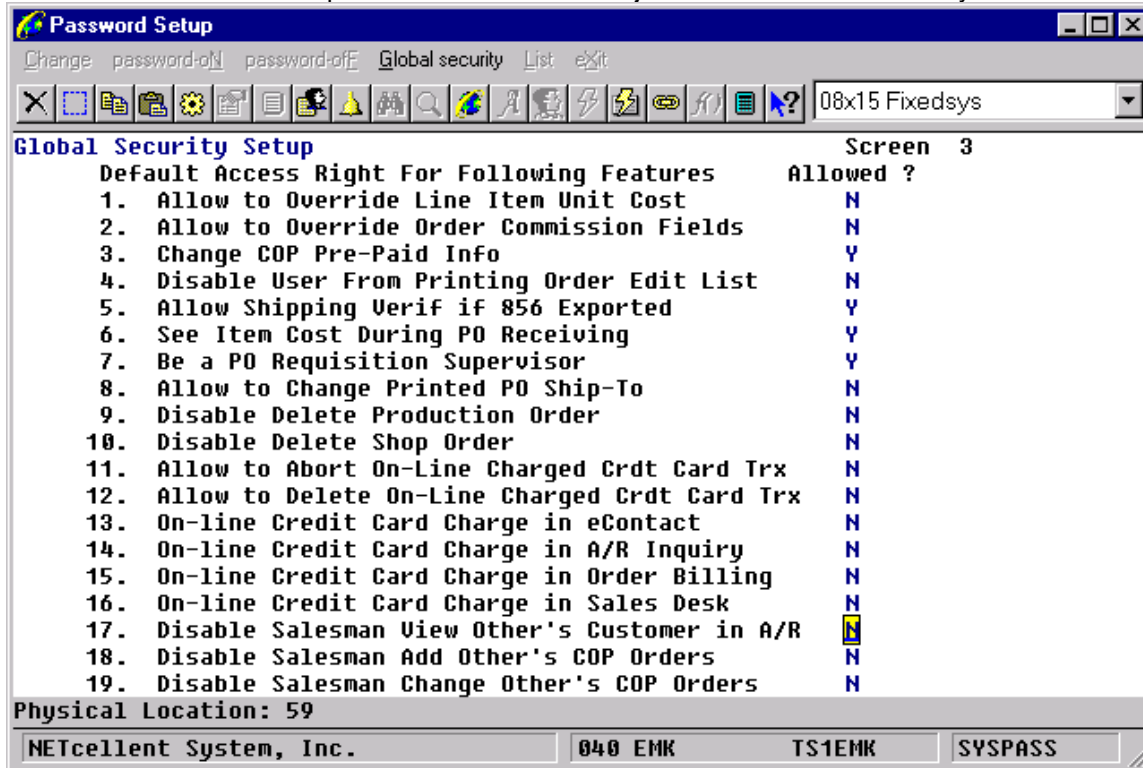
Physical Location: 12

NETcellent System, Inc. 040 EMK TS1EMK SYSPASS

4. The following flag "Disable Salesman View Other's Customer in A/R" is used for

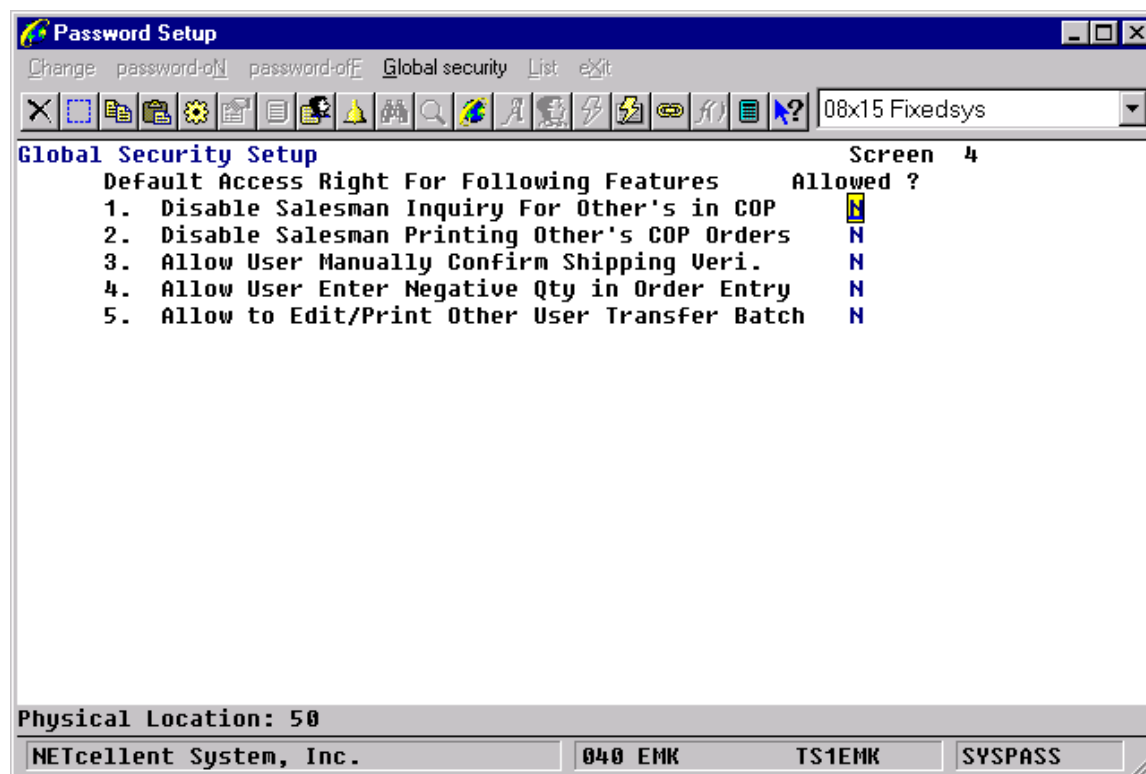
- A/R Customer File Maintenance
- A/R Customer File Inquiry
- A/R Account Inquiry
- A/R Summary Account Inquiry
- eContact Processor (AR Files & Ship to)
- Export Processor (AR Files & Ship to)

You need to determine if a particular salesman is subject to the salesman security in the above areas.



5. The following flag "Disable Salesman Inquiry For Other's in COP" is used in
- COP Order Inquiry
  - COP Invoice History Inquiry
  - COP Stock Status Inquiry
  - COP Recurring Order Inquiry
  - COP Freight Calculation Inquiry
  - eContact Processor
  - Export Processor (COP Files, except Ship-To).

You need to determine whether the salesman is subject to salesman security in the above areas.



6. You also want to limit the activities that a salesman can do in Elliott. The following are areas in Elliott that salesman security is implemented:
- A/R Customer File Maintenance
  - A/R Customer Inquiry
  - A/R Customer Account Inquiry
  - A/R Summary Account Inquiry
  - COP Order Inquiry
  - COP Invoice History Inquiry
  - COP Recurring Order Inquiry
  - COP Stock Status Inquiry
  - COP Freight Calculation Inquiry
  - COP Order Entry
  - COP Sales Desk (Add Other's Orders, No Control on Change Quote)
  - COP Order Edit List (VA,46)
  - COP Order Acknowledgement/Email (not Laser Form) (VA,46)
  - COP Order Quote/Email (not Laser Form) (VA,46)
  - COP Open Order by Salesman (VA,46)
  - eContact Manager
  - eContact Processor
  - Export Processor

We suggest you restrict the Salesman beyond these menu items. For example, if you wish to let Salesmen print reports for their own customers, you do not want to give them the "Order Status Reports" menu item since there is no salesman security in that area. Instead, you might consider giving your salesmen access to "Export Processor" where salesman security is implemented.

The following flags determine whether the user can use eContact/Export Processor

**Security Setup**

Change exit

08x15 Fixedsys

**User Security Setup** Screen 1

User ID **EMK** Company **All**

Access Right For Following Features	Allowed ?
1. Maintain Users And Password	Y
2. Access Other Users' Spooled Reports	Y
3. Access Other SIm's Contact in Global eContact	Y
4. Access All Events & Bypass Supervisory Chain	Y
5. Maintain Event Template	Y
6. Allow 'Subscribe to All' in Event	Y
7. Allow Manually Triggering An Event	Y
8. Allow Editing eContact	Y
9. Allow Maintaining eContact Roles	Y
10. Allow Add/Update Credit Card No. in eContact	Y
11. Allow View Credit Card No. in eContact/Log	Y
12. Allow eContact/Export Processor	Y
13. Disable Interaction w/ eContact & Export Proc	N (Default)
14. Change Others' Template in Export Processor	Y
15. Disable Using Others' Template in Export Proc	N (Default)
16. Allow E-Mail Report Through Printing	Y

Y = Allow, N = Not Allow, Spaces = Default

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There is a separate flag for “Disable Interaction w/ eContact & Export Proc” because you may want certain people to use the “eContact/Export Processor” in batch mode without allowing them to use the interaction mode, where they can access more information.

Before you decide a user's security for eContact, customers and sales orders, you should consider the following factors:

- Is this user a salesman? Do you want to limit this user to access only those eContacts that he/she is a salesman?
- Do you have a house account? Do you allow house account information to be accessed by all salesmen if the previous answer is “yes.”
- Will this user use Global eContact? Global eContact is like a Rolodex where you can have a list of contacts with information for their phone number, email, fax number, etc. Do you want this user to see all Contact information in Global eContact or would you like to limit the salesman to see only his/her contacts in Global eContact?
- Do you want to let this user view eContact information only without the ability to edit it?
- Do you want to let this user add and edit credit cards or view the credit card number? Typically, you may allow collecting of credit card information, but once the credit card is collected you do not want users to see the credit card number for security reasons.
- Do you allow this user to access eContact/Export Processor? eContact/Export Processor is like a report writer where the user can access a lot of information in the Elliott system. You may consider giving the user access to pre-written reports without the ability to change it. This lowers the security concern. If you wish to implement this, then you will give users access to eContact/Export Processor, but disable the “Interaction” with eContact/Export Processor.
- If you decide to give users the ability to Interact with eContact/Export Processor, you need to decide whether this user use and view other people's templates or not. If a user is allowed to Interact with eContact/Export processor, even though they may be prevented from using other's templates, they can still create new templates or change their own template criteria.
- Once you allow a user to “Interact” with eContact/Export Processor, you should consider the Elliott menu security. For example, if you allow this user to access customer file maintenance,

then they can access all information in the Customer Category. Another example is if you allow this user to access order entry, then this user will be able to access all information in the Order Category. This may be subject to the Salesman Security, depending on how you set the following flags:

- Disable Salesman from Viewing Other's Customer in A/R
  - Disable Salesman from Inquiring Other's in COP
- If this user is a supervisor (IT) and develops a template (pre-written report) for other users, you need to give this user the ability to change the template for other users.
- The following areas in Elliott are also related to Salesman Security. It shows how the security is controlled:
  - A/R Customer File Maintenance
    - Elliott Menu Security
    - Global Security: "Disable Salesman from Viewing Other Customers in A/R".
    - Global Security: "Disable Change Customer"
    - Global Security: "Disable Delete Customer"
    - Global Security: "Disable Print Customer List/Label"
  - A/R Customer Inquiry
    - Elliott Menu Security
    - Global Security "Disable Salesman from Viewing Other Customers in A/R"
  - A/R Customer Account Inquiry
    - Elliott Menu Security
    - Global Security: "Disable Salesman from Viewing Other Customers in A/R".
  - A/R Summary Account Inquiry
    - Elliott Menu Security
    - Global Security: "Disable Salesman from Viewing Other Customers in A/R".
  - COP Order Inquiry
    - Elliott Menu Security
    - Global Security: "Disable Salesman Inquiry for Other's in COP"
  - COP Invoice History Inquiry
    - Elliott Menu Security
    - Global Security: "Disable Salesman Inquiry for Other's in COP"
  - COP Recurring Order Inquiry
    - Elliott Menu Security
    - Global Security: "Disable Salesman Inquiry for Other's in COP"
  - COP Stock Status Inquiry
    - Elliott Menu Security
    - Global Security: "Disable Salesman Inquiry for Other's in COP"
  - COP Freight Calculation Inquiry
    - Elliott Menu Security
    - Global Security: "Disable Salesman Inquiry for Other's in COP"
  - COP Order Entry
    - Elliott Menu Security
    - Global Security: "Disable User from Adding Orders in Order Entry"
    - Global Security: "Create Credit Memo in Order Entry"
    - Global Security: "Create COP Credit Memo from Invoice History"
    - Global Security: "Allow User Enter Negative Qty in Order Entry"
    - Global Security: "Change COP Orders After Pick Ticket Printed"
    - Global Security: "Allow to Delete COP Orders"
    - Global Security: "Allow to Override Terms in Order Entry"
    - Global Security: "Allow to Override Salesman in Order Entry"
    - Global Security: "Allow to Override Disc Pct in Order Entry"
    - Global Security: "Allow to Override Line Item Unit Cost"
    - Global Security: "Allow to Override Order Commission Field"
    - Global Security: "Change COP Pre-Paid Info"
    - Global Security: "Disable User from Printing Order Edit List"
    - Global Security: "Disable Salesman Add Other's COP Orders".



- Global Security: "Disable Salesman Change Other's COP Orders".
- Global Security: "Disable Salesman Printing Other's COP Orders".

## Global Security Control

This setup gives you additional **security controls** for features that are **not available as a menu selection** and for the COP Order Entry Menu functions to Create Credit Memos and Delete Orders.

## Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → System → Global Security Setup

**Global Security Setup** Screen 1

Default Access Right For Following Features	Allowed ?
1. Maintain Users And Password	N
2. Access Other Users' Spooled Reports	Y
3. Access Other Slm's Contact in Global eContact	N
4. Access All Events & Bypass Supervisory Chain	N
5. Maintain Event Template	N
6. Allow 'Subscribe to All' in Event	Y
7. Allow Manually Triggering An Event	N
8. Allow Editing eContact	N
9. Allow Maintaining eContact Roles	Y
10. Allow Add/Update Credit Card No. in eContact	N
11. Allow View Credit Card No. in eContact/Log	N
12. Allow Mass E-Mail/Export Processor	N
13. Allow E-Mail Report Through Printing	N
14. Allow Maintain Link Type	Y
15. Allow Maintain Laser Form	Y
16. Access Database Activities Window Ctl-Shift-D	N
17. Can See Customer Cost Information in AR	N
18. Disable Change Customer	N
19. Disable Delete Customer	N

Field Number ?

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These are Global Defaults only. These defaults can be tailored by individual user from the Password Setup menu → Global Security → User Global Security.

## Entry Field Descriptions – Screen 1

Name	Description
1. Maintain Users And Passwords	Y or N – Default: N If "Y," you must restrict users you do not want to access passwords. This is done in <b>Password Setup</b> , Package Name Sys. Process Name UTL, Field 4 Password Setup set to N. If "Y," then <b>key users</b> can access Password Setup with full rights. Key users are normally

	<p>defined to be upper management and/or additional supervisors.</p> <p>If "N," then <b>only User Name Supervisor</b> can access Password Setup regardless of the flag for field 4 in Sys, UTL.</p>
2. Access Other Users' Spooled Reports	<p>Y or N – Default: N</p> <p>When "N", this will disable the Show All Users checkbox in the Options window of the Print Spooled Reports. Users can only see their own reports unless the Show All Users box is checked.</p>
3. Access Other Slm's Contact in Global eContact	Y or N – Default: Y
4. Access All Events & Bypass Supervisory Chain	<p>Y or N – Default: N</p> <p>When "Y", this will allow the user to access all events regardless if the user is a supervisor or not.</p>
5. Maintain Event Template	<p>Y or N – Default: Y</p> <p>If "Y", then users are allowed to maintain Event Templates created by other users. If "N", then maintenance is not allowed, but the user can use templates created by other users.</p>
6. Allow 'Subscribe to All' in Event	<p>Y or N – Default: Y</p> <p>If "Y", the user can include all records in a master file for an event, e.g. all items in the Inventory Master file, all customer in the Customer Master file.</p>
7. Allow Manually Triggering an Event	Y or N – Default: N
8. Allow Editing eContact	<p>Y or N – Default: Y</p> <p>When "N", this will allow the user to view eContacts in the Contact Manager, but will not allow any editing.</p>
9. Allow Maintaining eContact Roles	<p>Y or N – Default: Y</p> <p>This applies to the Web Access screen of eContacts. Roles are defined with type of file rights you give the contact. If "N" the user cannot access Roles to change the rights.</p>
10. Allow Add/Update Credit Card No. in eContact	<p>Y or N – Default: Y</p> <p>This applies to the Billing/Credit screen in eContacts. If "Y", the user will be able to enter or update a credit card number.</p>
11. Allow View Credit Card No. in eContact/Log	<p>Y or N – Default: Y</p> <p>This applies to the Billing/Credit screen in eContacts. If "N", the user will only see asterisks and the last four digits of the contacts credit card number.</p>
12. Allow Mass E-Mail/Export Processor	<p>Y or N – Default: Y</p> <p>Mass e-Mail is an external Elliot e-mail program that gives the user access to eContacts and the ability to export the files. Export Processor allows these same files to be exported for use in a spreadsheet.</p>
13. Allow E-Mail Report Through Printing	<p>Y or N – Default: Y</p> <p>If "N", the E-mail option will be grayed out in the Print Options window.</p>
14. Allow Maintain Link Type	<p>Y or N – Default: Y</p> <p>If "N", users will not have access to create, change or delete links.</p>
15. Maintain Laser Form	<p>Y or N – Default: Y</p> <p>If "Y", the Edit Form button will be enabled in the Print Options window when printing a laser form.</p>
16. Access Database Activities Window Ctl-Shift-D	<p>Y or N – Default: N</p> <p>Normally you want to leave this "N" for most users since the Database Activities Window will</p>

	display some data, some may be sensitive.
17. Can See Customer Cost Information in AR	Y or N – Default: Y When “N”, fields 48, Cost PTD, 49, Cost YTD, and 50, Cost Last Yr, will display N/A in Customer Maintenance or Customer Inquiry.
18. Disable Change Customer	Y or N – Default: N When “Y”, the user can add or delete a customer, but will not be allowed into the Change menu option under Customer Maintenance.
19. Disable Delete Customer	Y or N – Default: N When “Y”, the user can add or change a customer, but will not be allowed into the Delete menu option under Customer Maintenance. We discourage users from deleting customers unless all database activity for that customer has been purged from the data files.

### Entry Field Descriptions – Screen 2

Name	Description
1. Disable Print Customer List/Label	Y or N – Default: N When “Y”, the menu options for Numeric-list, alPha-list and Labels are not allowed under Customer Maintenance.
2. Maintain Other Users in A/P Batch	Y or N – Default: Y This applies to the A/P Batch Processing feature. If this flag is set to “N”, then users cannot view, print or post the batches of another user.
3. Disable Delete Vendor	Y or N – Default: N When “Y”, the user can add or change a vendor, but will not be allowed into the Delete menu option under Vendor Maintenance. We discourage users from deleting vendors unless all database activity for that vendor has been purged from the data files.
4. Disable Delete Employee	Y or N – Default: N When “Y”, the user can add or change an employee, but will not be allowed into the Delete menu option under Employee Maintenance. We discourage users from deleting employees unless all database activity for that employee has been purged from the data files.
5. See Item Cost Information	Y or N – Default: Y If “N”, the cost fields 24 – 26 and 86 – 88 will display N/A for the user in the Item Maintenance and Item Inquiry screens. If the user is allowed access to Order Entry, the cost field will still display there.
6. See Item Cost for Hide Cost Product Category	Y or N – Default: Y If “N” and the Hide Cost field is set to “Y” for the product category of the item, the cost fields 24 – 26 and 86 – 88 will display N/A for the user in the Item Maintenance and Item Inquiry screens. If the user is allowed access to Order Entry, the cost field will still display there.
7. See ATP Vendor Info	Y or N – Default: Y If “N”, the user will not be allowed to drill down to PO activity for an item in the ATP Inquiry screen.
8. Disable Delete Item	Y or N – Default: N When “Y”, the user can add or change an item, but will not be allowed into the Delete menu option under Item Maintenance. We discourage users from deleting items unless all database activity for that item has been purged from the data files. This is why the Obsolete option is available for the Activity Code.
9. Disable User from Adding Orders	Y or N – Default: N

in Ord Entry	When "Y", the user can change or delete an order, but will not be allowed into the Add menu option under Order Entry.
10. Create Credit Memo in Order Entry	Y or N – Default: Y When "N", the user is not allowed to enter a type "C" in Order Entry, but can still create a Credit Memo by pressing F4 when in the Change menu of Order Entry.
11. Create COP Credit Memo From Invoice History	Y or N – Default: Y When "N", the user is not allowed to process the F4 key when in the Change menu of Order Entry, but can still enter a Credit Memo by choosing type "C" in Order Entry.
12. Change COP Order After Pick Tick Printed	Y or N – Default: Y Once a picking ticket has been printed for an order and the user attempts to enter the Change menu under Order Entry, a message box will appear stating that the function is not allowed if this flag is set to "N".
13. Allow to Delete COP Orders	Y or N – Default: Y When "N", the user can add or change an order, but will not be allowed into the Delete menu option under Order Entry.
14. Allow to Override Terms Code In Order Entry	Y or N – Default: Y When "N", field 16, Terms, will be bypassed during order entry of the header and can not be changed by the user.
15. Allow to Override Salesman In Order Entry	Y or N – Default: Y When "N", field 19, Salesmen, will be bypassed during order entry of the header and can not be changed by the user.
16. Allow to Override Disc Pct In Order Entry	Y or N – Default: Y When "N", field 23, Disc Pct, will be bypassed during order entry of the header and can not be changed by the user.
17. Allow to Override Line Item Unit Cost	Y or N – Default: Y When "N", field 6, Unit Cost, will be bypassed during order entry of the line items and can not be changed by the user.
18. Allow to Override Order Commission Fields	Y or N – Default: Y When "N", field 8, Comm Pct/Amt, will be bypassed during order entry of the line items and can not be changed by the user.
19. Change COP Pre-Paid Info	Y or N – Default: Y

### Entry Field Descriptions – Screen 3

Name	Description
1. Disable User From Printing Order Edit List	Y or N – Default: N When "Y", the user can add, change or delete an order, but will not be allowed into the List menu option in Order Entry.
2. Allow Shipping Verif if 856 Exported	Y or N – Default: N When "N", the user can is not allowed to perform shipping verification on an order that has already been exported through COP, Util-setup, Sales Order Export, Export and Shipped Order Data Export.
3. See Item Cost During PO Receiving	Y or N – Default: Y When "N", field 10, Unit Cost, will be skipped and will display "N/A" in the Purchase Order Receiving screen. The user will not be allowed to change this field.

4. Be a PO Requisition Supervisor	Y or N – Default: Y This applies to the PO Requisition process which carries additional security in its setup flags.
5. Allow to Change Printed PO Ship-To	Y or N – Default: N When “N”, the user is not allowed to change the Ship To location on the purchase order header. If this flag is set to “Y” and the user changes the Ship To, the Reset Qty On Order in I/M must be run.
6. Disable Delete Production Order	Y or N – Default: N When “Y”, the user can add or change a production order, but will not be allowed into the Delete menu option under Production Order Entry.
7. Disable Delete Shop Order	Y or N – Default: N When “Y”, the user can add or change a shop floor order, but will not be allowed into the Delete menu option under Order Entry.
8. Allow to Abort On-Line Charged Crdt Card Trx	Y or N – Default: N
9. Allow to Delete On-Line Charged Crdt Card Trx	Y or N – Default: N
10. On-Line Credit Card Charge in eContact	Y or N – Default: N
11. On-Line Credit Card Charge in A/R Inquiry	Y or N – Default: N
12. On-Line Credit Card Charge in Order Billing	Y or N – Default: N
13. On-Line Credit Card Charge in Sales Desk	Y or N – Default: N
14. Disable Salesman View Other's Customer in A/R	Y or N – Default: N When “Y”, the user is not allowed to change or inquire another salesman's customers. A Salesman Number must be entered in the Password Setup main screen for the user.
15. Disable Salesman Add Other's COP Orders	Y or N – Default: N When “Y”, the user is not allowed to add COP orders for another salesman's customers. A Salesman Number must be entered in the Password Setup main screen for the user.
16. Disable Salesman Change Other's COP Orders	Y or N – Default: N When “Y”, the user is not allowed to change COP orders for another salesman's customers. A Salesman Number must be entered in the Password Setup main screen for the user.
17. Disable Salesman Inquiry For Other's in COP	Y or N – Default: N When “Y”, the user is not allowed to inquire COP orders for another salesman's customers. A Salesman Number must be entered in the Password Setup main screen for the user.
18. Disable Salesman Printing Other's COP Orders	Y or N – Default: N
19. Allow User Manually Confirm Shipping Verif.	Y or N – Default: N

#### Entry Field Descriptions – Screen 4

Name	Description
------	-------------

1. Allow User Enter Negative Qty in Order Entry	Y or N – Default: N
---	---------------------

## User Global Security

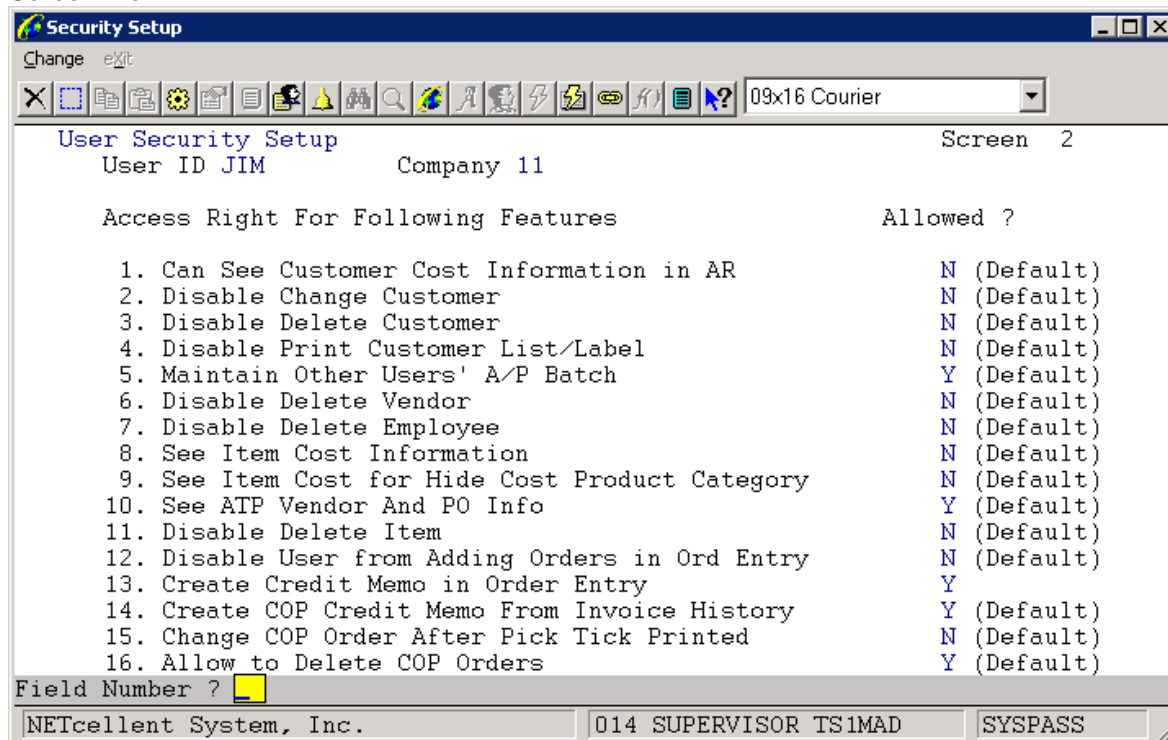
This feature allows you to tailor the flags in Global Security Setup to meet specific user needs. For example, if the flag to Create Credit Memo in Order Entry is set to N, then only user name Supervisor can enter credit memos. This security feature would soon become a great inconvenience to both the Supervisor and user, as well as disrupt the workflow. But, by using this feature you could designate other users to enter Credit Memos.

### To Tailor Global Security Flags:

**Password Setup → Global Security → User Global Security → Change**

Enter User ID and tailor as needed.

#### Screen 2 of 4



**Security Setup**  
Change exit

User Security Setup  
User ID JIM Company 11 Screen 2

Access Right For Following Features	Allowed ?
1. Can See Customer Cost Information in AR	N (Default)
2. Disable Change Customer	N (Default)
3. Disable Delete Customer	N (Default)
4. Disable Print Customer List/Label	N (Default)
5. Maintain Other Users' A/P Batch	Y (Default)
6. Disable Delete Vendor	N (Default)
7. Disable Delete Employee	N (Default)
8. See Item Cost Information	N (Default)
9. See Item Cost for Hide Cost Product Category	N (Default)
10. See ATP Vendor And PO Info	Y (Default)
11. Disable Delete Item	N (Default)
12. Disable User from Adding Orders in Ord Entry	N (Default)
13. Create Credit Memo in Order Entry	Y
14. Create COP Credit Memo From Invoice History	Y (Default)
15. Change COP Order After Pick Tick Printed	N (Default)
16. Allow to Delete COP Orders	Y (Default)

Field Number ? 014

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This screen, and all the screens in User Security Setup, will have all the fields flagged according to the Global Security Setup default values. When you change a field, you have 3 options:

1. Y = Yes
2. N = No

### 3. Spaces = Default Value

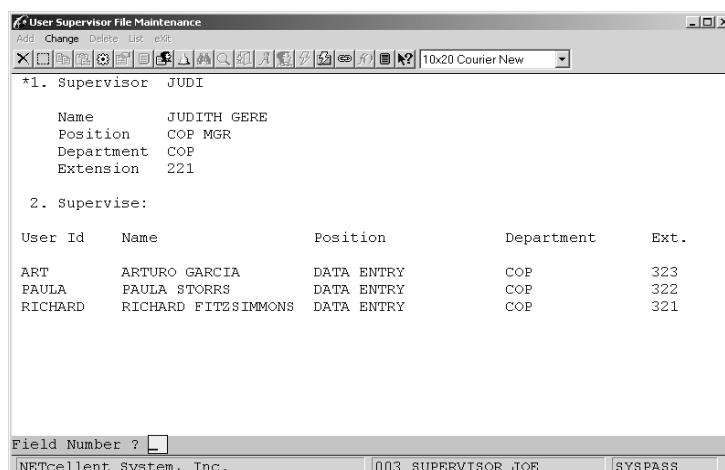
If you change a "Y" default flag to "N" and then go back later and change it to "Y", the field will not display as being the default value. **It is important** that you enter Spaces for defaults to display that this field is the default value.

## Supervisor Relationships

This feature establishes the framework for relationships within an organization and establishes the flow of access rights for certain programs.

**Main Menu → Util-Setup → Password Setup → Global Security → Supervisor Relationships**

Below is a supervisory relationship in Change Mode for supervisor Judi:



The screenshot shows a window titled "User Supervisor file Maintenance" with a menu bar (Add, Change, Delete, Help, Exit) and a toolbar. The main area displays the following information:

```

*1. Supervisor: JUDI

Name      JUDITH GERE
Position   COP MGR
Department COP
Extension  221

2. Supervise:

User Id    Name                Position      Department    Ext.
---
ART        ARTURO GARCIA          DATA ENTRY   COP            323
PAULA      PAULA STORRS           DATA ENTRY   COP            322
RICHARD    RICHARD FITZSIMMONS    DATA ENTRY   COP            321
  
```

At the bottom, there is a "Field Number ?" field and a status bar showing "NETcellent System, Inc." and "003 SUPERVISOR JOE" with a "SYSPASS" button.

### Access Rights Flow:

- Notes:** If blocked, users cannot see User Notes for other users. However, in this supervisory relationship the supervisor can view the blocked notes of the users supervised.
- Events:** Users cannot view Existing Event Request Actions of other users. However, in this supervisory relationship the supervisor can view and change Event Request Actions of the users supervised.
- E-Mail Template:** Users can use, but cannot change templates created by other users. However, in this supervisory relationship the supervisor can change the templates of the users supervised.

**NOTE:** If a Supervisory Relationship is not defined, the Supervisor has no access to the above rights.

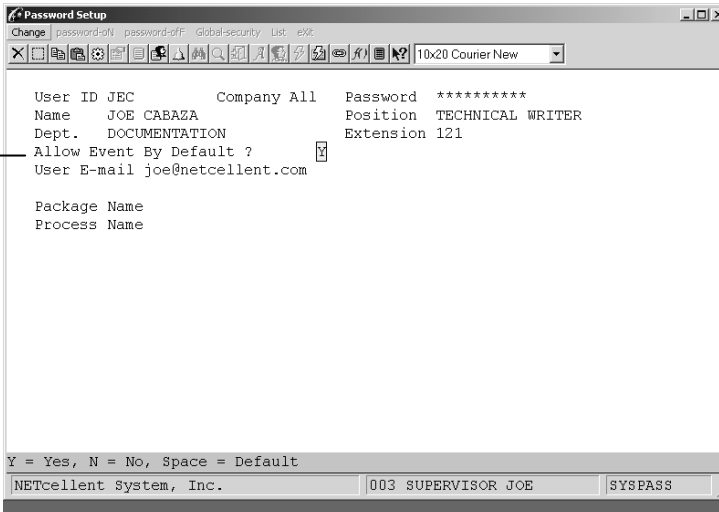


## Event Security

This level of protection applies to **Event Templates** and **Adding New Events (Subscriptions)** only.

## Event Template Security

Maintain Event Templates is controlled in Global Setup and flagged as “Y” or “N”. This default value can be overridden by User ID in Password Setup as shown below.



The screenshot shows a 'Password Setup' window with the following fields and values:

User ID	JEC	Company	All	Password	*****
Name	JOE CABAZA	Position	TECHNICAL WRITER		
Dept.	DOCUMENTATION	Extension	121		
Allow Event By Default ?	<input checked="" type="checkbox"/> Y				
User E-mail	joe@netcellent.com				
Package Name					
Process Name					

Legend: Y = Yes, N = No, Space = Default

Footer: NETcellent System, Inc. | 003 SUPERVISOR JOE | SYSPASS

This flag overrides the Global Setup default value.

### Global Setup Override:

Click F4 to access user content and tab to this field. There are 3 options:

1. Y = Yes
2. N = No
3. Spaces = Default Value

If the Global Setup Default flag is set to “N” to not let users maintain Event Templates, you would enter “Y” here to allow this user to maintain his or her templates or vice versa to prohibit maintenance.

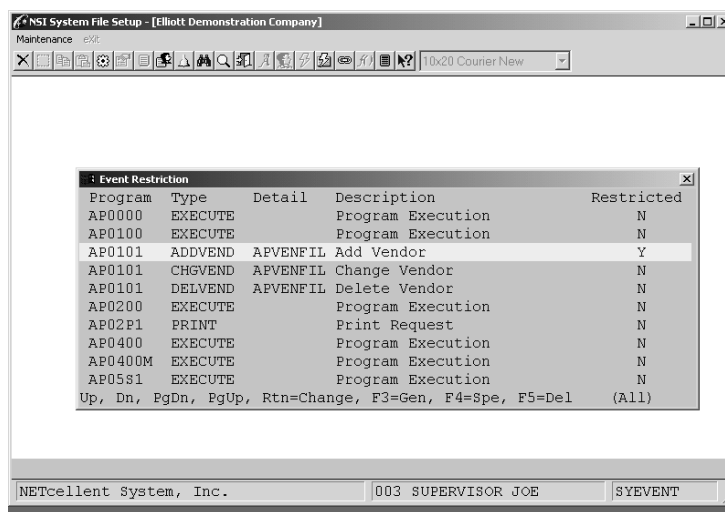
If you change a “Y” default flag to “N” and then go back later and change it to “Y”, the field will not display as being the default value. **It is important** that you enter Spaces for defaults to display that the field is the default value.

## Adding New Events Security

The first level of security is deciding what events to make available globally. Remember, you are setting Global availability and this can be amended at the user level.

To select, (restrict), events:

**Elliott Main Menu → Util-Setup → System File Setup → Maintenance → Event Restriction**



Events Restriction Window

### Function Key:

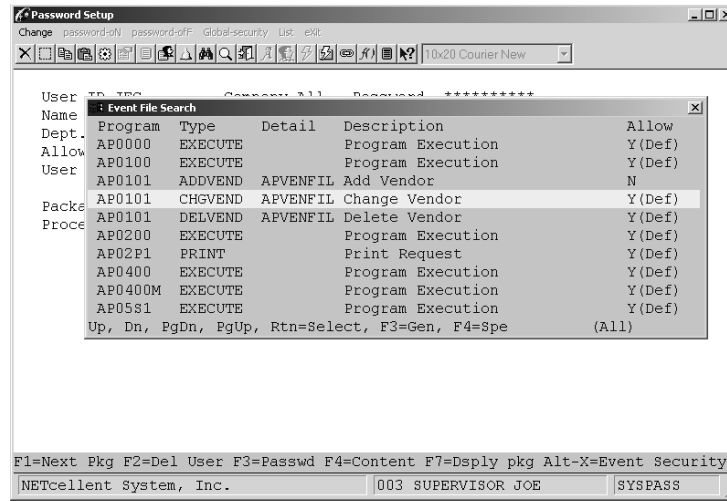
- F3** = View General Events Only (Gen will be displayed in lower right area)
- F3** = View Specific Events Only (Spe will be displayed in lower right area)
- Rtn** = **Change the Restriction of event highlighted**  
(Note that we restricted the event Add Vendor)

After you have completed restricting events, any event flagged "Y" will not be available globally to all users. Now we are ready to grant key users **access to restricted events** in the second level of security.

## Second Level Security:

### Elliot Main Menu → Util-Setup → Password Setup → Change

Select User ID and press enter. In the Package Name field, press **Alt X** and the following screen appears:



**Note** that event “Add Vendor” is flagged “N” which means Do Not Allow. If we wanted to give this user the ability to create a new event for Add Vendor, we would highlight it and press Return to change the value.

Likewise, if we wanted to deny this user from creating new events for “Change Vendor” we would highlight it and press Return to change the field value.

## ***Print Spooled Reports***

### **Application Overview**

See chapter titled Printing System

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## ***Deferred Processing***

### **Application Overview**

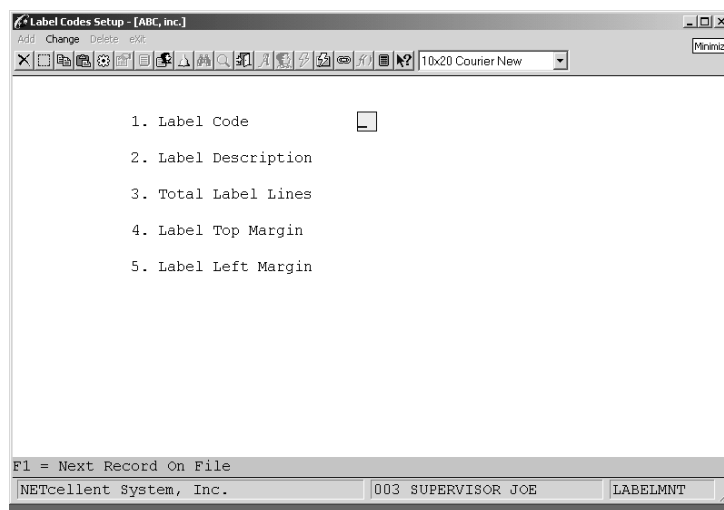
See chapter titled Printing System

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## Label Code Setup

### Application Overview

This application allows the user to define Label Codes. Label Codes are used to define label sizes used by the **Elliott Software**. Label Codes can be used for the printing of labels from the **Accounts Payable** package when printing Vendor Labels, from the **Customer Order Processing** package when printing Shipping Labels, and from **Accounts Receivable** package when printing Customer Labels.



Label Code Setup

### Run Instructions

Select Util\_Setup from the Elliott Main Menu Bar.

Select Label Code Setup from the pull down window. The Label Code Setup menu bar will allow you to select one of the following functions:

- Add Label Codes
- Change Label Codes
- Delete Label Codes

The following options are available:

- \* Select the desired function and enter the data requested on the screen in accordance with the Entry Field Description.
- \* When you have finished with any one of these functions, press the ESC or F10 key and the program will return to the Label Code Setup menu bar.
- \* When you have finished the label setup, press the ESC or F10 key when the menu bar is displayed. The Elliott Main Menu Bar will then be redisplayed.



## Entry Field Descriptions

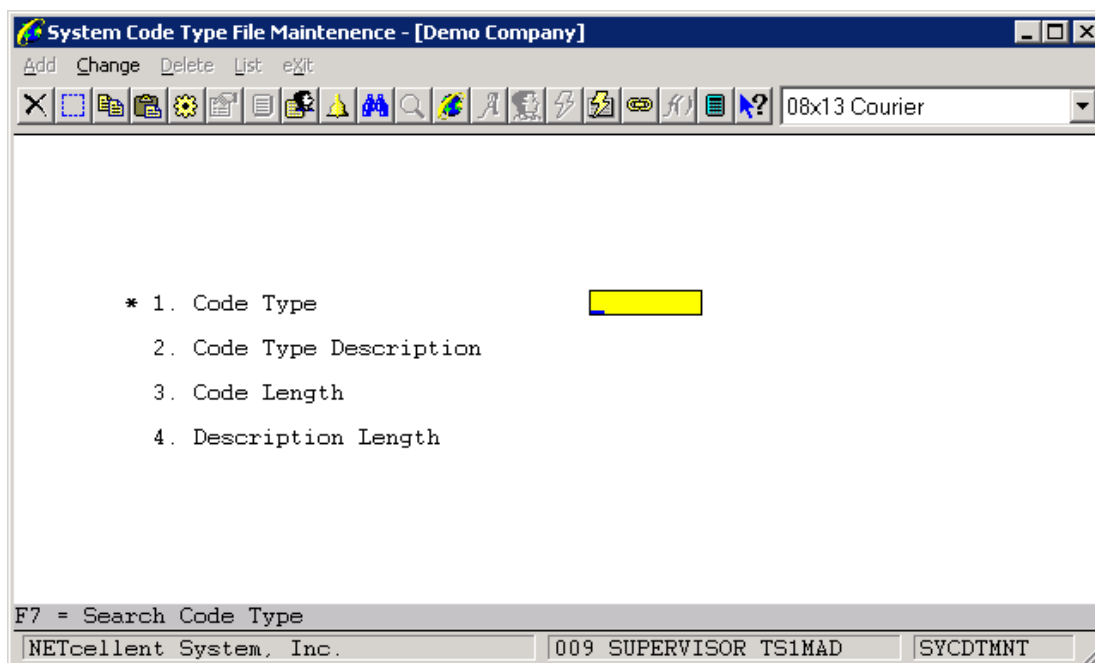
Name	Type and Description
1. Label Codes	2 numeric digits.  Enter the code you want to represent the Label Code. The maximum Label Code that can be entered is 99. In the change or delete mode, press the F1 key to search for defined Label Codes.
2. Label Description	30 alphanumeric characters.  This is the description of the Label Code. This description will be displayed any time the entry of a Label Code is requested so that you will be able to see that you have entered the correct Label Code.
3. Total Label Lines	2 numeric digits.  Enter the total number of label lines. The default is 6.
4. Label Top Margin	2 numeric digits.  Enter the label top margin. The Label Top Margin can't exceed the Total Label Lines less 6. For example, if the Total Label Lines is equal to 6, then the Label Top Margin can't be greater than 4. If the Label Top Margin does exceed the Total Label Lines the message " <b>Label Top Margin Can't Be Greater Than 4</b> ", using our example.
5. Label Left Margin	2 numeric digits.  Enter the label left margin. This will position the printing of the labels at the left margin specified.

## System Code Type File Maintenance

\*Note: This menu option replaces “Report writer” which has been discontinued. We suggest using Elliott’s Export Processor or Crystal Reports if you need a more robust report writer.

### Application Overview

This selection allows you to define generic codes that can be used throughout the system. User defined code types are maintained in a file called **SYCDTYPE.BTR**.



### Run Instructions

Select Util\_Setup from the Elliott Main Menu Bar.

Select System Code Type File from the pull down window. The System Code Type File menu bar will allow you to select one of the following functions:

- Add System Code Types
- Change System Code Types
- Delete System Code Types
- List System Code Types

The following options are available:

- \* Select the desired function and enter the data requested on the screen in accordance with the Entry Field Description.
- \* When you have finished with any one of these functions, press the ESC or F10 key and the program will return to the System Code Type File menu bar.
- \* When you have finished with System Code Type setup, press the ESC or F10 key when the menu bar is displayed. The Elliott Main Menu Bar will then be redisplayed.

## Entry Field Descriptions

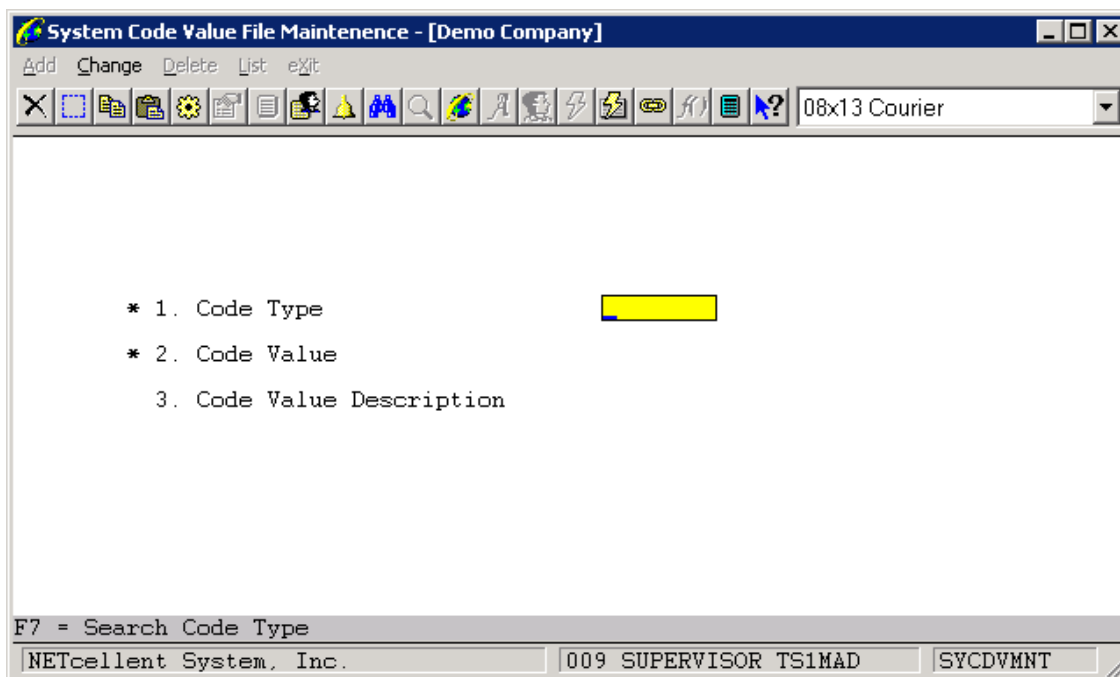
Name	Type and Description
1. Code Type	8 alphanumeric characters.  Enter the code you want to represent the System Code. In the change or delete mode, press the F7 key to bring up the search window for defined System Codes.
2. Code Type Description	30 alphanumeric characters.  This is the description of the Code Type. This description will be displayed any time the entry of a Code Type is requested so that you will be able to see that you have entered the correct Code Type.
3. Code Length	2 numeric digits.  Enter a value from 1 to 15 for the length of the Code Type.
4. Description Length	2 numeric digits.  Enter a value from 1 to 30 for the length of the Code Type Description.

## System Code Value

\*Note: This menu option replaces "Options" which has been discontinued.

## Application Overview

This selection allows you to assign values to the generic codes that you have set up.



## Run Instructions

Select Util\_Setup from the Elliott Main Menu Bar.

Select System Code Value from the pull down window. The System Code Value menu bar will allow you to select one of the following functions:

- Add System Code Values
- Change System Code Values
- Delete System Code Values
- List System Code Values

The following options are available:

- \* Select the desired function and enter the data requested on the screen in accordance with the Entry Field Description.
- \* When you have finished with any one of these functions, press the ESC or F10 key and the program will return to the System Code Value File menu bar.
- \* When you have finished with System Code Value setup, press the ESC or F10 key when the menu bar is displayed. The Elliott Main Menu Bar will then be redisplayed.

## Entry Field Descriptions

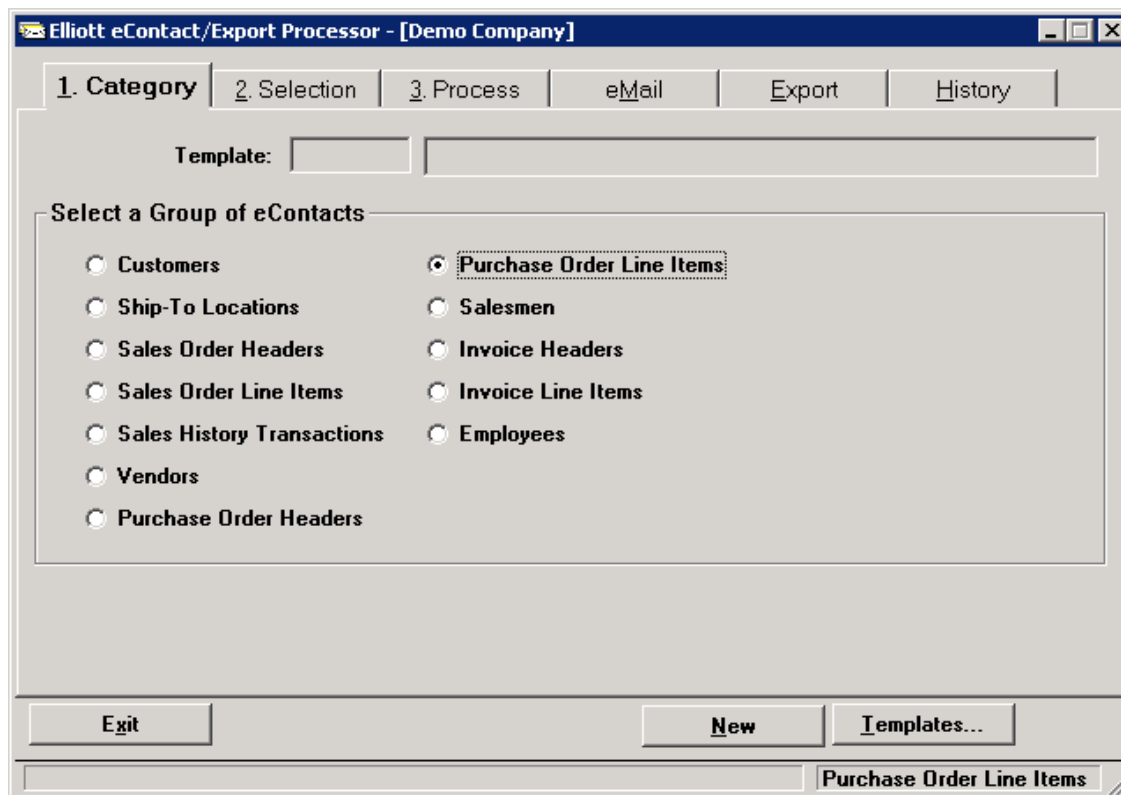
Name	Type and Description
1. Code Type	<p>8 alphanumeric characters.</p> <p>Enter the code type you want to assign values to. In the change or delete mode, press the F7 key to bring up the search window for defined System Codes. This must be a valid code.</p>
2. Code Value	<p>1 to 15 alphanumeric characters.</p> <p>The length of this field is dependent upon the value entered in the Code Type setup. Enter the value you wish to assign to this code.</p>
3. Code Value Description	<p>1 to 30 alphanumeric characters.</p> <p>The length of this field is dependent upon the value entered in the Code Type setup. Enter the value description you wish to assign to this code.</p>

## eContact Processor

\*Note: This menu option replaces "Bar code utilities" which has been discontinued.

### Application Overview

This selection allows you to perform a mass e-mail with the eContacts set up in Elliott. A multi-tab window will allow you to perform different functions; choose eContacts from different categories, select different criteria for the eContact list, process the request, compose and send an e-mail to the eContacts selected, export the data to a text file or spreadsheet and provide a history of functions performed in eContact Processor.

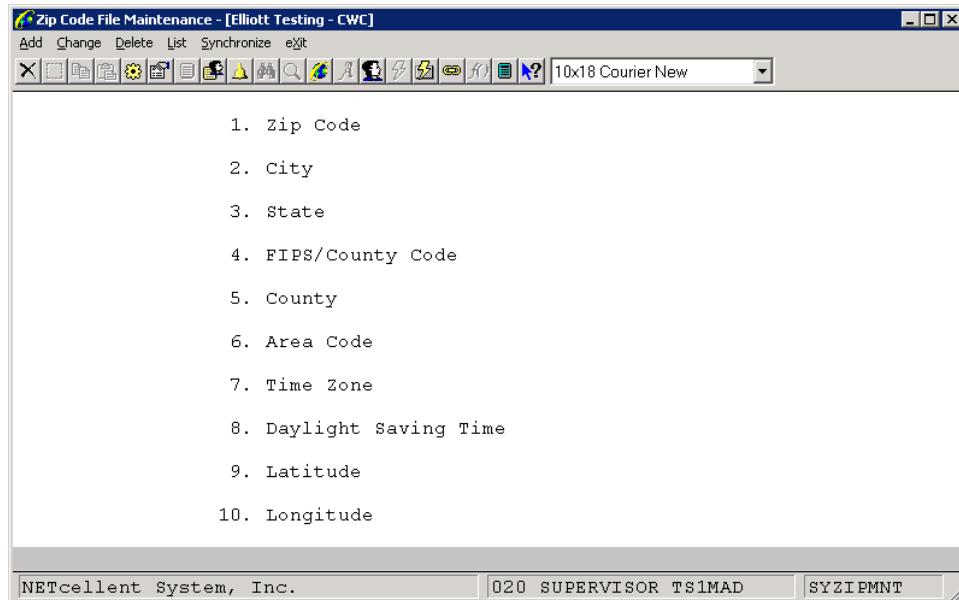


## Zip code File

\*Note: This menu option replaces "Install updates" which has been discontinued.

## Application Overview

This selection allows you to maintain the zip code file that is used throughout Elliott.



## ***Estimate File Size***

### **Application Overview**

This menu option is not supported in Version 7.x.



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## User List

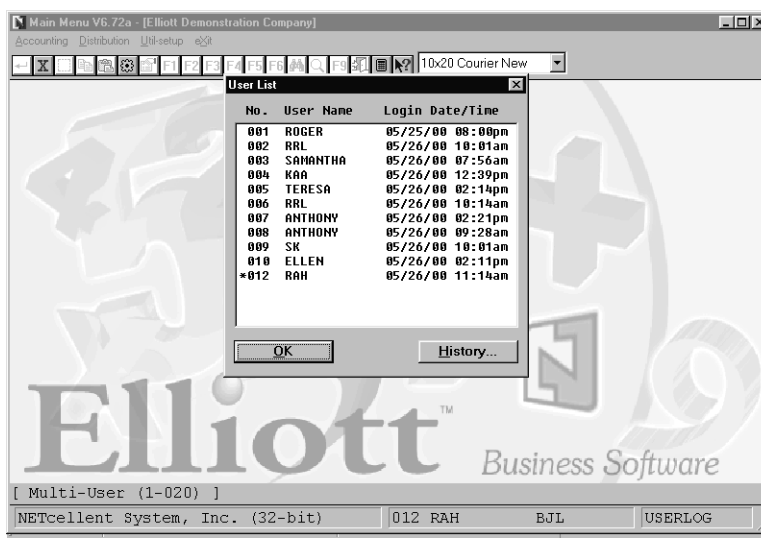
### Application Overview

The **User List** utility displays a list of users currently logged into the **Elliott** system. Each user's login date and time are displayed. If the password system is in use, the User names entered there will also be displayed. If the password system is not in use, **No User Name** will be displayed in that field. An asterisk is displayed next to the user who is running the **User List** utility.

### Run Instructions

Select the **User List** application from the **Util\_Setup** pull-down window at the **Elliott** main menu. The following screen will appear:

List Of Current Users



The following option is available:

\*A window containing the list of current users will automatically be displayed. Use the **Pg Up** and **Pg Dwn** keys to scroll up and down the list. Use the **Escape** or **F10** keys to exit the application.

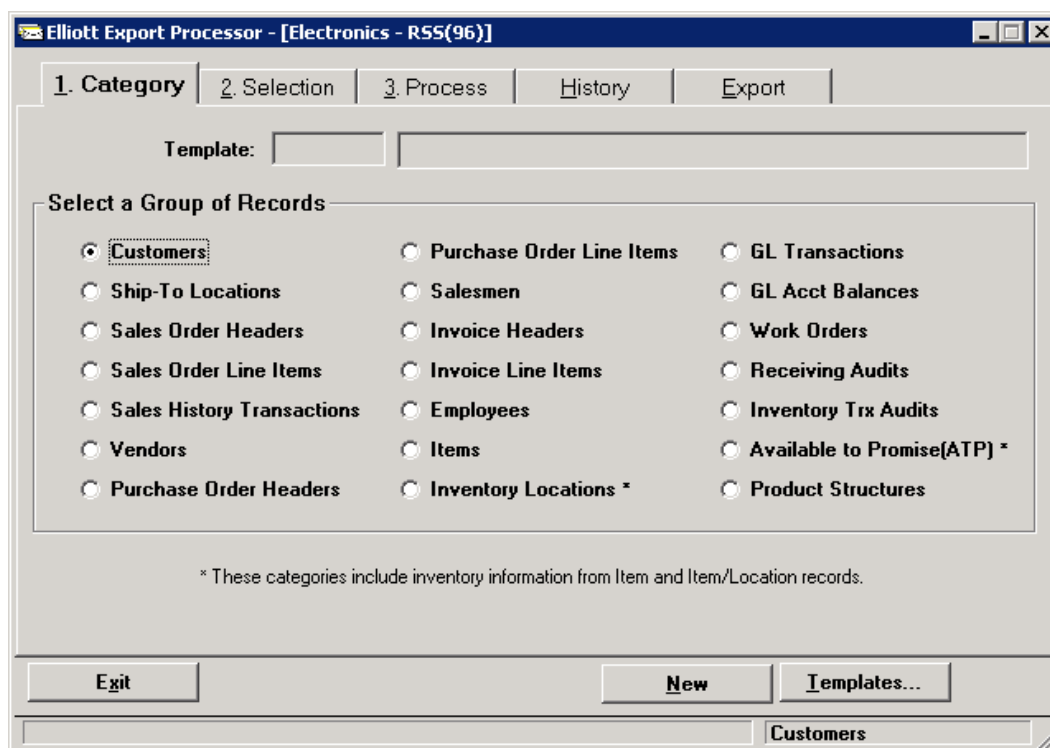
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## Export Processor

\*Note: This menu option replaces “EDI Interface” which has been replaced with the import and export sales orders functions in COP.

## Application Overview

This selection allows you to export data from certain master files within Elliott.



Elliott Export Processor - [Electronics - RSS(96)]

1. Category | 2. Selection | 3. Process | History | Export

Template:

Select a Group of Records

- ☒ Customers
- ☐ Ship-To Locations
- ☐ Sales Order Headers
- ☐ Sales Order Line Items
- ☐ Sales History Transactions
- ☐ Vendors
- ☐ Purchase Order Headers
- ☐ Purchase Order Line Items
- ☐ Salesmen
- ☐ Invoice Headers
- ☐ Invoice Line Items
- ☐ Employees
- ☐ Items
- ☐ Inventory Locations \*
- ☐ GL Transactions
- ☐ GL Acct Balances
- ☐ Work Orders
- ☐ Receiving Audits
- ☐ Inventory Trx Audits
- ☐ Available to Promise(ATP) \*
- ☐ Product Structures

\* These categories include inventory information from Item and Item/Location records.

Exit | New | Templates...

Customers

## Notes Processing

### Application Overview

This area allows you to print notes, purge notes, and maintain note types (Add Change, Delete). This is a critical area where users can access sensitive information. **Password protection** should be considered for the Print and Purge menu selections.

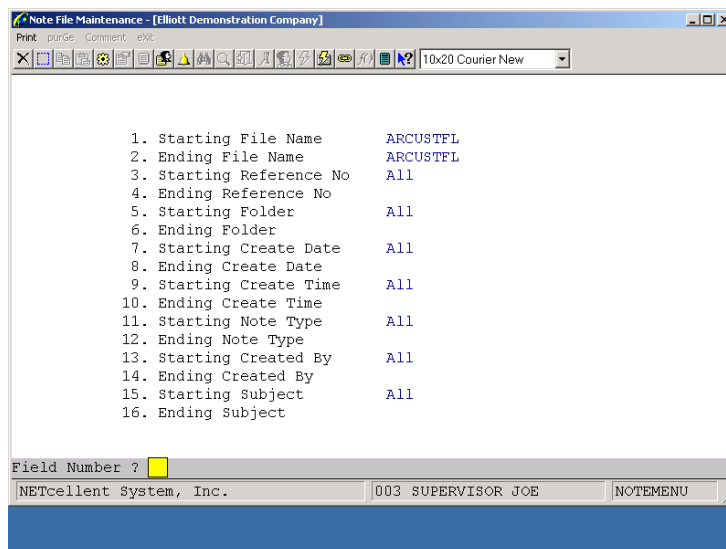
### Printing Notes

Main Menu → Util-Setup → Notes Processing → Print → Notes → Print

The Print Option gives you three selections:

#### 1. Edit List

This applies to both user notes and regular notes. From the selection criteria you can tailor the report you want.



Edit List (Report) for all notes associated with customers (ARCUSTFIL)

#### Field 1 –2:

Master Record, e.g., Customers, Vendors, Inventory, etc.

#### Field 3 –4:

Starting Record Number, e.g., Customer, Vendor or Item Number.

(Master Record file names are available in the Developers Reference Manual and from the Initialize Files screen.)

#### User Notes Only:

In Field 1 and 2 enter SYUSRFIL (User File).  
In Field 13 and 14 enter User ID (Login name).

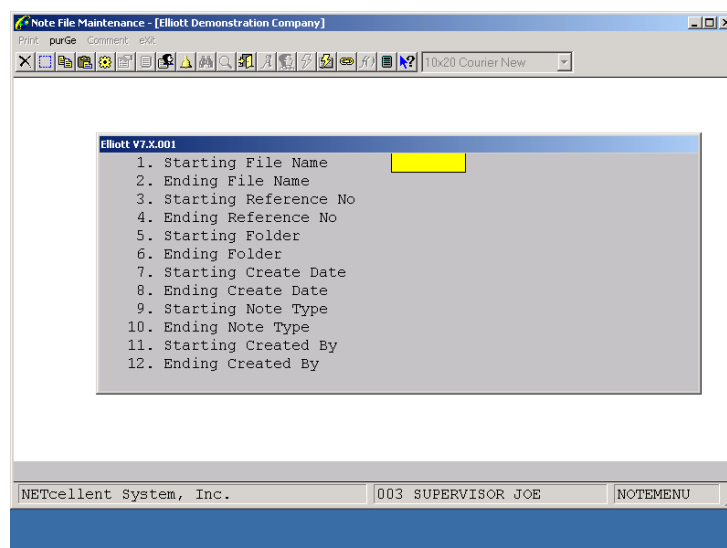
**Outstanding Task Report:** This applies to Ticklers by User ID for tasks still open. For tasks still open, the system allows you to go back 999 days.

**Completed Task Report:** This applies to Completed by User ID and Starting and Ending Dates.

## Purge Notes

This purges all notes based on your selection criteria. **Password Protection** to this selection should be considered.

To purge: **Main Menu → Util-Setup → Notes Processing → Print → Notes → Purge**



## Note Type

This allows you to structure notes by user defined fields. Using Note Type gives you consistent data type information.

To Define: **Main Menu → Util-Setup → Notes Processing → Note Type**

The screenshot shows the 'Notetype File Maintenance' window for 'Elliott Demonstration Company'. It contains a list of note types and their associated fields. The fields are organized into two columns. The first column lists fields 1 through 12, and the second column lists fields 13 through 23. The fields are as follows:

Field Number	Field Name	Field Value
1.	Note Type	CONTACT
2.	Description	CONTACT
3.	Literal 1	Name:
4.	Literal 2	Home Address:
5.	Literal 3	
6.	Literal 4	Home Phone:
7.	Literal 5	Home Fax:
8.	Literal 6	E-mail:
9.	Literal 7	Birthday:
10.	Literal 8	Spouse:
11.	Literal 9	Hoby:
12.	Literal 10	
13.	Print To Invoice	N
14.	Print To PO	N
15.	Print To Pick/Pack Slip	N
16.	Print To Work/Shop Ord	N
17.	Shareable For Read ?	Y
18.	Shareable For Change ?	Y
19.	Shareable For Delete ?	Y
20.	Print To Ord Acklmnt	N
21.	Print To Quote	N
22.	Print Aging Report	N
23.	Disp Prev Note Lst Line	N

Field Number ?

NETcellent System, Inc. (32-bit) 001 SUPERVISOR TOSHIBA NOTEMENU

## Entry Field Descriptions

Name	Type and Description
1. Note Type	6 alphanumeric characters.  Enter the code you want to represent the Note Type.
2. Description	30 alphanumeric characters.  This is the description of the Note Type. This description will be displayed any time the entry of a Note Type is requested so that you will be able to see that you have entered the correct Note Type.
3 - 12. Literals 1 - 10	30 alphanumeric characters.  Enter the literal you want to appear each time this note type is used. These can be left blank.
13. Print To Invoice	Y or N.  Indicates if the Note Type is to print on the invoices.
14. Print To PO	Y or N.  Indicates if the Note Type is to print on the purchase orders.
15. Print To Pick/Pack Slip	Y or N.  Indicates if the Note Type is to print on the Picking Tickets and Packing Slips.

16. Print To Work/Shop Ord	Y or N.  Indicates if the Note Type is to print on the Work Orders and Shop Floor Orders.
17. Shareable For Read	Y or N.  Indicates if the Note Type can be read only by the user and Note Supervisors.
18 Shareable For Change	Y or N.  Indicates if the Note Type can be changed only by the user and Note Supervisors.
19 Shareable For Delete	Y or N.  Indicates if the Note Type can be deleted only by the user and Note Supervisors.
20. Print To Ord Acklmnt	Y or N.  Indicates if the Note Type is to print on the Order Acknowledgements.
21. Print To Quote	Y or N.  Indicates if the Note Type is to print on the Quotes.
22. Print To Aging Report	Y or N.  Indicates if the Note Type is to print on the Aging Report.
23. Disp Prev Note Lst Line	Y or N.  Used for reference and review purposes.



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## ***System File Maintenance***

### **Application Overview**

This allows the maintenance of several system files that are used throughout Elliott.

### **Attribute File**

See Attributes section in Customer Relationship Management

### **Restricted Attribute**

See Restricted Attributes section in Customer Relationship Management

### **Event Restriction**

See Event Security section in Util-Setup → Password Setup

### **Attribute Enhancement**

See Attribute Enhancement section in Customer Relationship Management

### **Packaging Code File**

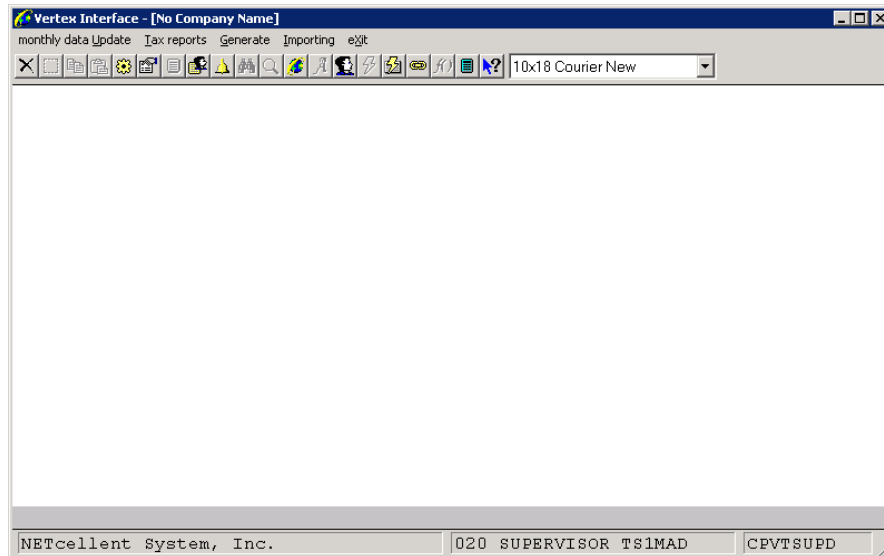
See Packaging Code File

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## Vertex Interface

### Application Overview

The Vertex Interface is an enhancement within Elliott that utilizes certain files to calculate the sales tax. Files are provided with the tax and location information on an annual basis. The utilities provided here allow that information to be brought into Elliott.



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## Global Setup

### Overview

There are a vast number of features and functions in the Elliott Software that we let you Pick & Choose rather than install them by default. This way, you can select what best suits your needs and that which can improve your functionality and customer service.

The **Util-Setup** menu option in the **Elliott Main Menu** offers you a menu choice titled **Global Setup**. This menu choice, Global Setup, organizes the features and functions by sub-menus. These sub-menu setup options are listed below.

### System Global Setup

These are applications used system wide, e.g., Notes, or applications that may cross and be functional in two or more modules, e.g., Landed Cost. Their setup and default values are defined in this manual (see **System Global Setup**). Their functionality and usage are as follows:

Menu Item	Functionality	Usage Instructions
Additional Search Key	System Wide	With Setup Instructions
Available To Promise	I/M and COP	I/M & COP Manuals
Bar Code Printing Setup	I/M, COP, PO, BOMP & SFC	I/M, COP, and PO Manuals
Company Specialized Control		
Design Your Own Form	AP, COP, PO	AP, COP, and PO Manuals
Landed Cost Control	I/M and PO	I/M and PO Manuals
Note Function	System Wide	System Manager Manual
Printing Control	System Wide	System Manager Manual
Serial Number Tracking Ctrl	I/M and BOMP	I/M and BMOP Manual
System Period Control	System Wide	With Setup Instructions
User Purging Control	System Wide	With Setup Instructions
Events Handling	System Wide	System Manager Manual
Attribute Handling	System Wide	System Manager Manual
Hold Handling		
eContact Manager	System Wide	System Manager Manual
Link Setup	System Wide	System Manager Manual

## Accounting Global Setup

These are module specific features and functions for GL, AP, and AR. Their setup is defined in the Global Setup section of their respective manual. The Usage instructions are in the section of their manual where applicable; Maintenance, Inquiry, Processing, Reports, Util-Setup.

### Setup Options for:

- G/L Global Control
- G/L Setup
- A/R Global Control
- A/R Setup
- A/R Bill To Customer
- A/R Sales Tax Audit Trail
- A/R Payment Source
- A/P Global Control
- A/P Setup
- A/P Batch Processing
- P/R Setup
- P/R Global Control
- Bankrec Setup

## Distribution Global Setup

These are module specific features and functions for I/M, PO, and BMOP. Their setup is defined in the Global Setup section of their respective manual. The Usage instructions are in the section of their manual where applicable: Maintenance, Inquiry, Processing, Reports or Util-Setup.

### Setup Options For:

- I/M Global Control
- I/M Setup
- Display Item History Information
- Substitute Item Control
- Inventory Transfer Control
- COP Setup
- P/O Global Control
- P/O Setup
- P/O Requisition Process
- BOMP Global Control
- BOMP Setup

## COP Control Global Setup

These are additional features and options in Customer Order Processing, many of which have their own menu selection. Their setup is defined in the Global Setup section of the COP manual. The Usage instructions are in the section of the COP manual where applicable: Maintenance, Inquiry, Processing, Reports or Util-Setup.

### Setup Options Available:

- Bill of Lading
- Copy Order
- Customer Item Cross Reference
- Freight Calculation
- Order/Invoice Inquiry
- Price By Whole Order
- Price List By Customer
- Print COD Tag
- Credit Check & Release
- Salesman Commission Control
- User Defined Code
- Stock Status Inquiry
- Sales Desk
- Sales Desk Screen Layout
- Change Customer Screen Layout
- Contract Pricing

## COP Function Global Setup

These are additional features and options in Customer Order Processing that greatly impact the functionality of many order processing, inquiry and posting functions. Their setup is defined in the Global Setup section of the COP manual. The Usage instructions are in the section of the COP manual where applicable: Maintenance, Inquiry, Processing, Reports or Util-Setup.

### Setup Options Available:

- Change Quote To Order
- Invoice Printing
- Print Order/Quote/Acknowledgement
- Order Billing Screen
- Order Header Screen
- Order Line Item Screen
- Pick Ticket/Ship Label
- Post Invoice To A/R
- Purge Posted Invoice
- Future Price Screen
- Shipping Manifest Report
- Shipping E-mail Acknowledgement



Shipping Data Update  
Shipping Confirmation

## Add-Ons

This is the area where you setup or, in some cases, run Elliott Vertical Add-On modules that require a separate license agreement.

### Options Available:

Multi-Bin Control  
Style Group Control  
Vertex Sales Tax  
Sales Order Export  
Sales Order Import  
Shipping Verification  
Purchase Order Import  
Take An Order Interface  
Activex Component  
On-line Credit Process  
Consumer Scanner Interface  
Radio Beacon Interface  
Item Import Utility  
Warehouse Receiving  
Recurring Order

## Utility Global Setup

These are programs or file maintenance utilities required for a few functions. There are no setup programs within this menu.

### Programs and Utilities Available:

Generate User Index  
Convert Ship-To To Customer  
Reset Last Access User And Date  
Switch FOB And Landed Cost  
Copy FOB to Landed Cost  
Event Alert And Purge  
eContact Integrity Check  
eContact Password Generate  
Set CC Master Password  
Preauthorize User CC Access

Preauthorize Server CC Access  
COP Order Integrity Check

## System Global Setup

### Additional Search Key

#### Application Overview

This enhancement offers increased search option criteria for customer, employee, item, ship-to, vendor and service invoice searches. For example, users can search a customer by address, city, zip code, phone number, contact, etc., in addition to customer number and name.

#### Run Instructions

Setup: Elliott Main Menu → Util-Setup → Global Setup → System → Additional Search Key

Additional Search Key	
1. Additional Search Key For Customer ?	Y
2. Customer No In Srch Window Position	L
3. Customer Name In Srch Window Position	F
4. Additional Search Key For Employee ?	N
5. Employee No In Srch Window Position	F
6. Employee Name In Srch Window Position	F
7. Additional Item Search Keys ?	Y
8. Item No In Srch Window Position	F
9. Item Desc In Srch Window Position	F
10. Use UPC/SCC-14 / Alternate Item No	N
11. Additional Search Key For Ship To ?	Y
12. Ship To No In Srch Window Position	F
13. Additional Search Key For Vendor ?	N
14. Vendor No In Search Window Position	F
15. Vendor Name In Search Window Position	F
16. Search Name & Description Directly	N
17. Additional Search Key For Service Invoice	Y

Field Number ?

NETcellent System, Inc. 003 SUPERVISOR TS1MAD NSCTLMN1

Setup screen controls customer, item, employee, ship-to, and vendor.

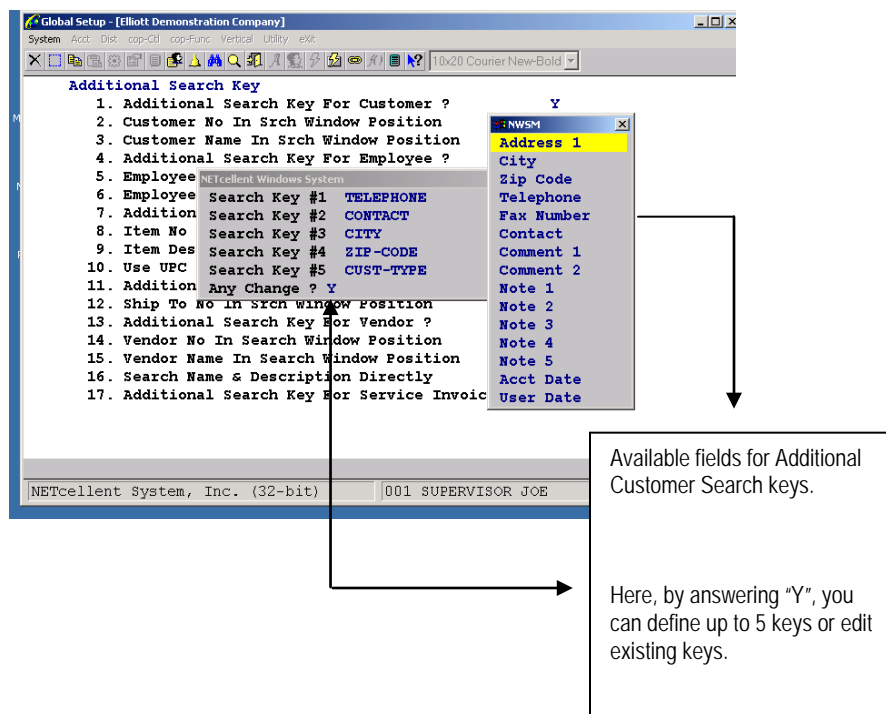
#### Field Entry Descriptions

**Field 1:** Additional Search Key For Customer?

Answer "Y" to use this feature.

After entering "Y" and pressing <enter>, the system displays a window with the five additional search keys. By default, the search keys are blank. To define the blank keys or change existing search keys, press "Y" to any changes.

In "change mode", an additional window is displayed with all the choices available that can be used as additional search keys. See Figure on the next page.



**Field 2.** Customer No. In Srch Window Position?

"F" = Display Customer No. first in the search selection window.

"L" = Display Customer No. after the five additional search keys.

Since most searches are seldom by Customer No., selecting "L" gives you more useful search keys such as ZIP Code, Telephone, etc.

**Field 3.** Customer Name in Srch Window Position?

"F" = Display Customer Name first in the search selection window.

"L" = Display Customer Name after the five additional search keys.

**Fields 4-16** Same functionality and procedures as Fields 1–3, but each with its own set of search criteria.

**Field 16.** Search Name and Description Directly?

"Y" = Goes straight to Name when using the F8 key and does not display the additional search keys.

**Field 17.** Additional Search Key For Service Invoice?

Same as Field 1. Additional Search Key For Customer, but for Service Invoices with their own set of search criteria.

**NOTE:** Additional Search Keys require generating index keys for all records. **See next page.**

## Generating Index Keys

This is a **required procedure** to properly index the additional search keys you have defined.

Goto: **Elliott Main Menu → Util-Setup → Global Setup → Utility → Generate User Index**

When you select Generate, you are given the following options:

1. All Keys
2. Customer
3. Employee
4. Item
5. Ship-To
6. Vendor
7. Service Invoice

After you have made your selection, the system will prompt you for how you want to print your Summary Report, (Printer, Disk, Screen, Defer, E-mail).

This process **must be run** whenever you add, change, or edit an additional search key category. It can also be used as a utility tool should your file somehow become corrupt.

### Generate Index Report By all Keys:

Run Date: Sep 20, 2001 - 6:55am  
Page 1

Elliott Demonstration Company

#### U S E R I N D E X G E N E R A T E L I S T

Total Customer Search key Generated :	16
Total Employee Search key Generated :	9
Total Item Search Key Generated :	162
Total Vendor Search Key Generated :	16
Total Srv Inv Search Key Generated :	14

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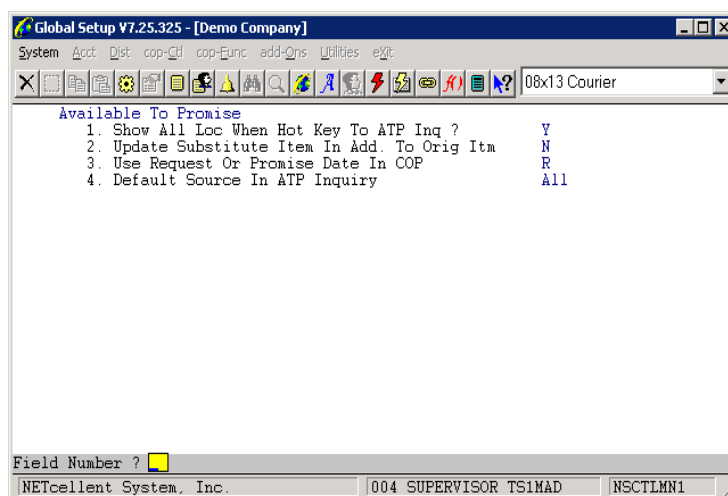
## Available To Promise

### Application Overview

Available To Promise (ATP) reflects COP Order Line Items, PO Order Line Items, and BOMP Production Orders to provide future stock availability information held in the ATP Open Item File. From this Open Item File the Inventory or Customer Processing user can produce reports and screen inquiries of projected inventory balances based on the date sequence from the transactions processed in the source modules.

### Run Instructions

From Elliott Main Menu → Util-Setup → Global Setup → System → Available To Promise



Available To Promise Setup Screen

### Entry Field Descriptions

Name	Type and Description
1. Show All Loc When Hot Key To ATP Inq ?	Y or N.  This question asks if you would like to show all warehouse locations when you press the function key to access the Available To Promise Inquiry screen. Answer "Y" to display all locations.
2. Update Substitute Item In Add. To Orig Itm	Y or N.  If an item has a substitute item defined, then it will be updated to the Available To Promise file when you enter an order. If you do not need this functionality, answer "N."
3. Use Request Or Promise Date In COP	R or P.  In the COP Line Item Screen, there is a request and promise date. If you wish to use request date to



	display during Available To Promise Inquiry, then answer "R". Otherwise, answer "P" to display by promise date.
4. Default Source In ATP Inquiry	<p>S, P, B or blank.</p> <p>Select a default source, (COP, PO, BOMP), to be merged into the ATP Open Item File, enter "S" for Sales Orders, "P" for Purchase Orders or "B" for BOMP Production Orders. To select <b>ALL</b> sources press &lt;Enter&gt;.</p> <p>The purpose of this flag is to allow you to control what sources to merge from. For example, some companies may only be interested in future availability of items entered through Production Orders in BOMP, whereas others may need to know what will be available on a future date based on open purchase orders only.</p>
14. Print To PO	<p>Y or N.</p> <p>Indicates if the Note Type is to print on the purchase orders.</p>
15. Print To Pick/Pack Slip	<p>Y or N.</p> <p>Indicates if the Note Type is to print on the Picking Tickets and Packing Slips.</p>

**NOTE:** After the five fields have been defined, the ATP Open File is generated and maintained from the Inventory module, (Utilities menu).

## ***Barcode Printing Setup***

### **Application Overview**

This enhancement generates a comma delimited ASCII file containing such information as the item UPC code, Lot No., Serial No., and many more fields to interface with BarTender®<sup>1</sup> software for **barcode label** printing. BarTender®<sup>1</sup> is a third party software package that handles the printing of barcode labels. To obtain information about BarTender®<sup>1</sup>, contact Netcellent System, Inc. at 888-595-3818. This ASCII file actually can be generated from 6 sources: 1) I/M Item file, 2) I/M Receiving, 3) COP Shipping Label, 4) PO Receiving, 5) BOMP Production Transaction Processing, 6) SFC Transaction. The flexibility of this enhancement is that users can define what fields are to be included in the ASCII output file. This is a very useful function to have when you receive items that do not already have labels on them.

### **Automatic Label Printing**

The barcode layout is user-definable in the BarTender® software. BarTender has a file detection component called Commander. This can constantly monitor the existence of the ASCII file so that the system can launch the label printing component in BarTender. As a result, barcode labels can be printed automatically.

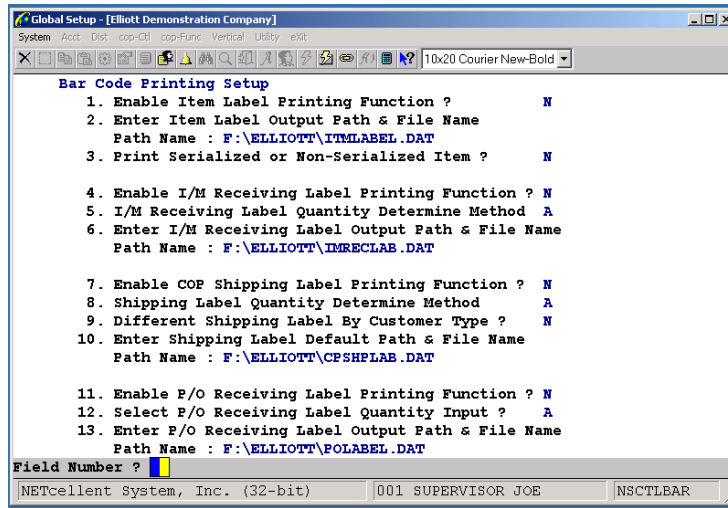
**Note:** Barcode labels are printed using BarTender®. The automatic label printing will only work if you are using BarTender® with Commander.

Since BarTender® supports a wide range of barcode printers, it is extremely easy and flexible to define the layout of a barcode label. If flexibility is what you are looking for, go for this enhancement!

This document discusses only the functions within Elliott. If you wish to learn more about BarTender®, contact our sales department at Netcellent System, Inc. This enhancement is straightforward and very easy to use.

## Run Instructions

From Elliott Main Menu → Util-Setup → Global Setup → System → Barcode Printing Setup



Global Setup - [Elliott Demonstration Company]

System Acc. Upst. cop+Co cop+Func. Vertical Utility exit

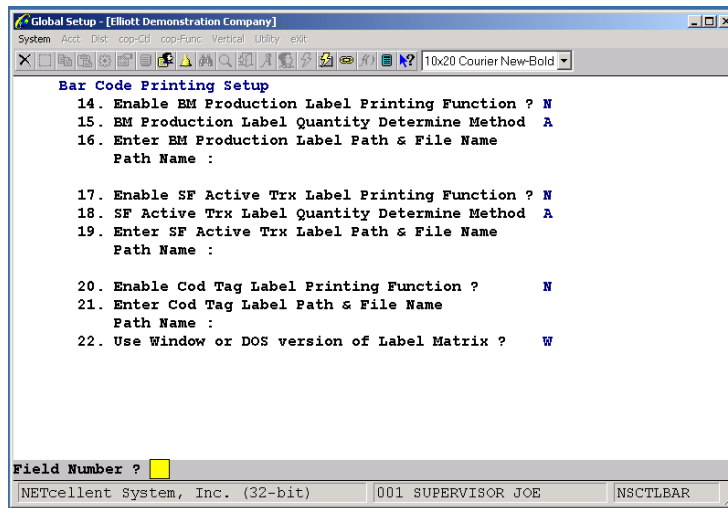
Bar Code Printing Setup

1. Enable Item Label Printing Function ? N
2. Enter Item Label Output Path & File Name  
Path Name : F:\ELLIOTT\ITMLABEL.DAT
3. Print Serialized or Non-Serialized Item ? N
4. Enable I/M Receiving Label Printing Function ? N
5. I/M Receiving Label Quantity Determine Method A
6. Enter I/M Receiving Label Output Path & File Name  
Path Name : F:\ELLIOTT\IMRECLAB.DAT
7. Enable COP Shipping Label Printing Function ? N
8. Shipping Label Quantity Determine Method A
9. Different Shipping Label By Customer Type ? N
10. Enter Shipping Label Default Path & File Name  
Path Name : F:\ELLIOTT\CPSHPLAB.DAT
11. Enable P/O Receiving Label Printing Function ? N
12. Select P/O Receiving Label Quantity Input ? A
13. Enter P/O Receiving Label Output Path & File Name  
Path Name : F:\ELLIOTT\POLABEL.DAT

Field Number ?

NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE NSCTLBAR

Barcode Printing Setup Screen 1



Global Setup - [Elliott Demonstration Company]

System Acc. Upst. cop+Co cop+Func. Vertical Utility exit

Bar Code Printing Setup

14. Enable BM Production Label Printing Function ? N
15. BM Production Label Quantity Determine Method A
16. Enter BM Production Label Path & File Name  
Path Name :
17. Enable SF Active Trx Label Printing Function ? N
18. SF Active Trx Label Quantity Determine Method A
19. Enter SF Active Trx Label Path & File Name  
Path Name :
20. Enable Cod Tag Label Printing Function ? N
21. Enter Cod Tag Label Path & File Name  
Path Name :
22. Use Window or DOS version of Label Matrix ? W

Field Number ?

NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE NSCTLBAR

Barcode Printing Setup Screen 2

## Entry Field Descriptions

Name	Type and Description
1. Enable Item Label Print Function?	<p>Y or N.</p> <p>If you wish to generate a barcode label for the I/M Master File, answer "Y" to this question. After entering "Y" and pressing &lt;Enter&gt;, the system will display a small window with fields for you to select. To mark a field to print, press enter at field description.</p> <p>The following fields are available to print on a barcode label from the I/M Master File:</p> <ol style="list-style-type: none"> <li>1. Item number</li> <li>2. Item Description 1</li> <li>3. Item Description 2</li> <li>4. Item Product Category</li> <li>5. Item Product Category Desc</li> <li>6. Item User Defined Code</li> <li>7. Item User Defined Code Desc</li> <li>8. Item Note Literals (Fields 12 – 16 I/M Item File)</li> <li>9. Item Date Literal (Field 17 I/M Item File)</li> <li>10. Item Amount Literal (Field 18 I/M Item File)</li> <li>11. Serial Number</li> </ol>
2. Enter Item Label Output Path & File Name	<p>40 alphanumeric characters.</p> <p>This field allows you to enter the file name of the ASCII file and the location where it will be created. Normally, you would create this file in the BarTender® directory.</p>
3. Print Serialized or Non-Serialized Item?	<p>Y or N.</p> <p>If you answer "N" to this question, the system will not print any serialized/lot items.</p>
4. Enable I/M Receiving Label Print Function?	<p>Y or N.</p> <p>If you wish to generate a barcode label for I/M Receiving, answer "Y" to this question. After entering "Y" and pressing &lt;Enter&gt;, the system will display a small window with fields for you to select. To mark a field to print, press &lt;Enter&gt; when the field description is highlighted. View the program setup to see what fields are available.</p>
5. I/M Receiving Label Quantity Determine Method?	<p>A, S or M.</p> <p>If you wish to print labels for all transactions, then answer "A" for automatic label quantity. You can select "S" to calculate the number of labels to be the number of transactions divided by the item user amount. Enter "M" for manual entry of the label quantity.</p>
6. Enter I/M Receiving Label Output Path & File Name	<p>40 alphanumeric characters.</p> <p>This field allows you to enter the file name of the ASCII file and the location where it will be created. Normally, you would create this file in the BarTender® directory.</p>
7. Enable COP Shipping Label Print Function ?	<p>Y or N.</p> <p>If you wish to generate a barcode label for COP Shipping, answer "Y" to this question. After entering "Y" and pressing &lt;Enter&gt;, the system will display a small window with fields for you to select. To mark a field to print, press &lt;Enter&gt; when the field description is highlighted. View the program setup to see what fields are available.</p>
8. Shipping Label Quantity Determine Method	<p>A, S or M.</p> <p>If you wish to print labels for all transactions (quantity to ship), then answer "A" for automatic label</p>

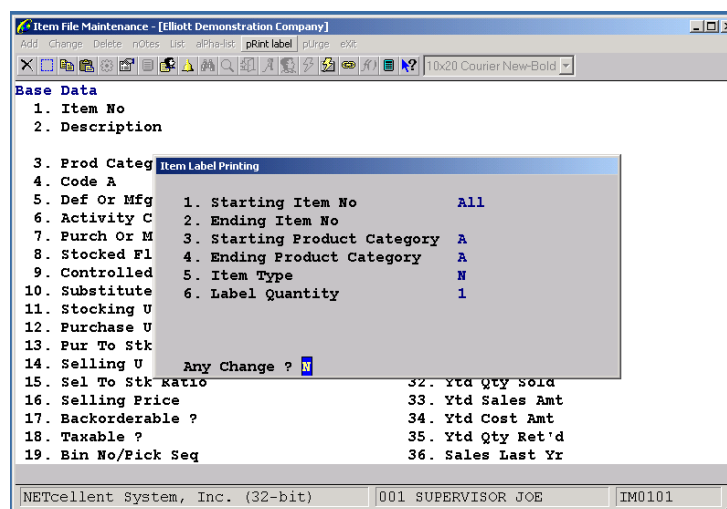
	quantity. You can select "S" to calculate the number of labels to be the number of quantity to ship divided by the item user amount. Enter "M" for manual entry of the label quantity.
9. Different Shipping Label By Customer Type?	Y or N.  If you answer "Y" to this question, the system will print the shipping label based on the customer type.
10. Enter Shipping Label Default Path & File Name	40 alphanumeric characters.  This field allows you to enter the file name of the ASCII file and the location where it will be created. Normally, you would create this file in the BarTender® directory.
11. Enable P/O Receiving Label Print Function?	Y or N.  If you wish to generate a barcode label for PO Receiving, answer "Y" to this question. After entering "Y" and pressing <Enter>, the system will display a small window with fields for you to select. To mark a field to print, press <Enter> when the field description is highlighted. View the program setup to see what fields are available.
12. Select P/O Receiving Label Quantity Input?	A, S or M.  If you wish to print labels for all transactions, then answer "A" for automatic label quantity. You can select "S" to calculate the number of labels to be the number of transactions divided by the item user amount. Enter "M" for manual entry of the label quantity.
13. Enter P/O Receiving Label Output Path & File Name	40 alphanumeric characters.  This field allows you to enter the file name of the ASCII file and the location where it will be created. Normally, you would create this file in the BarTender® directory.
14. Enable BM Production Label Print Function?	Y or N.  If you wish to generate a barcode label for BOMP Production Orders, answer "Y" to this question. After entering "Y" and pressing <Enter>, the system will display a small window with fields for you to select. To mark a field to print, press <Enter> when the field description is highlighted. View the program setup to see what fields are available.
15. BM Production Label Quantity Determine Method	A, S or M.  If you wish to print labels for all transactions, then answer "A" for automatic label quantity. You can select "S" to calculate the number of labels to be the number of transactions divided by the item user amount. Enter "M" for manual entry of the label quantity.
16. Enter BM Production Label Path & File Name	40 alphanumeric characters.  This field allows you to enter the file name of the ASCII file and the location where it will be created. Normally, you would create this file in the BarTender® directory.
17. Enable SF Active Trx Label Print Function?	Y or N.  If you wish to generate a barcode label for Shop Floor Active Transactions, answer "Y" to this question. After entering "Y" and pressing <Enter>, the system will display a small window with fields for you to select. To mark a field to print, press <Enter> when the field description is highlighted. View the program setup to see what fields are available.
18. SF Active Trx Label Quantity Method	A or S.  If you wish to print labels for all transactions (quantity completed), then answer "A" for automatic label quantity. You can select "S" to calculate the number of labels to be the number of transactions (quantity completed) divided by the item user amount.
19. Enter SF Active Trx Label Path & File Name	40 alphanumeric characters.  This field allows you to enter the file name of the ASCII file and the location where it will be created. Normally, you would create this file in the BarTender® directory.
20. Enable COD Tag Label Print Function?	Y or N.  If you wish to generate a barcode label when a COD Tag is printed, answer "Y" to this question. After entering "Y" and pressing <Enter>, the system will display a small window with fields for you to select. To mark a field to print, press <Enter> when the field description is highlighted. View the program setup to see what fields are available.

21. Enter COD Tag Label Path & File Name	40 alphanumeric characters.  This field allows you to enter the file name of the ASCII file and the location where it will be created. Normally, you would create this file in the BarTender® directory.
22. Use Windows or DOS version of Label Matrix	Elliott currently supports BarTender and this field is now obsolete.

## Using Bar Code Label Printing (Generating the ASCII File)

### Generating File from Item Master

From **Inventory Menu** → **Maintenance** → **Item File** → **Print Label**



The Item Label Printing Screen allows you to define the records to print to the ASCII file. The above figure shows the items we have selected. After generating the file, the system will print out (depending on the output type from the print option window) a journal of the transaction.

Generating ASCII Files for the other areas mentioned under the setup are similar to the item master. The next procedure is to print the barcode labels from BarTender®.

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## ***Company Specialized Control***

### **Application Overview**

If you purchase modifications from Netcellent and they require new global settings, a menu will be created and placed here. Normally there is nothing here.



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## Design Your Own Form

### Application Overview

These features were developed by Saturn Business Systems, Inc. and integrated into Elliott Business Software by NETcellent System, Inc. They are powerful functions that give you greater flexibility when printing Invoices, A/P checks, Order Quotes & Acknowledgements, Shipping Labels, Picking Tickets, Packing Slips, and Purchase Orders. If you do not enable the Design Your Own Forms feature, the system will use its original format for printing:

**A Comparison Between Saturn Design Your Own and Elliott's Original Format**

	<b>Original Format</b>	<b>Saturn Design Your Own</b>
COP Invoices	User definable. Not all fields can be placed on the invoice. Not flexible with field length. Works with multiple forms feature per customer file setup.	User definable and very flexible. Extensive fields are supported. Even though it supports multiple forms at printing time, it does not work with the multiple forms feature per customer file setup.
COP Order Quotes	Hard code format.	User definable and very flexible.
Order Acknowledgement	Hard code format.	User definable and very flexible.
Shipping Labels	Four different pre-defined options. Works with the barcode label feature.	User definable and very flexible. Does not work with the barcode label feature.
Picking Tickets	Hard code format.	User definable and very flexible.
Packing Slip	Hard code format.	User definable and very flexible.
Purchase Order	User definable. Not all fields can be placed on the PO. Not flexible with field length.	User definable and very flexible. Extensive fields are supported.
A/P Check	Hard code format with a few options.	User definable and very flexible.

## Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → System → Design Your Form

Design Your Form	
1. Use Design Your Own AP Check ?	N
2. Default Form For DY0 AP Check	DY0-AP-Check-1
3. Use Design Your Own Invoice ?	Y
4. Default Form For DY0 Invoice	DY0-Invoice-1
5. Use Design Your Own Order Acknowledgement ?	N
6. Default Form For DY0 Acknowledgement	DY0-Ord-Ack-1
7. Use Design Your Own Order Quote ?	N
8. Default Form For DY0 Quote	DY0-Quote-1
9. Use Design Your Own Shipping Label ?	N
10. Default Form For DY0 Shipping Label	DY0-Ship-Lbl-1
11. Use Design Your Own Picking Ticket ?	N
12. Default Form For DY0 Picking Ticket	DY0-Pick-Tick-1
13. Use Design Your Own Packing Slip ?	N
14. Default Form For DY0 Packing Slip	DY0-Pack-Slip-1
15. Use Design Your Own Purchase Order ?	N
16. Default Form For DY0 Purchase Order	DY0-PO-1
17. No of Dec. For DY0I Item List Price Disc%	2
18. No of Dec. For DY0I Item List Price	2

Field Number ?

NETcellent System, Inc. 014 SUPERVISOR TS1MAD NSCTLMN1

Design Your Form Setup Screen - Defaults

## Field entry Descriptions

If any of the odd numbered fields from 1 to 15 are flagged "Y", Design-Your-Own-Form places a menu option for you in the Util-setup menu of the respective module. Each form has a default assigned in the even fields from 2 to 16. Fields 17 and 18 define how many decimal places are available for the Item List Price Discount Percent and the Item List Price.

This function is implemented in the Accounts Payable, Customer Order Processing and Purchase Order modules. Please see their respective manuals on how to design your own forms.

## Hide Cost Control

### Application Overview

This feature hides the cost fields in AR Customer File Maintenance, IM Item File Maintenance, and P/O Receiving. This is to prevent everyday users from viewing sensitive cost information. For higher echelon users, the system will let you define five users who can view these hidden fields.

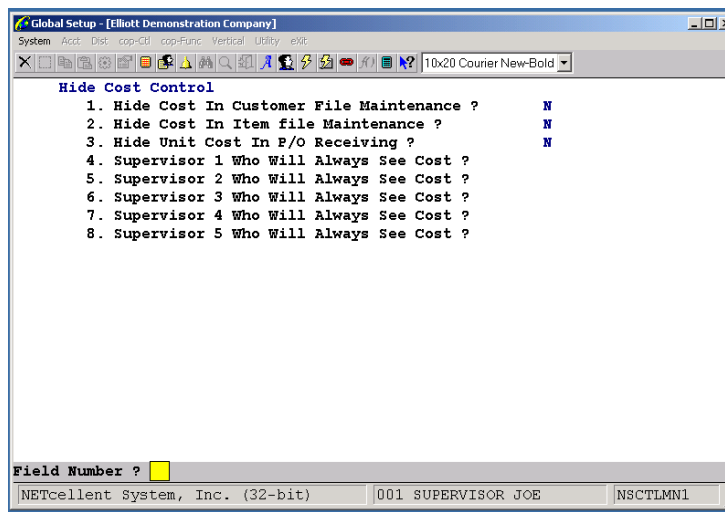
The following fields will be hidden with this function enabled:

- Customer file: Cost PTD, YTD, and Last YR
- Item Master file: FOB and Landed Avg Cost, Last Cost, and Std Cost
- PO Receiving: Unit Cost, Avg, Last, and Std FOB Cost

If protecting sensitive cost information is important to you, the cost in the COP line item screen and order edit list can also be hidden. This is not done through this feature, but in COP Setup by flagging fields 12 and 13 to not display or print costs.

### Run Instructions

From Elliot Main Menu → Util-Setup → Global Setup → System → Hide Cost Control



```

Global Setup - [Elliott Demonstration Company]
System  Acc. Dist.  cop-Cl  cop-hunc  Verbal  Utility  002
10x20 Courier New-Bold

Hide Cost Control
1. Hide Cost In Customer File Maintenance ?      N
2. Hide Cost In Item file Maintenance ?          N
3. Hide Unit Cost In P/O Receiving ?             N
4. Supervisor 1 Who Will Always See Cost ?
5. Supervisor 2 Who Will Always See Cost ?
6. Supervisor 3 Who Will Always See Cost ?
7. Supervisor 4 Who Will Always See Cost ?
8. Supervisor 5 Who Will Always See Cost ?

Field Number ?           
NETcellent System, Inc. (32-bit) | 001 SUPERVISOR JOE | NSCTLMN1
  
```

Hide cost Control Setup Screen

**Field 1.** Hide Cost In Customer File Maintenance?

Answer "Y" if you wish to hide the cost fields in Customer File Maintenance.

**Field 2.** Hide Cost In Item File Maintenance?

Answer "Y" if you wish to hide the item cost fields in Item File Maintenance.

**Field 3.** Hide Unit Cost In P/O Receiving ?

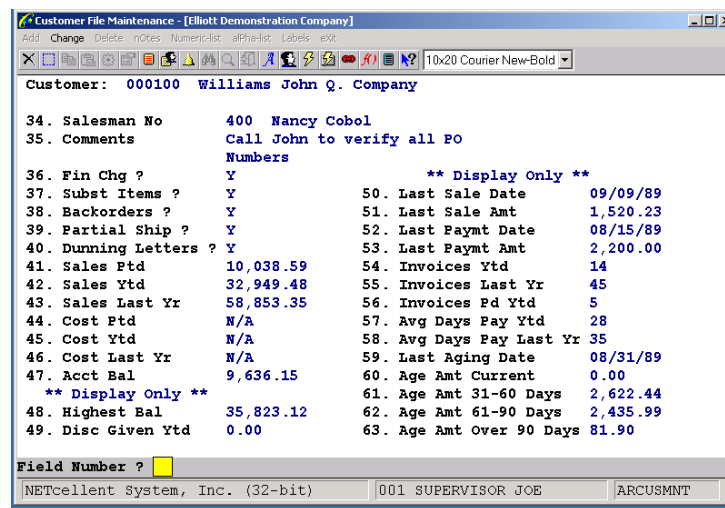
Answer "Y" if you wish to hide the unit cost in P/O Receiving.

**Fields 4-8.** Supervisor 1 - 5 Who Will Always See Cost?

Fields 4 through 8 allows you to define five supervisors who will be able to view these cost fields.

### Hide Cost Customer File Maintenance

If you answer "Y" to "Hide Cost In Customer File Maintenance" and are not one of the 5 designated supervisors, you will see an "N/A" status in the cost fields (44, 45 and 46) in the Customer File Maintenance as shown below.



Customer File Maintenance - [Elliott Demonstration Company]

Customer: 000100 Williams John Q. Company

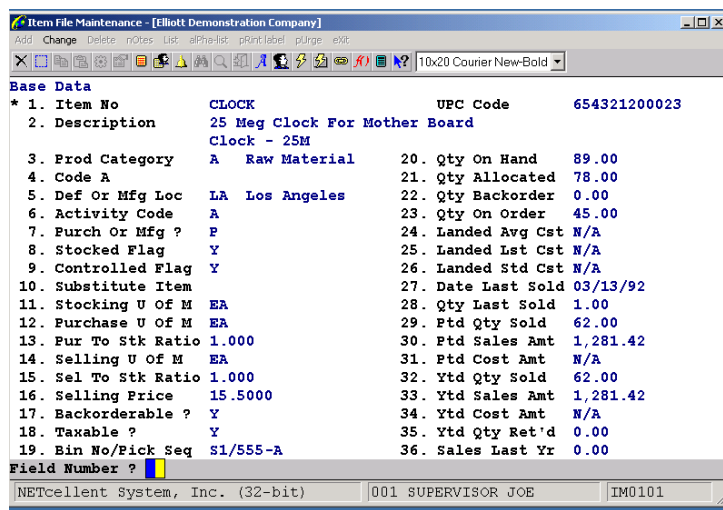
34. Salesman No	400 Nancy Cobol	50. Last Sale Date	09/09/89
35. Comments	Call John to verify all PO	51. Last Sale Amt	1,520.23
	Numbers	52. Last Paymt Date	08/15/89
36. Fin Chg ?	Y	53. Last Paymt Amt	2,200.00
37. Subst Items ?	Y	54. Invoices Ytd	14
38. Backorders ?	Y	55. Invoices Last Yr	45
39. Partial Ship ?	Y	56. Invoices Pd Ytd	5
40. Dunning Letters ?	Y	57. Avg Days Pay Ytd	28
41. Sales Ptd	10,038.59	58. Avg Days Pay Last Yr	35
42. Sales Ytd	32,949.48	59. Last Aging Date	08/31/89
43. Sales Last Yr	58,853.35	60. Age Amt Current	0.00
44. Cost Ptd	N/A	61. Age Amt 31-60 Days	2,622.44
45. Cost Ytd	N/A	62. Age Amt 61-90 Days	2,435.99
46. Cost Last Yr	N/A	63. Age Amt Over 90 Days	81.90
47. Acct Bal	9,636.15		
** Display Only **			
48. Highest Bal	35,823.12		
49. Disc Given Ytd	0.00		

Field Number ?

NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE ARCUSMNT

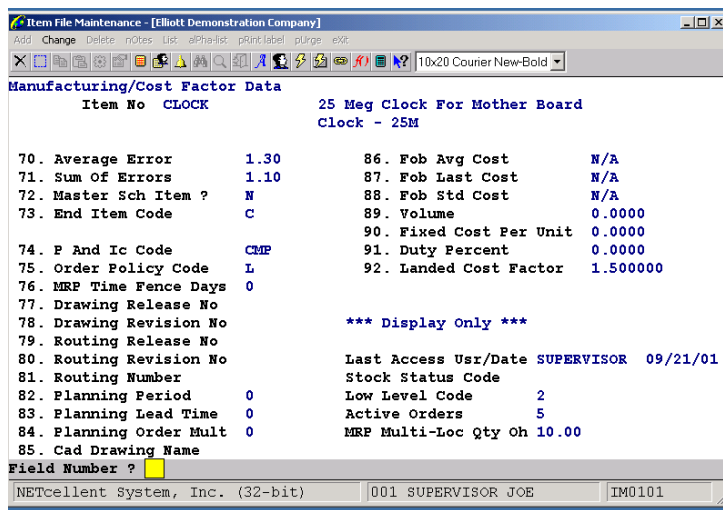
## Hide Cost In Item File Maintenance

If you answer “Y” to Hide Cost In Item File Maintenance and are not one of the five supervisors, you will see an “N/A” status in the item cost fields in the Item Master File as shown below. If you have Landed Cost enabled, the Landed Cost and FOB Cost fields will both be hidden.



Item File Maintenance - [Elliott Demonstration Company]			
Add Change Delete notes List alpha list print label purge exit			
Base Data			
1. Item No	CLOCK	UPC Code	654321200023
2. Description	25 Meg Clock For Mother Board Clock - 25M		
3. Prod Category	A Raw Material	20. Qty On Hand	89.00
4. Code A		21. Qty Allocated	78.00
5. Def Or Mfg Loc	LA Los Angeles	22. Qty Backorder	0.00
6. Activity Code	A	23. Qty On Order	45.00
7. Purch Or Mfg ?	P	24. Landed Avg Cst	N/A
8. Stocked Flag	Y	25. Landed Lst Cst	N/A
9. Controlled Flag	Y	26. Landed Std Cst	N/A
10. Substitute Item		27. Date Last Sold	03/13/92
11. Stocking U Of M	EA	28. Qty Last Sold	1.00
12. Purchase U Of M	EA	29. Ptd Qty Sold	62.00
13. Pur To Stk Ratio	1.000	30. Ptd Sales Amt	1,281.42
14. Selling U Of M	EA	31. Ptd Cost Amt	N/A
15. Sel To Stk Ratio	1.000	32. Ytd Qty Sold	62.00
16. Selling Price	15.5000	33. Ytd Sales Amt	1,281.42
17. Backorderable ?	Y	34. Ytd Cost Amt	N/A
18. Taxable ?	Y	35. Ytd Qty Ret'd	0.00
19. Bin No/Pick Seq	S1/555-A	36. Sales Last Yr	0.00
Field Number ?			
NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE IM0101			

Cost Fields 24 – 27 = N/A



Item File Maintenance - [Elliott Demonstration Company]			
Add Change Delete notes List alpha list print label purge exit			
Manufacturing/Cost Factor Data			
Item No	CLOCK	25 Meg Clock For Mother Board Clock - 25M	
70. Average Error	1.30	86. Fob Avg Cost	N/A
71. Sum Of Errors	1.10	87. Fob Last Cost	N/A
72. Master Sch Item ?	N	88. Fob Std Cost	N/A
73. End Item Code	C	89. Volume	0.0000
74. P And Ic Code	CMP	90. Fixed Cost Per Unit	0.0000
75. Order Policy Code	L	91. Duty Percent	0.0000
76. MRP Time Fence Days	0	92. Landed Cost Factor	1.500000
77. Drawing Release No		*** Display Only ***	
78. Drawing Revision No		Last Access User/Date SUPERVISOR 09/21/01	
79. Routing Release No		Stock Status Code	
80. Routing Revision No		Low Level Code 2	
81. Routing Number		Active Orders 5	
82. Planning Period	0	MRP Multi-Loc Qty On 10.00	
83. Planning Lead Time	0		
84. Planning Order Mult	0		
85. Cad Drawing Name			
Field Number ?			
NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE IM0101			

Cost Fields 86 – 88 = N/A

## Hide Unit Cost In P/O Receiving

If you answer "Y" to "Hide Unit Cost In P/O Receiving" and are not one of the five supervisors, you will see an "N/A" status in the Unit Cost field (10) in PO Receiving as shown below.

Receivings Processing - [Elliott Demonstration Company]

Add Change Delete List Print-label Mass-receiving exit

10x20 Courier New-Bold

1. P.O. Number	000001-00	2. Line Number	001	4. Doc Number	114
Vendor	000100 Computer Electronics Center				
3. Item Number	CHAR-GEN	Character Generator At 25 Meg			
		Character - Gen - 25			
5. Vend Item No					
6. Receipt Date	09/21/01	10. Unit Cost	N/A		
7. Qty Received	0.00	11. Receiver			
8. Qty Rejected	0.00	12. Hold Posting?	N		
Rej. Reason					
9. Receipt U/M	EA				

Elliott V7-X.001

Notify:	JLB	Move To:	QC	Job No:	PC100
Promise Date:	02/03/92	Commodity Cd:			
Stocking U/M:	EA	Qty Ordered:	50.00	Qty Due:	40.00
Purchase U/M:	EA	Pur-Ratio:	1.000		
Ship-To Code:	LA LA Whse			Location:	LA
Recv. Accrual Acct:	02165-10000-00000	Receiving Accrual			

Field Number ?

NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE PO2000

## Landed Cost Control

### Application Overview

This application lets you keep track of both Landed Cost and Freight On Board (**FOB**) Cost. FOB Cost is the cost your vendor charges to get your merchandise to a point where you take ownership and assume the responsibility of getting the merchandise to your location. The FOB Cost plus any additional costs such as vessel freight, inland freight, duties, insurance, etc. are referred to as Landed costs.

With this feature you can manually or automatically calculate Landed Costs, perform breakdown analysis, or simply let Landed Cost be the same as FOB. When calculating Landed costs, you can use a simple Landed Factor defined at the item level or aggregate the entire vessel shipment to calculate Landed Cost for each item in the shipment.

Normally, import businesses and those with freight being a significant part of their inventory value should use Landed Cost as the method to value their inventory. However, this decision should be carefully evaluated with a CPA, as there are pros and cons as well as IRS requirements. By default, the system will use FOB cost to value your inventory.

### Run Instructions

A requirement to using Landed Cost is to flag the “Distribute By Amt or Qty” fields in the Purchase Order and Inventory setup file to be “Q”, distribute by Quantity.

The screenshot shows the 'I/M Setup' window for 'Elliott Demonstration Company'. The window title is 'I/M Setup - [Elliott Demonstration Company]'. The menu bar includes 'Change', 'File', 'Edit', 'View', 'Tools', 'Help', and '10x20 Counter New-Bold'. The main area displays a list of setup fields with their current values:

19. Audit Trail On Inv Transactions ?	N
20. Multiple I/M Accts ?	Y
21. Default Asset Acct	01100-00000-00000
22. Next Document Number	114
23. Using Kit Items ?	Y
24. Online Update Inventory Trx ?	N
25. Upd Dist During Phy Cnt Proc ?	Y
26. Process Non-Stk Parents In Bomp ?	N
27. Distribute By Amount Or Quantity	Q
28. Use Job Numbers ?	Y
Inventory Freeze Date	//
Physical Count Post Date	//

At the bottom, there is a 'Field Number ?' field with a dropdown arrow. The status bar at the bottom shows 'NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE IM1100'.

I/M Setup Screen #2 Field 27 = “Q”

Inventory Menu → Util-Setup → I/M Setup

The screenshot shows the 'P/O Setup' window for 'Elliott Demonstration Company'. The window title is 'P/O Setup - [Elliott Demonstration Company]'. The menu bar includes 'Change', 'File', 'Edit', 'View', 'Tools', 'Help', and '10x20 Counter New-Bold'. The main area displays a list of setup fields with their current values:

1. Starting Purchase Order No	000011
2. Default Ship-To Code	LA
3. Default Buyer Code	BC
4. Default Notification Initials	JLB
5. Default Move-To Location	QC
6. Percent Early-Ship Allowed	10
7. Percent Overship Allowed	2
8. Percent Overprice Allowed	3
9. \$-Amount Overprice Allowed	100
10. Print Company Name On Order ?	Y
11. Close Po's Not Full Invoiced ?	Y
12. Default PO Form Number	1
13. Create PFF Rec Using STD Cost?	N
14. Next Doc Number For Receivings	111
15. Online Update Receivings Trx ?	N
16. Receivings Accrual Account	02165-10000-00000
17. Distribute By Amt Or Qty	Q
18. Default PFF Account	04240-00000-00000
19. Print PO's On Laser ?	N
20. Default Std Cost on PO's ?	

At the bottom, there is a 'Field Number ?' field with a dropdown arrow. The status bar at the bottom shows 'NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE PO1000'.

PO Setup Screen field 17 = “Q”

Purchase Order Menu → Util-Setup → P/O Setup

After changing the above fields, the next step is to set up Landed Cost.



## Landed Cost Setup

Goto: Elliott Main Menu → Util-Setup → Global Setup → System → Landed Cost Control

The screenshot shows a window titled "Global Setup - [Elliott Demonstration Company]". The menu bar includes "System", "Acct", "Dist", "cop-Cl", "cop-Func", "Vertical", "Utility", and "exit". The toolbar contains various icons for file operations and help. The font is set to "10x20 Courier New-Bold". The main area displays the "Landed Cost Control" settings:

Field Number	Description	Value
1.	Use FOB Or Landed Cost As A Primary Cost ?	F
2.	Create Landed Cost Var Act For A/P Trx ?	Y
3.	Landed Cost Variance Account	
4.	Warning If Landed Cost <= FOB Cost	Y
5.	Default Duty Rate In %	0.0000
6.	Are All Duty Rates Identical ?	Y
7.	Use Last Landed Cost Or Factor During Receiving	F

At the bottom, there is a "Field Number ?" label next to a yellow input box. Below this, a status bar displays "NETcellent System, Inc. (32-bit)", "001 SUPERVISOR JOE", and "NSCTLMN1".

Landed Cost Setup Screen

## Entry Field Descriptions

### Field 1. Use FOB Or Landed Cost as A Primary Cost?

If you wish to use Landed Cost to value your inventory, then answer "L" to this question. If you wish to use FOB Cost, then answer "F" to this question. By default, the system will assign "F".

After entering "L", a window will display prompting you to switch from FOB to Landed Cost (See figure on the next page). If you answer "Y", the utility will run the conversion process. After running this procedure, the item master file will show Landed Cost for Standard, Average and Last Cost in the first Screen (See figure on the next page).

Global Setup - [Elliott Demonstration Company]

System Acc. Dist. Cap-CU Cap-Func Vertical Utility Exit

Landed Cost Control

1. Use FOB Or Landed Cost As A Primary Cost ? **L**

Elliott V7.X.001

The cost for G/L interface has been changed from FOB cost to landed cost. It will effects item file:

Before		-->	After	
FOB Cost	Landed Cost	-->	Landed Cost	FOB Cost
AVG-COST	AVG-COST-2		AVG-COST	AVG-COST-2
LAST-COST	LAST-COST-2		LAST-COST	LAST-COST-2
STD-COST	STD-COST-2		STD-COST	STD-COST

Thus, you need to run switch program. You have two options:  
 (1) Run Converting Program Right Now  
 (2) Run Converting Program Under Utility Menu  
 Do You Want To Run Converting Program Now <Y/N> ? **Y**

F = FOB Cost, L = Landed Cost

NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE NSCTLMN1

To Convert to Landed Cost answer "Y"

Item File Maintenance - [Elliott Demonstration Company]

Add Change Delete notes List alpha list print label purge exit

Base Data

\* 1. Item No **CLOCK** UPC Code **654321200023**

2. Description **25 Meg Clock For Mother Board**

**Clock - 25M**

3. Prod Category <b>A Raw Material</b>	20. Qty On Hand <b>77.00</b>
4. Code <b>A</b>	21. Qty Allocated <b>78.00</b>
5. Def Or Mfg Loc <b>LA Los Angeles</b>	22. Qty Backorder <b>0.00</b>
6. Activity Code <b>A</b>	23. Qty On Order <b>20.00</b>
7. Purch Or Mfg ? <b>F</b>	24. Landed Avg Cst <b>9.2162</b>
8. Stocked Flag <b>Y</b>	25. Landed Lst Cst <b>0.0000</b>
9. Controlled Flag <b>Y</b>	26. Landed Std Cst <b>12.5400</b>
10. Substitute Item	27. Date Last Sold <b>03/13/92</b>
11. Stocking U Of M <b>EA</b>	28. Qty Last Sold <b>1.00</b>
12. Purchase U Of M <b>EA</b>	29. Ptd Qty Sold <b>62.00</b>
13. Pur To Stk Ratio <b>1.000</b>	30. Ptd Sales Amt <b>1,281.42</b>
14. Selling U Of M <b>EA</b>	31. Ptd Cost Amt <b>777.48</b>
15. Sel To Stk Ratio <b>1.000</b>	32. Ytd Qty Sold <b>62.00</b>
16. Selling Price <b>15.5000</b>	33. Ytd Sales Amt <b>1,281.42</b>
17. Backorderable ? <b>Y</b>	34. Ytd Cost Amt <b>777.48</b>
18. Taxable ? <b>Y</b>	35. Ytd Qty Ret'd <b>0.00</b>
19. Bin No/Pick Seq <b>S1/555-A</b>	36. Sales Last Yr <b>0.00</b>

Field Number ? **Y**

NETcellent System, Inc. (32-bit) 001 SUPERVISOR JOE IM0101

Inventory Item File Now Reflects Landed Cost, Fields 24 – 25

The original FOB costs in these fields have now been moved to Fields 86, 87, and 88 of the 3<sup>rd</sup> Inventory Item File screen.

If you are not using Landed Cost, then the FOB cost fields will be displayed in the 1<sup>st</sup> Inventory File screen and the Landed Costs displayed in the 3<sup>rd</sup> screen, Fields 86, 87, and 88.

**Field 2.** Create Landed Cost Var Act on A/P Trx?

If you would like to create a Landed Cost Variance account, answer "Y" to this question. In cases where differences are found between the A/P Voucher Actual Amt and the Landed Cost Amt (entered during receiving), this Variance Account will hold the "difference" in amount.

**Field 3.** Landed Cost Variance Account

If you enter "Y" to question 2, then you need to put in the variance account number in this field.

**Field 4.** Warning if Landed Cost <= FOB Cost

Normally, the landed cost is greater than the FOB cost. This yes/no question allows you to activate/deactivate this warning message.

**Field 5.** Default Duty Rate in %

Many times when importing, companies must pay duty taxes on their inventory. For this reason, duty taxes are part of Landed Cost. The rate entered in this field, will serve as the default duty rate for each new item entered in I/M Item File Maintenance.

**Field 6.** Are all Duty Rates Identical?

If you answer "N", you will be able to override the duty % for each item when maintaining the item records. In some instances, the duty rate is the same for all items in a company's inventory. This option gives you the ability to enforce one rate for all items entered in I/M Item File Maintenance.

If you enter "Y" the following happens:

1. All inventory items will use the duty rate % entered in Field 5: Default Duty Rate in %
2. No matter what is entered in the item file's duty rate, the rate entered in Field 5 will be used in the Landed Cost calculation.
3. Users are not allowed access to the duty rate from within I/M's Item File Maintenance.

If you enter "N" the following happens:

1. All inventory items will use the duty rate % entered in Field 5 Default Duty Rate In %
2. The duty rate % entered in the Item File record will be used in Landed Cost calculations.
3. Users may override the duty rate from within I/M Item File Maintenance.

**Field 7.** Use Last Landed Cost Or Factor During Receiving?

IF "L", the system defaults, at time of PO receiving, to the last Landed Cost in the I/M file and allows you to override it.

If "F", it will use the **Landed Cost factor set up in the Inventory Item file** for that item.

If by past experience, the average Landed Cost is 15% higher than FOB cost on a particular item, then you can set a Landed Cost factor of 1.15 for that item. At the time of PO Receiving, the PO line item FOB Cost will be multiplied by 115% to calculate your Landed Cost. Since  $\text{Landed Cost} = \text{FOB Cost} + \text{additional costs}$ , the Landed Cost factor should always be  $\Rightarrow 1$ .

**NOTE:** You cannot use this function if are automatically calculating Landed Cost.

**Additional Setups**

**Fixed Cost Per Unit:** This allows you to apply an additional fixed cost to an item that will be added to the Landed Cost at time of receiving the Purchase Order. Fixed Cost Per Unit is set up and maintained in the Inventory Item File. Fixed Cost Per Unit is an option and not a required step.

**Vessel File:** This is a required file if you wish to use automatic Landed Cost calculations. It is set up and maintained in Inventory Maintenance.

For processing and calculating Landed Cost, see the Receiving Chapter of the Purchase Order Manual and the Calculate Landed Cost in Inventory Maintenance, Vessel file.

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## Note Function

### Application Overview

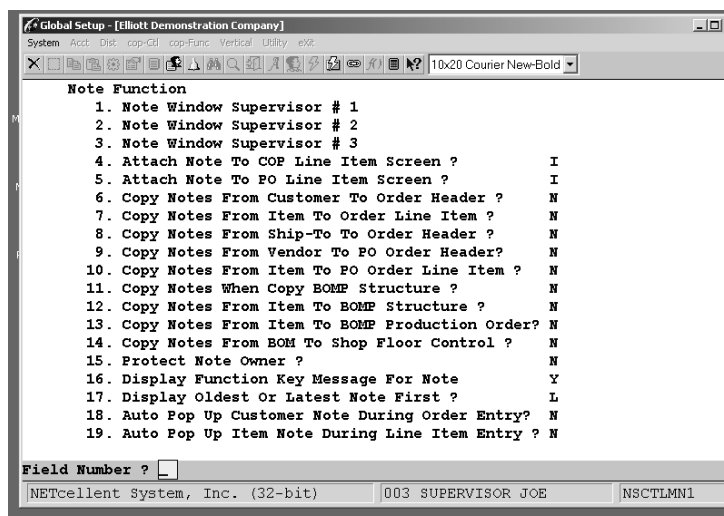
This function provides you with an effective tool to incorporate more information with file records such as customers, vendors, employees, salespersons, items, sales orders, purchase orders, G/L accounts, work orders, and shop floor orders. The following are some of the highlights for the Note Function:

- **Unlimited** – You can have an unlimited number of notes for each master record.
- **Searchable** – Notes can be searchable by keywords. With Elliott, you can essentially use Notes as a knowledge base.
- **Structural** – You can use Notes as a database extension to the master file. By setting up proper Note Types, Notes can act like a database.
- **Flexible Printing** – Notes can be printed on various documents like orders, picking tickets, invoices, etc. Printing is controllable by user.
- **Security** – You can set security policies on Notes and make certain they are not shareable for read, change or delete by other users.
- **Tickler** – A Note can be a tickler that reminds you to do certain things by a certain time. Used in conjunction with Elliott, you can reap the most benefit from using a Note as a tickler.
- **Management** – If you use the tickler function with the proper organization hierarchy setup, ticklers can become a management tool for supervisors.

### Run Instructions

This only defines the setup and default values for the Note Function. For everyday usage, please see the chapter titled Notes in the Customer Relations Management section of this manual.

Go to: **Elliott Main Menu → Util-Setup → Global Setup → System → Notes Function**



Note Function	
1. Note Window Supervisor # 1	
2. Note Window Supervisor # 2	
3. Note Window Supervisor # 3	
4. Attach Note To COP Line Item Screen ?	I
5. Attach Note To PO Line Item Screen ?	I
6. Copy Notes From Customer To Order Header ?	N
7. Copy Notes From Item To Order Line Item ?	N
8. Copy Notes From Ship-To To Order Header ?	N
9. Copy Notes From Vendor To PO Order Header?	N
10. Copy Notes From Item To PO Order Line Item ?	N
11. Copy Notes When Copy BOMF Structure ?	N
12. Copy Notes From Item To BOMF Structure ?	N
13. Copy Notes From Item To BOMF Production Order?	N
14. Copy Notes From BOM To Shop Floor Control ?	N
15. Protect Note Owner ?	N
16. Display Function Key Message For Note	Y
17. Display Oldest Or Latest Note First ?	L
18. Auto Pop Up Customer Note During Order Entry?	N
19. Auto Pop Up Item Note During Line Item Entry ?	N

Field Number ?

NETcellent System, Inc. (32-bit) | 003 SUPERVISOR JOE | NSCTLMN1

## Note Function Setup Screen 1 of 2

Global Setup - [Elliott Demonstration Company]

System Acc Dist cop-Ord cop-Func Vertical Utility exit

10x20 Courier New-Bold

Note Function

20. Number Of Days User Can Change For Due Date 0

21. Enter Estimated Time In Tickler ? N

22. Copy Orig. Note When Release PO Blanket Order

23. Can User Assign Tickler To Everybody? (32-Bit) N

24. Default Folder For Tickler ? TICKLER

Field Number ?

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE NSCTLMN1

## Note function Setup Screen 2 of 2

## Field Entry Descriptions

**Field 1.** Note Window Supervisor #1

**Field 2.** Note Window Supervisor #2

**Field 3.** Note Window Supervisor #3

These three fields apply only to Version 6.72 or lower.

The Note Function allows you to implement security control to allow the access of certain Notes that contains personal information. The user names specified in Fields 1, 2, and 3 are not subject to any restrictions within the Note windows. The three supervisors entered can read, change, and delete any Note in the system. You do not necessarily have to be one of three supervisors defined here to implement security control. You only need to specify if the Note is shareable by answering the following three questions for each in Note Type Processing: 1) shareable for read, 2) shareable for change, and 3) shareable for delete. Defining Note Type will be discussed later in this document. This security control is effective only when Elliott's password control is turned on.

The three supervisors for the Note function is implemented in DOS Note. For windows Note function implementation, the system checks organization hierarchy (user supervisor setup) to determine the security. If you are a supervisor, then you have full rights to Notes created by other users.

**Field 4.** Note Attach To In COP Line Item Screen?

When entering an order, the user has the option of having a Note attached to either an item in the

Item File Maintenance or to a COP Order Line Item. If you set this flag to “I”, every time you enter a Note in the COP Order Line Item Screen, the Note will be attached to the Item file in I/M (IMITMFIL), whereas if you set it to “L”, the Note will be attached to the COP Order Line Item file (CPODLIN).

**Field 5.** Note Attach To In PO Line Item Screen?

This question is similar to the previous questions in Field 4. Please refer to this Field and apply it accordingly.

**Field 6.** Copy Notes From Customer To Order Header?

“Y” = Copy

“N” = Do Not Copy

“P” = Print without Copying

Answer “Y” if you wish to copy customer notes to the order header file during order entry and print them on COP documents. After the notes are copied over, you can override the notes before they are printed.

Answer “N” If you do not need to print customer notes on COP documents.

Answer “P” if you need to print certain notes attached to the customer file on certain COP documents (i.e. shipping instruction on picking ticket) and the notes do not require changes. If “P”, the system will automatically check the customer file for qualified notes to print on the COP document.

**Field 7.** Copy Notes From Item To Order Line Item?

“Y” = Copy

“N” = Do Not Copy

“P” = Print without Copying

Similar to **Field 6.** Apply accordingly.

**Field 8.** Copy Notes From Ship-To To Order Header?

“Y” = Copy

“N” = Do Not Copy

“P” = Print without Copying

Similar to **Field 6.** Apply accordingly.

**Field 9.** Copy Notes From Vendor To PO Order Header?

“Y” = Copy

“N” = Do Not Copy



"P" = Print without Copying

Similar to **Field 6**. Apply accordingly.

**Field 10.** Copy Notes From Item To PO Order Line Item?

"Y" = Copy

"N" = Do Not Copy

"P" = Print without Copying

Similar to **Field 6**. Apply accordingly.

**Field 11.** Copy Notes When Copy BOMP Structure?

When you answer "Y", the system will copy the notes that were attached to the BOMP Product structure when you copy the BOMP Structure.

**Field 12.** Copy Notes From Item To BOMP Structure?

When you answer "Y", the system will allow you to copy the notes that were in the Item Master File to the BOMP structure as you maintain the BOMP product structure.

**Field 13.** Copy Notes From Item to BOMP Production Order?

Similar to Fields 6, 7, 8, 9 and 10. When you answer "Y", the system will allow you to copy notes that were in the Item Master File to the BOMP Production Order. Only those notes that will be printed on Production Work Order will be copied. Answer "N" if you do not wish to print any item notes on BOMP production work orders or "P" to print on production work orders without copying.

**Field 14.** Copy Notes From BOM To Shop Floor Control?

If you answer "Y", the system will allow you to copy the notes from BOMP Product Structure to the SFC Order Entry. This happens when you are creating a new shop order and are copying a BOMP product structure to the shop order. If "N" is the answer, the system will bypass the note-copying function. After the notes are copied, the user will be able to look at them on the shop order list, material pick list, and shop packets.

**Field 15.** Protect Note Owner?

If you answer "Y" to this flag, the system will not allow you to change the note owner information in the note window. In the Netcellent Windows Systems Manager (**ELLIOTT**) implementation, users are not allowed to change the note owner regardless of the setup here.

**Field 16.** Display Function Key Message For Note

If you answer "Y" to this question, the system will display the literal "F6 = Notes" at the top of the screen. The key will be highlighted if the record has notes attached. While this provides a good user interface to notes, there is an additional process to check the note database as you bring up each master record. If you experience a performance issue, turn this field off.

**Field 17. Display Oldest Or latest Note First?**

This field controls the display of entered notes. If you answer "L", the system displays the latest notes first. If you answer "F", the system will display the oldest notes first. For Elliott, the system always displays notes by the date and time in ascending sequence. Since it is displayed in a list box and the sorting sequence can be easily changed by clicking on the column heading, this is not an issue with notes in Elliott.

**Field 18. Auto Pop up Customer Note During Order Entry?**

Answering "Y" to this question will trigger the customer note to pop up upon the entry of the customer number in COP Order Entry. Otherwise, the user can optionally press the F6 key to look at the note. While this function is helpful in some situations, it can also be intrusive to the order entry process.

**Field 19. Auto Pop Up Item Note During Line Item Entry?**

Answering "Y" to this question will trigger the item note to pop up upon the entry of the item number in COP Order Line Entry. Similar to field 18, this function is helpful in some situations, i.e. always want to see the accessories that you should sell to a customer when they purchase an item, it can also be intrusive for the order entry process.

**Field 20. Number of Days User Can Change For Due Date**

This function is for ticklers. When a user has not met the due date for a tickler, they can postpone the due date. Each time a due date is postponed, an internal counter will be increased by 1 to show the number of times the tickler has been postponed. This flag determines how many days a user can postpone the due date of a tickler.

**Field 21. Enter Estimated Time In Tickler?**

Ticklers can prompt you for the estimated amount of time to complete the task. You can either turn this feature on or off.

**Field 22. Copy Original Note When Release P.O. Blanket Order?**

"Y" = Copy

"N" = Do Not Copy

"P" = Print without Copying

Similar to **Field 6**. Apply accordingly.

**Field 23. Can User Assign Tickler To Everybody?**

"Y" or "N"

**Field 24. Default Folder For Tickler**

Enter a name for the Tickler folder. This is not on the hard drive, but a part of the Notes folder for better organization.

## Printing Control

### Application Overview

This feature enables you to set up a default printer destination by report and user, and will retain the printer setup from the previous session. In Elliott, the default is by report and workstation. The system will support 9 local and 36 network printers (using the letters of the alphabet). It will display the user name on the spooled reports. There is an optional security control setup which only allows you to access the spooled reports you printed. You can also define 10 supervisors who are not subject to this security control.

Since different reports might have different printer destinations, it is not appropriate to apply the same printer destination default for all the reports. For instance, printer destinations for invoices are obviously different from printer destinations for labels. Our enhancement resolves this problem by allowing you to define your own printer destination default. Even though the printer defaults are not very important, since you can always override them, it is definitely convenient to have the proper printer defaults so you do not have to change it each time you want to print something.

### Run Instructions

Go to **Elliott Main Menu → Util-Setup → Global Setup → System → Printing Control**

The screenshot shows a window titled "Global Setup - [Elliott Demonstration Company]". The menu bar includes "System", "Acct", "Dist", "cop-Cl", "cop-Func", "Vertical", "Utility", and "exit". The toolbar contains various icons for file operations and printing. The font is set to "10x20 Courier New-Bold". The main area displays the "Printing Control" section with three options:

- 1. Capture The Last Printing Option ? Y
- 2. Track User Name for Spooled Reports ? Y
- 3. Security Control for Spooled Report ? N

At the bottom, there is a "Field Number ?" label next to a small input box. Below this, a status bar shows "NETcellent System, Inc. (32-bit)", "003 SUPERVISOR JOE", and "NSCTLMN1".

Printing Control Setup Screen

## Field Entry Descriptions

### Field 1. Capture The Last Printing Option?

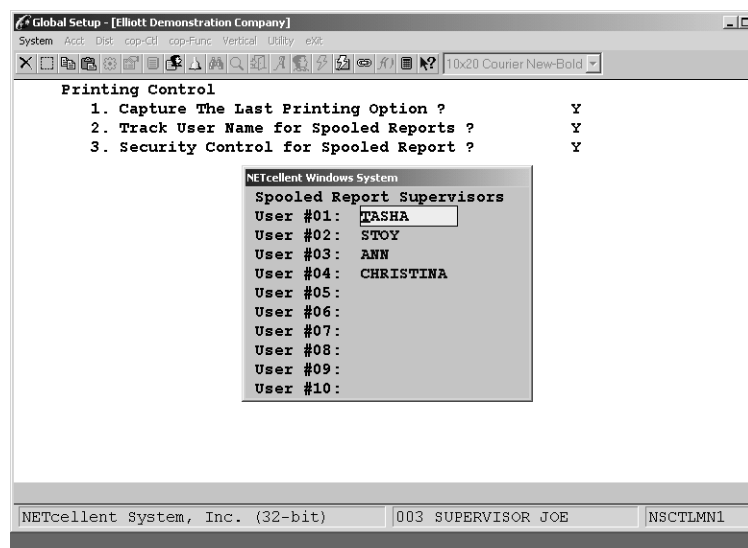
Answer “Y” to save the previous printing session. For example, if you print an Invoice to an HP LaserJet 4 and select a specific font, the next time you print an invoice the system will maintain the same printer and settings.

### Field 2. Track User Name for Spooled Reports?

Answer “Y” if you wish to print the user name on the spooled reports.

### Field 3. Security Control for Spooled Report?

If you wish to set security controls when spooling reports, set this flag to “Y”. By doing this, users can only access the report they spooled. You can define 10 supervisors that can view and print all spooled reports. See figure below.



Global Setup - [Elliott Demonstration Company]

System Acc. Dist. cop-Cl cop-Func Verbal Utility eVZ

Printing Control

1. Capture The Last Printing Option ?	Y
2. Track User Name for Spooled Reports ?	Y
3. Security Control for Spooled Report ?	Y

NETcellent Windows System

Spooled Report Supervisors

User #01:	TASHA
User #02:	STOY
User #03:	ANN
User #04:	CHRISTINA
User #05:	
User #06:	
User #07:	
User #08:	
User #09:	
User #10:	

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE NSCTLMN1

## Print Options Window

### Destination

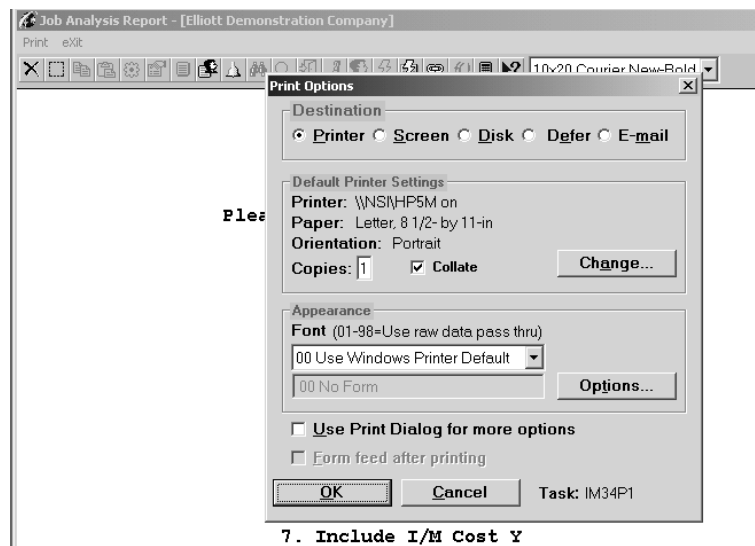
Printer  
Screen  
Disk  
Defer  
E-mail

### Default Settings

Printer  
Paper  
Orientation  
Copies  
Collate  
Change

### Appearance

Font  
Options



7. Include I/M Cost Y

## Print Spooled Reports Window

### Print

### View

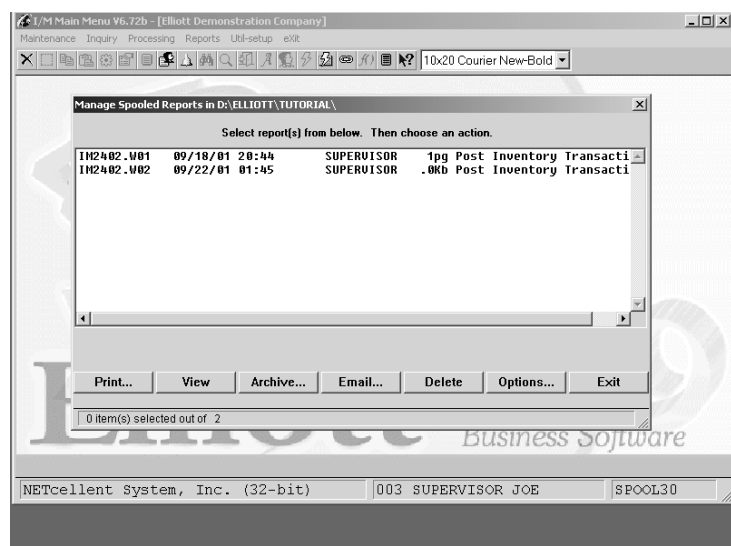
### Archive

### E-mail

### Delete

### Options

Sort By Name  
Sort By Date  
Show All Users  
Spool directory



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**Figure 1H.4** shows the *Print Spooled Reports in COP*. The user Anthony can only see the reports that were spooled by “Anthony”.

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## Serial Number Tracking Control

### Application Overview

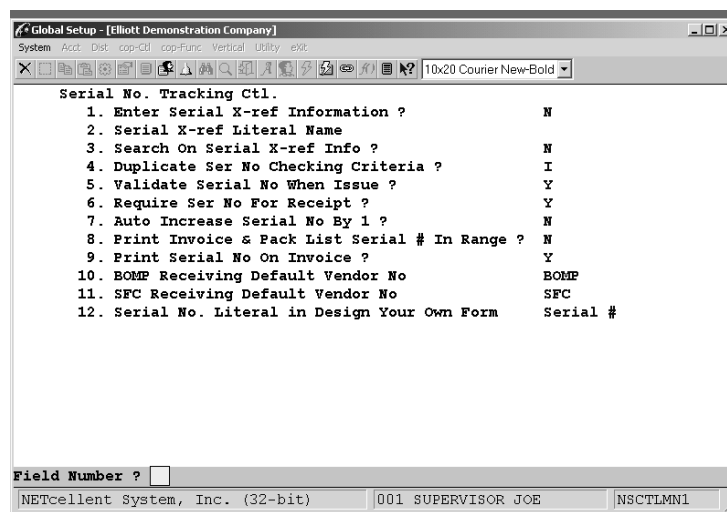
The following functions are featured in the Serial Number Tracking Control:

1. Enter and display 10 serial numbers in the serial number window.
2. Enter a range of serial numbers that begin with alphabetic characters.
3. Cross reference multiple serial numbers by allowing the end-user to define literals such as carton number and bin number that the serial numbers will be referenced to.
4. Inquiry in serial number history for receipts and issues by serial number only or item number plus serial number.
5. Enter an unlimited number of serial numbers for each COP order line item.
6. Consolidate serial numbers when printing on various reports and documents.
7. Check for the serial number integrity between the inventory serial lot transaction file and the inventory quantities on hand and allocated.
8. Track Serial Numbers in PO Receiving Audit Trail File.
9. Track Serial Numbers in Inventory Transaction Audit Trail File.

### Run Instructions

Serial Tracking is only applicable if you have enabled Serialized Items in the I/M Setup process and are not using the Multi-Bin Vertical Package.

Go to **Elliott Main Menu → Util-Setup → Global Setup → System → Serial No. Tacking Control**



Serial No. Tracking Ctl.	
1. Enter Serial X-ref Information ?	N
2. Serial X-ref Literal Name	
3. Search On Serial X-ref Info ?	N
4. Duplicate Ser No Checking Criteria ?	I
5. Validate Serial No When Issue ?	Y
6. Require Ser No For Receipt ?	Y
7. Auto Increase Serial No By 1 ?	N
8. Print Invoice & Pack List Serial # In Range ?	N
9. Print Serial No On Invoice ?	Y
10. BOMP Receiving Default Vendor No	BOMP
11. SFC Receiving Default Vendor No	SFC
12. Serial No. Literal in Design Your Own Form	Serial #

Field Number ?

NETcellent System, Inc. (32-bit)    001 SUPERVISOR JOE    NSCTLMN1



## Field Entry Descriptions

### Field 1. Enter Serial X-ref Information?

This is an option to cross reference serial numbers. If you answer "Y", then during the receiving of a serial number the system will prompt you for both the serial number and X-ref information.

If you answer "Y", you need to complete Fields 2 and 3.

### Field 2. Serial X-ref Literal Name

If you answered "Y" to Field 1 "Enter Serial X-ref Information?", then you need to define a literal for the X-ref. For example, you might label the X-ref field as Bin-No or Carton ID. As you receive serialized items, the system will prompt you for a Bin-No or Carton ID and this can be used for tracking purposes.

### Field 3. Create Serial X-ref File?

If you know the X-ref and would like to know the serial numbers associated with that X-ref, answer "Y" and the system will create a serial X-ref file for search purposes. For example:

1. You specify the literal in Field 2 as "Carton".
2. During the time of receiving inventory, you enter the serial number and assign it to a unique carton number.
3. In COP line entry or I/M Issues, you may simply specify the carton number to bring up all the serial numbers in that carton.

### Field 4. Duplicate Ser No. Checking Criteria?

This field will enable you to set up the duplicate checking criteria for your serial numbers. There are three options:

1. <Space> = Serial No. Only,
2. I = Serial No. and Item No.
3. W = Serial No. and Item No. With Warning message.

Option 1. You can only have one unique serial number regardless of the Item number.

Option 2. You can have duplicate serial numbers, as long as the item number is different.

Option 3. This option is similar to the second, but only warns you of duplicate serial numbers. You still receive the number if it goes to a different warehouse.

### Field 5. Validate Serial No When Issue?

Answer "Y" to ensure a serial number exists in inventory. Answer "N" for no validation. If you answered "N", Field 6 should also be "N" to avoid inaccurate inventories.

**Field 6. Require Ser No For Receipt?**

If you are not are not interested in tracking serial numbers in your inventory, answer "N".

**Field 7. Auto Increase Serial No. By 1?**

If you wish to let the system automatically increment the serial number by 1 during receiving to speed up data entry, then answer "Y" to this question.

**Field 8. Print Invoice & Pack List Serial # In Range?**

This question is asking if you want to print the serial numbers in a range (i.e. serial 123 to 150), instead of printing every serial number on an invoice or pack list. This will save printing space if most of your serial numbers are in consecutive sequence.

**Field 9. Print Serial No On Invoice?**

This flag controls the printing of serial numbers on invoices. Answer "Y" if you wish to print serial numbers on invoices or "N" to not print serial numbers on invoices.

**Field 10. BOMP Receiving Vendor No**

For each inventory receiving of serial numbers, the system requires the vendor number for RMA tracking, auditing, or some other special tracking purpose. If you produce a serial number through BOMP production processing, by default the system will use the vendor number you specify in this field. For tracking purposes, this vendor number will normally be a dummy number so that BOMP will know where this serial number came from.

**Field 11. SFC Receiving Vendor No**

Similar to the previous field - This field is for serial numbers produced through SFC.

**Field 12. Serial No. Literal in Design Your Own Form**

This is the literal that will be printed when using Design Your Own Form for each serial number. Default value is "Serial #".

## Using Serial Number Tracking

The features and functions of Serial Number Tracking are implemented in PO, IM, COP, BOMP, & SF.

## P/O Receiving

The following example shows how this function works in PO Receiving (Figure 11.2).

The screenshot displays the 'Receivings Processing - [Demo Company]' application window. The main window contains a menu bar with 'Add', 'Change', 'Delete', 'List', 'Print label', 'Mass receiving', and 'eXit'. Below the menu is a toolbar with various icons. The main data area shows the following information:

- 1. P.O. Number: 000079-00
- 2. Line Number: 001
- 4. Doc Number: 143
- Vendor: 000200 CompuPart Computer Services
- 3. Item Number: CHAR-GEN
- Character Generator At 25 Meg
- 5. Vend Item No: 200
- 6. Receipt Date: 03/21/05
- 7. Qty Received: 5.00
- 8. Qty Rejected: 0.00
- Rej. Reason: EA
- 9. Receipt U/M: EA

At the bottom left, there is a section for 'Elliott Business Software V7.25.315' with various settings like 'Avg FOB: 7.8000', 'Notify: JLB', 'Promise Date: 03/22/05', 'Stocking U/M: EA', 'Purchase U/M: EA', 'Ship-To Code: LA LA Whse', and 'Recv. Accrual Acct: 02165-10000-UUUUU'. At the bottom right, it says 'RETURN = Add, ESC = Abort' and 'Receiving Accrual'.

A modal window titled 'Enter Serial Numbers' is open in the center. It displays:

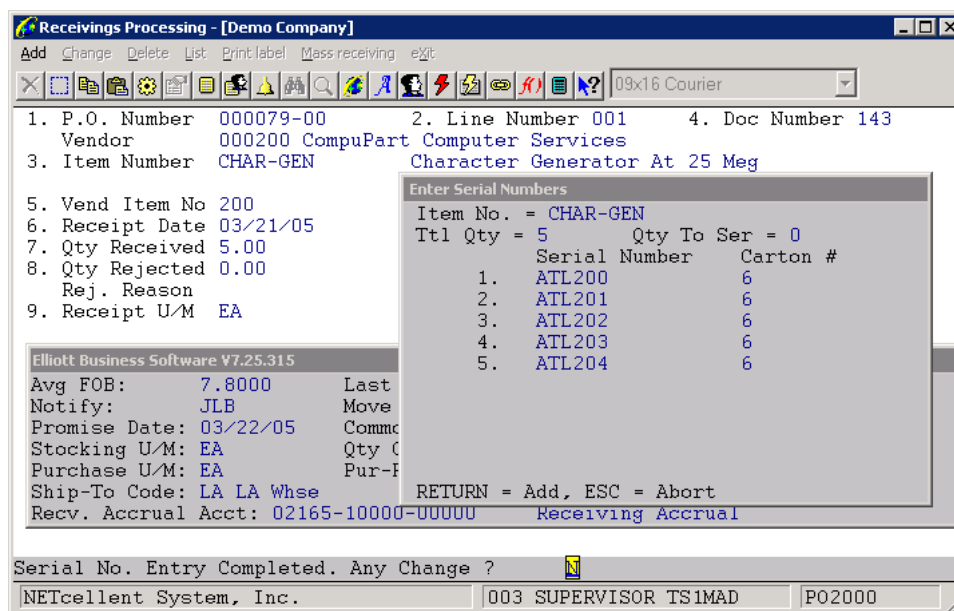
- Item No. = CHAR-GEN
- Ttl Qty = 5 Qty To Ser = 5
- Serial Number Carton #
- 1. [Yellow input field]

At the bottom of the main window, there is a status bar with 'F3/F4 = Range/File', 'NETcellent System, Inc.', '003 SUPERVISOR TS1MAD', and 'PO2000'.

Figure 11.2 shows PO 1670 being received.

Figure 11.2 shows the Serial Numbers entry window. At the top of the window, you will see the item number (CHAR-GEN), total qty (5), and qty to serialize (5). In the middle of the window, the system prompts you for the serial number and carton #. The carton #, as mentioned in the setup section of this enhancement, is an optional feature. The literal "Carton #" was defined under the enhancement setup (refer to Figure 11.1).

Many companies receive their merchandise in bins or cartons and would like to enter this information in addition to the serial numbers as shown in Figure 11.3. If you do not want to enter the carton #, press <Enter> to leave it blank. In our example, we have entered the number 6 for carton #. This information can later be utilized to perform X-ref searches during the issue of serial numbers for this particular item. As you will notice, you will only need to enter the serial number and carton # once. The system will automatically increment the serial number by one after a hard return <Enter>. The carton # will remain the same. The system will also let you enter an alphanumeric serial number.



Receivings Processing - [Demo Company]

Add Change Delete List Printlabel Mass receiving exit

1. P.O. Number 000079-00 2. Line Number 001 4. Doc Number 143  
 Vendor 000200 CompuPart Computer Services  
 3. Item Number CHAR-GEN Character Generator At 25 Meg

5. Vend Item No 200  
 6. Receipt Date 03/21/05  
 7. Qty Received 5.00  
 8. Qty Rejected 0.00  
 Rej. Reason  
 9. Receipt U/M EA

Enter Serial Numbers  
 Item No. = CHAR-GEN  
 Ttl Qty = 5 Qty To Ser = 0

	Serial Number	Carton #
1.	ATL200	6
2.	ATL201	6
3.	ATL202	6
4.	ATL203	6
5.	ATL204	6

RETURN = Add, ESC = Abort  
 Recv. Accrual Acct: 02165-10000-UUUUU Receiving Accrual

Serial No. Entry Completed. Any Change ?

NETcellent System, Inc. 003 SUPERVISOR TS1MAD P02000

**Figure 11.3.** shows the entry of carton # with serial numbers.

If you do not want to press <Enter> to assign the serial numbers, then press [F3] to Enter a Range. Enter the beginning serial number and press <Enter>. You will notice that the system will automatically assign the remaining serial numbers. You can then assign the carton #.

If you had answered "Y" to Track Serial Numbers in PO Receivings Audit Trail File, then after posting your transaction, the system will update this file with serial numbers. When you print the report, it will display the serial numbers received (Figure 11.4).

Run Date: Mar 23, 2005 - 8:45am												Demo Company												Page 1		
R E C E I V I N G S   A U D I T   T R A I L   R E P O R T																										
Range: Purchase Orders Numbered 000079-00 Thru 000079-00																										
All Items																										
All Entry Dates																										
Po-Number	Line	Item-Number	Comm-Cd	Vendor-No	Prom-Date	Qty-Ord	Um	Expctd-Cost	Qty-Rej	Um	Landed-Cost	Qty-Rec	Um	Actual-Cost	Old-Qty-Oh	Um	Old-Avg-Cost	Notify Move-To	Rej Job-No	Tot-Rec	Um	Recv	Loc	New-Qty-Oh	Um	New-Avg-Cost
000079-00	001	CHAR-GEN		000200	03/22/05	5.00	EA	7.8000	.00	EA	.0000	5.00	EA	7.8000	66.00	EA	7.8000			5.00	EA	1	LA	71.00	EA	7.8000
		Character Generator At 25 Meg		200	03/21/05																					
		Character - Gen - 25		JLB	QC																					
		Serial #		From ATL200	To ATL204																				Carton # 6	
				Transaction Added	At 14:52:15 On 03/21/05																					

**Figure 11.4** shows the PO Receiving Audit Trail File.

## Inventory Management

### Serial/Lot Stock Status Inquiry (Stocked Items Only)

Figure 11.5 shows the Serial/Lot Stock Status Inquiry (Stocked Items Only) screen. If you are using Elliott's original function, you are forced to enter or select an item no. With the Serial Number Plus Enhancement, the system will allow you to press <Enter> for all. You can then enter the starting serial number as shown in Figure 11.5. The screen also displays the carton # column.

Serial/Lot Stock Status Inquiry - [Demo Company]

Inquire exit

Item No: All

Starting Serial No: ATL200

Serial No:	Item No	Rec Date	Carton #	Cost	Loc	Alloc?
ATL200	CHAR-GEN	03/21/05	6	7.8000	LA	N
ATL201	CHAR-GEN	03/21/05	6	7.8000	LA	N
ATL202	CHAR-GEN	03/21/05	6	7.8000	LA	N
ATL203	CHAR-GEN	03/21/05	6	7.8000	LA	N
ATL204	CHAR-GEN	03/21/05	6	7.8000	LA	N
S000	SERIAL 0	07/26/04		.0000	LA	N
S001	SERIAL 0	07/26/04		.0000	LA	Y
S002	SERIAL 0	07/26/04		.0000	LA	N
S003	SERIAL 0	07/26/04		.0000	LA	N
S004	SERIAL 0	07/26/04		.0000	LA	Y
S005	SERIAL 0	07/26/04		.0000	LA	N
S006	SERIAL 0	07/26/04		.0000	LA	N
S007	SERIAL 0	07/26/04		.0000	LA	N
S008	SERIAL 0	07/26/04		.0000	LA	N

Press F1-Key To See Next Page

NETcellent System, Inc. 003 SUPERVISOR TS1MAD IM1904

Figure 11.5 shows the Serial/Lot Stock Status Inquiry (Stocked Items Only).

### Serial/Lot Stock Status Inquiry (Issued or Stocked Items)

This is a standard Elliott function. However, we have modified the inquiry screen to include the carton # as shown in **Figure 11.6**.

Serial/Lot Stock Status Inquiry - [Demo Company]

Inquire exit

Item No: CHAR-GEN Character Generator At 25 Meg

Show Issue Or Receipts ? R Character - Gen - 25

Starting Serial No: ATL200 Location: All

Serial No:	Rec Date	Carton #	Cost	Loc	Alloc ?
ATL200	03/21/05	6	7.8000	LA	N
ATL201	03/21/05	6	7.8000	LA	N
ATL202	03/21/05	6	7.8000	LA	N
ATL203	03/21/05	6	7.8000	LA	N
ATL204	03/21/05	6	7.8000	LA	N

Total Items: 5 Total Cost: 39.0000

End Of Item - Press Return To Continue

NETcellent System, Inc. 003 SUPERVISOR TS1MAD IM1904

Figure 11.6 shows the Serial/Lot Stock Status Inquiry (Issued or Stocked Items). Note the "Carton #" column.

### **Serial/Lot Stock Status Report**

The Serial/Lot Stock Status Report shows the serialized items in stock (refer to Figure 11.7). We have modified this report to include the literal "Carton #" based on the enhancement setup. Figure 11.8 shows the Invoice History Serial/Lot Report. This report is only available with the Serial Number Plus Enhancement. It keeps detail information on the issuing and receiving of serialized items, which you will later see. This can be very helpful when you need to track serialized items. We will later compare this report with Elliott's Serial/Lot Issue History Report.

Run Date: Mar 23, 2005 - 8:52am

Demo Company

Page 1

## S E R I A L / L O T S T O C K S T A T U S R E P O R T

Ranges: All Locations

All Items

Serial/Lot Numbers ATL200

Thru ATL204




Item No	Description	Location	Serial/Lot-No	Rec-Date	Order-No.	Alloc ?	Std-Cost
CHAR-GEN	Character Generator At 25 Meg						7.8000
	LA	ATL200		03/21/05	6	N	7.8000
		ATL201		03/21/05	6	N	7.8000
		ATL202		03/21/05	6	N	7.8000
		ATL203		03/21/05	6	N	7.8000
		ATL204		03/21/05	6	N	7.8000

\*\*\* Warning - Not All Serial Numbers Selected

5 Serial/Lots Printed	Item Value:	Trx Cost	Act Cost
		39.0000	39.0000
1 Items Printed	Total Value:	39.0000	39.0000

Figure 11.7 shows the Serial/Lot Stock Status Report.

### To print the Invoice History Serial/Lot Report:

Customer order processing  Reports  Invoice history reports  invoice history  
Serial/lot report

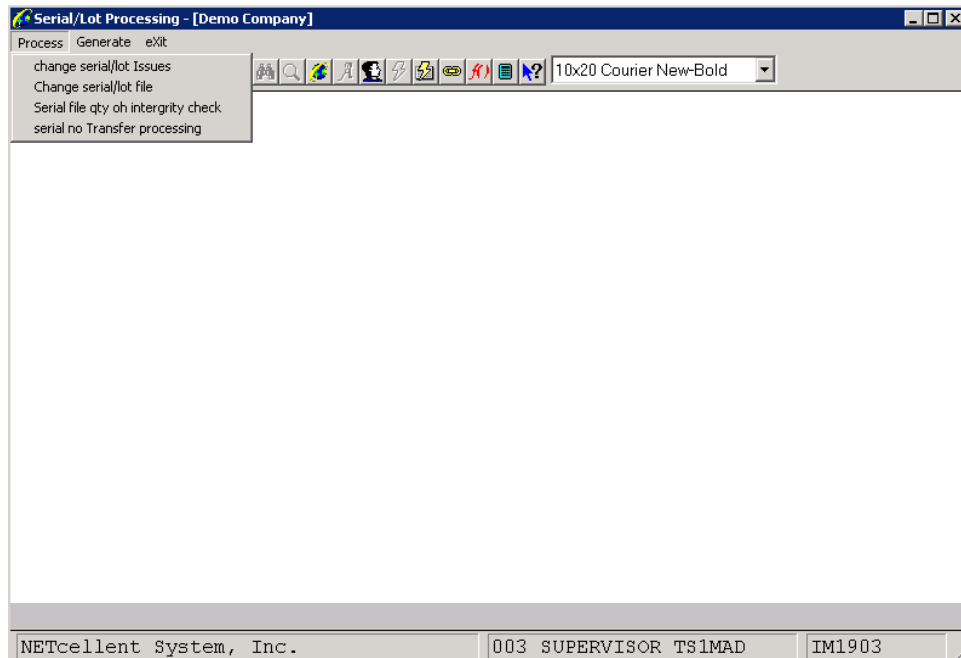
Run Date: Mar 23, 2005 - 9:11am			Demo Company		Page 1	
I N V O I C E   H I S T O R Y   S E R I A L / L O T   R E P O R T						
Ranges: Items CHAR-GEN Thru CHAR-GEN						
Serial/Lot Numbers ATL200 Thru ATL204						
All Customers						
All Vendors						
All Trx Dates						
Item No				Vend Or		Std-Cost
Description	Serial/Lot-No	Location	Issue-Date	Cust-No	Action	Vendor/Customer Address
				Inv-No		
CHAR-GEN						7.8000
CHAR-GEN	ATL200	LA	03/21/05	000200	Rcv'd From PO	CompuPart Computer Services
Character Generator At 25 Meg				00007900	00007900	Lumbard Park
						6000 Unkerman Blvd.
						San Diego CA 98437
CHAR-GEN	ATL201	LA	03/21/05	000200	Rcv'd From PO	CompuPart Computer Services
Character Generator At 25 Meg				00007900	00007900	Lumbard Park
						6000 Unkerman Blvd.
						San Diego CA 98437
CHAR-GEN	ATL202	LA	03/21/05	000200	Rcv'd From PO	CompuPart Computer Services
Character Generator At 25 Meg				00007900	00007900	Lumbard Park
						6000 Unkerman Blvd.
						San Diego CA 98437
CHAR-GEN	ATL203	LA	03/21/05	000200	Rcv'd From PO	CompuPart Computer Services
Character Generator At 25 Meg				00007900	00007900	Lumbard Park
						6000 Unkerman Blvd.
						San Diego CA 98437
CHAR-GEN	ATL204	LA	03/21/05	000200	Rcv'd From PO	CompuPart Computer Services
Character Generator At 25 Meg				00007900	00007900	Lumbard Park
						6000 Unkerman Blvd.
						San Diego CA 98437
5 Transactions Printed						
1 Items Printed						

Figure 11.8 shows the Invoice History Serial/Lot Report.

### Serial/Lot Processing - Process

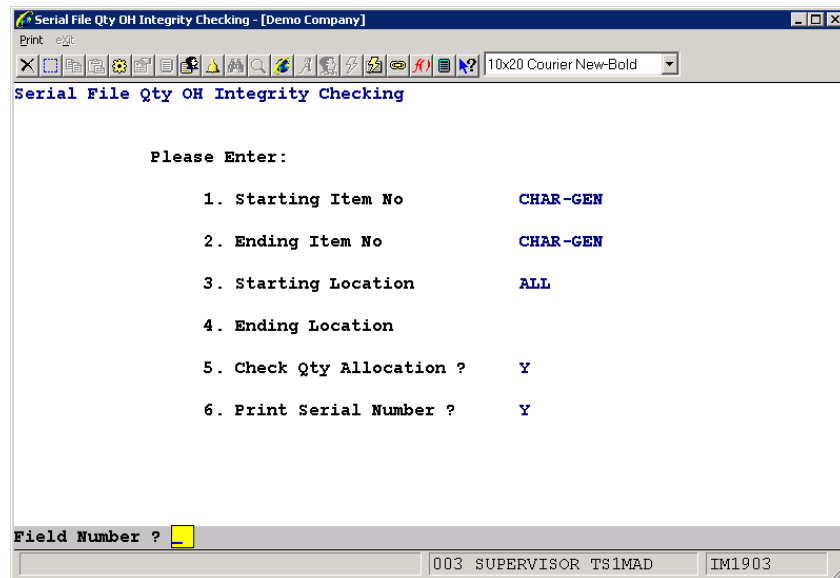
Another area that has changed due to the Serial Number Tracking is the Serial/Lot Processing. Elliott's original processing only included "Change Serial/Lot Issues" and "Change Serial/Lot File". We have added additional functions to the Serial/Lot Processing as shown in Figure 11.9.





**Figure 11.9** shows the modified Serial/Lot Processing Screen.

We have added an additional function to check the serial file quantity on-hand as shown in Figure 11.9. **Figure 11.10** shows that we are checking the serial number integrity between the inventory serial lot transaction file and the inventory quantity on hand and allocated. **Figure 11.11** shows the Serial Qty Integrity Checking Report.



Serial File Qty OH Integrity Checking

Please Enter:

1. Starting Item No CHAR-GEN
2. Ending Item No CHAR-GEN
3. Starting Location ALL
4. Ending Location
5. Check Qty Allocation ? Y
6. Print Serial Number ? Y

Field Number ?

003 SUPERVISOR TS1MAD IM1903

**Figure 11.10** shows the interface screen for the Serial File Qty OH Integrity Checking. Here we are checking on the serialized item “CHAR-GEN”.

Run Date: Mar 23, 2005 - 9:37am Demo Company Page 1

S E R I A L   Q T Y   I N T E G R I T Y   C H E C K I N G

Ranges: All Locations  
Items CHAR-GEN Thru CHAR-GEN

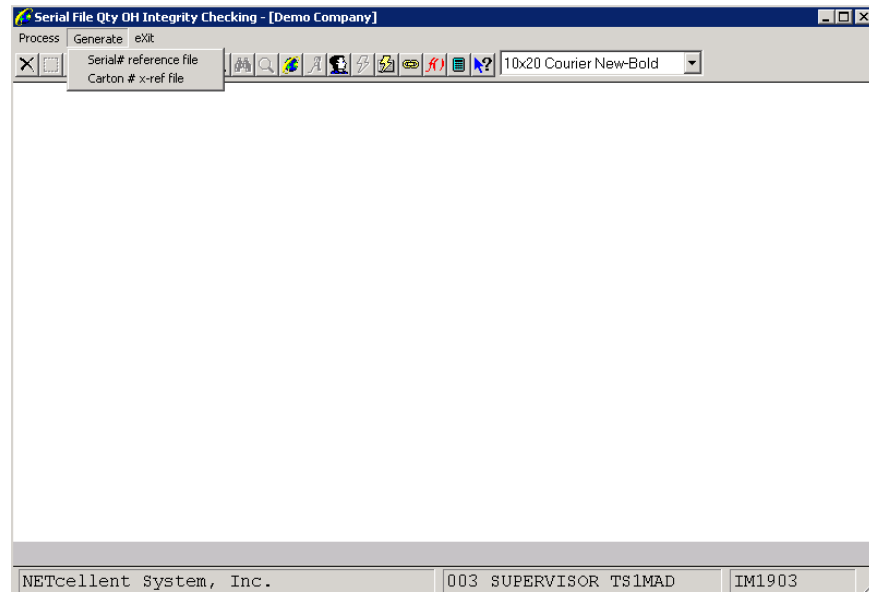
Item No	Description	Alloc ?	Std-Cost	Item On-Hand	Serial On-Hand	Item Allocat	Serial Allocat
CHAR-GEN	Character Generator At 25 Meg Character - Gen - 25		7.8000	71	5	104-	0
LA	ATL200	03/21/05 6					
LA	ATL201	03/21/05 6					
LA	ATL202	03/21/05 6					
LA	ATL203	03/21/05 6					
LA	ATL204	03/21/05 6					

1 Items Printed

**Figure 11.11** shows the Serial Qty Integrity Checking.

### Serial/Lot Processing - Generate

Two more functions have been added, generate serial number reference file and generate carton number cross reference file. These are shown in Figure 11.12.



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## System Period Control

### Application Overview

This feature controls the date you enter for the A/R, AP, PR, IM, COP, PO, and GL modules. It can prevent you from entering a date before or after the current period for each module.

### Run Instructions

Go to **Elliott Main Menu → Util-Setup → Global Setup → System → System Period Control**

System Period Control			
1. Enable System Period Checking ? Y			
	Starting Date	Ending Date	Should System Give Warning Only When Trx Outside Date Range?
2. GL:	09/01/01	09/30/01	X
3. AR:	09/01/01	09/30/01	Y
4. AP:	09/01/01	09/30/01	Y
5. PR:	09/01/01	09/30/01	Y
6. IM:	09/01/01	09/30/01	Y
7. CP:	09/01/01	09/30/01	Y
8. PO:	09/01/01	09/30/01	Y

Y = Warning, N = Not Allowed, X = No Checking

001 SUPERVISOR JOE NSCTLMN1

System Period Control Setup Screen

**Field 1.** Enable System Period Checking?

Select "Y" to enable, "N" to disable.

**Fields 2-8.** Define the periods for each module

Each module has 3 controls for date entry before or after the defined periods

1. "Y" = Warning Only
2. "N" = Not Allowed (Supervisor allowed to override)
3. "X" = No checking

**NOTE:** Before setting a control to "N", you should review the Not Allowed considerations on the next page.

## Not Allowed Considerations

The following is a list of modules where the system date check will apply:

### General Ledger

During the G/L Interface function, a starting date is required. This field will be restricted to the current period.

### Accounts Receivable

During add and change functions of Sales and CR/DR Memo Processing, each transaction requires a document date. This field will be restricted to the current period.

During add and change functions of Cash Receipts Processing, each transaction requires a receipt date. This field will be restricted to the current period.

During the calculate function of Finance Charges Processing, a document date cut-off is required. This field will be restricted to the current period.

During add and change functions of Recurring Sales Processing, a starting date is required. This field will be restricted to the current period.

### Accounts Payable

During add and change functions of A/P Trx Processing, a distribution to G/L date is required. Also, for "P" vouchers, a check date field is required. Both of these date fields will be restricted to the current period.

During add and change functions of Recurring Voucher Processing, a starting date field is required. This field will be restricted to the current period.

During the A/P Open Item Adjustment function with the "M" transaction type, a check date field is required. This field will be restricted to the current period.

During the Print A/P Check function, a check date field is required. This field will be restricted to the current period.

During the Void Checks After Posting function, a check void date field is required. This field will be restricted to the current period.

### Payroll

During the Print Payroll Check function, a check date field is required. This field will be restricted to the current period.

During Manual Trx Processing, a check date field is required. This field will be restricted to the current period.

**Inventory Management**

During the Inventory Transaction Processing function (batch mode only), a transaction date field is required. This field will be restricted to the current period.

During the Posting Physical Count Tags function, a posting date field is required. This field will be restricted to the current period.

**Customer Order Processing**

During the printing of invoices, an invoice date is required. This field will be restricted to the current period.

**Purchase Order**

During the Receiving Processing function (batch mode only), a receipt date field is required. This field will be restricted to the current period.

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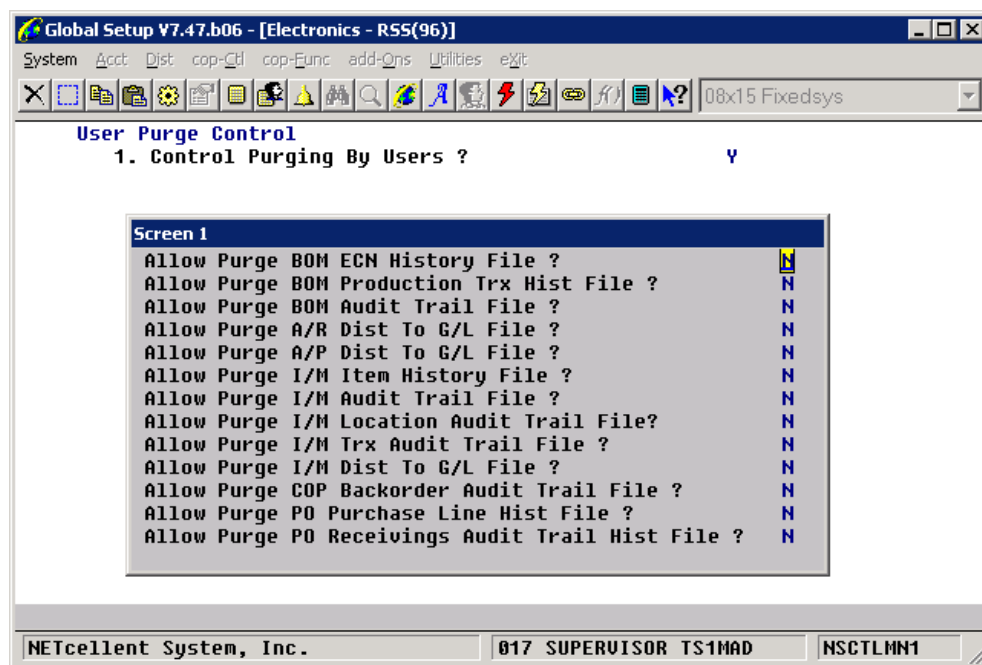
## User Purge Control

### Application Overview

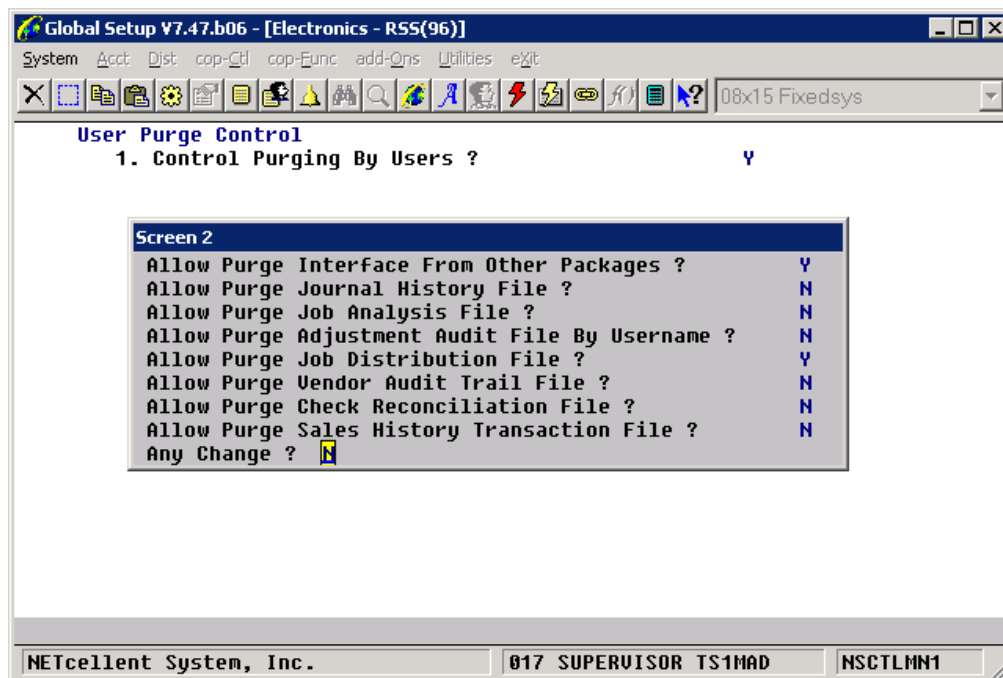
This function controls the permission to purge 23 key reports. This is primarily designed to avoid accidentally purging records before they have been thoroughly reviewed or archived.

### Run Instructions

Go to Elliott Main Menu → Util-Setup → Global Setup → System → User Purge Control



User Purge Control Setup Screen 1



User Purge Control Setup Screen 2

**Field 1. Control User Purging**

If you select "Y", the first of two windows pop up with reports that you can assign purge permissions. In the report pop up window, if you set a report to "N", then that report cannot be purged until the flag has been re-set to "Y".

## User Purge Control Example

If a report is flagged “N”, The “Purge File” field defaults to “N” and the system will not allow access to this field.

The screenshot shows a window titled "Item History Report - [Elliott Demonstration Company]". The window has a menu bar with "Print" and a toolbar with various icons. The main area contains the text "Please Enter:" followed by a list of five items:

- 1. Starting Item All
- 2. Ending Item
- 3. Starting Period 7
- 4. Ending Period 9
- 5. Purge File? N

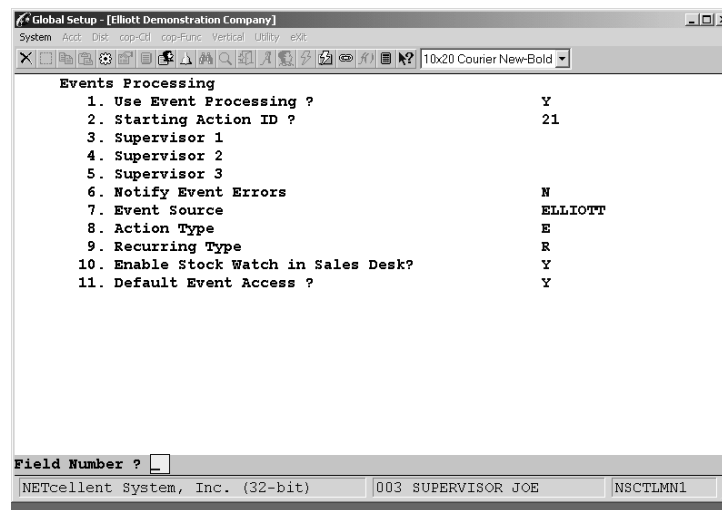
At the bottom of the window, there is a status bar with the text "Field Number ?" and a small input field. Below this, there are three fields containing the text "NETcellent System, Inc. (32-bit)", "001 SUPERVISOR JOE", and "IM14S1".

## Events Handling

### Application Overview

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Events Handling



The screenshot shows a window titled "Global Setup - [Elliott Demonstration Company]". The window has a menu bar with "System", "Acc", "Dis", "cap-Cl", "cap-Func", "Vertical", "Utility", and "e/R". Below the menu bar is a toolbar with various icons. The main area of the window displays the "Events Processing" configuration screen. The screen lists 11 configuration items with their current values. At the bottom of the window, there is a status bar with the text "Field Number ?" followed by a small box, and a footer with the text "NETcellent System, Inc. (32-bit)", "003 SUPERVISOR JOE", and "NSCTLMN1".

Events Processing	
1. Use Event Processing ?	Y
2. Starting Action ID ?	21
3. Supervisor 1	
4. Supervisor 2	
5. Supervisor 3	
6. Notify Event Errors	N
7. Event Source	ELLIOTT
8. Action Type	E
9. Recurring Type	R
10. Enable Stock Watch in Sales Desk?	Y
11. Default Event Access ?	Y

Field Number ?

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE NSCTLMN1

## Field 10: Enable Stock Watch In Sales Desk

“Y” will require setting up Stock Watch default values and parameters as follow:

```
Elliott V7.X.001
Stock Watch Setup (Page 1 of 3)

Stock Watch Event Template ID:          999
Automatic Prompt When Qty-Avail <=0 ?  ☒
Default Value for Automatic Prompt      Y
Will Stock Watch Event Expire?          Y
Prompt for Expiration Days?             U
Default No. of Days for Expiration?     30
Include or Exclude the Following Warehouse E
```

### Stock Watch Event Template ID

The Stock Watch Template determines what information will appear in the e-mail message. In order to complete the setup, enter 999 and after the template is defined the Template ID must be updated

### Automatic Prompt When Qty-Avail <=0?

If you answer “Y”, a popup window will prompt the user to ask the customer if they want to be notified when the item is received into inventory.

The default Qty-Avail is **less than or equal to zero**. Calculation Formula: Qty Avail = Qty On Hand – Qty Allocated.

If “N” the user is still notified of an Insufficient Qty situation and can press the Options Key F5 to select Stock Watch. This will open the Stock Watch Confirmation Box.

### Default Value For Automatic Prompt

Select “Y” or “N” to be the default value for the Stock Watch Confirmation Box.

### Will Stock Event Expire

Y = The event will expire if not triggered (item not received into inventory).

N = The event will remain active until triggered by an item received into inventory.

### Prompt For Expiration Days

Y = If the event is flagged to expire, the system will prompt the user to enter the number of days before the event expires.

N = Do not prompt user.

U = Use the number of default days without confirmation as set in the next setup field.

### Default No of Days for Expiration

Enter the default number of days. If “Y” was selected in previous setup field, the user can override the default value.

### Exclude or Include the Following Warehouses

I = Enter warehouses to **Include** for this event.

E = Enter warehouses to **Exclude** from this event.

**Blank** input fields will include **all** warehouses.

### Stock Watch Setup Screen 2

```

Elliott V7.X.001
Stock Watch Setup (Page 2 of 3)

Confirm Salesman E-mail?      ☒
Confirm Customer E-mail?     Y
Confirm Admin E-mail?        Y
Admin Email:amy@netcellent.com
Confirm Contact?              Y
Confirm Phone?                Y
Confirm Customer Name?        Y
Enable User Defined Prompt 1? Y
Prompt 1 Question:RATE OUR CUSTOMER SERVICE 1-10
Prompt 1 Length                30
Enable User Defined Prompt 2? Y
Prompt 2 Question:RATE OUR WEBSITE 1-10
Prompt 2 Length                30
Enable User Defined Prompt 3? Y
Prompt 3 Question:FUTURE FEATURE WISH LIST
Prompt 3 Length                30
  
```

### Confirm Salesman E-mail

- Y = E-mail address appears in Stock Watch Confirmation Box and allows the user to override the value if needed.
- N = E-mail address will not appear in Stock Watch Confirmation Box and no e-mail will be generated when the event is triggered.
- S = System uses the e-mail address from the Salesman's file and this field will not appear in the Stock Watch Confirmation Box.

**Confirm Customer E-mail**

- Y = E-mail address appears in Stock Watch Confirmation Box and allows the user to override the value if needed.
- N = E-mail address will not appear in Stock Watch Confirmation Box and no e-mail will be generated when the event is triggered.
- S = System uses the e-mail address from the Customer File/Contacts and this field will not appear in the Stock Watch Confirmation Box.

**Confirm Admin E-mail**

- Y = E-mail address appears in Stock Watch Confirmation Box and allows the user to override the value if needed.
- N = E-mail address will not appear in Stock Watch Confirmation Box and no e-mail will be generated when the event is triggered.
- S = System uses the e-mail address defined below and this field will not appear in the Stock Watch Confirmation Box.

**Admin e-mail**

Normally the e-mail address for a sales manager, customer service representative or sales assistant that follows up on triggered events.

**Confirm Contact**

- Y = Contact name appears in Stock Watch Confirmation Box and allows the user to override the value if needed.
- N = Contact name will not appear in Stock Watch Confirmation Box.

**Confirm Phone**

- Y = Telephone number name appears in Stock Watch Confirmation Box and allows the user to override the value if needed.
- N = Telephone number will not appear in Stock Watch Confirmation Box.

**Enable User Defined Prompt 1**

Y = Enables prompt as defined below

N = User defined prompts will be N/A and not appear in the Stock Watch Confirmation Box

**Prompt 1 Question**

User defined literal, up to 30 characters in length

**Prompt 1 Answer**

Customer response, up to 30 characters in length

**Enable User Defined Prompt 2**

Y = Enables prompt as defined below

N = User defined prompts will be N/A and not appear in the Stock Watch Confirmation Box

**Prompt 2 Question**

User defined literal, up to 30 characters in length

**Prompt 2 Answer**

Customer response, up to 30 characters in length

**Enable User Defined Prompt 3**

Y = Enables prompt as defined below

N = User defined prompts will be N/A and not appear in the Stock Watch Confirmation Box

**Prompt 3 Question**

User defined literal, up to 30 characters in length

**Prompt 3 Answer**

Customer response, up to 30 characters in length



## Stock Watch Setup Screen 3

The following template variables are available to use when defining the Stock Watch Template

Elliott V7.X.001	
Answer 'Y' for Variables That Will Be Used on Stock Watch Template (Page 3 of 3)	
CONTACT	Y
CUST-NAME	Y
CUST-ADR1	N
CUST-ADR2	N
CUST-CITY	N
CUST-ST	N
CUST-ZIP	N
CUST-FAX	N
CUST-TYPE	N
CUST-PHONE	Y
REQ-DATE	Y
REQ-TIME	N
UD-PROM1	N
UD-PROM2	N
UD-PROM3	N
SLSMNEMAIL	N
CUSTEMAIL	N
ADMINEMAIL	N

The fields flagged “Y” are template recommendations.

## Stock Watch Template

**Before proceeding**, the user should already be able to create a Specific Event with e-mail Type Actions.

### Step 1. Use An Existing Event or Create A New Event

From Inventory Item File Maintenance, Change Mode, open item Clock

Click the Specific Events Icon or press Ctrl-E

If an Event containing **PO2002 Receive Item** is listed, **go to Step 3**. If not, Press F5 to find, highlight, and insert program PO2002 Receive Item to create a new event.

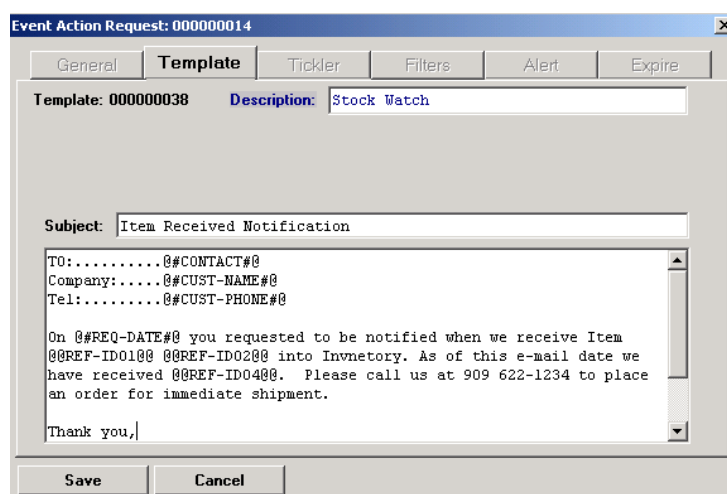
**Step 2. General Window**

There is no need to enter anything here since we only need to define an event template.

**Step 3. Click E-mail Tab**

If Template notification message appears, select No.

In E-mail message window click Templates and select New

**Step 4. Complete Template**


Event Action Request: 000000014

General **Template** Tickler Filters Alert Expire

Template: 000000038 Description: Stock Watch

Subject: Item Received Notification

TO:.....@CONTACT#@  
 Company:.....@CUST-NAME#@  
 Tel:.....@CUST-PHONE#@

On @REQ-DATE#@ you requested to be notified when we receive Item  
 @REF-ID01#@ @REF-ID02#@ into Inventory. As of this e-mail date we  
 have received @REF-ID04@#. Please call us at 909 622-1234 to place  
 an order for immediate shipment.

Thank you,

Save Cancel

The data input fields for Stock Watch Template Variables are automatically filled in and do not prompt the user for input as do the Specific Event Templates.

Stock Watch Template Variables	Source
CONTACT	A/R Customer File or Confirmation Box
CUST-NAME	A/R Customer File or Confirmation Box
CUST-ADR1	A/R Customer File
CUST-ADR2	A/R Customer File
CUST-CITY	A/R Customer File
CUST-ST	A/R Customer File
CUST-ZIP	A/R Customer File
CUST-FAX	A/R Customer File
CUST-TYPE	A/R Customer File
CUST-PHONE	A/R Customer File or Confirmation Box

Stock Watch Template Variables	Source
REQ-DATE	System Date
REQ-TIME	System Date
UD-Prom1	Stock Watch Setup
UD-Prom2	Stock Watch Setup
UD-Prom3	Stock Watch Setup
SLSMNEMAIL	A/R Salesman File or Confirmation Box
CUSTEMAIL	A/R Customer/eContacts or Confirmation Box
ADMINEMAIL	Stock Watch Setup

**Step 5. Save Template**

**Note Template Action-ID #38**

**Do Not Press “Use Template”**

**Press Cancel (Template has already been saved)**

Creator	Description	Action-ID
SUPERVISOR	Stock Watch for Cust W/O Email	000000013
SUPERVISOR	Stock Watch	000000038

**Step 6. Update Stock Watch Setup For Temple ID**

Elliott V7.X.001  
Stock Watch Setup (Page 1 of 3)

Stock Watch Event Template ID: 38  
Automatic Prompt When Qty-Avail <=0 ? Y  
Default Value for Automatic Prompt Y  
Will Stock Watch Event Expire? Y  
Prompt for Expiration Days? U  
Default No. of Days for Expiration? 30  
Include or Exclude the Following Warehouse E

**NOTE:** To complete the update you must enter through all three setup screens.

**E-mail Notification: Template ID 38**

**From:** Joe Cabaza                      **To:** Joe Cabaza; 'jamesg@bjltd.com'  
**Subject:** Item Received Notification      **Cc:**

TO:.....James Gilmore  
Company:.....Brooks and Johnson, LTD.  
Tel:.....617-678-2100

On 10/02/01 you requested to be notified when we receive Item CLOCK 25 Meg Clock  
For Mother Board into Invnetory. As of this e-mail date we have received 24.000.  
Please call us at 909 622-1234 to place an order for immediate shipment.

Thank you,  
NetCellent Customer Service

**Salesman Copy = Call Customer and Get Order**

## Attribute Handling

### Application Overview

Attributes are database extensions or controls that can be attached to any master record. They are normally used to track information that is outside of the master record and in some cases for control purposes to meet restrictions and regulations that affect how you do business.

In a marketing environment attributes can track participants and their individual results of a marketing promotion or advertising campaign. In a service environment they can track service contracts, expiration dates, and amount of contract. In regulated business they can track licenses, requirements, as well as, business restrictions by geographical area.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → System → Attribute Handling

Global Setup V7.35.a20 - [Elliott Testing - CWC]

System Acct Dist cop-ctl cop-Func add-Ons Utilities exit

10x18 Courier New

Attribute Processing

1. Use Attribute Processing ?	Y
2. Warehouse Exempt From Restricted Attribute ?	
AA BB CC DD EE	
3. Attach Attribute To COP Line Item Screen ?	I
4. Attach Attribute To PO Line Item Screen ?	I
5. Allow Some Restr Attribute Apply To All Items?	N
6. Order Header Attribute Option ?	C
7. Enter Attribute in Customer Add Mode ?	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN1

**Field 1.** Select "Y" to use attributes, otherwise select "N."

**Field 2.** Enter up to five warehouses to exempt from Restricted Attributes. However, based on your sales and shipping policy, there is nothing to keep the exempt warehouses from doing business in the areas and with customers where restrictions apply.

**Field 3.** Enter "I" to attach the attribute to the item and "L" to attach it to the line item during COP order entry.

**Field 4.** Enter "I" to attach the attribute to the item and "L" to attach it to the line item during Purchase Order entry.

- Field 5.** Select "Y" to allow restricted attributes to apply to all items, otherwise select "N."
- Field 6.** Enter "H" to attach the attribute to the order header and "C" to attach it to the customer during COP order entry.
- Field 7.** Select "Y" to prompt the user for an attribute during the adding of a customer in Customer Maintenance, otherwise select "N."

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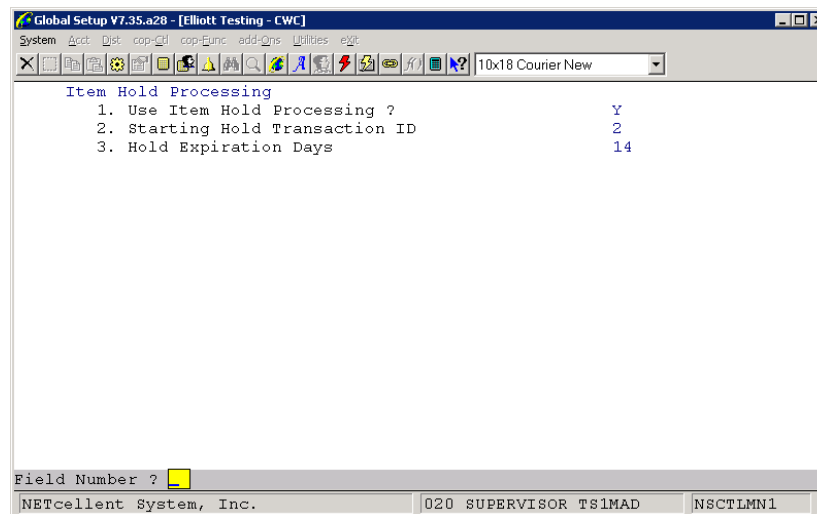
### ***Item Hold Processing***

## Application Overview

This is the global setup for Item Hold, which allows users to place items on hold. Item Hold allocates the inventory without having to place an order for the item.

## Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → System → Item Hold Processing



- |                 |  |
|-----------------|--|
| <b>Field 1.</b> | Turns Item Hold Processing on and off. Select “Y” to use.  |
| <b>Field 2.</b> | Enter a starting Hold Transaction ID number. This is an internal control number and the user can press a function key for the next sequential number when entering a hold transaction. |
| <b>Field 3.</b> | Enter the number of days you wish the transaction to hold the inventory before it expires. This can be a number from 1 to 999.   |



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## ***eContacts Manager***

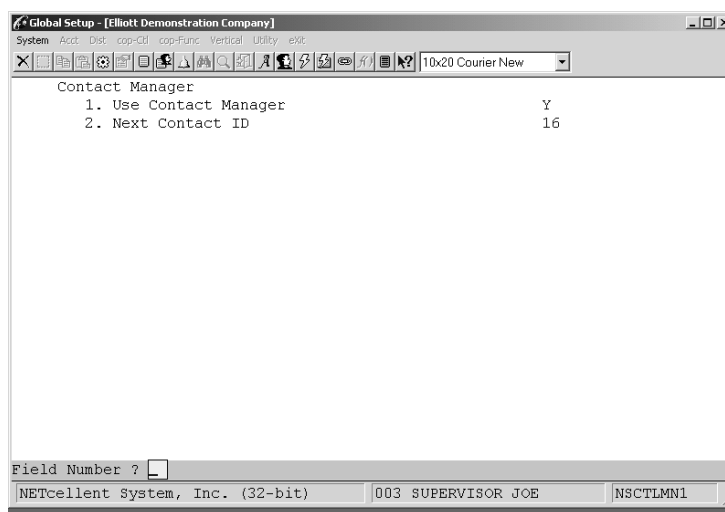
### **Application Overview**

eContacts is a CRM database designed for e-mail programs and web site authentication. Management and system users can easily and efficiently develop a feature rich and robust user database for their web site and use it with 3<sup>rd</sup> party applications, Elliott Software and Elliott Web Solutions.

eContacts integrates to Elliott Software, Elliott Shopping Cart, Notes, and is the database for the Mass E-Mail program. The only requirement to using eContacts is a contact e-mail address. The **advantages and rewards** of eContacts **are further enhanced** by the Mass E-Mail Program. Users should read the Mass E-Mail chapter to better appreciate this CRM database and its structuring.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → System → eContact Manager



**Field 1.** Turns eContacts off or on. Select "Y" to use.

**Field 2.** Enter starting Contact ID number. This is an internal control only and serves no functionality or purpose to the user.

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## Link Setup

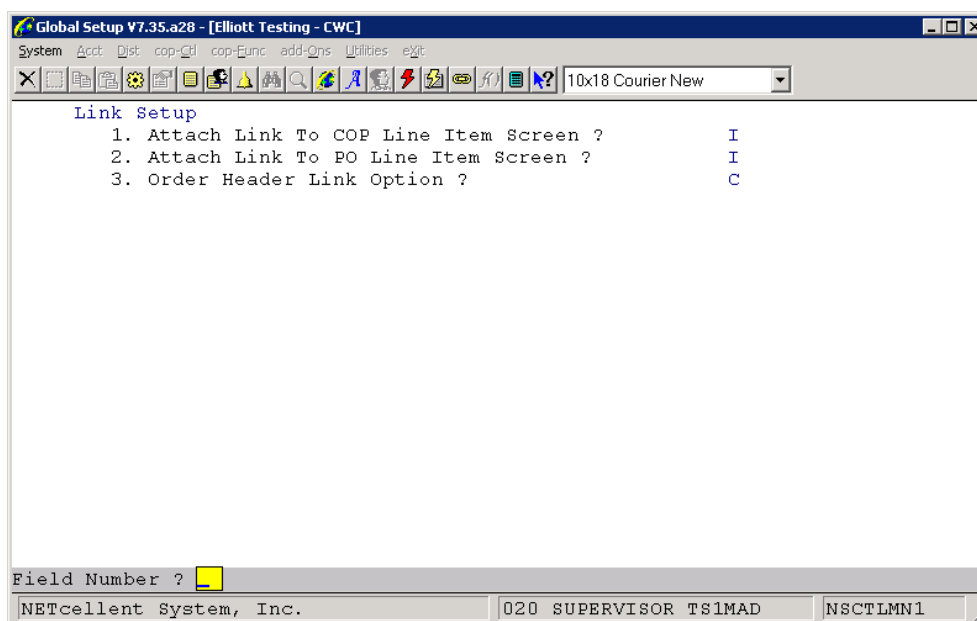
### Application Overview

Links allow the user to attach external files to records within Elliott. These can be jpg files with a picture of the item or customer, Word documents that may be a support or pricing contract or a file on the internet, like a webpage.

The following allows the global setup for links.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → System → Link Setup



- Field 1.** Enter "I" to attach the link to the item and "L" to attach it to the line item during COP order entry.
- Field 2.** Enter "I" to attach the link to the item and "L" to attach it to the line item during Purchase Order entry.
- Field 3.** Enter "H" to attach the link to the order header and "C" to attach it to the customer during COP order entry.

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**Acct**

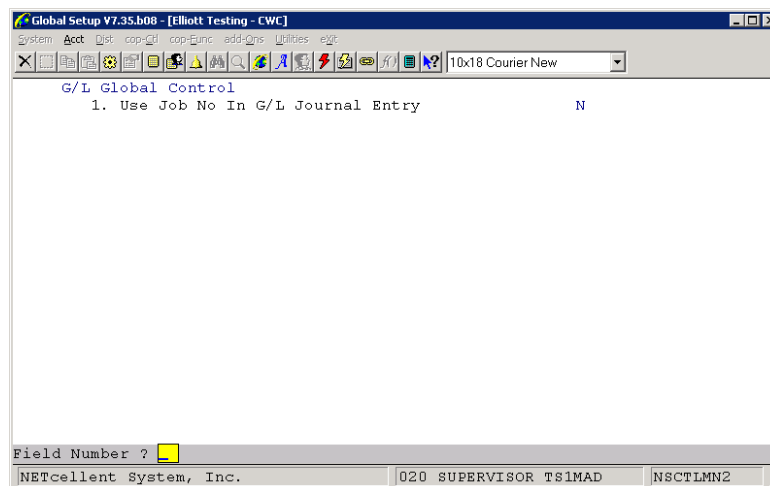
***G/L Global Control***

## Application Overview

This setup screen allows you to set certain global variables for the General Ledger module.

## Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → GL Global Control



**Field 1.** Enter "Y" to have Elliott prompt for a Job Number when making journal entries in General Ledger.

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## ***G/L Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the General Ledger module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Acct → GL Setup

**Procedure:** Enter values for the prompted fields.



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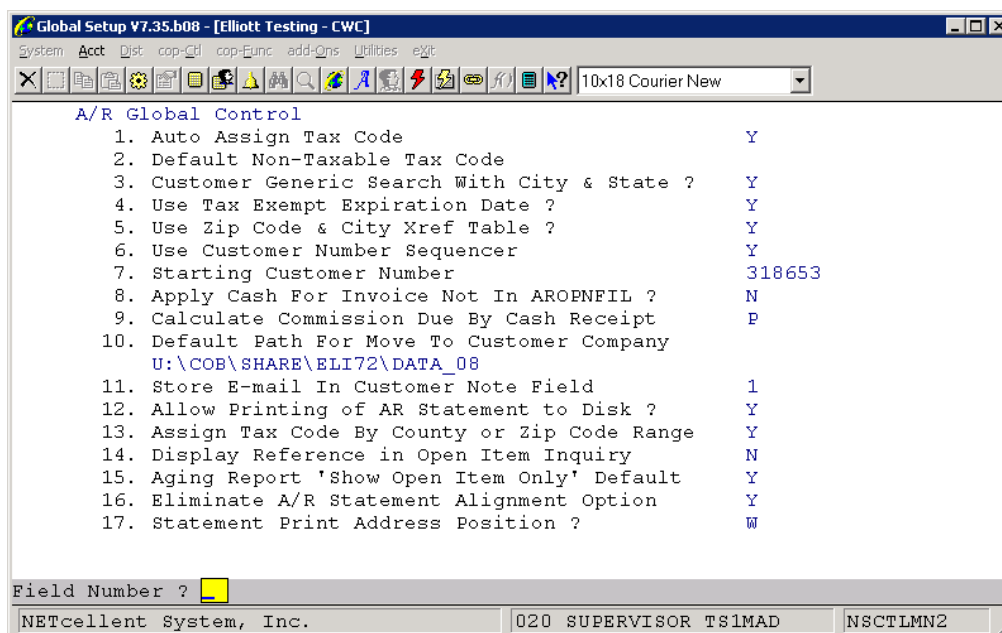
## A/R Global Control

### Application Overview

This setup screen allows you to set certain global variables for the Accounts Receivable module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → AR Global Control



A/R Global Control	
1. Auto Assign Tax Code	Y
2. Default Non-Taxable Tax Code	Y
3. Customer Generic Search With City & State ?	Y
4. Use Tax Exempt Expiration Date ?	Y
5. Use Zip Code & City Xref Table ?	Y
6. Use Customer Number Sequencer	Y
7. Starting Customer Number	318653
8. Apply Cash For Invoice Not In AROPNFIL ?	N
9. Calculate Commission Due By Cash Receipt	P
10. Default Path For Move To Customer Company	U:\COB\SHARE\ELI72\DATA_08
11. Store E-mail In Customer Note Field	1
12. Allow Printing of AR Statement to Disk ?	Y
13. Assign Tax Code By County or Zip Code Range	Y
14. Display Reference in Open Item Inquiry	N
15. Aging Report 'Show Open Item Only' Default	Y
16. Eliminate A/R Statement Alignment Option	Y
17. Statement Print Address Position ?	W

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR T81MAD N8CTLMN2

**Field 1.** By selecting “Y” to this field, Elliott can auto assign tax codes to customers and ship-to’s. A “Y” will cause two additional fields to display in State File Maintenance, Taxable Tax Code and Non-taxable Tax Code. Based on this information, when the state and/or region matches an entry in the State File, the tax code will be used as a default when entering a customer or ship-to.

**Field 2.** Enter a three character tax code. This will be the default non-taxable code when adding a new record to the state file if the Auto Assign Tax Code flag is turned on. There is no error checking for this field, so be sure the code exists in the Tax Code file.

**Field 3.** By selecting “Y” to this field, Elliott will display a City column and a State column in the lookup window.

**Field 4.** By selecting “Y” to this field, Elliott will prompt for an expiration date if “N” is entered for the Taxable field in Customer Maintenance. During the entry of an order if the tax exempt status has expired, then Elliott will use the tax rate specified in the tax code field and will default the taxable field to “Y.”

**Field 5.** Selecting “Y” to this field will enable Elliott to display a cross reference table when entering

the city, state or zip code for a customer. If you are on the city field, then pressing F7 will allow you to enter a zip code and display the zip code, city, state and county for each zip code in numerical order. If you are on the state field, then you can press F7 to lookup states by abbreviation or F8 to look them up by name. By pressing F7 on the zip code field, Elliott will display a lookup window of zip codes, cities, states and counties sorted by city. The zip code file is supplied with your Elliott installation, but the state file is maintained by the user under Maintenance and State Table File.

**Field 6.** Selecting “Y” to this field will enable the Customer Number Sequencer. When adding a customer you can press the F1 key to obtain the next available customer number.

**Field 7.** This is the next sequence number for the Customer Number Sequencer. When adding a customer and pressing the F1 key, this number will appear as the customer number.

**Field 8.** By turning on this flag, Elliott will allow you to perform a cash receipt and apply it towards an invoice that has not been posted.

**Field 9.** Either “F” for Full Pay or “P” for Partial Pay can be entered. Full Pay means that commission will be calculated only on invoices that are fully paid. Partial Pay means the commission will be calculated on all the cash receipts, regardless if the invoice is fully paid or not.

**Field 10.** This is the default path for the Customer Copy To Company feature. The Customer Copy To Company feature is a special function of Customer Maintenance.

**Field 11.** This field has been made obsolete by eContacts.

**Field 12.** Normally, statements should not be allowed to print to disk. There are exceptions to this rule, so we have provided a Y/N flag to allow for this.

**Field 13.** Indicate “Y” to assign tax codes by county and “N” to assign tax codes by zip code range. The tax code found will be the default value when adding a customer.

**Field 14.** To display the reference in the Open Item Inquiry on a second line, place a “Y” in this field.

**Field 15.** This controls the default value for the Show Open Items Only flag for the Aging Report.

**Field 16.** We recommend you set this to “Y” only if you are using laser statements. This will eliminate the alignment window.

**Field 17.** There are three options; “O” for the original print position of the customer address, “W” to move the address up two lines to fit a #9 window envelope, and “C” to move the address up four lines to fit the crash form.

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## ***A/R Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Accounts Receivable module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Acct → AR Setup

**Procedure:** Enter values for the prompted fields.

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## A/R Bill To Customer

### Application Overview

This setup screen allows you to set certain global variables for the Accounts Receivable module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → AR Bill To Customer

Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-CD cop-Eunc add-Qns Utilities eXit

10x18 Courier New

A/R Bill To Customer

1. Enter Bill-To No At Order Header ? Y

2. Limited Bill-To Selection At Order Header ? N

3. Do You Use Commission By Cash Receipt Report ? N

4. Post Invoice To Bill-To Or Original Customer ? B

5. Use Original Terms Code Or Bill To Terms Code

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN2

**Field 1.** By selecting “Y” to this field, Elliott will prompt for a Bill To during Order Entry. The Bill To must be a valid customer in the Customer File.

**Field 2.** If you answer “Y”, a window will pop up prompting for up to 10 valid Bill To numbers. Verification against the Customer File does not take place here, but it does when the order is entered.

**Field 3.** If you calculate commissions by cash receipt rather than by invoice, then answer “Y” to this field.

**Field 4.** Invoices can either post against the customer or the Bill To indicated in the order. Select “B” to post against the Bill To and “O” to post against the Original Customer.

**Field 5.** The terms on the order can either be the Bill To terms, “B”, or the Original terms of the customer, “O”.

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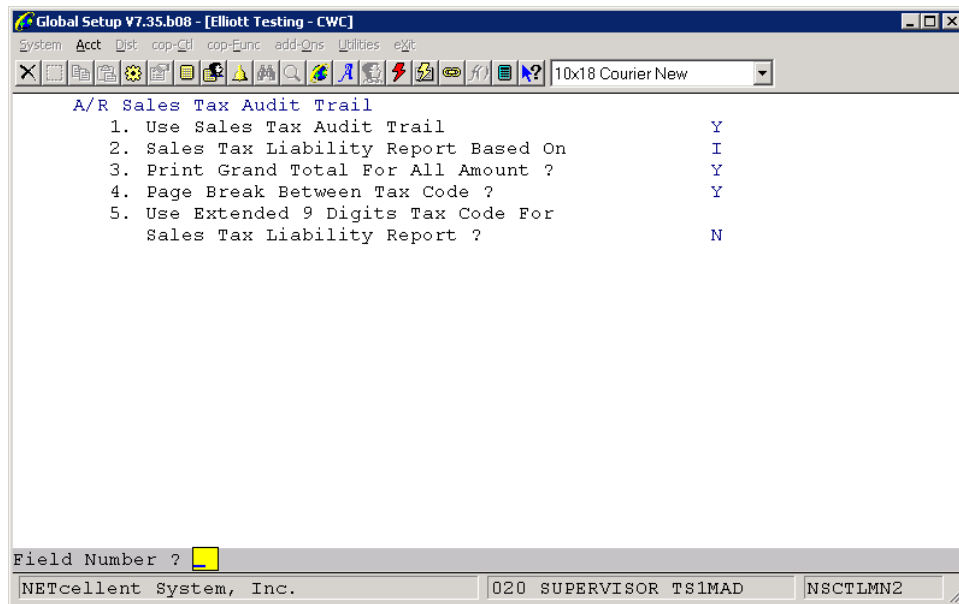
## A/R Sales Tax Audit Trail

### Application Overview

This setup screen allows you to set certain global variables for the Accounts Receivable module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → AR Sales Tax Audit Trail



A/R Sales Tax Audit Trail	
1. Use Sales Tax Audit Trail	Y
2. Sales Tax Liability Report Based On	I
3. Print Grand Total For All Amount ?	Y
4. Page Break Between Tax Code ?	Y
5. Use Extended 9 Digits Tax Code For Sales Tax Liability Report ?	N

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN2

**Field 1.** Answering “Y” to this field will instruct Elliott to store sales tax information in the Sales Tax Liability File (ARSTLFIL).

**Field 2.** This can be configured to print the Sales Tax Liability Report based on “I”, invoice or “C”, cash receipt.

**Field 3.** Selecting “Y” will print all of the totals on the Sales Tax Liability Report. Selecting “N” will only print the tax amount total.

**Field 4.** Selecting “Y” will force a page break between tax codes on the Sales Tax Liability Report.

**Field 5.** Selecting “Y” will allow you to enter a nine digit description in the Tax Code Maintenance screen. Lookups can use this field and the Sales Tax Liability Report can use this as a parameter.

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## A/R Payment Source

### Application Overview

This setup screen allows you to set certain global variables for the Accounts Receivable module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → AR Payment Source

A/R Payment Source	
1. Next Available Credit Log Number	3
2. Next Available Credit Trx ID.	81
3. Default Source for Credit card Trx.	WEB
4. Default Source for Cash	POS
5. Default Source for Gift Certificate	POS
6. Default Source for Check	POS

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TSLMAD NSCTLMN2

**Field 1.** This number will be assigned to the next credit card verification. This number will show up in the Document field of the credit card receipt. Initially this should be set to 1 and should not be changed unless instructed by Netcellent to do so.

**Field 2.** This number will be assigned to the next credit card transaction. It is the main transaction number to keep the records unique. Initially this should be set to 1 and should not be changed unless instructed by Netcellent to do so.

**Field 3.** Enter the source code you want as the default for credit card transactions. Verification is not performed here, but this should be a valid code in the AR Payment Source Code file. If this field is left blank, order entry will not prompt for the credit card information in the payment window.

**Field 4.** Enter the source code you want as the default for cash transactions. Verification is not performed here, but this should be a valid code in the AR Payment Source Code file. If this field is left blank, order entry will not prompt for the cash amount in the payment window.

**Field 5.** Enter the source code you want as the default for gift certificates. Verification is not performed here, but this should be a valid code in the AR Payment Source Code file. If this field is left blank, order entry will not prompt for the gift certificate amount in the payment window.

**Field 6.** Enter the source code you want as the default for checks. Verification is not performed here, but this should be a valid code in the AR Payment Source Code file. If this field is left blank, order entry will not prompt for the check information in the payment window.

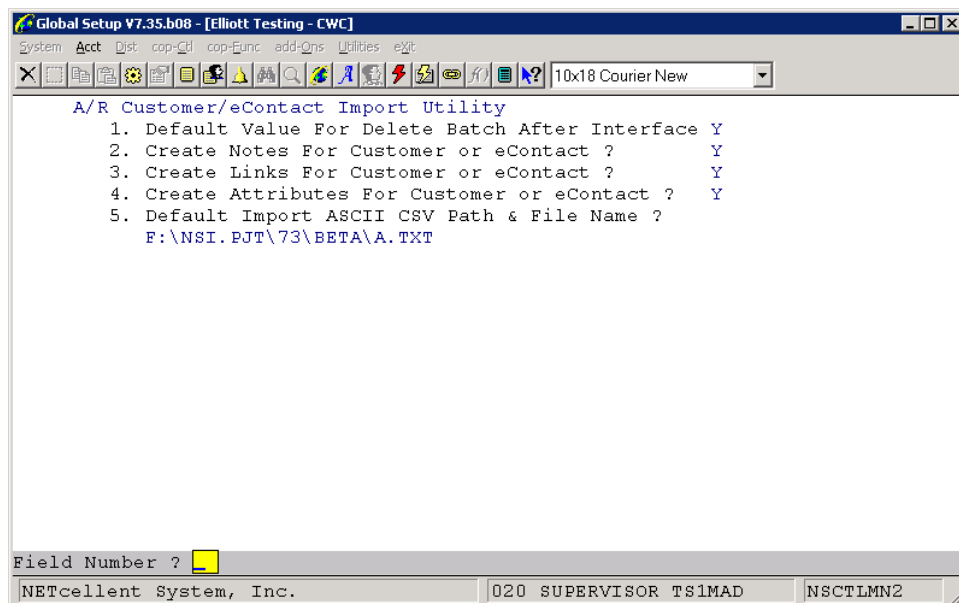
## A/R Customer/eContact Import

### Application Overview

This setup screen allows you to set certain global variables for the Accounts Receivable module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → AR Cust/eCont Import



**Field 1.** This is the default value for the Delete Batch After Interface flag in the Customer/eContact Import Utility.

**Field 2.** This flag indicates if the import utility is to create Notes for the customers and econtacts that are imported.

**Field 3.** This flag indicates if the import utility is to create Links for the customers and econtacts that are imported.

**Field 4.** This flag indicates if the import utility is to create Attributes for the customers and econtacts that are imported.

**Field 5.** This is the default value for the file name and path of the ASCII import file.

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## A/P Global Control

### Application Overview

This setup screen allows you to set certain global variables for the Accounts Payable module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → AP Global Control

A/P Global Control	
1. Print Voucher Reference On A/P Check ?	Y
2. Use Rec Accrual Account Reconciliation	Y
3. Vendor Remit To Flag	O
4. Print Vendor Name On A/P Check	Y
5. Allow Dist To PO Line Item Acct For Non-Inv Item PPV	N
6. Dist To PO Line Item Acct For Non-Inv Itm By Default	P
7. Using Voucher Reference For Interface G/L ?	N
8. Enter Extra Data In Vendor Add Mode ?	N
9. Use Vendor Number Sequencer	Y
10. Starting Vendor Number	1012
11. Default Voucher Date as Invoice Date ?	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN2

**Field 1.** This flag indicates if the voucher reference is to print on the AP check.

**Field 2.** This flag indicates if the Receiving Accrual Account is used in PO Reconciliation.

**Field 3.** This flag indicates if the Vendor Remit To is used. A blank means no remit to is used, an "O" means the transaction is made under the original vendor, but the check is sent to the remit to and an "R" means that the transaction is made under the remit to.

**Field 4.** This flag indicates if vendor name should print on the AP check stub.

**Field 5.** Answer "Y" to this flag if you wish to distribute to the PO line item account for non-inventory PPV.

**Field 6.** This flag indicates which type of account should be the default for non-inventory items received through PO. An "L" indicates the line item account. A "P" indicates the PPV account. "O" means other account.

**Field 7.** Answer "Y" to this flag if you want to use the reference on the voucher for the reference on

the interfaced GL transaction.

**Field 8.** Answer "Y" to this flag if you want to be prompted for extra vendor data each time a vendor is added.

**Field 9.** Answer "Y" to this flag if you want Elliott to assign vendor numbers. Vendor numbers can still be entered manually, but the user has the option to press the F1 key to obtain the next sequential vendor number.

**Field 10.** This is the vendor number that will be assigned to the next vendor if the F1 key is pressed during entry of the vendor number and the Vendor Number Sequencer (number 9) is turned on.

**Field 11.** Answer "Y" to this flag if you want to default the GL distribution date to the same date as the invoice date during entry of a voucher. If this flag is set to "N", then the date will default to the current date.

**Procedure:** Enter values for the prompted fields.



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## ***A/P Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Accounts Payable module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Acct → AP Setup

**Procedure:** Enter values for the prompted fields.

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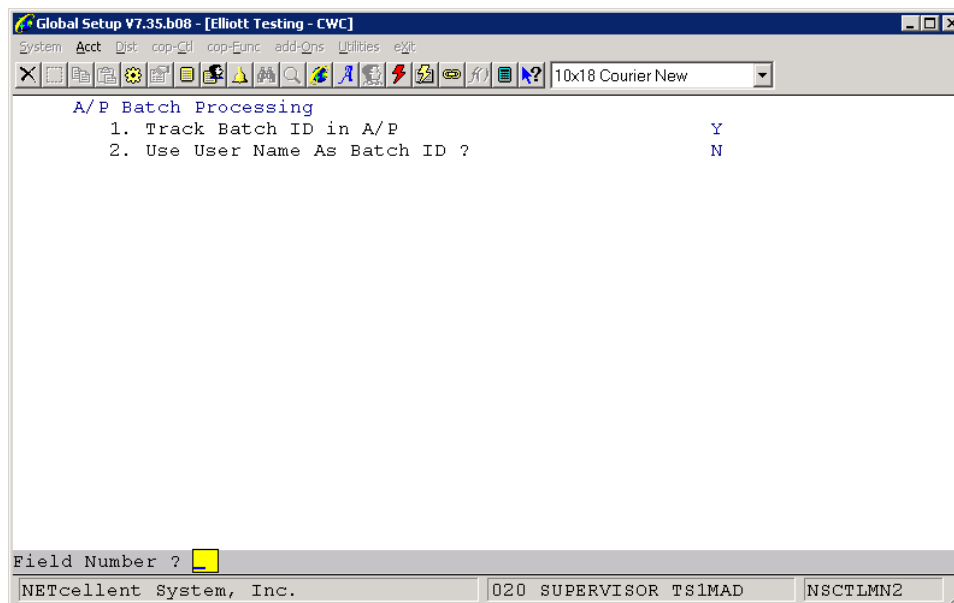
## A/P Batch Processing

### Application Overview

This setup screen allows you to set certain global variables for the Accounts Payable module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → AP Batch Processing



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Gl cop-Func add-Ons Utilities eXit

10x18 Courier New

A/P Batch Processing

1. Track Batch ID in A/P Y

2. Use User Name As Batch ID ? N

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN2

**Field 1.** Answer "Y" to this flag to use batch ID's in AP. When entering AP vouchers, Elliott will prompt for a batch ID. You can either enter an existing ID to edit a batch or a new ID to start a new batch. Posting will also prompt for a range of batches.

**Field 2.** By answering "Y" to this flag, the batch ID will default to the user ID.

**Procedure:** Enter values for the prompted fields.

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## ***P/R Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Payroll module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Acct → PR Setup

**Procedure:** Enter values for the prompted fields.

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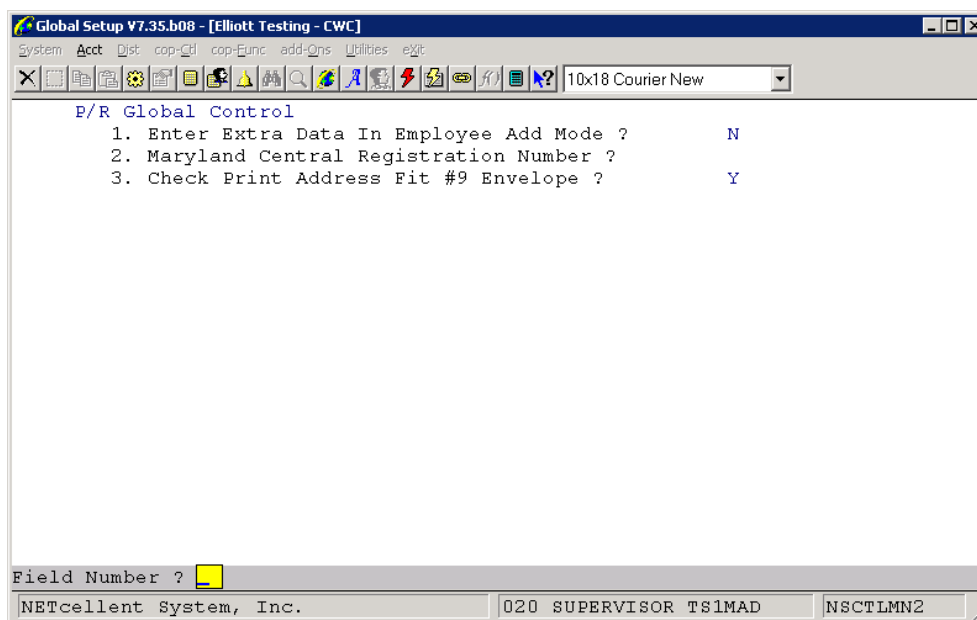
## *P/R Global Control*

### Application Overview

This setup screen allows you to set certain global variables for the Payroll module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Acct → PR Global Control



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-CD cop-Eunc add-Qns Utilities eXit

10x18 Courier New

P/R Global Control

1. Enter Extra Data In Employee Add Mode ? N

2. Maryland Central Registration Number ? N

3. Check Print Address Fit #9 Envelope ? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN2

**Field 1.** Answer “Y” to prompt the user for employee extra data when a new employee is entered.

**Field 2.** This is an 8 digit number that is used by Maryland users for reporting payroll taxes.

**Field 3.** Answer “Y” to this field if the employee address on the payroll check prints too low for a standard #9 envelope.

**Procedure:** Enter values for the prompted fields.



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## ***Bankrec Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Bank Book module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Acct → Bankrec Setup

**Procedure:** Enter values for the prompted fields.

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## Dist

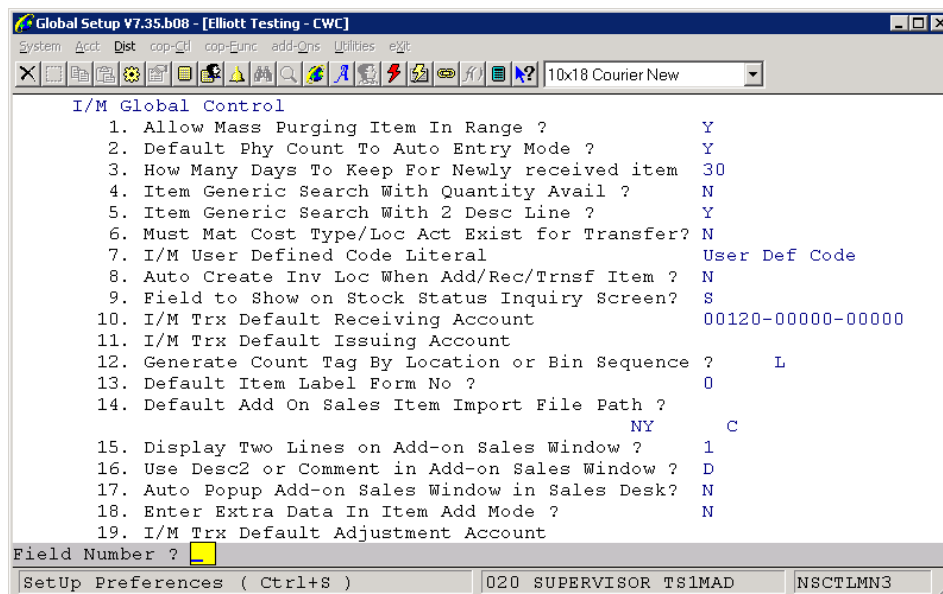
### *I/M Global Control*

## Application Overview

This setup screen allows you to set certain global variables for the Inventory Management module.

## Run Instructions

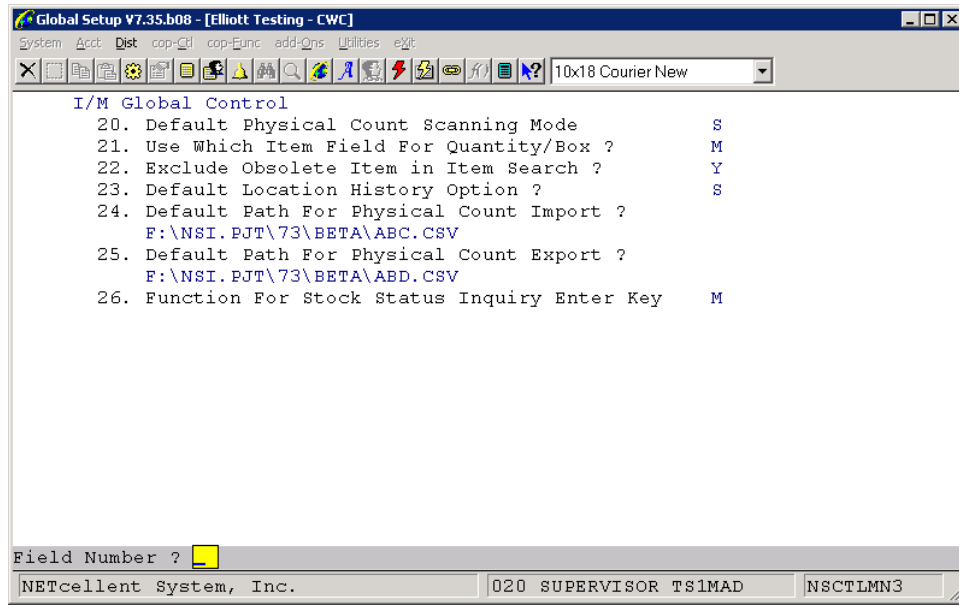
Elliott Main Menu → Util-Setup → Global Setup → Dist → IM Global Control



I/M Global Control	
1. Allow Mass Purging Item In Range ?	Y
2. Default Phy Count To Auto Entry Mode ?	Y
3. How Many Days To Keep For Newly received item	30
4. Item Generic Search With Quantity Avail ?	N
5. Item Generic Search With 2 Desc Line ?	Y
6. Must Mat Cost Type/Loc Act Exist for Transfer?	N
7. I/M User Defined Code Literal	User Def Code
8. Auto Create Inv Loc When Add/Rec/Trnsf Item ?	N
9. Field to Show on Stock Status Inquiry Screen?	S
10. I/M Trx Default Receiving Account	00120-00000-00000
11. I/M Trx Default Issuing Account	
12. Generate Count Tag By Location or Bin Sequence ?	L
13. Default Item Label Form No ?	0
14. Default Add On Sales Item Import File Path ?	NY C
15. Display Two Lines on Add-on Sales Window ?	1
16. Use Desc2 or Comment in Add-on Sales Window ?	D
17. Auto Popup Add-on Sales Window in Sales Desk?	N
18. Enter Extra Data In Item Add Mode ?	N
19. I/M Trx Default Adjustment Account	

Field Number ?

SetUp Preferences ( Ctrl+S )      020 SUPERVISOR TS1MAD      NSCTLMN3



**Field 1.** Answer "Y" to enable the item purge function in Item File Maintenance.

**Field 2.** This will be the default prompt for Auto Entry Mode when entering data in Physical Count Processing.

**Procedure:** Enter values for the prompted fields.

## ***I/M Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Inventory Management module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Dist → IM Setup

**Procedure:** Enter values for the prompted fields.

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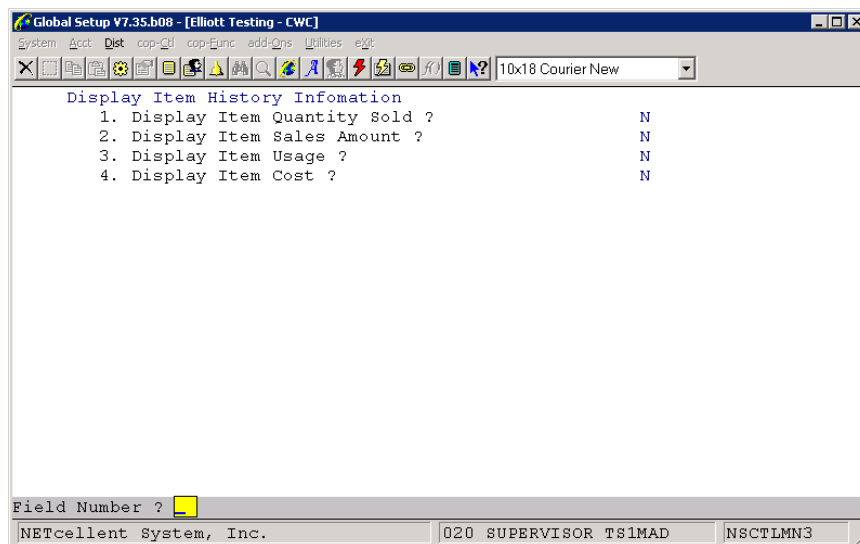
## ***Display Item History Information***

### **Application Overview**

This setup screen allows you to set certain global variables for the Inventory Management module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Dist → Display Item History Info.



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Git cop-Eunc add-Qns Utilities exit

10x18 Courier New

Display Item History Information

1. Display Item Quantity Sold ?	N
2. Display Item Sales Amount ?	N
3. Display Item Usage ?	N
4. Display Item Cost ?	N

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN3

**Procedure:** Enter values for the prompted fields.



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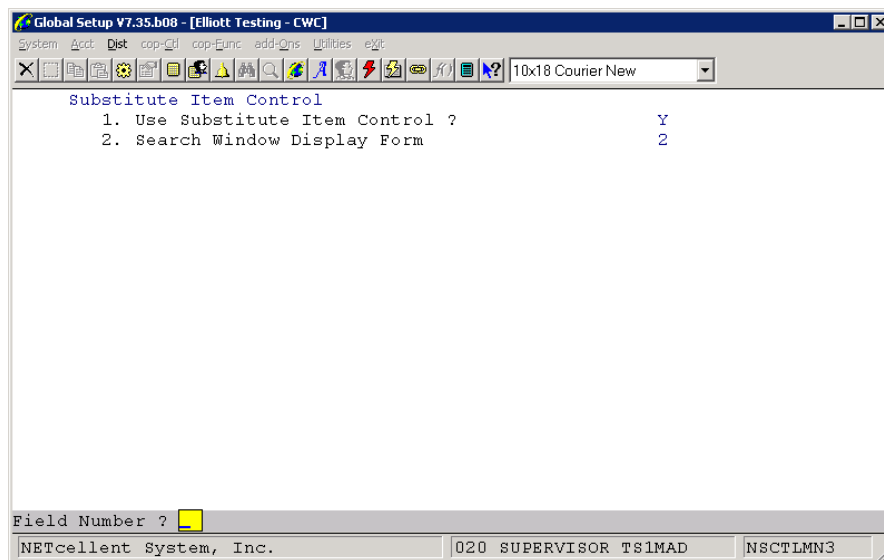
## ***Substitute Item Control***

### **Application Overview**

This setup screen allows you to set certain global variables for the Inventory Management module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Dist → Substitute Item Control



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Gd cop-Eunc add-Qns Utilities e2f

Substitute Item Control

1. Use Substitute Item Control ? Y

2. Search Window Display Form 2

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN3

**Procedure:** Enter values for the prompted fields.

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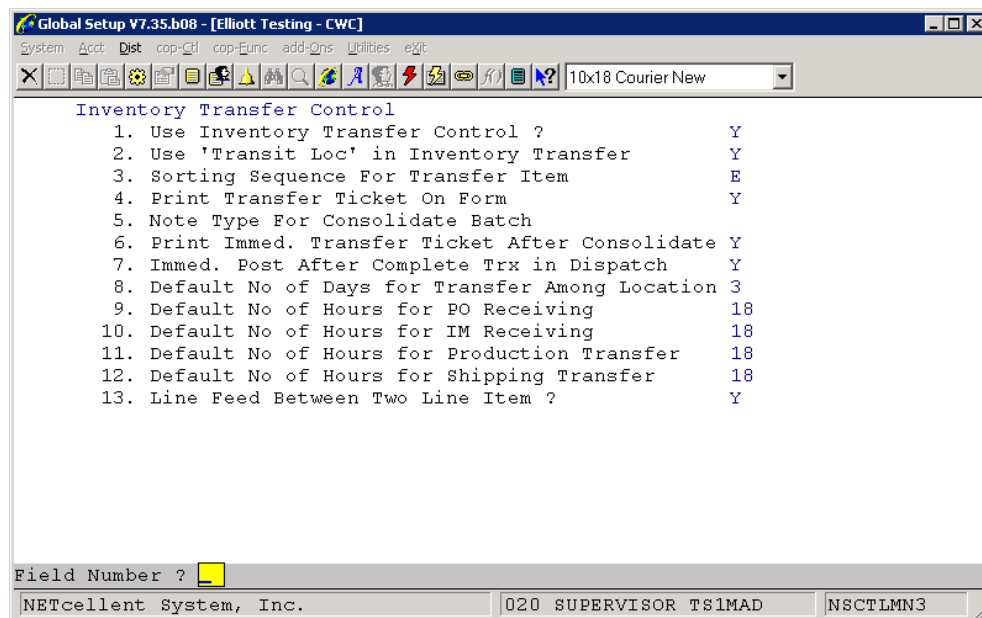
## Inventory Transfer Control

### Application Overview

This setup screen allows you to set certain global variables for the Inventory Management module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Dist → Inventory Transfer Control



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-CD", "cop-Eunc", "add-Qns", "Utilities", and "eXit". The toolbar contains various icons for file operations and help. The font is set to "10x18 Courier New". The main area displays the "Inventory Transfer Control" screen with a list of 13 items, each with a value to its right:

Item	Value
1. Use Inventory Transfer Control ?	Y
2. Use 'Transit Loc' in Inventory Transfer	Y
3. Sorting Sequence For Transfer Item	E
4. Print Transfer Ticket On Form	Y
5. Note Type For Consolidate Batch	
6. Print Immed. Transfer Ticket After Consolidate	Y
7. Immed. Post After Complete Trx in Dispatch	Y
8. Default No of Days for Transfer Among Location	3
9. Default No of Hours for PO Receiving	18
10. Default No of Hours for IM Receiving	18
11. Default No of Hours for Production Transfer	18
12. Default No of Hours for Shipping Transfer	18
13. Line Feed Between Two Line Item ?	Y

At the bottom, there is a "Field Number ?" prompt with a yellow cursor icon. The status bar at the very bottom shows "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "NSCTLMN3" on the right.

**Procedure:** Enter values for the prompted fields.

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## ***COP Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Customer Order Processing module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Dist → COP Setup

**Procedure:** Enter values for the prompted fields.

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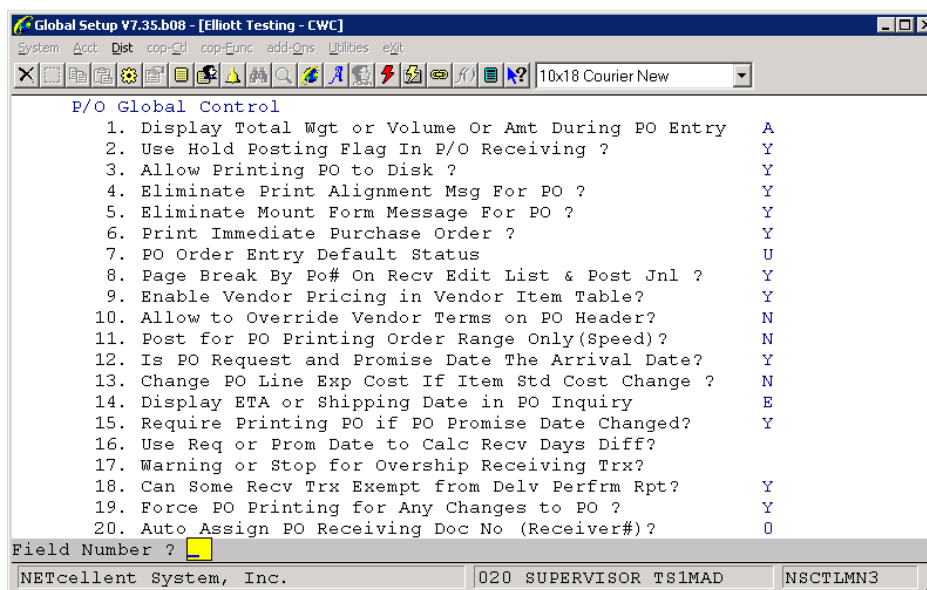
## P/O Global Control

### Application Overview

This setup screen allows you to set certain global variables for the Purchase Order module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Dist → PO Global Control



P/O Global Control	
1. Display Total Wgt or Volume Or Amt During PO Entry	A
2. Use Hold Posting Flag In P/O Receiving ?	Y
3. Allow Printing PO to Disk ?	Y
4. Eliminate Print Alignment Msg For PO ?	Y
5. Eliminate Mount Form Message For PO ?	Y
6. Print Immediate Purchase Order ?	Y
7. PO Order Entry Default Status	U
8. Page Break By Po# On Recv Edit List & Post Jnl ?	Y
9. Enable Vendor Pricing in Vendor Item Table?	Y
10. Allow to Override Vendor Terms on PO Header?	N
11. Post for PO Printing Order Range Only(Speed)?	N
12. Is PO Request and Promise Date The Arrival Date?	Y
13. Change PO Line Exp Cost If Item Std Cost Change ?	N
14. Display ETA or Shipping Date in PO Inquiry	E
15. Require Printing PO if PO Promise Date Changed?	Y
16. Use Req or Prom Date to Calc Recv Days Diff?	Y
17. Warning or Stop for Overship Receiving Trx?	Y
18. Can Some Recv Trx Exempt from Delv Perfrm Rpt?	Y
19. Force PO Printing for Any Changes to PO ?	Y
20. Auto Assign PO Receiving Doc No (Receiver#)?	0

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN3

**Procedure:** Enter values for the prompted fields.



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## ***P/O Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Purchase Order module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Dist → PO Setup

**Procedure:** Enter values for the prompted fields.

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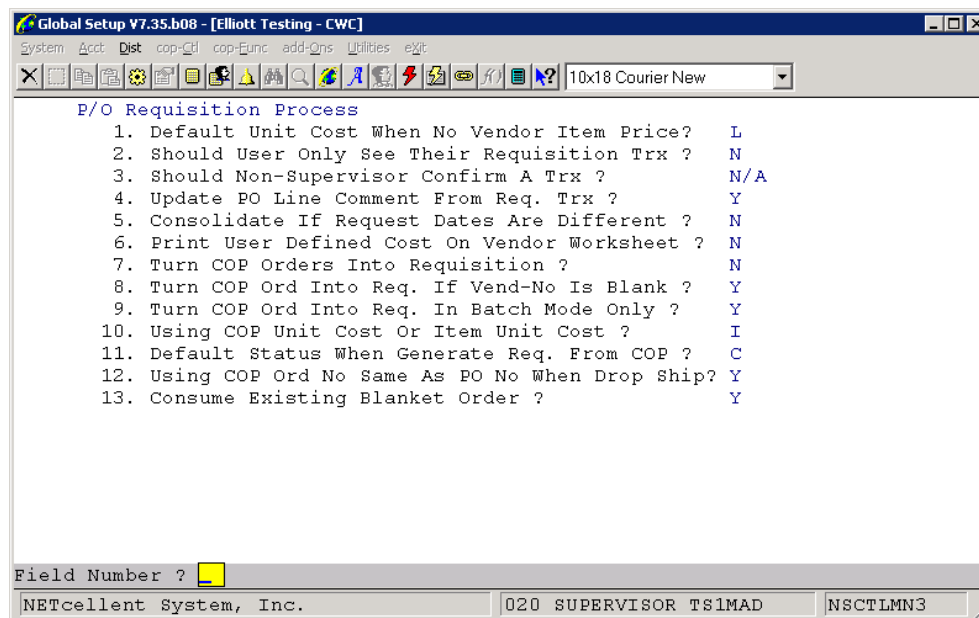
## P/O Requisition Process

### Application Overview

This setup screen allows you to set certain global variables for the Purchase Order module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Dist → PO Requisition Process



The screenshot shows a Windows-style application window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-CD", "cop-Eunc", "add-Qns", "Utilities", and "eXit". The toolbar contains various icons for file operations and a font dropdown set to "10x18 Courier New". The main text area displays the "P/O Requisition Process" with a list of 13 setup questions and their current values:

Question	Value
1. Default Unit Cost When No Vendor Item Price?	L
2. Should User Only See Their Requisition Trx ?	N
3. Should Non-Supervisor Confirm A Trx ?	N/A
4. Update PO Line Comment From Req. Trx ?	Y
5. Consolidate If Request Dates Are Different ?	N
6. Print User Defined Cost On Vendor Worksheet ?	N
7. Turn COP Orders Into Requisition ?	N
8. Turn COP Ord Into Req. If Vend-No Is Blank ?	Y
9. Turn COP Ord Into Req. In Batch Mode Only ?	Y
10. Using COP Unit Cost Or Item Unit Cost ?	I
11. Default Status When Generate Req. From COP ?	C
12. Using COP Ord No Same As PO No When Drop Ship?	Y
13. Consume Existing Blanket Order ?	Y

At the bottom, there is a "Field Number ?" label with a yellow icon, and a status bar showing "NETcellent System, Inc.", "020 SUPERVISOR TS1MAD", and "NSCTLMN3".

**Procedure:** Enter values for the prompted fields.

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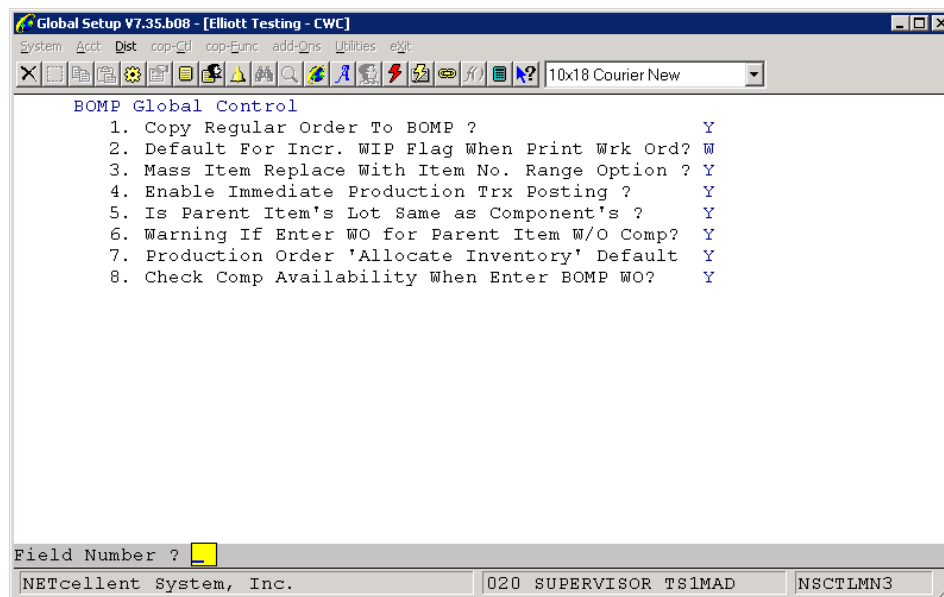
## ***BOMP Global Control***

### **Application Overview**

This setup screen allows you to set certain global variables for the Bill Of Materials Processing module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Dist → BOMP Global Control



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cl cop-Eunc add-Ons Utilities exit

10x18 Courier New

**BOMP Global Control**

1. Copy Regular Order To BOMP ? Y
2. Default For Incr. WIP Flag When Print Wrk Ord? W
3. Mass Item Replace With Item No. Range Option ? Y
4. Enable Immediate Production Trx Posting ? Y
5. Is Parent Item's Lot Same as Component's ? Y
6. Warning If Enter WO for Parent Item W/O Comp? Y
7. Production Order 'Allocate Inventory' Default Y
8. Check Comp Availability When Enter BOMP WO? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN3

**Procedure:** Enter values for the prompted fields.

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## ***BOMP Setup***

### **Application Overview**

This setup screen is the same setup screen that appears in the Bill Of Materials Processing module.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Dist → BOMP Setup

**Procedure:** Enter values for the prompted fields.



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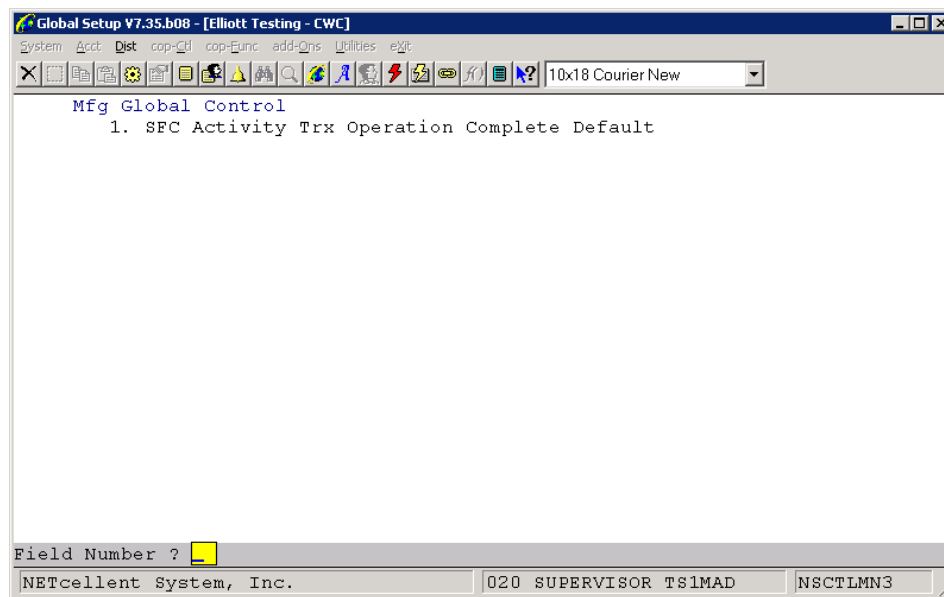
## Mfg Global Control

### Application Overview

This setup screen allows you to set certain global variables for various manufacturing modules.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Dist → Mfg Global Control



**Procedure:** Enter values for the prompted fields.

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## COP-Control

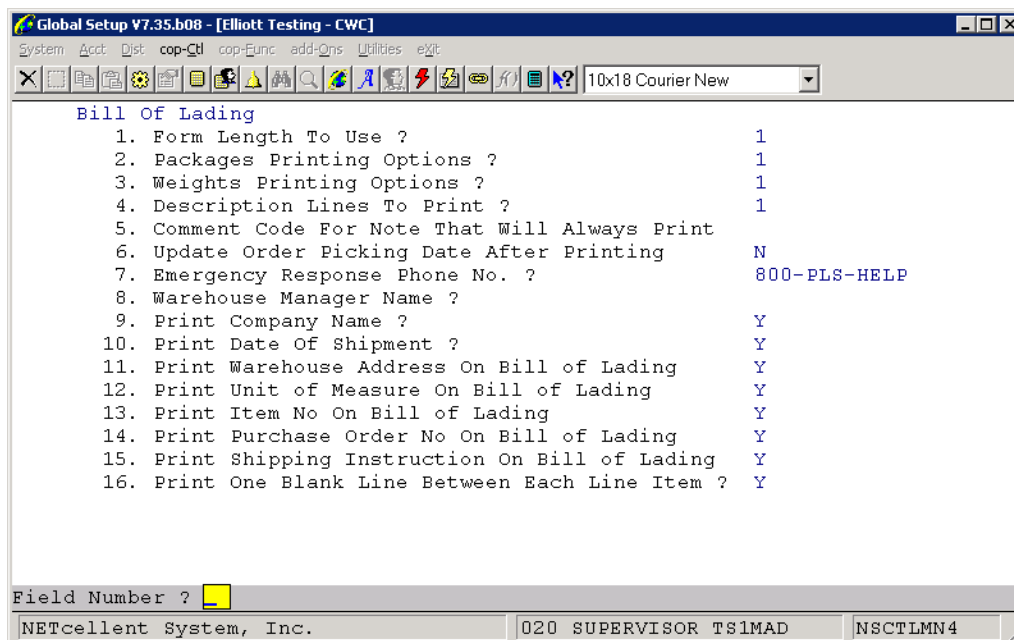
### *Bill Of Lading*

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Bill Of Lading



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Ctl cop-Func add-ons Utilities exit

10x18 Courier New

Bill Of Lading

1. Form Length To Use ?	1
2. Packages Printing Options ?	1
3. Weights Printing Options ?	1
4. Description Lines To Print ?	1
5. Comment Code For Note That Will Always Print	
6. Update Order Picking Date After Printing	N
7. Emergency Response Phone No. ?	800-PLS-HELP
8. Warehouse Manager Name ?	
9. Print Company Name ?	Y
10. Print Date Of Shipment ?	Y
11. Print Warehouse Address On Bill of Lading	Y
12. Print Unit of Measure On Bill of Lading	Y
13. Print Item No On Bill of Lading	Y
14. Print Purchase Order No On Bill of Lading	Y
15. Print Shipping Instruction On Bill of Lading	Y
16. Print One Blank Line Between Each Line Item ?	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.

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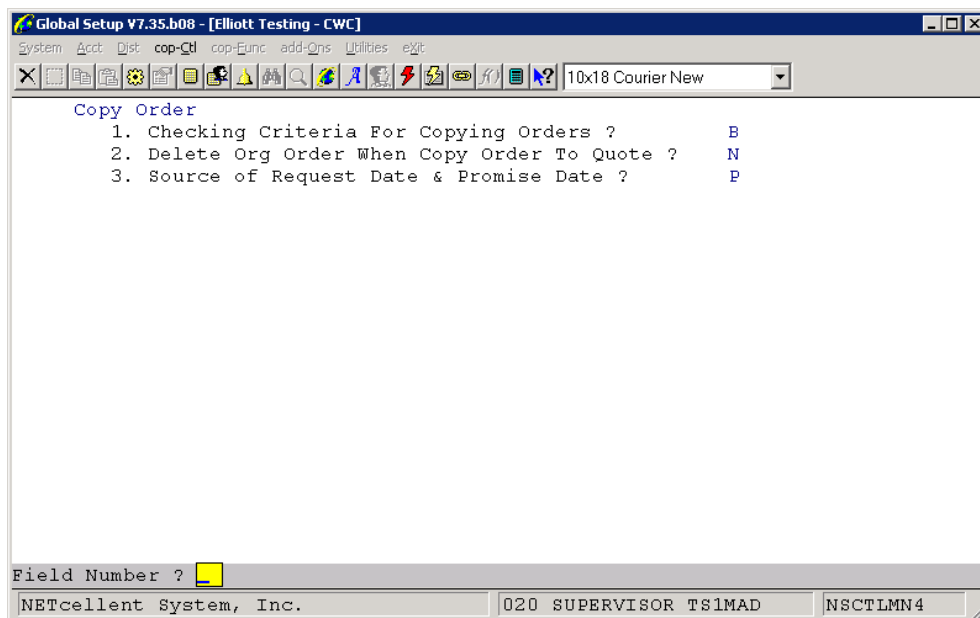
## Copy Order

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Copy Order



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Ctl cop-Eunc add-Qns Utilities eXit

10x18 Courier New

Copy Order

1. Checking Criteria For Copying Orders ? B

2. Delete Org Order When Copy Order To Quote ? N

3. Source of Request Date & Promise Date ? P

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.

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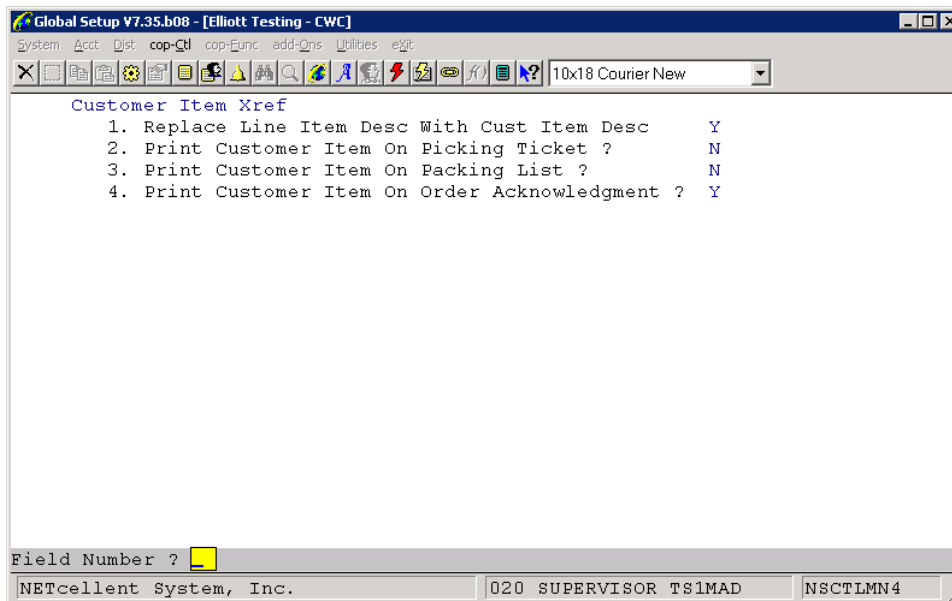
## Customer Item Cross Reference

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Customer Item Xref



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Ctl", "cop-Func", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The main area displays the "Customer Item Xref" screen with the following list:

Customer Item Xref	
1. Replace Line Item Desc With Cust Item Desc	Y
2. Print Customer Item On Picking Ticket ?	N
3. Print Customer Item On Packing List ?	N
4. Print Customer Item On Order Acknowledgment ?	Y

At the bottom, there is a "Field Number ?" prompt with a yellow cursor icon. The status bar at the very bottom displays "NETcellent System, Inc.", "020 SUPERVISOR TS1MAD", and "NSCTLMN4".

**Procedure:** Enter values for the prompted fields.



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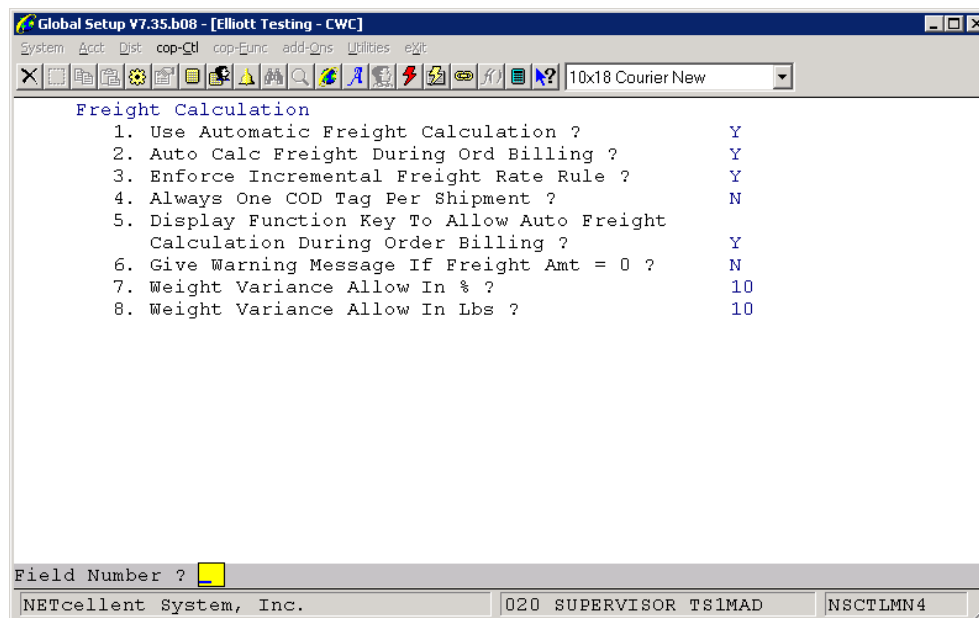
## Freight Calculation

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Freight Calculation



Freight Calculation	
1. Use Automatic Freight Calculation ?	Y
2. Auto Calc Freight During Ord Billing ?	Y
3. Enforce Incremental Freight Rate Rule ?	Y
4. Always One COD Tag Per Shipment ?	N
5. Display Function Key To Allow Auto Freight Calculation During Order Billing ?	Y
6. Give Warning Message If Freight Amt = 0 ?	N
7. Weight Variance Allow In % ?	10
8. Weight Variance Allow In Lbs ?	10

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.

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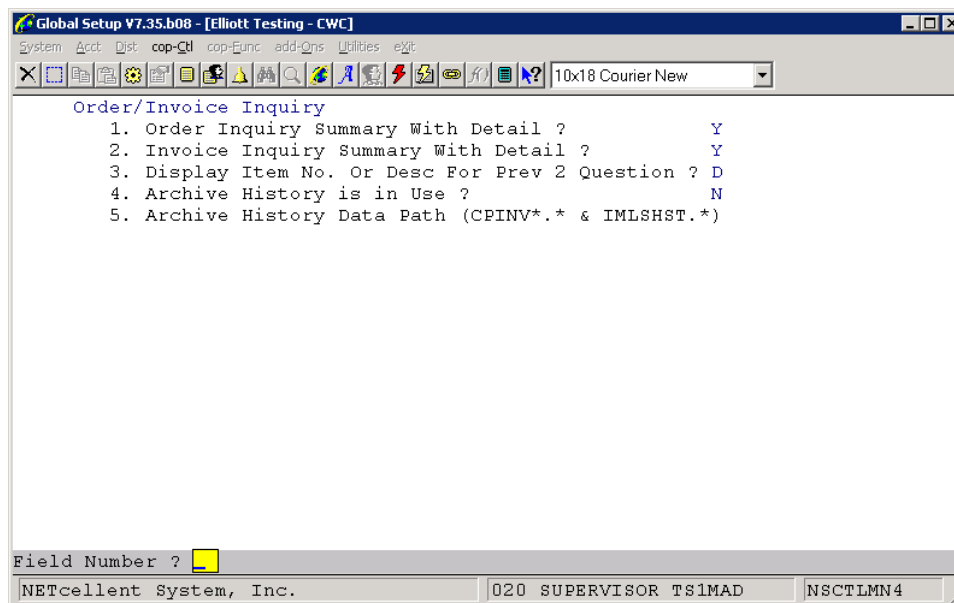
## Order/Invoice Inquiry

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Order/Invoice Inquiry



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Ctl cop-Func add-Ons Utilities eXit

10x18 Courier New

Order/Invoice Inquiry

1. Order Inquiry Summary With Detail ? Y

2. Invoice Inquiry Summary With Detail ? Y

3. Display Item No. Or Desc For Prev 2 Question ? D

4. Archive History is in Use ? N

5. Archive History Data Path (CPINV\*. \* & IMLSHST.\*)

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.

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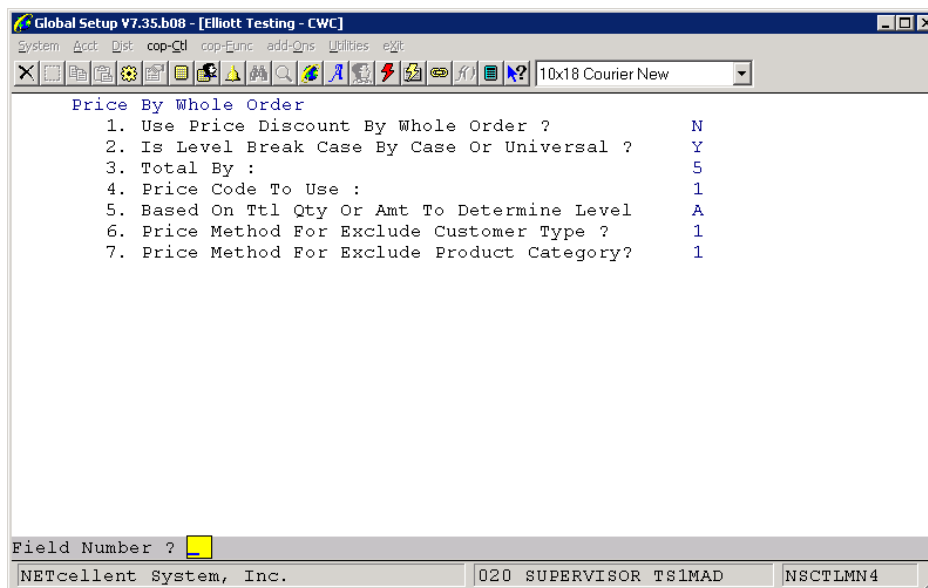
## Price By Whole Order

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Price By Whole Order



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Ctl", "cop-Func", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The font is set to "10x18 Courier New". The main display area shows the title "Price By Whole Order" followed by a list of seven prompts with their current values:

Field Number	Prompt	Value
1.	Use Price Discount By Whole Order ?	N
2.	Is Level Break Case By Case Or Universal ?	Y
3.	Total By :	5
4.	Price Code To Use :	1
5.	Based On Ttl Qty Or Amt To Determine Level	A
6.	Price Method For Exclude Customer Type ?	1
7.	Price Method For Exclude Product Category?	1

At the bottom, there is a "Field Number ?" label next to a yellow cursor icon. The status bar at the very bottom displays "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "NSCTLMN4" on the right.

**Procedure:** Enter values for the prompted fields.

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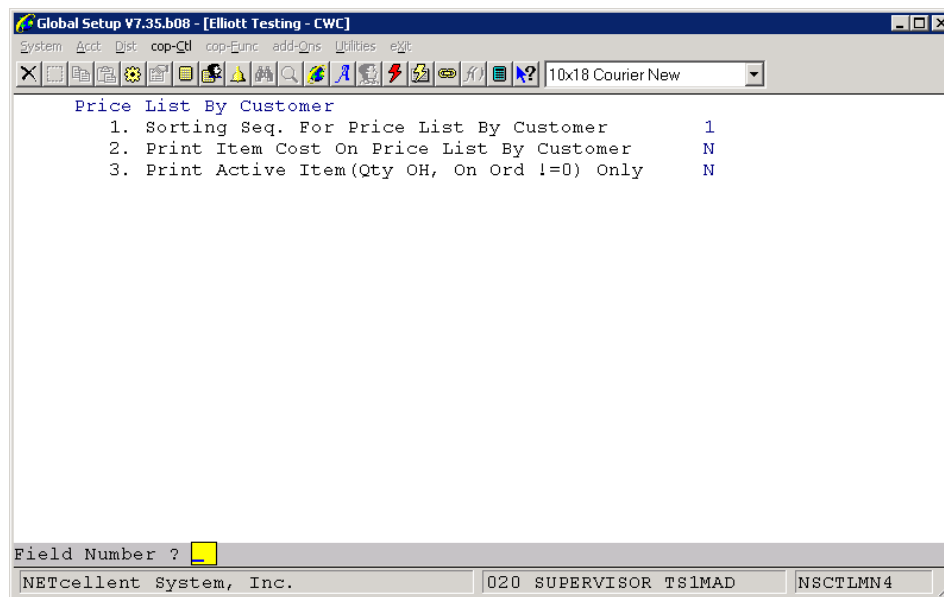
## Price List By Customer

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Price List By Customer



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Ctl cop-Eunc add-Ons Utilities exit

Price List By Customer

1. Sorting Seq. For Price List By Customer	1
2. Print Item Cost On Price List By Customer	N
3. Print Active Item(Qty OH, On Ord !=0) Only	N

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.



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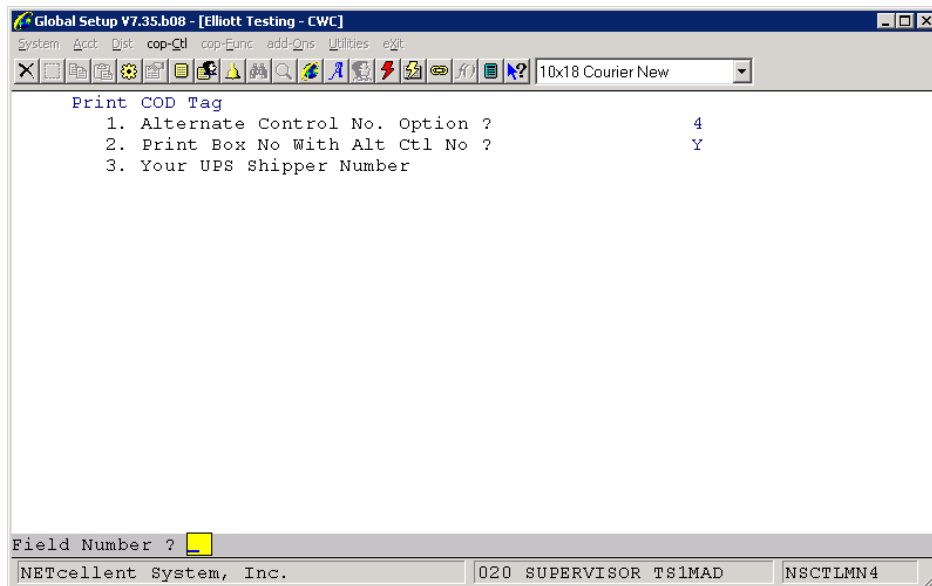
## Print COD Tag

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Print COD Tag



Global Setup V7.35.b08 - [Elliott Testing - CWC]


System Acct Dist cop-Ctl cop-Func add-Ons Utilities Exit

Print COD Tag

1. Alternate Control No. Option ? 4

2. Print Box No With Alt Ctl No ? Y

3. Your UPS Shipper Number

Field Number ? 

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.

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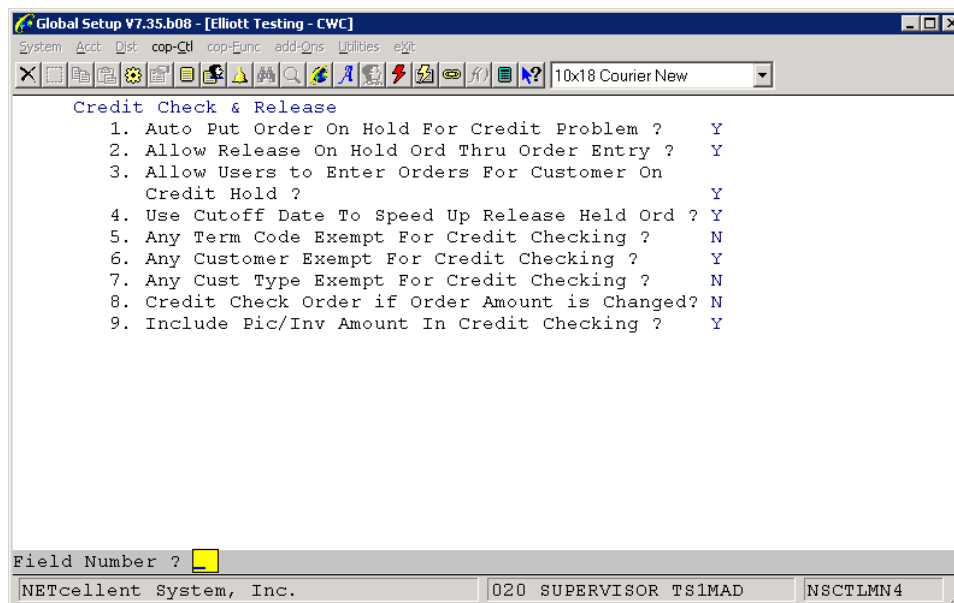
## Credit Check & Release

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Credit Check & Release



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Ctl cop-Func add-Ons Utilities eXit

10x18 Courier New

**Credit Check & Release**

1. Auto Put Order On Hold For Credit Problem ?	Y
2. Allow Release On Hold Ord Thru Order Entry ?	Y
3. Allow Users to Enter Orders For Customer On Credit Hold ?	Y
4. Use Cutoff Date To Speed Up Release Held Ord ?	Y
5. Any Term Code Exempt For Credit Checking ?	N
6. Any Customer Exempt For Credit Checking ?	Y
7. Any Cust Type Exempt For Credit Checking ?	N
8. Credit Check Order if Order Amount is Changed?	N
9. Include Pic/Inv Amount In Credit Checking ?	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.

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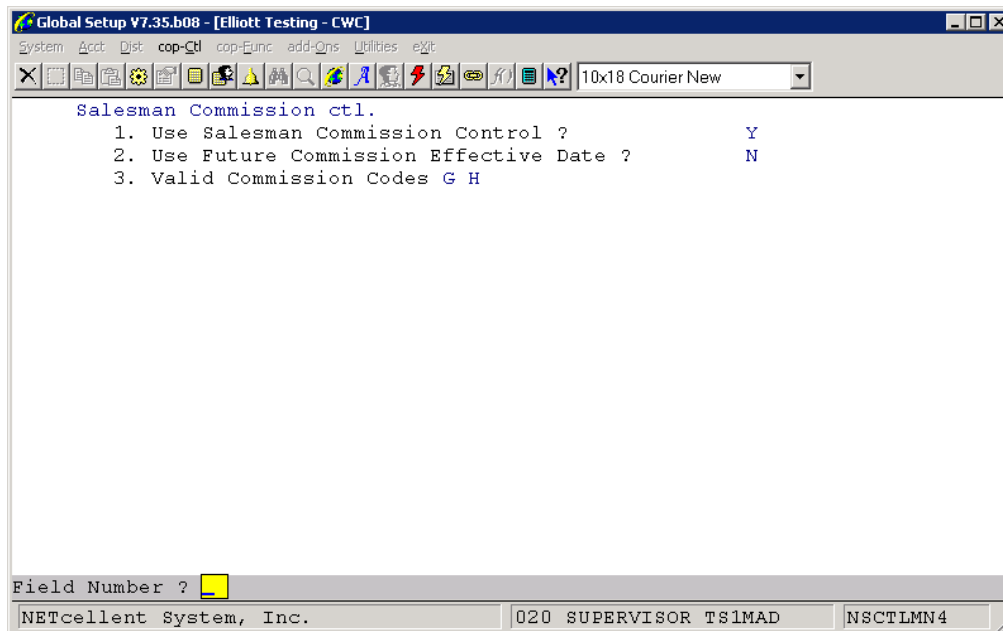
## Salesman Commission Control

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Salesman Commission Ctl.



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Ctl", "cop-Func", "add-Qns", "Utilities", and "eXit". The toolbar contains various icons for file operations and system functions. The main area displays the following text:

```
Salesman Commission ctl.  
1. Use Salesman Commission Control ?           Y  
2. Use Future Commission Effective Date ?       N  
3. Valid Commission Codes G H
```

At the bottom, there is a "Field Number ?" label next to a yellow square icon. The status bar at the very bottom shows "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "N8CTLMN4" on the right.

**Procedure:** Enter values for the prompted fields.

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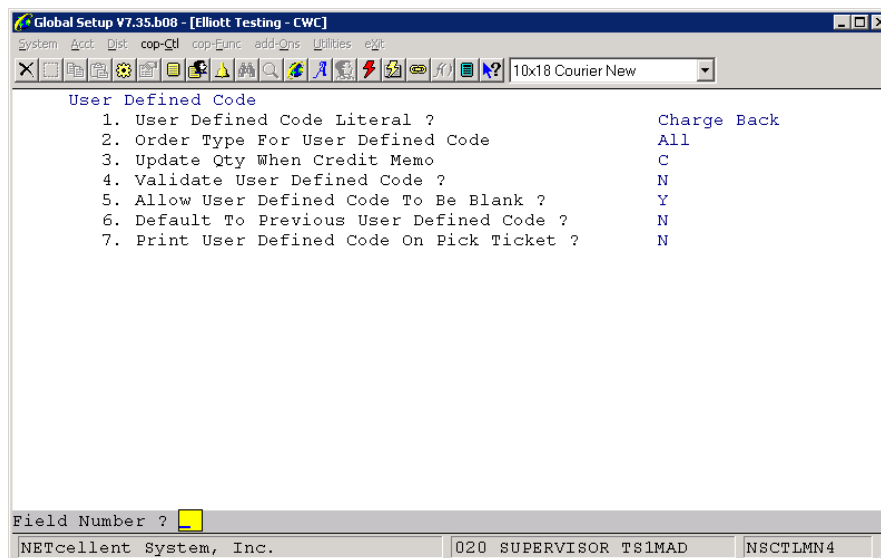
## User Defined Code

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → User Defined Code



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Ctl", "cop-Eunc", "add-Qns", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The font is set to "10x18 Courier New". The main area displays the "User Defined Code" screen with the following prompts and current values:

Prompt	Value
1. User Defined Code Literal ?	Charge Back
2. Order Type For User Defined Code	All
3. Update Qty When Credit Memo	C
4. Validate User Defined Code ?	N
5. Allow User Defined Code To Be Blank ?	Y
6. Default To Previous User Defined Code ?	N
7. Print User Defined Code On Pick Ticket ?	N

At the bottom, there is a "Field Number ?" prompt with a yellow cursor box. The status bar at the very bottom shows "NETcellent System, Inc.", "020 SUPERVISOR TS1MAD", and "NSCTLMN4".

**Procedure:** Enter values for the prompted fields.



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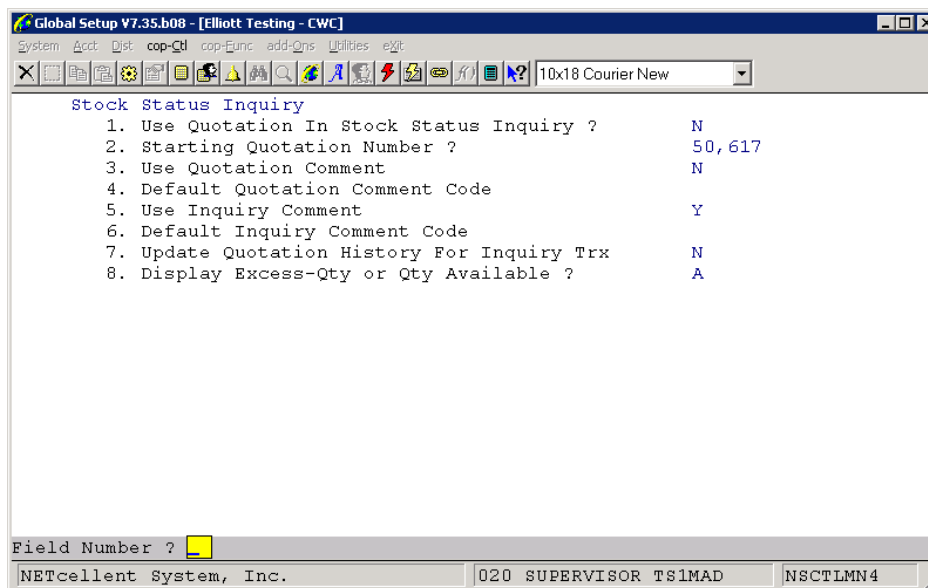
## Stock Status Inquiry

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Stock Status Inquiry



Stock Status Inquiry	
1. Use Quotation In Stock Status Inquiry ?	N
2. Starting Quotation Number ?	50,617
3. Use Quotation Comment	N
4. Default Quotation Comment Code	
5. Use Inquiry Comment	Y
6. Default Inquiry Comment Code	
7. Update Quotation History For Inquiry Trx	N
8. Display Excess-Qty or Qty Available ?	A

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.

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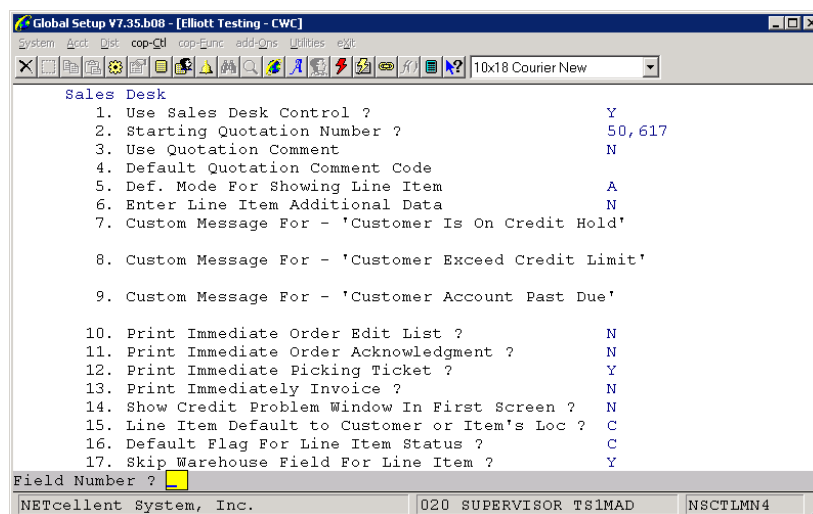
## Sales Desk

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Sales Desk



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Ctl cop-Func add-Qns Utilities eXit

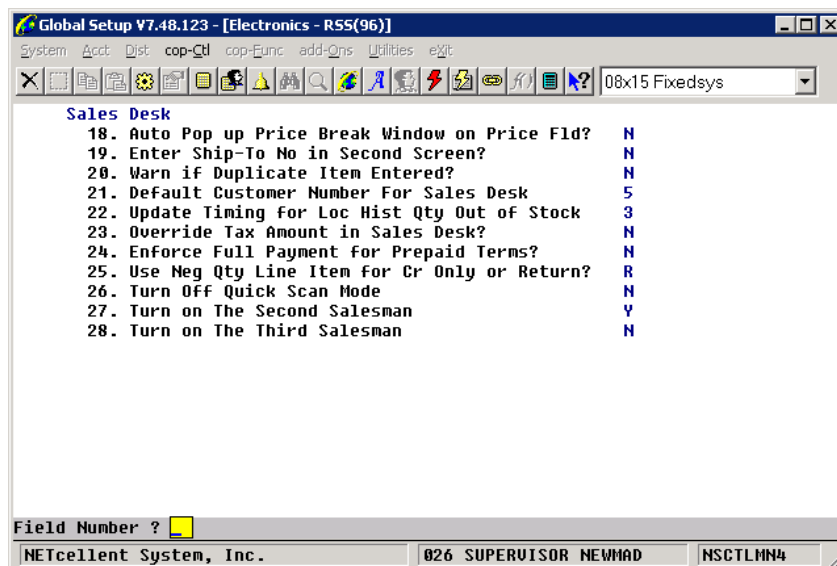
10x18 Courier New

**Sales Desk**

1. Use Sales Desk Control ? Y
2. Starting Quotation Number ? 50,617
3. Use Quotation Comment N
4. Default Quotation Comment Code
5. Def. Mode For Showing Line Item A
6. Enter Line Item Additional Data N
7. Custom Message For - 'Customer Is On Credit Hold'
8. Custom Message For - 'Customer Exceed Credit Limit'
9. Custom Message For - 'Customer Account Past Due'
10. Print Immediate Order Edit List ? N
11. Print Immediate Order Acknowledgment ? N
12. Print Immediate Picking Ticket ? Y
13. Print Immediately Invoice ? N
14. Show Credit Problem Window In First Screen ? N
15. Line Item Default to Customer or Item's Loc ? C
16. Default Flag For Line Item Status ? C
17. Skip Warehouse Field For Line Item ? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN4



Global Setup V7.48.123 - [Electronics - R55(96)]

System Acct Dist cop-Ctl cop-Func add-Qns Utilities eXit

08x15 Fixedsys

**Sales Desk**

18. Auto Pop up Price Break Window on Price Fld? N
19. Enter Ship-To No in Second Screen? N
20. Warn if Duplicate Item Entered? N
21. Default Customer Number For Sales Desk 5
22. Update Timing for Loc Hist Qty Out of Stock 3
23. Override Tax Amount in Sales Desk? N
24. Enforce Full Payment for Prepaid Terms? N
25. Use Neg Qty Line Item for Cr Only or Return? R
26. Turn Off Quick Scan Mode N
27. Turn on The Second Salesman Y
28. Turn on The Third Salesman N

Field Number ?

NETcellent System, Inc. 026 SUPERVISOR NEWMAD NSCTLMN4

**Procedure:** Enter values for the prompted fields.



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## Sales Desk Screen Layout

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Sales Desk Screen Layout

Change exit

10x18 Courier New

1. ITEM-NOTE-1	UPC
2. AVG-COST-FOB	Dept No.
3. QTY-OH	Qty On Hand
4. QTY-ALLOC	Qty Alloc.
5. QTY-AVAIL	Qty Avail.
6. QTY-ON-ORDER	Qty On Order
7. CUST-COMMENT-1	Cmt1
8. ITEM-NOTE-2	ESRE
9. PROD-CATE	Prod. Category
10. CUST-NOTE-1	TYPE
11. ITEM-WEIGHT	Item Weight
12. ITEM-VOLUME	Item Volume

UPC	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	Cmt1	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Dept No.	999,999.9999-	ESRE	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Qty On Hand	999,999,999.99-	Prod. Category	XXX
Qty Alloc.	999,999,999.99-	TYPE	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Qty Avail.	999,999,999.99-	Item Weight	99,999.999
Qty On Order	999,999,999.99-	Item Volume	999,999.9999

NETcellent System, Inc. 020 SUPERVISOR TS1MAD SDLAYOUT

**Procedure:** Enter values for the prompted fields.

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## Change Customer Screen Layout

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Chg Cust Screen Layout

Field Name	Screen Literal	Allow Change
1. CONTACT	Contact	Y
2. PHONE-NO	Phone No	Y
3. FAX-NO	Fax No	Y
4. ADDRESS-1	Address-1	Y
5. ADDRESS-2	Address-2	Y
6. CITY	City	Y
7. STATE	State	Y
8. ZIP-CODE	Zip Code	Y
9. COUNTRY	Country	Y
10. SALESMAN-NO	Salesman No	N
11. COLLECTOR	Collector	N
12.		
13.		
14.		
15.		
16. Access Sort Name In Change Mode		N
17. Access Correspond Name In Change Mode		N

NETcellent System, Inc. 020 SUPERVISOR TS1MAD SCLAYOUT

**Procedure:** Enter values for the prompted fields.

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## Contract Pricing

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Contract Pricing

The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Ctl", "cop-Func", "add-Qns", "Utilities", and "eXit". The toolbar contains various icons for file operations and a font dropdown set to "10x18 Courier New". The main text area displays "Contract Pricing Handling" followed by four numbered prompts with their current values:

Field Number	Prompt	Value
1.	Enable Contract Price ?	Y
2.	Starting Contract No ?	2
3.	Turn On Contract Starting & Ending Date ?	N
4.	Search Price Code When Price Found In Contract	N

At the bottom, there is a "Field Number ?" label next to a yellow cursor box. The status bar at the very bottom contains the text "NETcellent System, Inc." on the left, and "020 SUPERVISOR TS1MAD" and "N8CTLMN4" on the right.

**Procedure:** Enter values for the prompted fields.

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## Recurring Order

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Ctl → Recurring Order

The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Ctl", "cop-Eunc", "add-Qns", "Utilities", and "eXit". The toolbar contains various icons for file operations and help. The font is set to "10x18 Courier New". The main area is titled "Recurring Order" and contains a list of six prompts with their current values:

Field Number ?	Value
1. Enable Recurring Order ?	Y
2. Starting Recurring No ?	58
3. Freight Determined At Generating Order ?	Y
4. Misc. Chg Determined At Generating Order ?	Y
5. Generate Order If Any Line Items Are Rejected?	Y
6. Line Item Backorder Options ?	B

At the bottom, there are three input fields: "Field Number ?" (with a cursor), "NETcellent System, Inc." (containing "020 SUPERVISOR TS1MAD"), and "NSCTLMNV".

**Procedure:** Enter values for the prompted fields.

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## COP-Functions

### *Change Quote To Order*

## Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

## Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Change Quote To Order

Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-CH cop-Func add-Qns Utilities exit

10x18 Courier New

Change Quote To Order

1. Make Qty-To-Ship = Qty-Ordered ? Y

2. Request/Promise Date = Order Shipping Date ? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN5

**Procedure:** Enter values for the prompted fields.

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## Invoice Printing

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Invoice Printing

The screenshot shows a Windows-style application window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-CD", "cop-Func", "add-Qns", "Utilities", and "eXit". The toolbar contains various icons, and the font is set to "10x18 Courier New". The main content area is titled "Invoice Printing" and lists 12 configuration items with their current values:

1. Use Multiple Invoice Forms ?	Y
2. Print Invoice Immediately After Billing ?	Y
3. Allow Invoices to be Printed to Disk ?	Y
4. Eliminate Print Alignment Msg For COP Invoice?	N
5. Eliminate Mount Form Msg For COP Invoice ?	Y
6. Line Feed Between Two Line Items ?	N
7. Turn On Time Release Order ?	N
8. Latest Time For Release ?	32
9. Add 12 To Release Time If Hours Entered <=	55
10. Use Order-Ship-Date to Control Invoice Print	E
11. Consolidate Lot Number ?	N
12. Invoice Printing Sequence ?	C

At the bottom, there is a "Field Number ?" label with a yellow cursor icon. The status bar at the very bottom displays "NETcellent System, Inc." on the left, and "020 SUPERVISOR TS1MAD" and "NSCTLMN5" on the right.

**Procedure:** Enter values for the prompted fields.

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## Print Order/Quote/RMA

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Print Order/Quote/RMA

The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-ctl", "cop-Func", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The main text area displays the title "Print Order/Quote/RMA" followed by a list of 12 prompts with corresponding Y or N values:

Field Number	Prompt	Value
1.	Print Telephone Number on Legacy Order Ack?	Y
2.	Print Fax Number on Legacy Order Ack?	Y
3.	Print Contact on Legacy Order Ack?	N
4.	Send Immediate Acknowledgement (Order Entry)?	Y
5.	Print Order Acknowledgement Default with Form	Y
6.	Print Order Quote Default with Form	Y
7.	Print Sales Desk Quote with Form	Y
8.	Print Kit Component on Order Acknowledge/Quote	Y
9.	Print RMA Acknowledgement Default with Form	Y
10.	Send Immediate Quote (Order Entry)?	N
11.	Send Immediate Email Interactively?	N
12.	Send Immediate RMA Acknowledgement?	N

At the bottom, there is a "Field Number ?" label with a yellow cursor icon. Below this, a status bar displays "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "NSCTLMN5" on the right.

**Procedure:** Enter values for the prompted fields.

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## Order Billing Screen

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Order Billing Screen

The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The window has a menu bar with "System", "Acct", "Dist", "cop-ctl", "cop-Func", "add-Qns", "Utilities", and "exit". Below the menu bar is a toolbar with various icons and a font dropdown set to "10x18 Courier New". The main area displays the "Order Billing Screen" configuration with 12 numbered items, each with a question and a response (Y or N or S). At the bottom, there is a "Field Number ?" label with a yellow box, and a status bar with "NETcellent System, Inc.", "020 SUPERVISOR T81MAD", and "N8CTLMN5".

Item	Question	Response
1.	Initialize Freight Amount on Order Billing ?	Y
2.	Show Billing Scrn During O/E for 'O'-Type ?	Y
3.	Show Billing Scrn During O/E for 'Q'-Type ?	Y
4.	Use Payment Window for Real Time Cash Rcpt?	Y
5.	Validate A/R Open Item File ?	N
6.	Auto Pop Up Amount Paid Field ?	Y
7.	Auto Pop Up Amt Paid For COD Customer Only?	N
8.	Default Extra Charge Type For Terms Code?	N
9.	Select Back Order Line Item For Select All?	Y
10.	Select Back Order Line Item For Select Some?	Y
11.	Print Immediate Packing Slip ?	Y
12.	Default Billing Cutoff Date ?	S

Field Number ?  

NETcellent System, Inc.      020 SUPERVISOR T81MAD      N8CTLMN5

**Procedure:** Enter values for the prompted fields.

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## Order Header Screen

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Order Header Screen

Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Chi cop-Func add-Qns Utilities eXit

10x18 Courier New

Order Header Screen

1. Use Phantom Invoices ?	N
2. Copy Customer Primary Contact and Send E-mail? Y	
3. Copy Salesman Primary Contact and Send E-mail? N	
4. Mark Order As EDI Order/Trading Partners Setup N	
5. Duplication Criteria For PO # in Sales Order ? C	
6. Use Store & Dept # On Order Header Screen ? N	
7. Alert If Ord Chg After Pick Ticket Printed ? Y	
8. Alert If Ord Del After Pick Ticket Printed ? Y	
9. Mass Chg Line Promise Date When Ship Date Chg? Y	
10. Default Order Type ? O	
11. Prohibit Use Same As Shp To When Shp To Exist? N	
12. Allow Manual Override of Ship To Address ? Y	
13. Allow Manual Override of Bill To Address ? Y	
14. Display Order Date & Status in PO Srch Window? N	
Create Credit Memo By Serial#	
15. Default Location ?	
16. Allow User Enter Ord When Cust Over Crdt Limit Y	
17. Enter BOL# On Order Header ? N	
18. Use Date For BOL# When Blank When Export 856 ? Y	
19. Next Order No For Web Order ?	10007

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLN5

Global Setup V7.48.123 - [Electronics - R55(96)]

System Acct Dist cop-Chi cop-Func add-Qns Utilities eXit

08x15 Fixedsys

Order Header Screen

20. Change Order Addr. When Cust Addr. Change ?	N
21. Change Order Addr. When Ship-To Addr. Change ?	N
22. Does Frt Status 'P' Means Prepaid & No Charge?	Y
23. Allow Cancelled Orders to be Deleted ?	N
24. Allow Change Customer Number In Change Mode ?	N
25. <Blank> Ship-To No in Change Mode Means	B
26. Order Profit Center Account Checking ?	N
27. Allow Change Order After Process Thru Starship	W
28. Required Job No During Order Entry	
29. COP Job No User Defined Literal	CAN#
30. Salesman 1 Default Value	
31. Salesman 2 Default Value	
32. Salesman 3 Default Value	
33. Second Salesman Default Comm Split %	50.00
34. Third Salesman Default Comm Split %	0.00

Field Number ?

NETcellent System, Inc. 026 SUPERVISOR NEWMAD NSCTLN5

**Procedure:** Enter values for the prompted fields.





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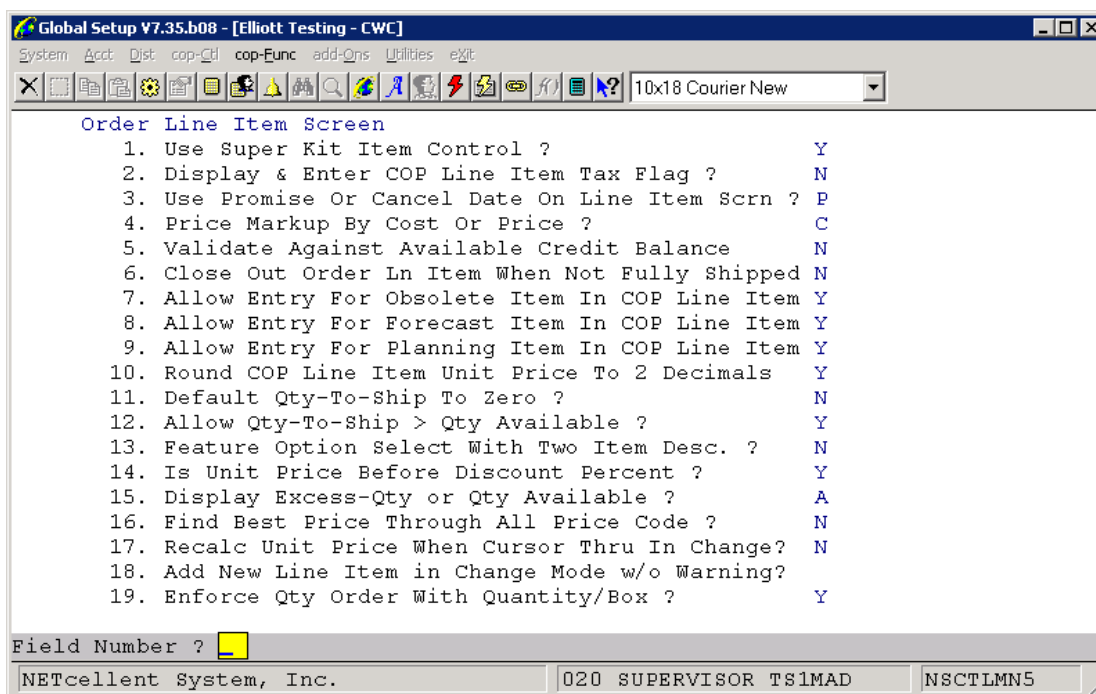
## Order Line Item Screen

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Order Line Item Screen



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cl cop-Func add-Qns Utilities exit

10x18 Courier New

Order Line Item Screen

1. Use Super Kit Item Control ?	Y
2. Display & Enter COP Line Item Tax Flag ?	N
3. Use Promise Or Cancel Date On Line Item Scrn ?	P
4. Price Markup By Cost Or Price ?	C
5. Validate Against Available Credit Balance	N
6. Close Out Order Ln Item When Not Fully Shipped	N
7. Allow Entry For Obsolete Item In COP Line Item	Y
8. Allow Entry For Forecast Item In COP Line Item	Y
9. Allow Entry For Planning Item In COP Line Item	Y
10. Round COP Line Item Unit Price To 2 Decimals	Y
11. Default Qty-To-Ship To Zero ?	N
12. Allow Qty-To-Ship > Qty Available ?	Y
13. Feature Option Select With Two Item Desc. ?	N
14. Is Unit Price Before Discount Percent ?	Y
15. Display Excess-Qty or Qty Available ?	A
16. Find Best Price Through All Price Code ?	N
17. Recalc Unit Price When Cursor Thru In Change?	N
18. Add New Line Item in Change Mode w/o Warning?	
19. Enforce Qty Order With Quantity/Box ?	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN5

**Procedure:** Enter values for the prompted fields.

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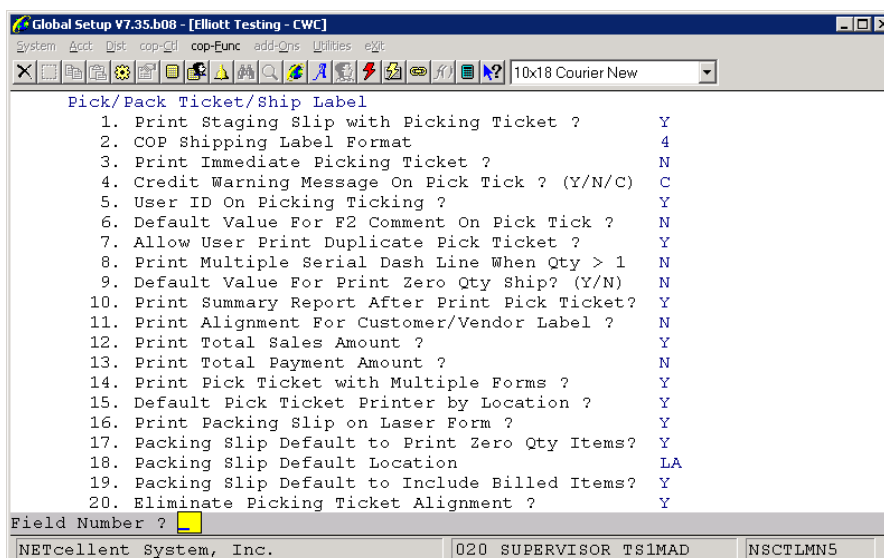
## Picking Ticket/Shipping Label

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

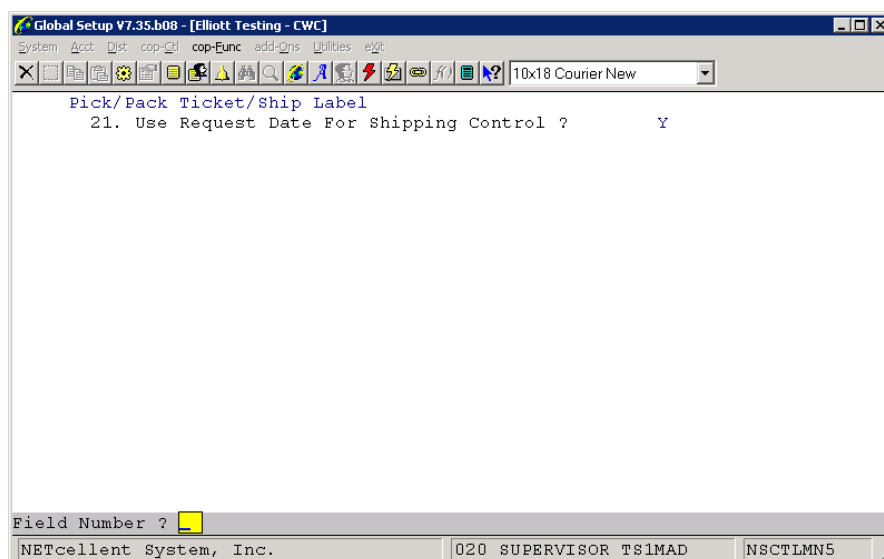
Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Pick Ticket/Ship Label



Pick/Pack Ticket/Ship Label		
1. Print Staging Slip with Picking Ticket ?	Y	
2. COP Shipping Label Format	4	
3. Print Immediate Picking Ticket ?	N	
4. Credit Warning Message On Pick Tick ? (Y/N/C)	C	
5. User ID On Picking Ticking ?	Y	
6. Default Value For F2 Comment On Pick Tick ?	N	
7. Allow User Print Duplicate Pick Ticket ?	Y	
8. Print Multiple Serial Dash Line When Qty > 1	N	
9. Default Value For Print Zero Qty Ship? (Y/N)	N	
10. Print Summary Report After Print Pick Ticket?	Y	
11. Print Alignment For Customer/Vendor Label ?	N	
12. Print Total Sales Amount ?	Y	
13. Print Total Payment Amount ?	N	
14. Print Pick Ticket with Multiple Forms ?	Y	
15. Default Pick Ticket Printer by Location ?	Y	
16. Print Packing Slip on Laser Form ?	Y	
17. Packing Slip Default to Print Zero Qty Items?	Y	
18. Packing Slip Default Location	LA	
19. Packing Slip Default to Include Billed Items?	Y	
20. Eliminate Picking Ticket Alignment ?	Y	

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN5



Pick/Pack Ticket/Ship Label		
21. Use Request Date For Shipping Control ?	Y	

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN5

**Procedure:** Enter values for the prompted fields.

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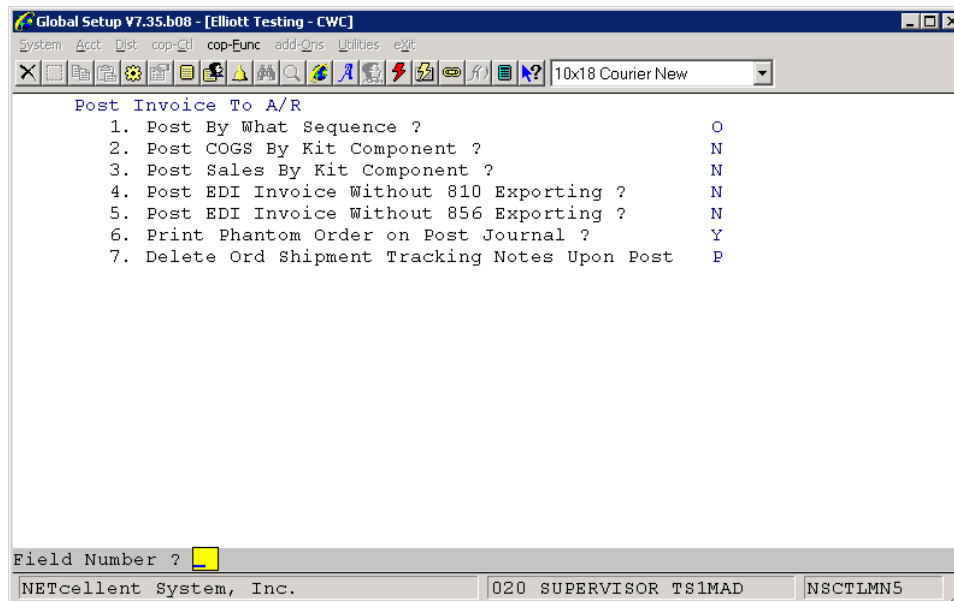
## Post Invoice To A/R

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Post Invoice To A/R



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Gtl", "cop-Func", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The main area displays the "Post Invoice To A/R" setup screen with the following list:

Item	Value
1. Post By What Sequence ?	O
2. Post COGS By Kit Component ?	N
3. Post Sales By Kit Component ?	N
4. Post EDI Invoice Without 810 Exporting ?	N
5. Post EDI Invoice Without 856 Exporting ?	N
6. Print Phantom Order on Post Journal ?	Y
7. Delete Ord Shipment Tracking Notes Upon Post	P

At the bottom, there is a "Field Number ?" label next to a yellow cursor icon. The status bar at the very bottom shows "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "NSCTLMN5" on the right.

**Procedure:** Enter values for the prompted fields.

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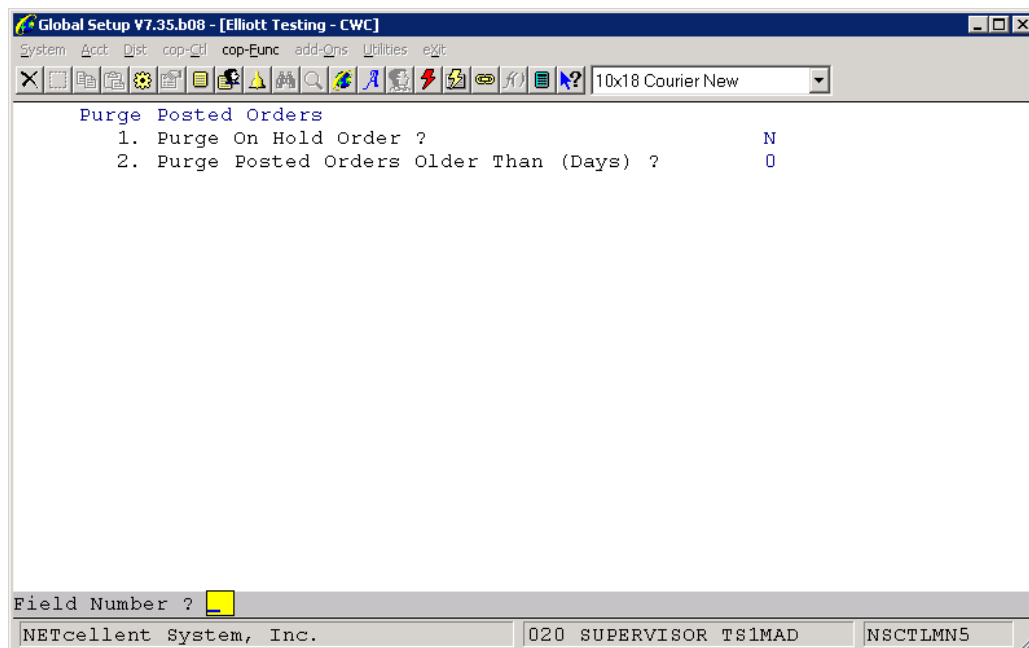
## Purge Posted Orders

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Purge Posted Orders



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cd cop-Func add-Ons Utilities exit

10x18 Courier New

Purge Posted Orders

1. Purge On Hold Order ? N

2. Purge Posted Orders Older Than (Days) ? 0

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN5

**Procedure:** Enter values for the prompted fields.



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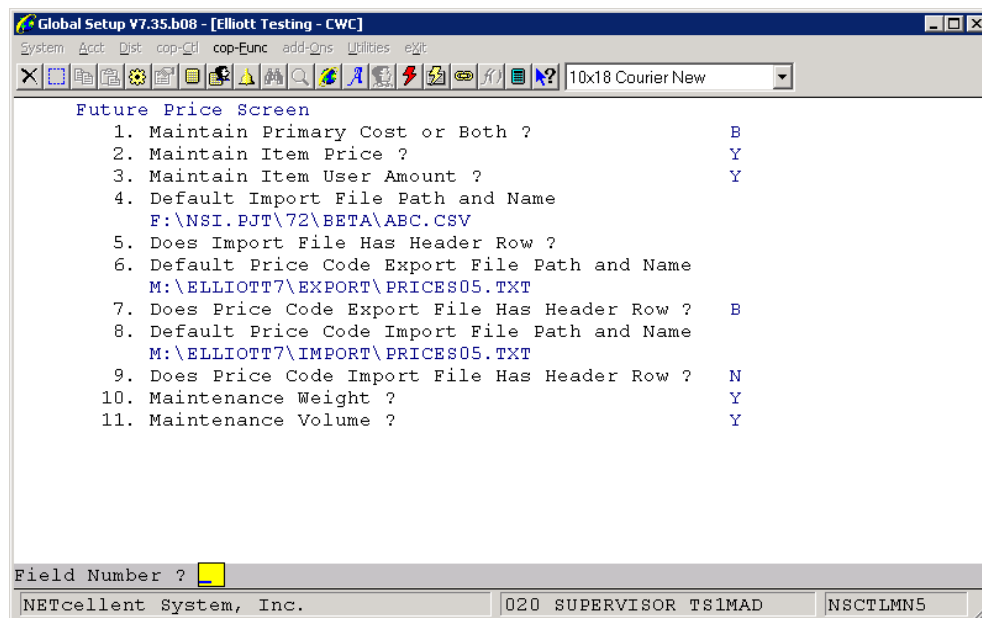
## Future Price Screen

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Future Price Screen



Future Price Screen	
1. Maintain Primary Cost or Both ?	B
2. Maintain Item Price ?	Y
3. Maintain Item User Amount ?	Y
4. Default Import File Path and Name	F:\NSI.PJT\72\BETA\ABC.CSV
5. Does Import File Has Header Row ?	
6. Default Price Code Export File Path and Name	M:\ELLIOTT7\EXPORT\PRICES05.TXT
7. Does Price Code Export File Has Header Row ?	B
8. Default Price Code Import File Path and Name	M:\ELLIOTT7\IMPORT\PRICES05.TXT
9. Does Price Code Import File Has Header Row ?	N
10. Maintenance Weight ?	Y
11. Maintenance Volume ?	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN5

**Procedure:** Enter values for the prompted fields.

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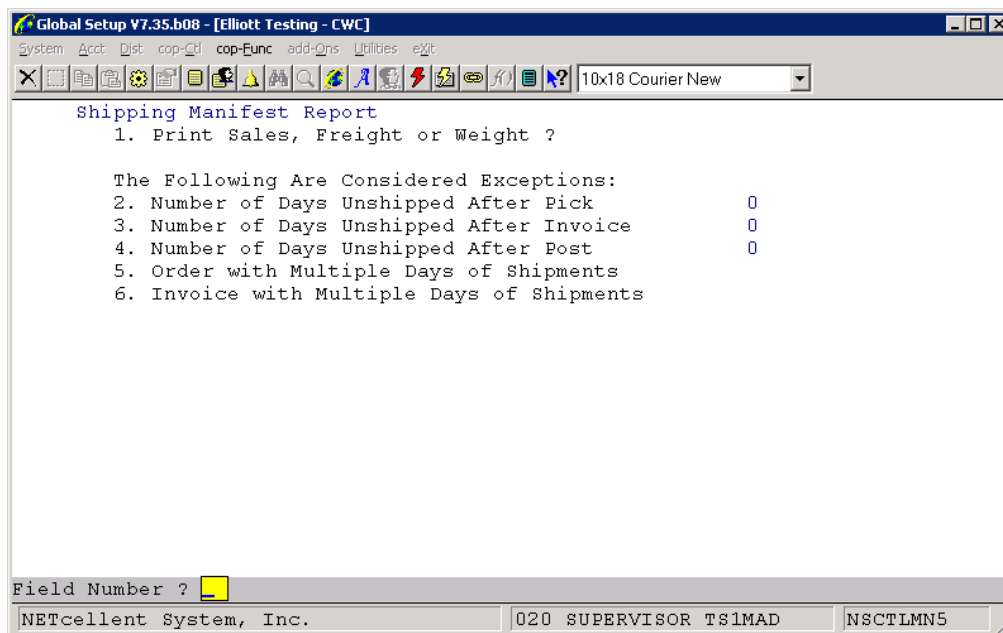
## Shipping Manifest Report

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Shipping Manifest Rpt



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes System, Acct, Dist, cop-G, cop-Func, add-Ons, Utilities, and Exit. The toolbar contains various icons for file operations and a font dropdown set to "10x18 Courier New". The main text area displays the following:

Shipping Manifest Report  
1. Print Sales, Freight or Weight ?

The Following Are Considered Exceptions:

2. Number of Days Unshipped After Pick	0
3. Number of Days Unshipped After Invoice	0
4. Number of Days Unshipped After Post	0
5. Order with Multiple Days of Shipments	
6. Invoice with Multiple Days of Shipments	

At the bottom, there is a "Field Number ?" label next to a yellow cursor icon. The status bar at the very bottom shows "NETcellent System, Inc." on the left, and "020 SUPERVISOR T81MAD" and "N8CTLMN5" on the right.

**Procedure:** Enter values for the prompted fields.

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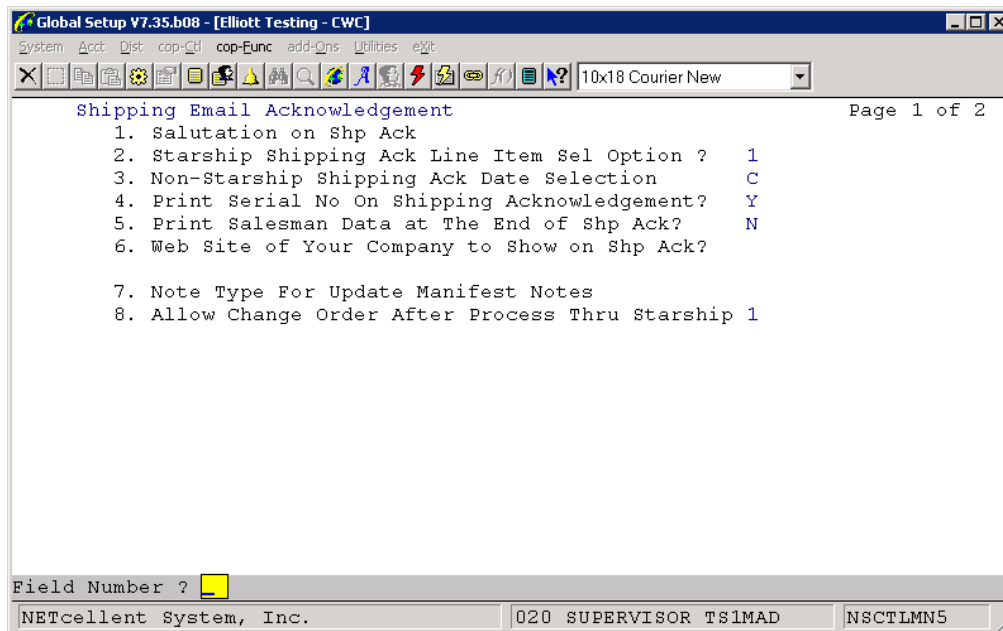
## Shipping Email Acknowledgement

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Shipping Email Ack.



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-ctl cop-Func add-Qns Utilities eXit

10x18 Courier New

Shipping Email Acknowledgement Page 1 of 2

1. Salutation on Shp Ack
2. Starship Shipping Ack Line Item Sel Option ? 1
3. Non-Starship Shipping Ack Date Selection C
4. Print Serial No On Shipping Acknowledgement? Y
5. Print Salesman Data at The End of Shp Ack? N
6. Web Site of Your Company to Show on Shp Ack?
7. Note Type For Update Manifest Notes
8. Allow Change Order After Process Thru Starship 1

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR T81MAD N8CTLMN5

**Procedure:** Enter values for the prompted fields.

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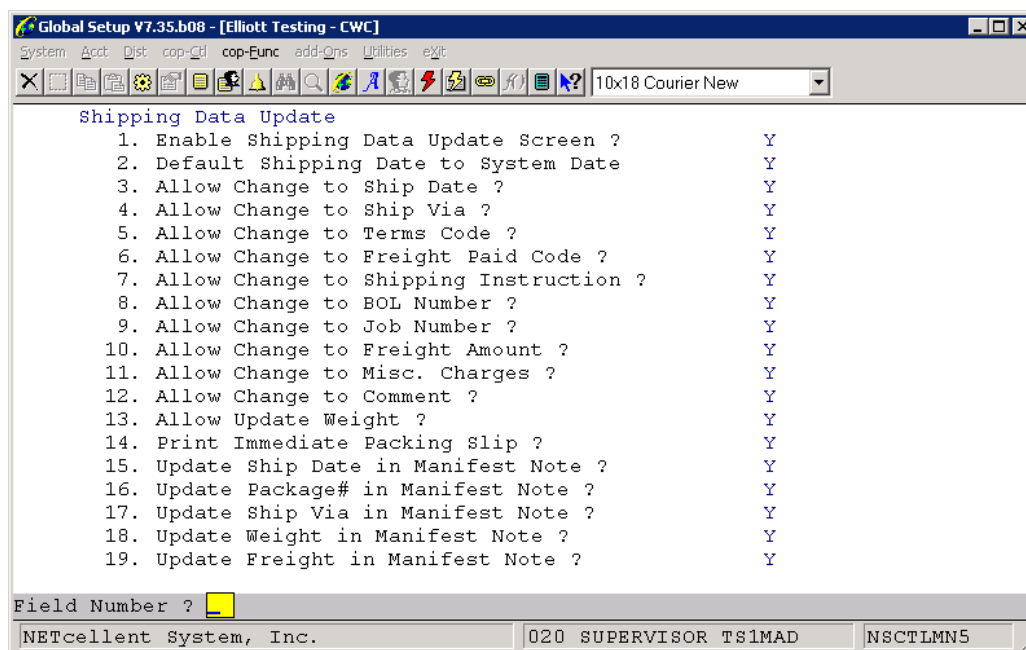
## Shipping Data Update

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Shipping Date Update



Shipping Data Update	
1. Enable Shipping Data Update Screen ?	Y
2. Default Shipping Date to System Date	Y
3. Allow Change to Ship Date ?	Y
4. Allow Change to Ship Via ?	Y
5. Allow Change to Terms Code ?	Y
6. Allow Change to Freight Paid Code ?	Y
7. Allow Change to Shipping Instruction ?	Y
8. Allow Change to BOL Number ?	Y
9. Allow Change to Job Number ?	Y
10. Allow Change to Freight Amount ?	Y
11. Allow Change to Misc. Charges ?	Y
12. Allow Change to Comment ?	Y
13. Allow Update Weight ?	Y
14. Print Immediate Packing Slip ?	Y
15. Update Ship Date in Manifest Note ?	Y
16. Update Package# in Manifest Note ?	Y
17. Update Ship Via in Manifest Note ?	Y
18. Update Weight in Manifest Note ?	Y
19. Update Freight in Manifest Note ?	Y

Field Number ?

NETcellent System, Inc.      020 SUPERVISOR TS1MAD      NSCTLMN5

**Procedure:** Enter values for the prompted fields.



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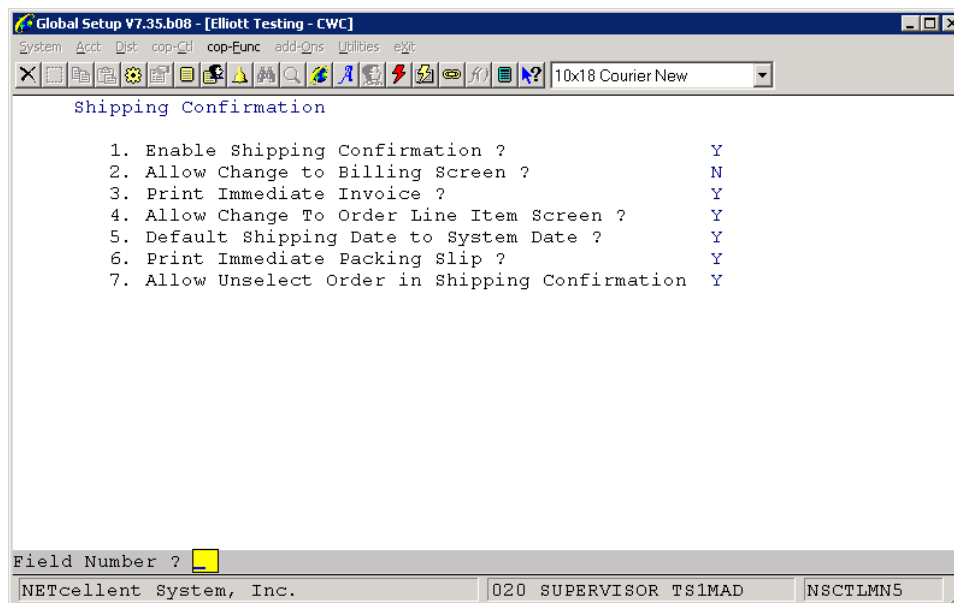
## Shipping Confirmation

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Shipping Confirmation



Field Number ?	Value
1. Enable Shipping Confirmation ?	Y
2. Allow Change to Billing Screen ?	N
3. Print Immediate Invoice ?	Y
4. Allow Change To Order Line Item Screen ?	Y
5. Default Shipping Date to System Date ?	Y
6. Print Immediate Packing Slip ?	Y
7. Allow Unselect Order in Shipping Confirmation	Y

**Procedure:** Enter values for the prompted fields.

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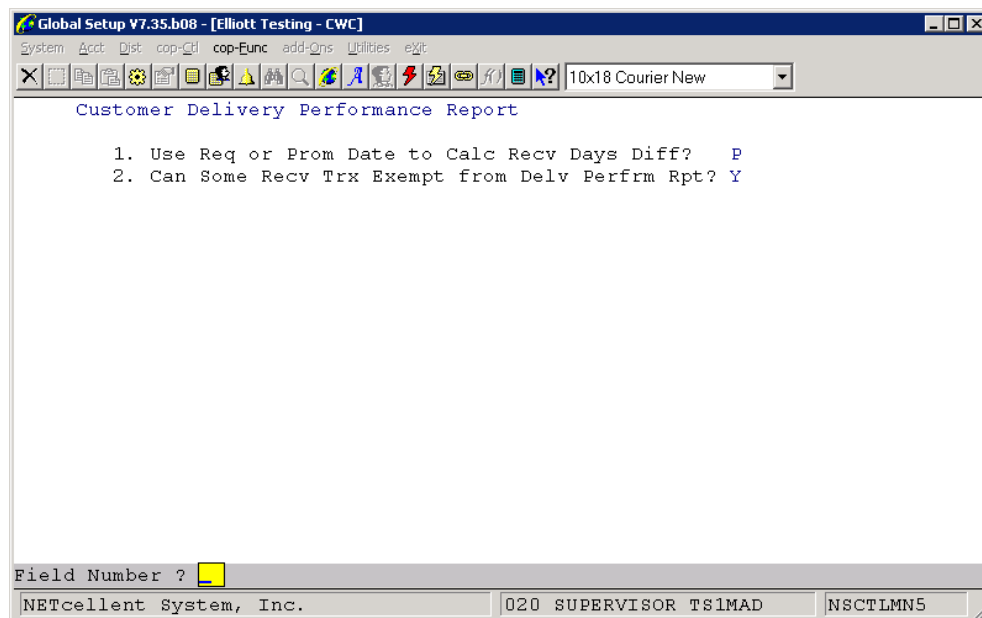
## Customer Delivery Performance Report

### Application Overview

This setup screen allows you to set certain global variables for the Customer Order Processing module.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → COP-Func → Delivery Perform Rpt



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cl cop-Func add-Qns Utilities eXit

10x18 Courier New

Customer Delivery Performance Report

1. Use Req or Prom Date to Calc Recv Days Diff? P

2. Can Some Recv Trx Exempt from Delv Perfrm Rpt? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMN5

**Procedure:** Enter values for the prompted fields.

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## Add-Ons

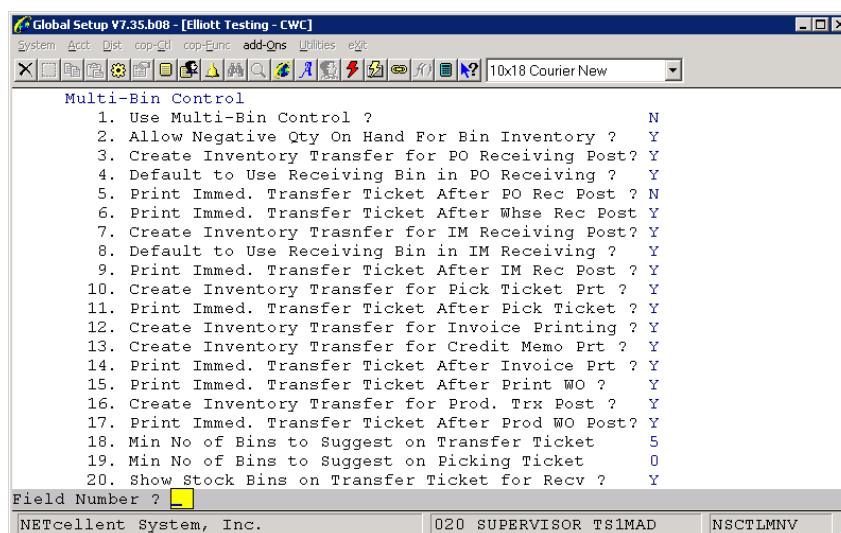
### Multi-Bin Control

## Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

## Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Multi-Bin Control



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Add Qst cop-01 cop-02 add-Ons Utilities e2f

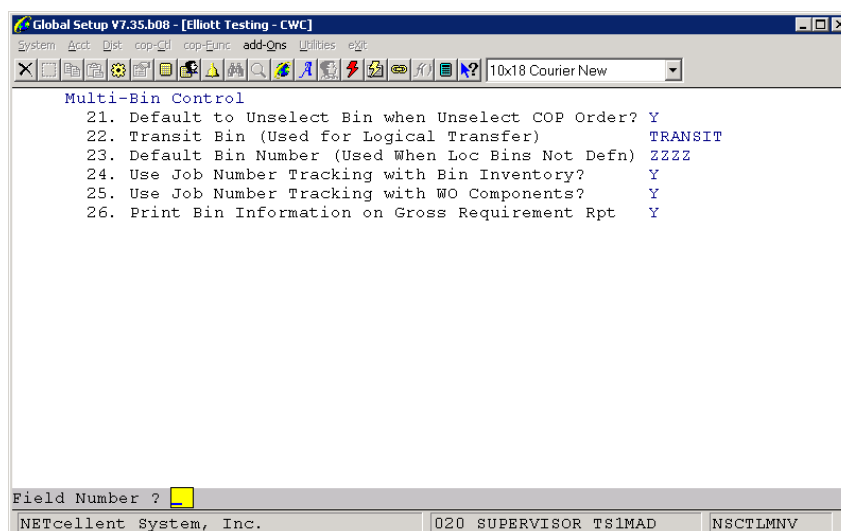
10x18 Courier New

Multi-Bin Control

1. Use Multi-Bin Control ?	N
2. Allow Negative Qty On Hand For Bin Inventory ?	Y
3. Create Inventory Transfer for PO Receiving Post?	Y
4. Default to Use Receiving Bin in PO Receiving ?	Y
5. Print Immed. Transfer Ticket After PO Rec Post ?	N
6. Print Immed. Transfer Ticket After Whse Rec Post	Y
7. Create Inventory Trasnfer for IM Receiving Post?	Y
8. Default to Use Receiving Bin in IM Receiving ?	Y
9. Print Immed. Transfer Ticket After IM Rec Post ?	Y
10. Create Inventory Transfer for Pick Ticket Prt ?	Y
11. Print Immed. Transfer Ticket After Pick Ticket ?	Y
12. Create Inventory Transfer for Invoice Printing ?	Y
13. Create Inventory Transfer for Credit Memo Prt ?	Y
14. Print Immed. Transfer Ticket After Invoice Prt ?	Y
15. Print Immed. Transfer Ticket After Print WO ?	Y
16. Create Inventory Transfer for Prod. Trx Post ?	Y
17. Print Immed. Transfer Ticket After Prod WO Post?	Y
18. Min No of Bins to Suggest on Transfer Ticket	5
19. Min No of Bins to Suggest on Picking Ticket	0
20. Show Stock Bins on Transfer Ticket for Recv ?	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Add Qst cop-01 cop-02 add-Ons Utilities e2f

10x18 Courier New

Multi-Bin Control

21. Default to Unselect Bin when Unselect COP Order?	Y
22. Transit Bin (Used for Logical Transfer)	TRANSIT
23. Default Bin Number (Used When Loc Bins Not Defn)	ZZZZ
24. Use Job Number Tracking with Bin Inventory?	Y
25. Use Job Number Tracking with WO Components?	Y
26. Print Bin Information on Gross Requirement Rpt	Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV

**Procedure:** Enter values for the prompted fields.

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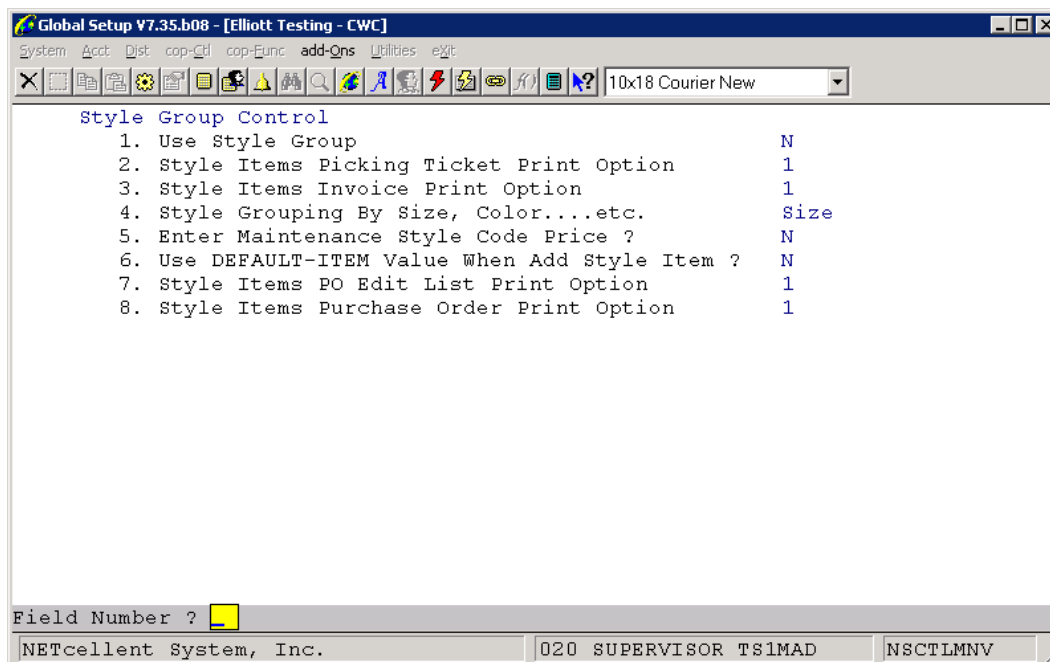
## Style Group Control

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Style Group Control



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Cl", "cop-Func", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The font is set to "10x18 Courier New". The main area displays the "Style Group Control" screen with a list of 8 items, each with a value to its right:

Item	Value
1. Use Style Group	N
2. Style Items Picking Ticket Print Option	1
3. Style Items Invoice Print Option	1
4. Style Grouping By Size, Color...etc.	Size
5. Enter Maintenance Style Code Price ?	N
6. Use DEFAULT-ITEM Value When Add Style Item ?	N
7. Style Items PO Edit List Print Option	1
8. Style Items Purchase Order Print Option	1

At the bottom, there is a "Field Number ?" label next to a yellow box. The status bar at the very bottom contains the text "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "NSCTLMNV" on the right.

**Procedure:** Enter values for the prompted fields.



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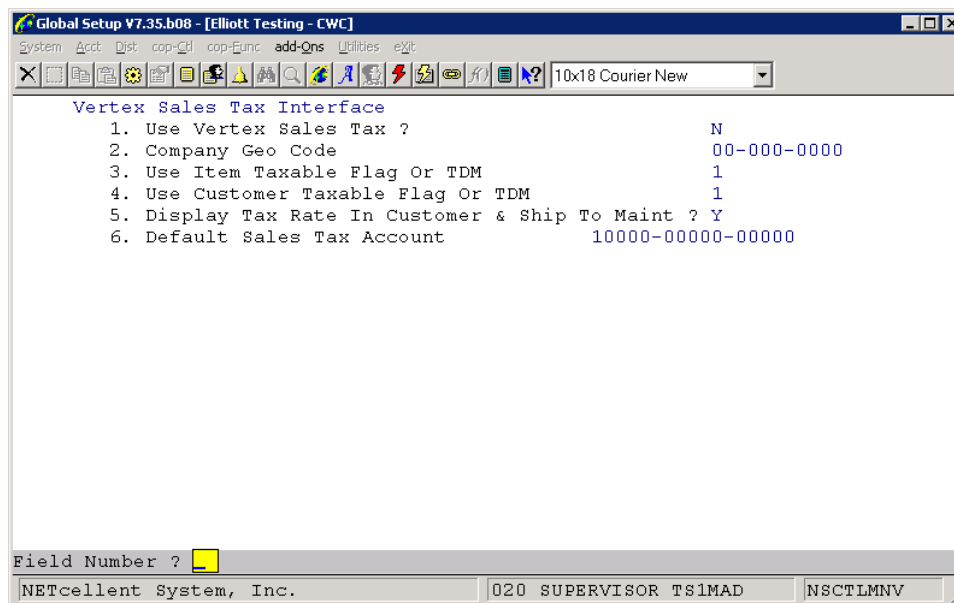
## Vertex Sales Tax Interface

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Vertex Sales Tax



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The window has a menu bar with "System", "Acct", "Dist", "cop-Gd", "cop-Eunc", "add-Ons", "Utilities", and "eXit". Below the menu bar is a toolbar with various icons. The main area displays the "Vertex Sales Tax Interface" with the following prompts and values:

Field Number	Prompt	Value
1.	Use Vertex Sales Tax ?	N
2.	Company Geo Code	00-000-0000
3.	Use Item Taxable Flag Or TDM	1
4.	Use Customer Taxable Flag Or TDM	1
5.	Display Tax Rate In Customer & Ship To Maint ? Y	
6.	Default Sales Tax Account	10000-00000-00000

At the bottom of the window, there is a "Field Number ?" label next to a yellow cursor icon. Below this, there are three text boxes containing "NETcellent System, Inc.", "020 SUPERVISOR TS1MAD", and "NSCTLMNV".

**Procedure:** Enter values for the prompted fields.

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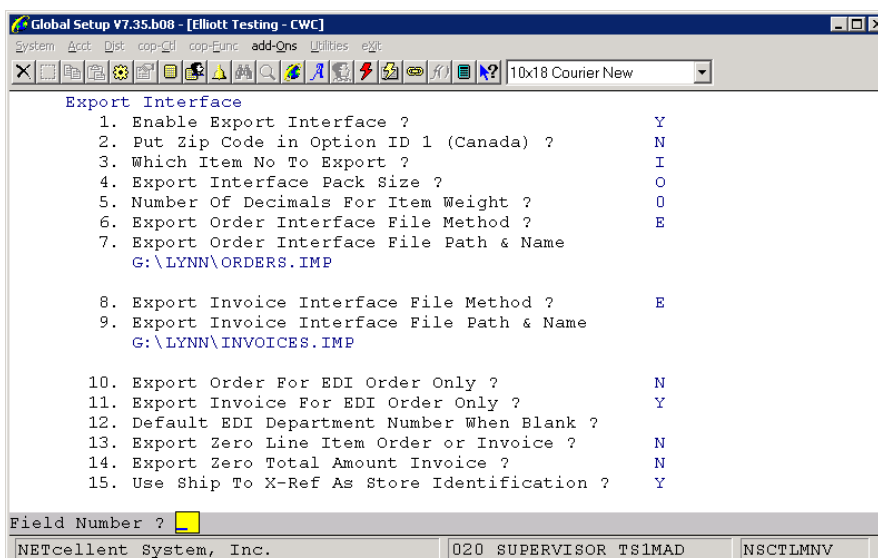
## Sales Order Export

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Sales Order Export



**Global Setup V7.35.b08 - [Elliott Testing - CWC]**

System Acct Dist cop-Gd cop-Eunc add-Ons Utilities egr

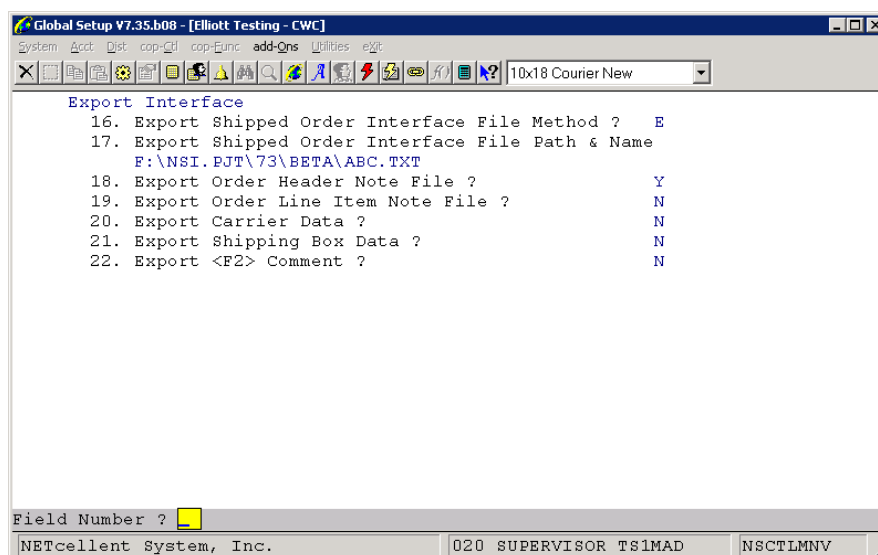
10x18 Courier New

**Export Interface**

1. Enable Export Interface ? Y
2. Put Zip Code in Option ID 1 (Canada) ? N
3. Which Item No To Export ? I
4. Export Interface Pack Size ? O
5. Number Of Decimals For Item Weight ? 0
6. Export Order Interface File Method ? E
7. Export Order Interface File Path & Name  
G:\LYNN\ORDERS.IMP
8. Export Invoice Interface File Method ? E
9. Export Invoice Interface File Path & Name  
G:\LYNN\INVOICES.IMP
10. Export Order For EDI Order Only ? N
11. Export Invoice For EDI Order Only ? Y
12. Default EDI Department Number When Blank ? N
13. Export Zero Line Item Order or Invoice ? N
14. Export Zero Total Amount Invoice ? N
15. Use Ship To X-Ref As Store Identification ? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV



**Global Setup V7.35.b08 - [Elliott Testing - CWC]**

System Acct Dist cop-Gd cop-Eunc add-Ons Utilities egr

10x18 Courier New

**Export Interface**

16. Export Shipped Order Interface File Method ? E
17. Export Shipped Order Interface File Path & Name  
F:\NSI.PJT\73\BETA\ABC.TXT
18. Export Order Header Note File ? Y
19. Export Order Line Item Note File ? N
20. Export Carrier Data ? N
21. Export Shipping Box Data ? N
22. Export <F2> Comment ? N

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV

**Procedure:** Enter values for the prompted fields.

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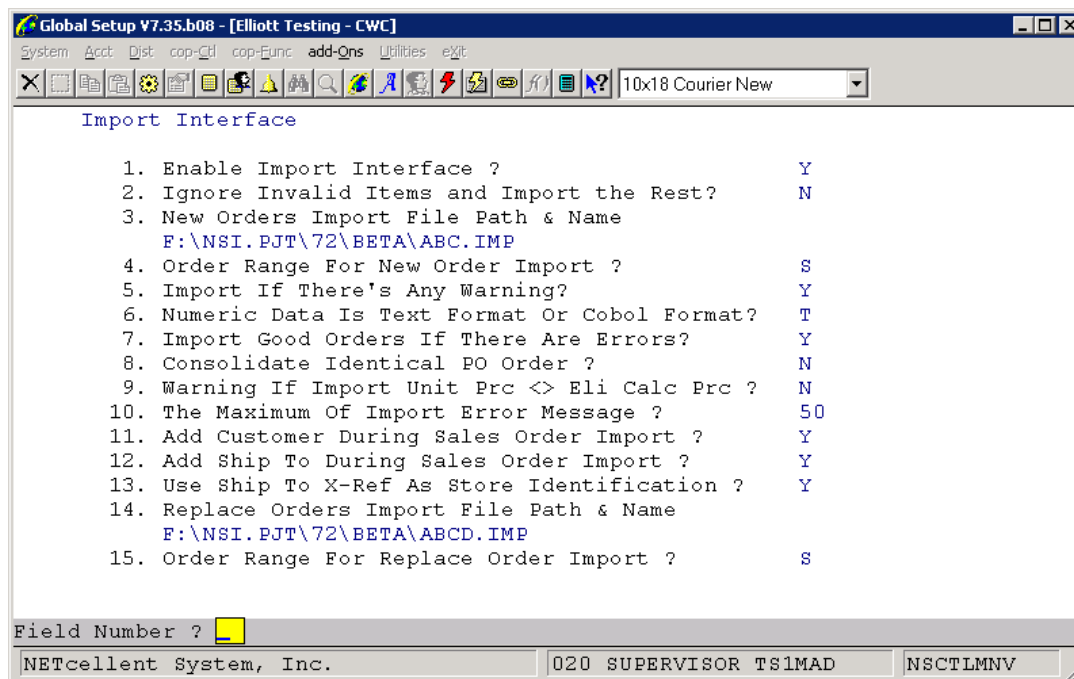
## Sales Order Import

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Sales Order Import



**Global Setup V7.35.b08 - [Elliott Testing - CWC]**

System Acct Dist cop-CH cop-Func add-Ons Utilities exit

10x18 Courier New

**Import Interface**

1. Enable Import Interface ?	Y
2. Ignore Invalid Items and Import the Rest?	N
3. New Orders Import File Path & Name	
F:\NSI.PJT\72\BETA\ABC.IMP	
4. Order Range For New Order Import ?	S
5. Import If There's Any Warning?	Y
6. Numeric Data Is Text Format Or Cobol Format?	T
7. Import Good Orders If There Are Errors?	Y
8. Consolidate Identical PO Order ?	N
9. Warning If Import Unit Prc <> Eli Calc Prc ?	N
10. The Maximum Of Import Error Message ?	50
11. Add Customer During Sales Order Import ?	Y
12. Add Ship To During Sales Order Import ?	Y
13. Use Ship To X-Ref As Store Identification ?	Y
14. Replace Orders Import File Path & Name	
F:\NSI.PJT\72\BETA\ABCD.IMP	
15. Order Range For Replace Order Import ?	S

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV

**Procedure:** Enter values for the prompted fields.

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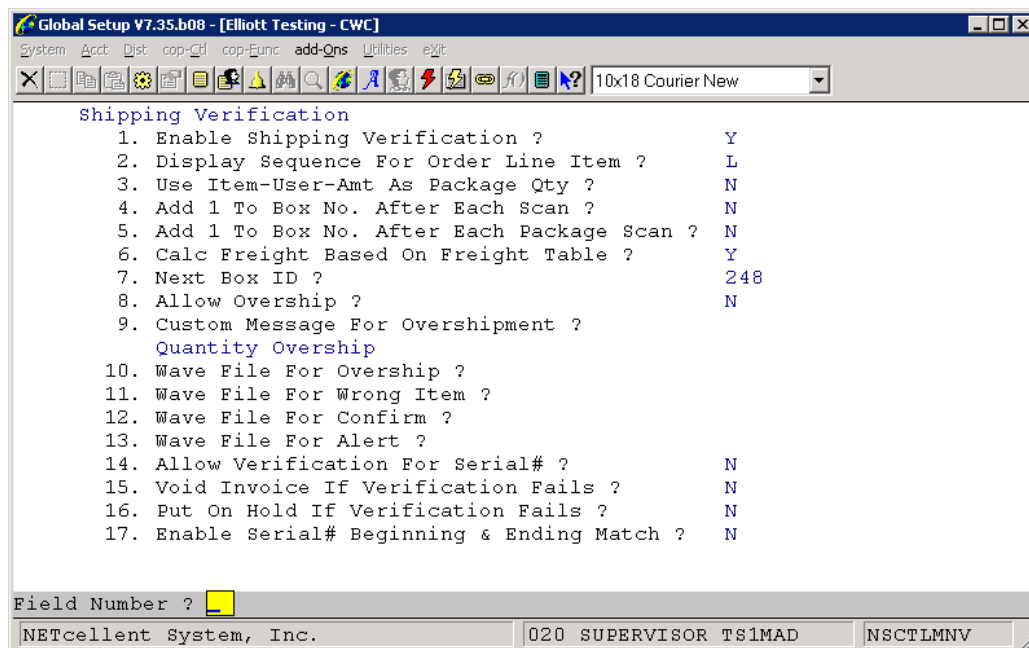
## Shipping Verification

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Shipping Verification



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cd cop-Eunc add-Ons Utilities exit

10x18 Courier New

**Shipping Verification**

1. Enable Shipping Verification ?	Y
2. Display Sequence For Order Line Item ?	L
3. Use Item-User-Amt As Package Qty ?	N
4. Add 1 To Box No. After Each Scan ?	N
5. Add 1 To Box No. After Each Package Scan ?	N
6. Calc Freight Based On Freight Table ?	Y
7. Next Box ID ?	248
8. Allow Overship ?	N
9. Custom Message For Overshipment ?	
<b>Quantity Overship</b>	
10. Wave File For Overship ?	
11. Wave File For Wrong Item ?	
12. Wave File For Confirm ?	
13. Wave File For Alert ?	
14. Allow Verification For Serial# ?	N
15. Void Invoice If Verification Fails ?	N
16. Put On Hold If Verification Fails ?	N
17. Enable Serial# Beginning & Ending Match ?	N

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cl cop-Eunc add-Ons Utilities exit

10x18 Courier New

Shipping Verification

19. Enable Shipping Label Printing Function ? Y

20. Different Shipping Label By Customer Type ? N

21. Enter Shipping Label Default Path & File Name  
Path Name : F:\NSI.PJT\72\BETA\ABC.CSV

22. Enter Shipping Xdock Label Default Path & File Name  
Path Name : F:\NSI.PJT\72\BETA\CDE.CSV

23. On-line Or Batch To Print Label ? O

24. Maximum # Of Item Per Label ? 1

25. UCC/EAN Mfg. No. ?

26. Export EDI 856 : Pick & Pack or Std. Pack P

27. Consider Item# Entry As Scan Or Manual ? M

28. Require Invoice Printed Before Ship ? N

29. Verify Invoice# If Invoice Is Printed ? N

30. Perform Billing Selection After Ship Verif? Y

31. Print Immed Inv. If Auto Billing Selection? N

32. Prmpt Pswrd If Not Allow Manual Confirm Itm?Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV

Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cl cop-Eunc add-Ons Utilities exit

10x18 Courier New

Shipping Verification

33. Default Shipping Date to System Date ? Y

34. Print Immediate Packing Slip ? Y

35. Bring up Shipping Data Update Scrn When Comp? Y

36. Allow User to Un-Verify a Selected Order ? Y

37. Collect Box Level Data ? Y

38. Attach Note To (H)header (L)ine Item L

39. Append Log File in Shipping Verification Y

40. Log File Path & Filename  
F:\NSI.PJT\72\BETA\AAA.LOG

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV

**Procedure:** Enter values for the prompted fields.

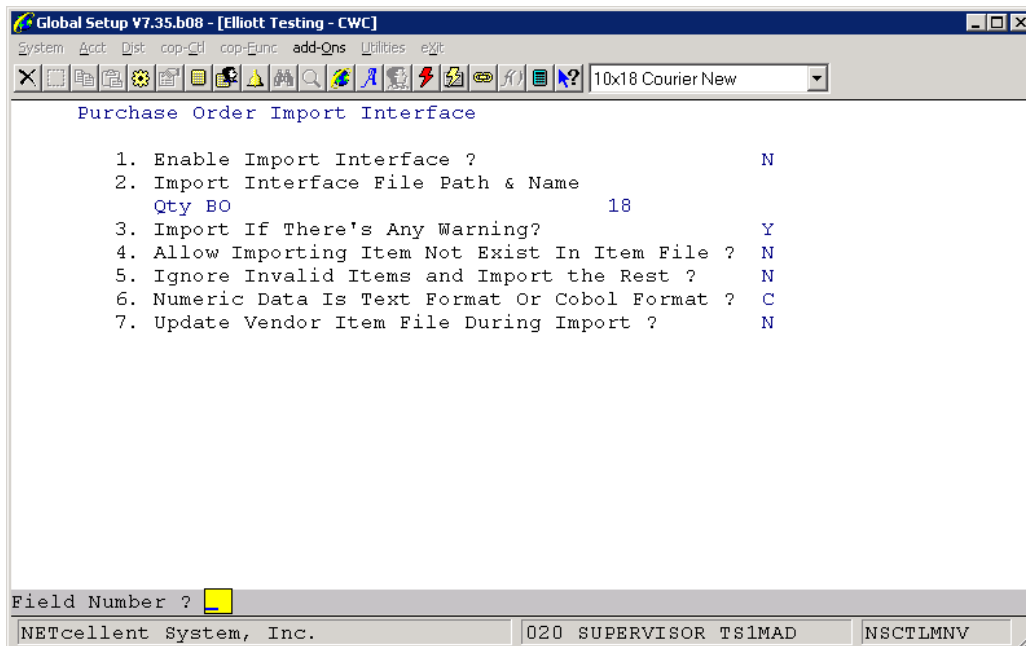
## Purchase Order Import

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Purchase Order Import



The screenshot shows a window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Cd", "cop-Eunc", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and a font dropdown set to "10x18 Courier New". The main area is titled "Purchase Order Import Interface" and displays a list of seven prompts with their current values:

Field Number	Prompt	Value
1	Enable Import Interface ?	N
2	Import Interface File Path & Name	Qty BO 18
3	Import If There's Any Warning?	Y
4	Allow Importing Item Not Exist In Item File ?	N
5	Ignore Invalid Items and Import the Rest ?	N
6	Numeric Data Is Text Format Or Cobol Format ?	C
7	Update Vendor Item File During Import ?	N

At the bottom, there is a "Field Number ?" prompt with a cursor, and a status bar with the text "NETcellent System, Inc." and "020 SUPERVISOR TS1MAD NSCTLMNV".

**Procedure:** Enter values for the prompted fields.

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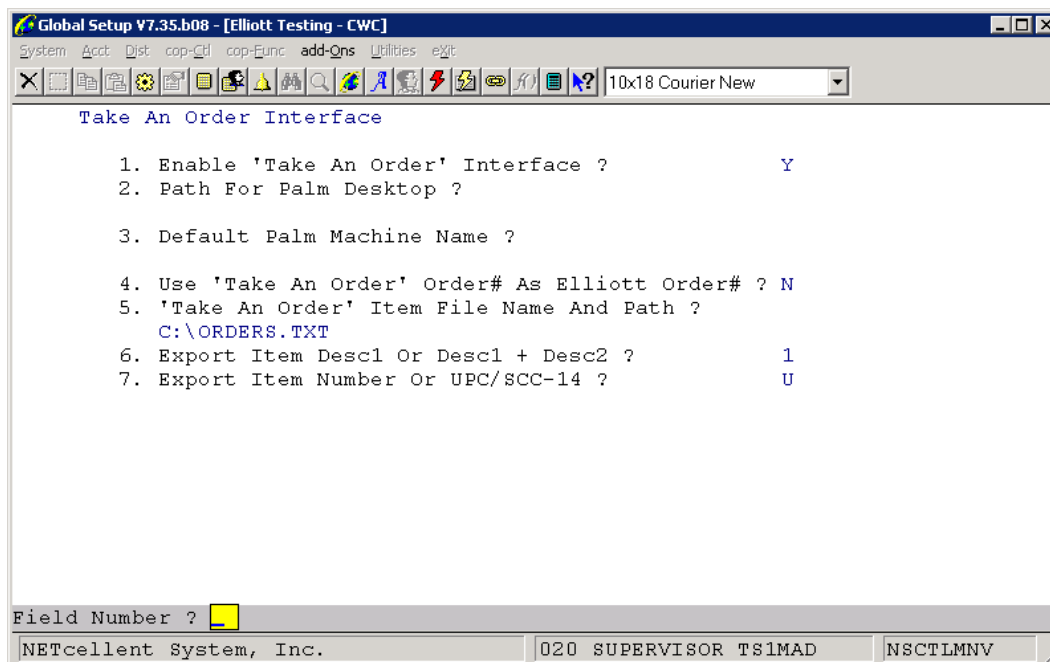
## Take An Order Interface

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Take An Order Interface



The screenshot shows a Windows-style window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Cl", "cop-Func", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The font is set to "10x18 Courier New".

The main content area is titled "Take An Order Interface" and contains a list of seven prompts with their current values:

1. Enable 'Take An Order' Interface ? Y
2. Path For Palm Desktop ?
3. Default Palm Machine Name ?
4. Use 'Take An Order' Order# As Elliott Order# ? N
5. 'Take An Order' Item File Name And Path ?  
C:\ORDERS.TXT
6. Export Item Desc1 Or Desc1 + Desc2 ? 1
7. Export Item Number Or UPC/SCC-14 ? U

At the bottom, there is a "Field Number ?" label next to a yellow square icon. The status bar at the very bottom displays "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "NSCTLMNV" on the right.

**Procedure:** Enter values for the prompted fields.

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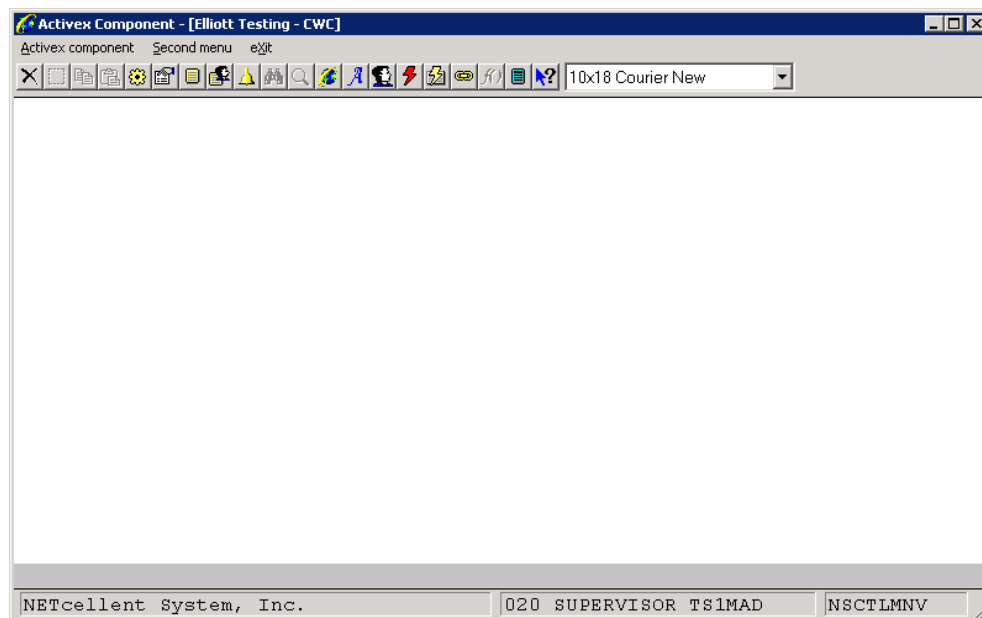
## ActiveX Component

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → ActiveX Component



**Procedure:** Enter values for the prompted fields.

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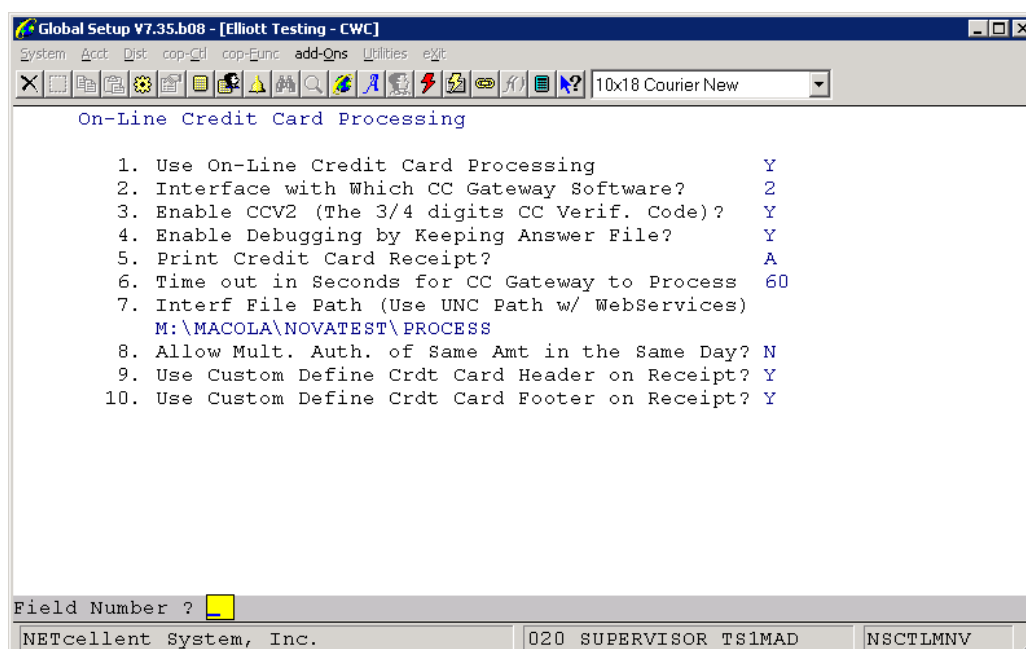
## On-line Credit Card Processing

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → On-line Credit Process



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cd cop-Eunc add-Ons Utilities exit

10x18 Courier New

On-Line Credit Card Processing

1. Use On-Line Credit Card Processing Y
2. Interface with Which CC Gateway Software? 2
3. Enable CCV2 (The 3/4 digits CC Verif. Code)? Y
4. Enable Debugging by Keeping Answer File? Y
5. Print Credit Card Receipt? A
6. Time out in Seconds for CC Gateway to Process 60
7. Interf File Path (Use UNC Path w/ WebServices)  
M:\MACOLA\NOVATEST\PROCESS
8. Allow Mult. Auth. of Same Amt in the Same Day? N
9. Use Custom Define Crdt Card Header on Receipt? Y
10. Use Custom Define Crdt Card Footer on Receipt? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV

**Procedure:** Enter values for the prompted fields.



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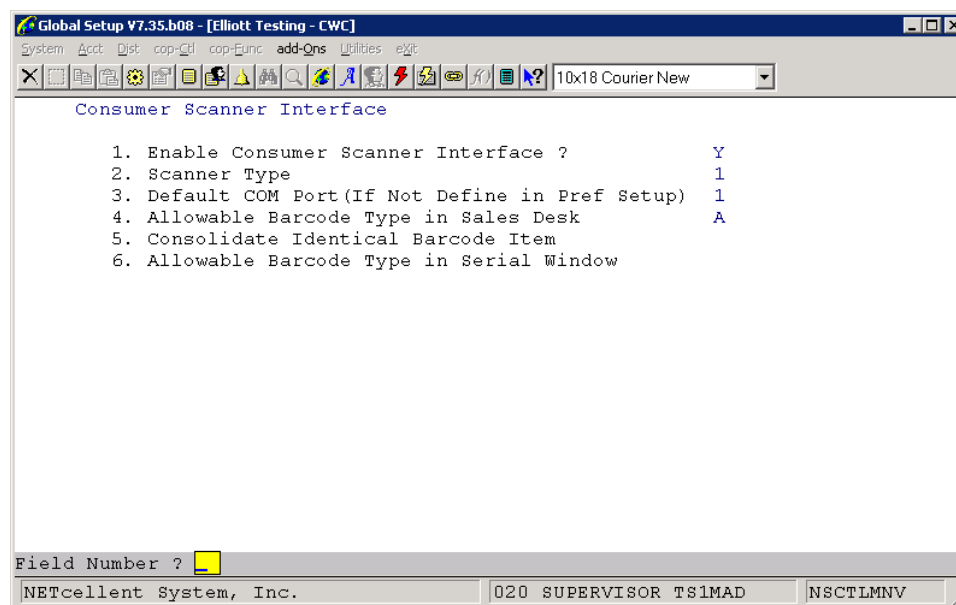
## Consumer Scanner Interface

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Consumer Scanner Interface



**Procedure:** Enter values for the prompted fields.

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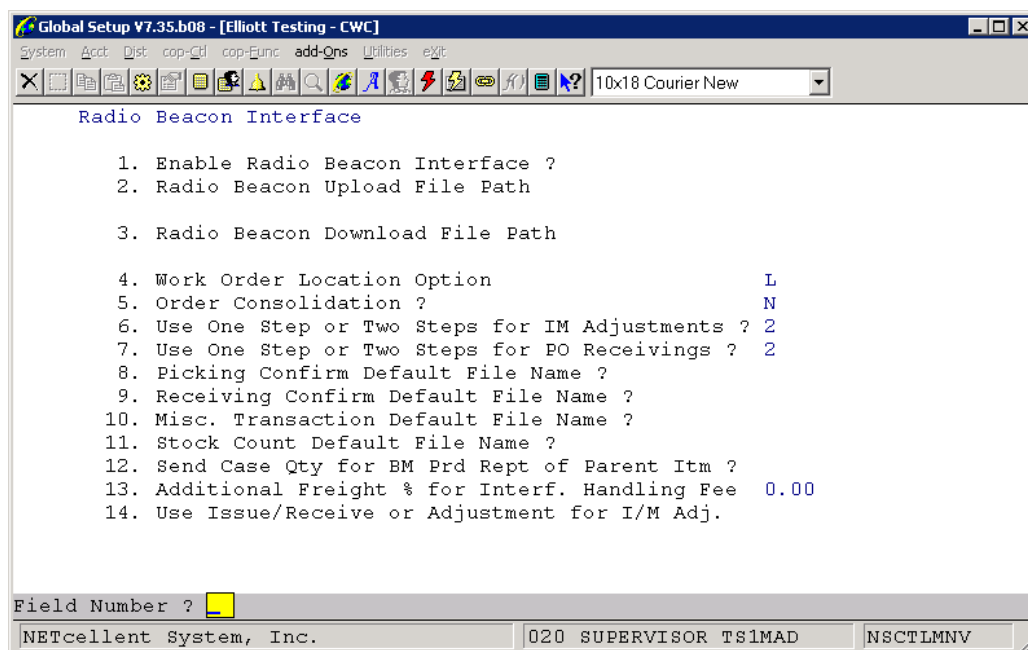
## Radio Beacon Interface

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Radio Beacon Interface



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Cd cop-Eunc add-Ons Utilities exit

10x18 Courier New

Radio Beacon Interface

1. Enable Radio Beacon Interface ?
2. Radio Beacon Upload File Path
3. Radio Beacon Download File Path
4. Work Order Location Option L
5. Order Consolidation ? N
6. Use One Step or Two Steps for IM Adjustments ? 2
7. Use One Step or Two Steps for PO Receivings ? 2
8. Picking Confirm Default File Name ?
9. Receiving Confirm Default File Name ?
10. Misc. Transaction Default File Name ?
11. Stock Count Default File Name ?
12. Send Case Qty for BM Prd Rept of Parent Itm ?
13. Additional Freight % for Interf. Handling Fee 0.00
14. Use Issue/Receive or Adjustment for I/M Adj.

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR TS1MAD NSCTLMNV

**Procedure:** Enter values for the prompted fields.

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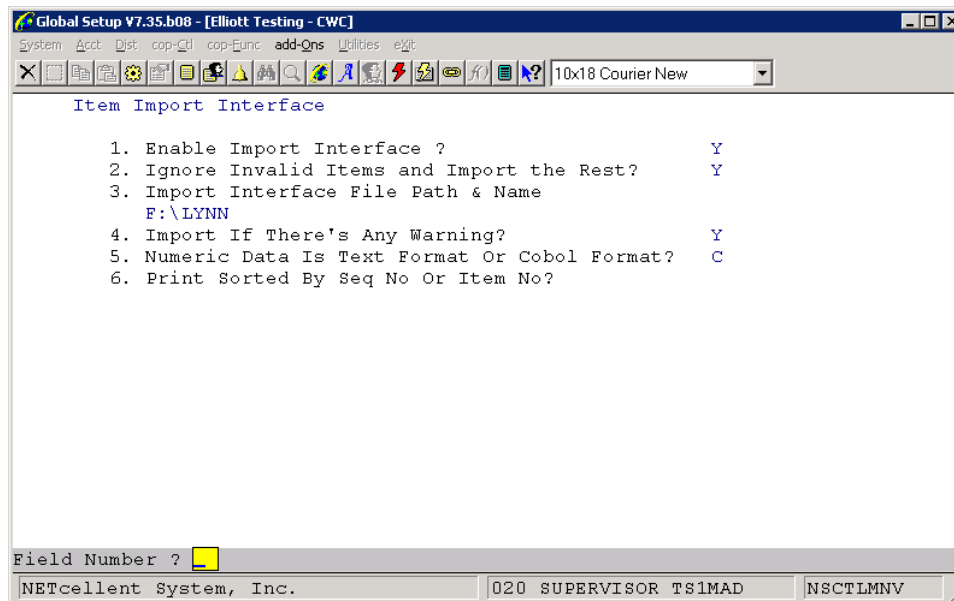
## Item Import Utility

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Item Import Utility



The screenshot shows a Windows-style application window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-Gtd", "cop-Eunc", "add-Ons", "Utilities", and "exit". The toolbar contains various icons for file operations and help. The main text area is titled "Item Import Interface" and contains a list of six prompts with corresponding values:

- 1. Enable Import Interface ? Y
- 2. Ignore Invalid Items and Import the Rest? Y
- 3. Import Interface File Path & Name  
F:\LYNN
- 4. Import If There's Any Warning? Y
- 5. Numeric Data Is Text Format Or Cobol Format? C
- 6. Print Sorted By Seq No Or Item No?

At the bottom, there is a "Field Number ?" label next to a yellow square icon. The status bar at the very bottom displays "NETcellent System, Inc." on the left, and "020 SUPERVISOR TS1MAD" and "NSCTLMNV" on the right.

**Procedure:** Enter values for the prompted fields.

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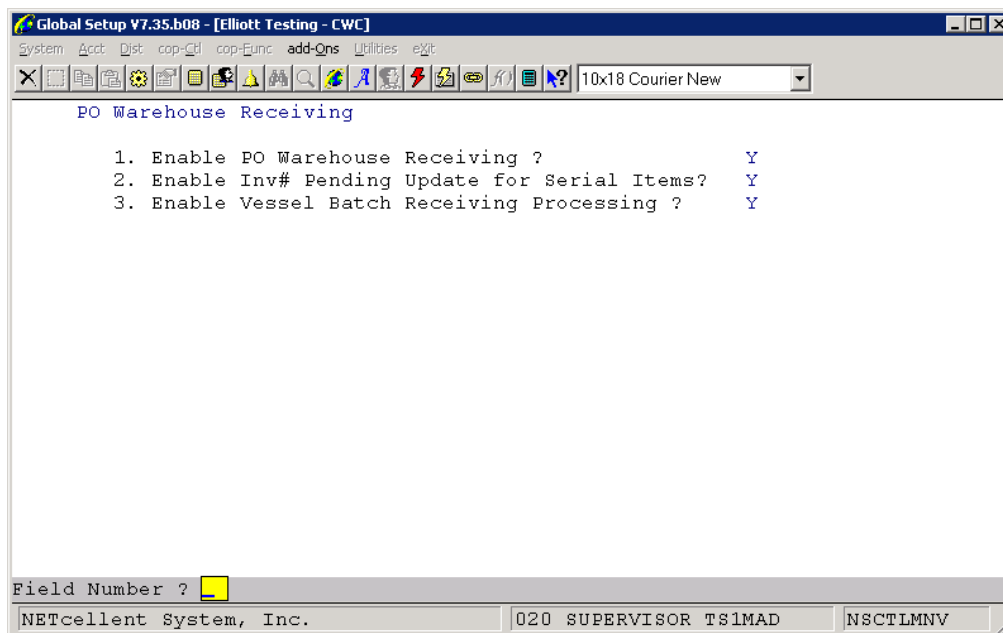
## Warehouse Receiving

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → Warehouse Receiving



Global Setup V7.35.b08 - [Elliott Testing - CWC]

System Acct Dist cop-Ad cop-Eunc add-Ons Utilities eXit

10x18 Courier New

PO Warehouse Receiving

1. Enable PO Warehouse Receiving ? Y

2. Enable Inv# Pending Update for Serial Items? Y

3. Enable Vessel Batch Receiving Processing ? Y

Field Number ?

NETcellent System, Inc. 020 SUPERVISOR T81MAD N8CTLMNV

**Procedure:** Enter values for the prompted fields.



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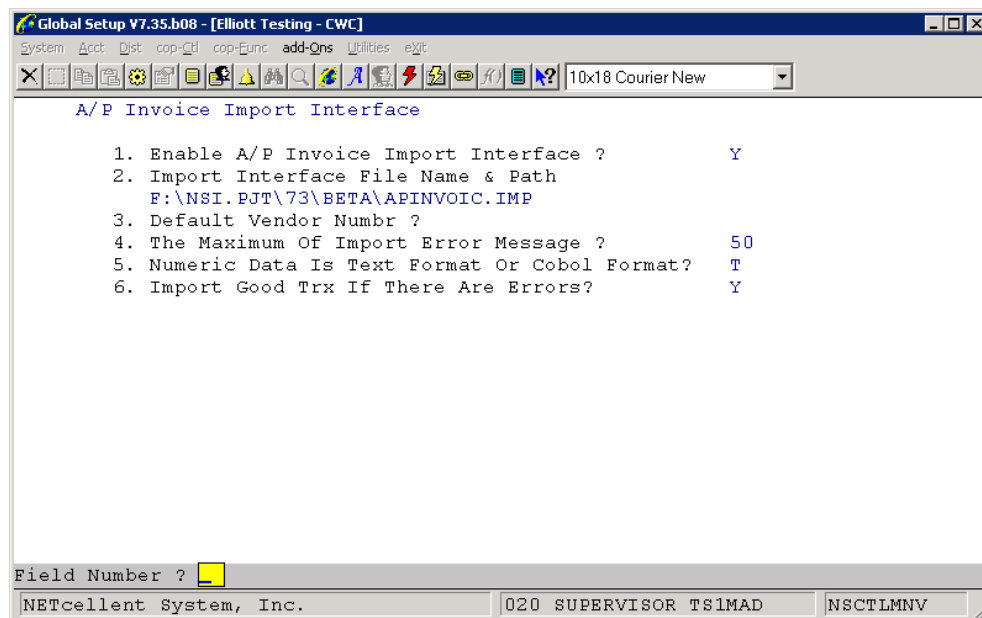
## A/P Invoice Import Interface

### Application Overview

This setup screen allows you to set certain global variables for vertical add-ons used throughout Elliott.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Add-Ons → A/P Invoice Import



The screenshot shows a Windows-style window titled "Global Setup V7.35.b08 - [Elliott Testing - CWC]". The menu bar includes "System", "Acct", "Dist", "cop-CD", "cop-Eunc", "add-Ons", "Utilities", and "eXit". The toolbar contains various icons for file operations and help. The main area is titled "A/P Invoice Import Interface" and contains a list of six setup items with their current values:

Item	Value
1. Enable A/P Invoice Import Interface ?	Y
2. Import Interface File Name & Path	F:\NSI.PJT\73\BETA\APINVOIC.IMP
3. Default Vendor Numbr ?	
4. The Maximum Of Import Error Message ?	50
5. Numeric Data Is Text Format Or Cobol Format?	T
6. Import Good Trx If There Are Errors?	Y

At the bottom, there is a "Field Number ?" label next to a yellow icon. The status bar at the very bottom displays "NETcellent System, Inc." on the left, "020 SUPERVISOR TS1MAD" in the center, and "NSCTLMNV" on the right.

**Procedure:** Enter values for the prompted fields.

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## Utilities

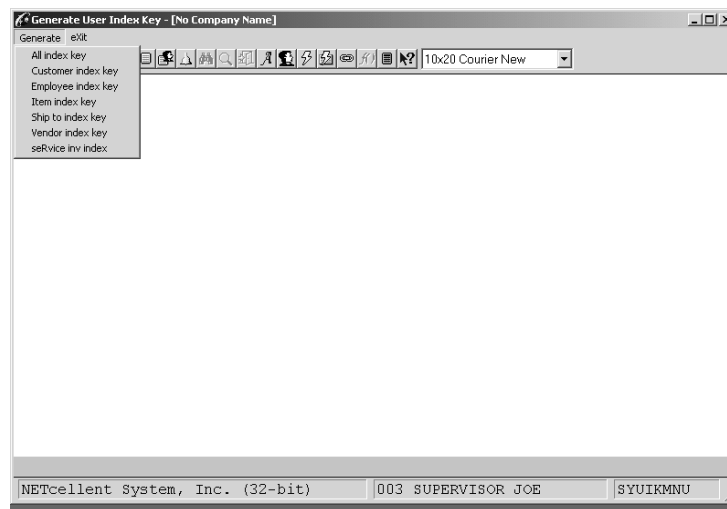
### *Generate User Index*

## Application Overview

This is the utility function used to index the user defined Additional Search Keys when they have been modified or have become corrupt.

## Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Generate User Index



**Procedure:** Click **Generate** and select “All” or the index key from the drop down menu. This is an internal process and when completed will prompt the user for a printer destination for the Index Log and will list how many records were indexed.

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## Convert Ship-To To Customer

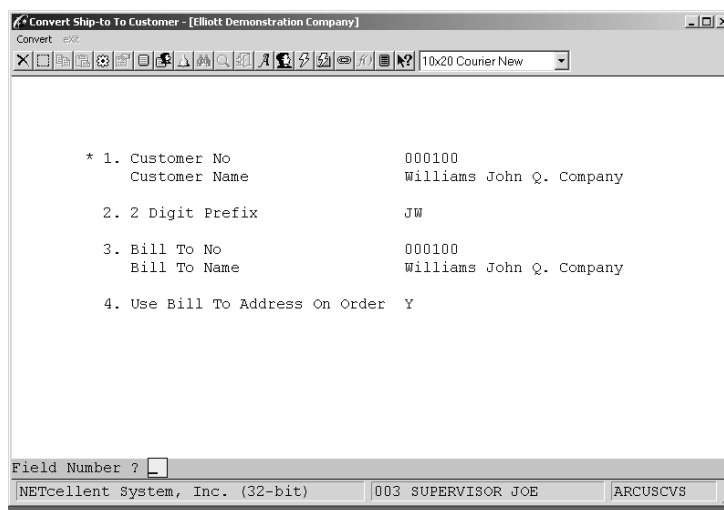
### Application Overview

For a Ship-To, the basic information available is name, address, ship via, salesman and tax code. As a result, sales history and pertinent business information is contained in the Customer master record. This utility allows you to convert Customer Ship-To's to a new customer allowing you to maintain and track customer file information, sales history and statistics independently from the previous master record.

For sort ability and grouping purposes, all converted customers are tied to the master record via the new Customer Number generated.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Convert Ship To customer



```

* 1. Customer No          000100
   Customer Name         Williams John Q. Company

2. 2 Digit Prefix        JW

3. Bill To No           000100
   Bill To Name          Williams John Q. Company

4. Use Bill To Address On Order  Y
  
```

Field Number ?

NETcellent System, Inc. (32-bit) 003 SUPERVISOR JOE ARCUSCVS

### Field Entry Descriptions

Name	Description
1. Customer No.	Enter Customer Number of the Ship-To's Note: This converts all Ship-To addresses to new customers.
2. 2 Digit Prefix	2 digit alpha numeric field  This is the key in assigning new customer numbers. If a customer has 20 Ship-To's ranging from 100 – 120, the new customers numbers will be JW0100 – JW0120.

3. Bill To	Enter the Bill To Customer Number. Normally, this is same Bill To as the master record.
4. Use Bill To Address On Order	<p>Select "Y" to use the above Field 3, Bill To address, for orders of the new customers.</p> <p>Select "N" to use Bill To address of new customer. This case usually applies when the customers review and approve their invoices for payment by the HQ office.</p> <p>Regardless of "Y" or "N" the Customer of Record in field 3 is the responsible party for payment of invoices. Any changes to this must be done in A/R Customer File Maintenance.</p>
NOTE:	Although the Ship-To's are converted to new customers, they still remain in the Ship-To file of the master record.

Run Date: Oct 10, 2001 - 10:22pm		Elliott Demonstration Company			
Page 1					
C O N V E R T   S H I P - T O   T O   C U S T O M E R					
Customer No.	Ship To No.		New Customer No.	New Customer Name	Bill To No.   Bill To On Order
000100	100	-->	JW100	John Q. Williams Company	000100   Y
000100	200	-->	JW200	John Q. Williams Company	000100   Y
2 Ship-To Are Convert To Customers					

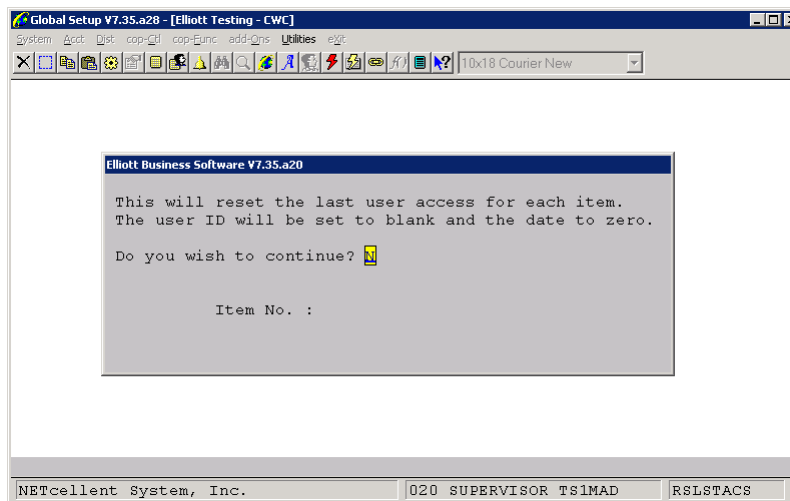
## ***Reset Last Access User and Date***

### **Application Overview**

This utility function will reset the last user access for each item in the Item File. The user ID will be set to blank and the date to zero.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Reset Last Access User & Date



**Procedure:** Type **Y** to continue and the utility will begin to run. No other entry is necessary. Each item number will be displayed as it is processed.



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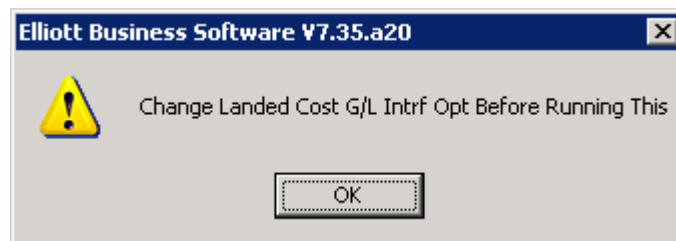
## ***Switch FOB and Landed Cost***

### **Application Overview**

This utility function will switch FOB and Landed Cost in the Item File.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Switch FOB and Landed Cost



**Procedure:** Type **Y** to continue and the utility will begin to run. No other entry is necessary. Each item number will be displayed as it is processed.

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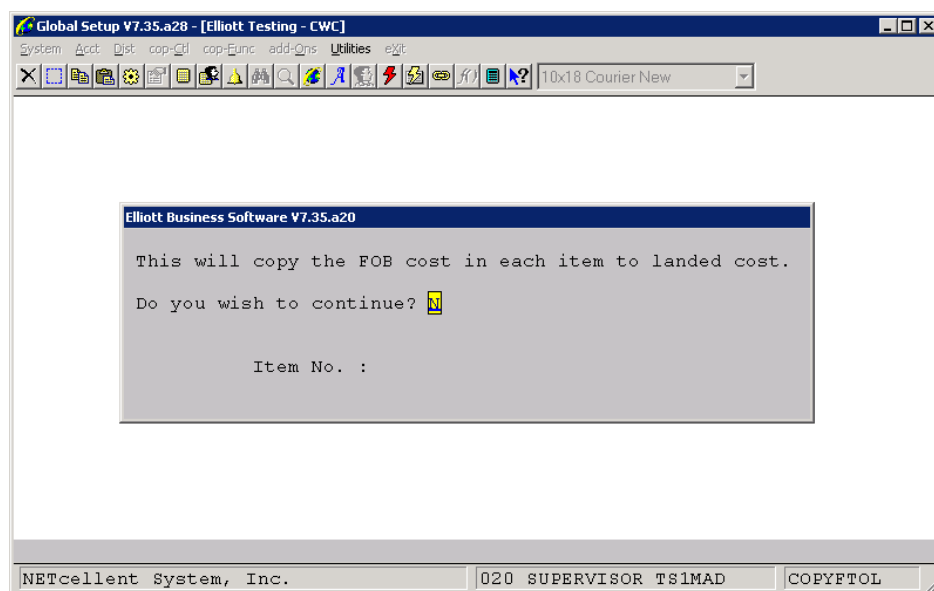
## Copy FOB to Landed Cost

### Application Overview

This utility function will copy the FOB Cost to Landed Cost for each item in the Item File.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Copy FOB Cost to Landed Cost



**Procedure:** Type **Y** to continue and the utility will begin to run. No other entry is necessary. Each item number will be displayed as it is processed.

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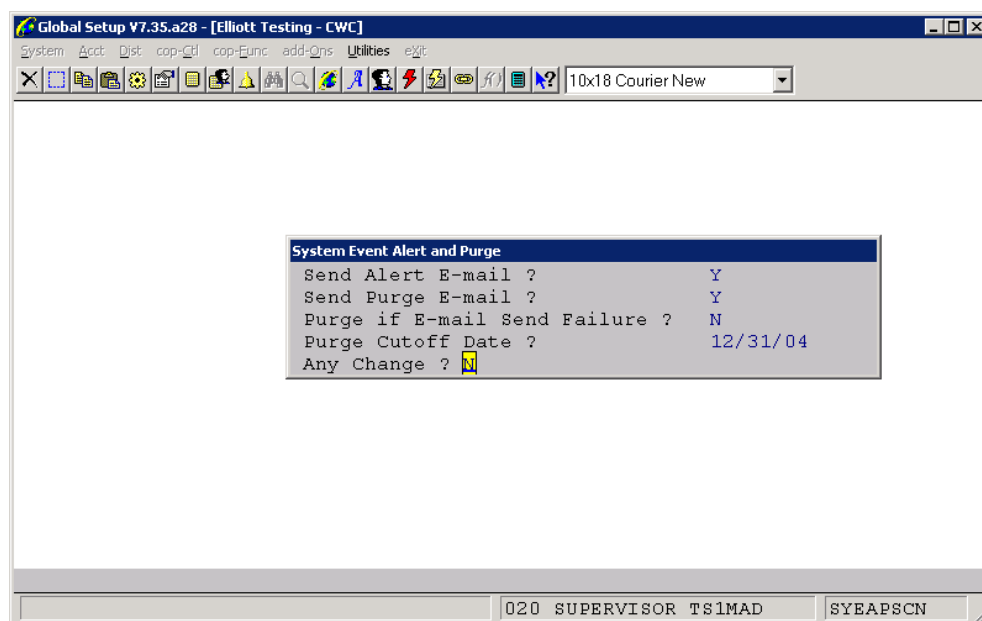
## Event Alert and Purge

### Application Overview

This utility function will copy the FOB Cost to Landed Cost for each item in the Item File.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Event Alert and Purge



**Procedure:** Type **Y** to continue and the utility will begin to run. No other entry is necessary. Each item number will be displayed as it is processed.

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## ***eContact Integrity Check***

### **Application Overview**

This utility function will read through the eContact Relationship file and check to see if the Elliott record still exists for the relationship (say a COP order) and will delete any relationships where record is missing.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Utilities → E-contact Integrity Check

**Procedure:** There is no input associated with this function. Once you choose the menu option, a standard print options window will appear asking for the destination of the report.



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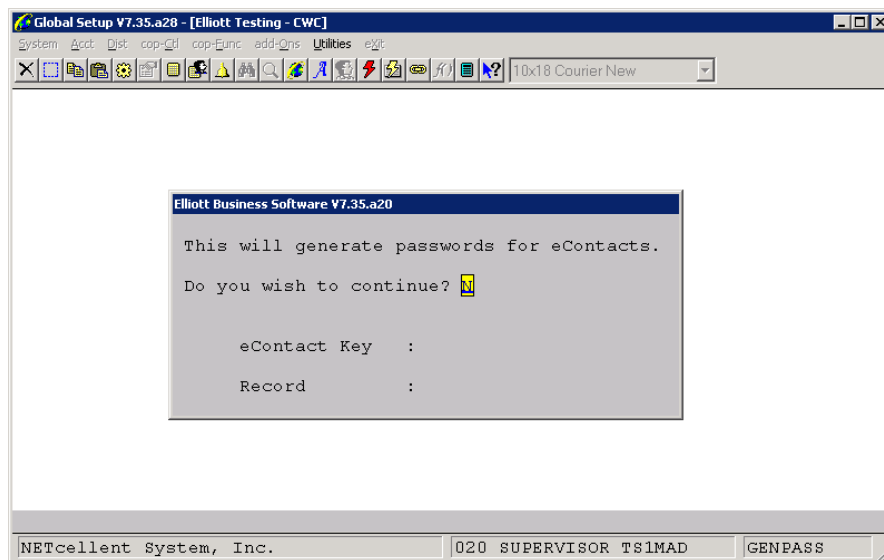
## ***eContact Password Generate***

### **Application Overview**

This utility function will assign a password to each eContact.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Utilities → E-contact Password Generate



**Procedure:** Type **Y** to continue and the utility will begin to run. No other entry is necessary. Each eContact will be displayed as it is processed.

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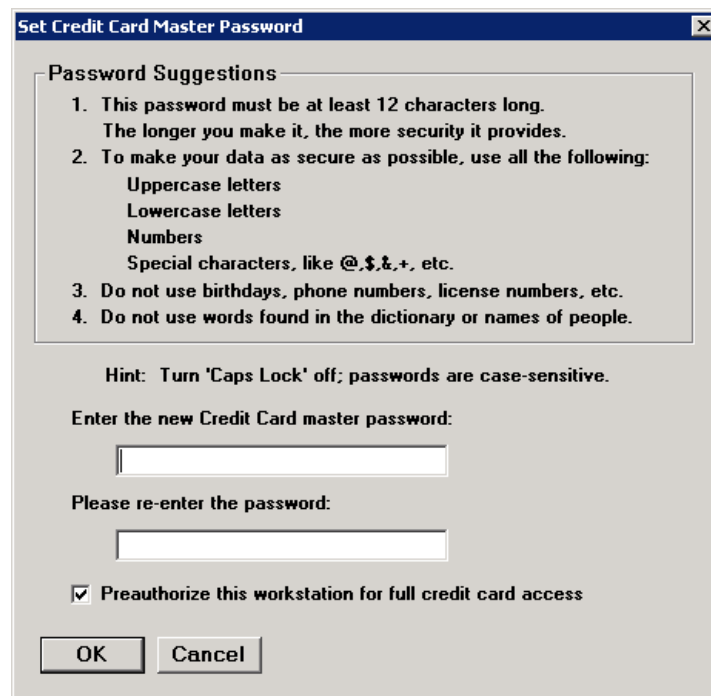
## Set CC Master Password

### Application Overview

This utility function will allow the user to assign a master password for credit card encryption.

### Run Instructions

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Set CC Master Password



The dialog box titled "Set Credit Card Master Password" contains the following elements:

- Password Suggestions:**
  1. This password must be at least 12 characters long. The longer you make it, the more security it provides.
  2. To make your data as secure as possible, use all the following:
    - Uppercase letters
    - Lowercase letters
    - Numbers
    - Special characters, like @, \$, &, +, etc.
  3. Do not use birthdays, phone numbers, license numbers, etc.
  4. Do not use words found in the dictionary or names of people.
- Hint:** Turn 'Caps Lock' off; passwords are case-sensitive.
- Enter the new Credit Card master password:** A text input field.
- Please re-enter the password:** A second text input field.
- ☒ Preauthorize this workstation for full credit card access
- Buttons:** OK and Cancel.

**Procedure:** Enter the desired password in each box. You are prompted twice to insure that you typed the password correctly. If the two entries do not match, then you are prompted again.

If a password already exists, then the following window will appear:

Change Existing Password

**Your credit card file is already encrypted with a password.**

To change the old password, please do the following:

1. Make sure no one else is using your database.
2. Enter the CURRENT password in the box below.
3. Press the 'Change Password' button.

Or, you may press 'Cancel' to keep you current password.

Current Password:

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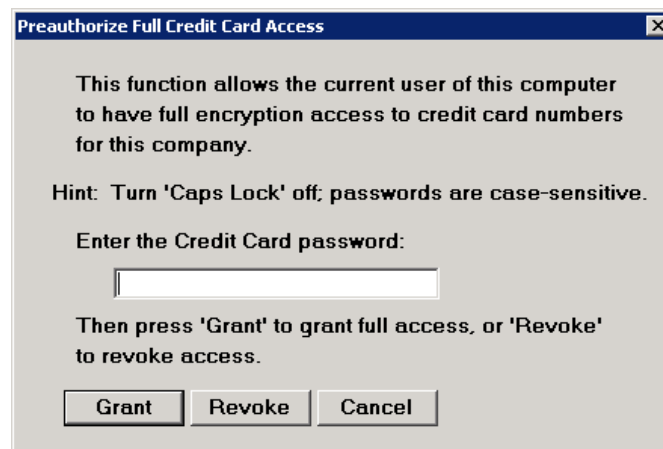
## ***Preauthorize User CC Access***

### **Application Overview**

This utility function will grant credit card access to the user on this workstation.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Preauthorize User CC Access



**Procedure:** Enter the credit card master password and click on the appropriate button to grant or revoke credit card access.

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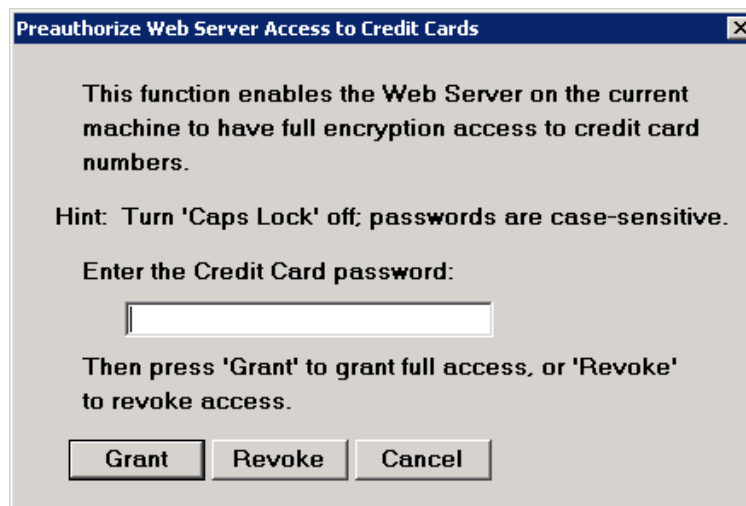
## ***Preauthorize Server CC Access***

### **Application Overview**

This utility function enables the Web Server to have full encryption access to credit card numbers.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Utilities → Preauthorize Server CC Access



**Procedure:** Enter the credit card master password and click on the appropriate button to grant or revoke credit card access.

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## ***COP Order Integrity Check***

### **Application Overview**

This utility function will read through the COP Order Line Item File and check to see if the header record still exists and will delete the line item record if the header is missing.

### **Run Instructions**

Elliott Main Menu → Util-Setup → Global Setup → Utilities → COP Order Integrity Check

**Procedure:** There is no input associated with this function. Once you choose the menu option, a standard print options window will appear asking for the destination of the report.

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## Appendix A

### *Developer Reference*

#### Modified Application Programs

Generally speaking, we can divide the Elliott V7 system layer code into two categories:

**Windows System Layer - EL700B.LBR and EL700U.LBR**  
**Application System Layer - RU700B.LBR and RU700U.LBR**

Developers will have control and may change the application system layer. The Windows System Layer deploys special coding techniques and requires additional software components in order to compile. Therefore, it is not licensed to developers by default.

In general, the Elliott V7.0 Windows System Layer code is newly created and will not conflict with a developer's older version modification. However, the following programs have become part of the Windows system layer code:

BIDRPT.CBL  
DEFERMNU.CBL  
DEFERP1.CBL  
BEXPORT.CBL  
BIMPORT.CBL  
CALLLBR.CBL  
FILLER.CBL  
GETPATH.CBL  
MAINTGEN.CBL  
PRINT240.CBL  
PRINT30.CBL

The developer no longer has control over these programs. If you have modified these programs and wish to continue to make them work in Elliott V7, you may request these programs on a case by case basis, as long as you have a valid source code license.

Please check if you modified any one of the source code files listed here to determine whether your modification might have a compatibility issue.

To compile these programs, you will need to have RCM (Reusable Code Manager) installed on your system.

#### Custom Modification Issues

Generally speaking, if your enhancements or custom modifications follow the standard Elliott V6.0 coding standard, they should work with Elliott V7.0. That is, if your custom code will work with Elliott V6.0 Windows System Manager, then it should work with Elliott V7.0.

The following are some special considerations you need to be aware of when you create custom modifications and enhancements that will run in Elliott:

- **Line Draw:** In Elliott V6.0, the system determined if the operating system was Windows. If so, the system did not perform a line draw. If your programs perform a line draw, regardless of the operating system type, you must change your practice now. Change the program so that it will not draw a line

with the Windows environment. You can look for examples in GNJNLMNT.CBL and ARSRVMNT.CBL.

- **Do not use any DOS function calls:** DOS function calls may cause unpredictable results with Windows. Any calls inside your program that are either **call by number** or **call by name**, you should check their compatibility with Windows. For example, making an X"83" function call in DOS is equivalent to waiting for keyboard input. However, in Windows you need to change it to a "GK" API call. Since a "GK" API call works for both DOS and Windows, you should avoid using X"83" in your programs. Another example, "CBL\_SET\_CSR\_POS" is a DOS (Character Based) function call that you can not use in Windows. Avoid using call by number or call by name coding methods and use Elliott API calls, as they will result in a highly compatible program.

In some situations, you need to write your program so that it works with V6.0 Windows System Manager in order to work with Elliott. However, generally speaking, Elliott will work with all Elliott V6.0 API calls as if it were written for a DOS application.

- **Search Windows:** In DOS, it does not matter whether you open a window by using the "OW" (Open Window) or "OL" (Open List Box) API call; both ways work. However, you should use "OL" if it is a search window in Elliott because this will signal to the System layer that this is a search window and the system will enable the mouse operation for highlighting and selection. When you use "OW" for a search window, you will find your mouse operation does not work properly in the search window. As for "RW" (Remove Window) and "RL" (Remove List Box), they will work either way regardless of the program used, "OW" or "OL", to open the window.

One thing you should be aware of is the bottom message: In a typical search window, based on Elliott V6.0 coding standards, you will typically call the paragraph START-SELECTION-MESSAGE to display the Page Up and Page Down messages at the bottom of the search window. The following is how the code looks in the GENSRCH.PL file:

```
START-SELECTION-MESSAGE.
unixa      PERFORM GET-OS.
WINDOW     IF PCDOS-OS
unixa      IF UNIX
unixa      MOVE "DL,21,24,50" TO SCREEN-PARAMETERS,
unixa      MOVE "Up, Dn, PgDn, PgUp, RETURN To Select"
unixa      TO SCREEN-LITERAL,
unixa      ELSE
unixa      MOVE "DL,21,24,50" TO SCREEN-PARAMETERS,
unixa      MOVE " ↑, ↓, PgDn, PgUp, RETURN To Select"
unixa      TO SCREEN-LITERAL,
unixa      END-IF
WINDOW     ELSE
WINDOW     MOVE "CL,21,24,50" TO SCREEN-PARAMETERS,
WINDOW     MOVE SPACES TO SCREEN-LITERAL,
WINDOW     END-IF.
           COMPUTE SCREEN-ROW = WINDOW-BOT-ROW-1 - 1.
           COMPUTE SCREEN-COLUMN = WINDOW-COLUMN + 2.
           COMPUTE SCREEN-MAXIMUM = WINDOW-WIDTH - 3.
           PERFORM DISPLAY-ROUTINE.
```

The "CL" API call signals Elliott to display the following line at the bottom of the search window automatically:

Up, Dn, PgDn, PgUp, RETURN To Select

If you wish to display a different message, then do not use the "CL" API call. Put the message you want in the SCREEN-LITERAL and use the "DL" API call instead.

- **Up and Down arrow key symbols:** In Elliott, most of the fonts do not support special symbols for up and down arrow keys. Therefore, you might see a solid rectangle at the position where you expect to see the up and down arrow key symbols. Either you can change the font of the terminal to support these special symbols or you can change your programs to use "Up" and "Dn" instead of the special symbols.
- **Sequential READ operations After DELETE Operations with Btrieve:** With Btrieve databases in Elliott, it is not possible to perform a sequence of sequential READ and DELETE statements when the key of reference is on a key which allows duplicates. This is because it is not possible to reposition the Current Record Pointer (CRP) after the DELETE operation. However, this problem does not apply to Micro Focus databases. There are three examples in Elliott V6.0 code that have this type of issue: GNJNLRG2.CBL, ARPRGAR0.CBL and IM10P2.CBL.
- **SYSPASS.CBL:** If you modify this program for any reason, you need to be aware that when you perform a "GO" (Get Operating System) API call, you will always get a return for the MS-DOS-OS. This is because the portion of the SYSPASS.CBL code that was written for V6.0 Elliott Windows System Manager will not work with Elliott. We decided not to modify SYSPASS.CBL to work for Elliott and distribute it with Elliott. This is because SYSPASS.CBL gets recompiled often when developers add a new menu choice. Modifying SYSPASS.CBL will not make Elliott highly transparent if users have developer modifications on their system.

## Special Considerations with 32-Bit

**Elliott V7 is a 32-bit application and 32-bit application code does not work well with a relative path file name.** That is, if you wish to open the password file, do not attempt to open the physical file name "SYSPASS.DAT". Instead, use a full path name like "M:\Elliott\SYSPASS.DAT". Also, the 32-bit application does not respond well to the "Change Directory" API call.

Elliott 16-bit starts up from the \NSI (startup directory) and once all Elliott DLLs and library files have been loaded, it will change its default directory to, for example, \Elliott (target directory).

Elliott 32-bit starts up from the \NSI (startup directory) and it will stay at the start up directory without changing to the target directory. All files opened by the 32-bit application, including data and library files, are accessed by the full path name.

For this reason, if you have any custom modifications that open a file with a relative path, it will not work properly with Elliott 32-bit. One good example is the system password file (SYSPASS). In Elliott V6.0 and V6.2, the system password file is opened with a relative path and the system assumes the current path is \Elliott and therefore does not specify a full path. This type of coding will not work in Elliott 32-bit, but 16-bit will continue to work. If you have any custom modifications with this problem, you need to first PERFORM GET-OS to determine if this is a 32-bit Windows environment. If it is a 32-bit Windows environment, you need to use a "RD" parameter to call "GETPATH". GETPATH will return the target root directory for the "SYSPASS" file. From there, you will be able to open the SYSPASS file with the correct full path. There are good examples in MAINMENU.CBL which is distributed with V6.62 and V6.67 code. Please refer to the source code for details. The following sample code is listed for your reference:

```
Build-SysPass-Path.  
  Perform Get-OS.  
  If MS-Windows-NT  
    MOVE "RD" TO PASSING-DATA-ID  
    MOVE SYSPASS TO PASSING-DATA-FILE
```

```
PERFORM GET-PATH
MOVE PASSING-DATA-PATH TO SYSPASS-PATH
Else
  Move Syspass To Syspass-Path
End-If.
```

## Develop Your Own On-Line Help

If you wish to develop an application that works with Elliott and need to develop on-line Windows help, please read this section.

In the standard Windows Help design, each help file (\*.hlp) may contain multiple books. Each book can contain multiple topics. Each topic has a unique map-id. In Elliott's implementation, each field in each screen will correspond to a unique topic to achieve context sensitive help.

## Programming Requirements to Support Windows Help

If you add a new program and want to provide Windows help for your program, you must first use the API call "SH" to tell Elliott what your help-id is. This is the standard API call in V6.0.

## Which Tool Should I use?

Once this is done, you need to develop a Windows help file. A good tool to develop Windows help is RoboHELP®, which greatly speeds up the help development process. In fact, Elliott 6.X.056 and above is distributed with RoboHELP DLLs that are required to support the help file format. You may find more information about RoboHELP by visiting their web site, <http://www.blue-sky.com>. However, if you develop your help file in standard Windows help format by using Rich Text format and the help compiler, it will work with Elliott as well.

## Creating a Windows Help File

The most important thing you should know about creating Windows Help for Elliott is assigning the map-id in the help file. When you create a help file, it must have at least one book and multiple topics under that book. The first topic of that book should start with "Introduction" and you can randomly assign a map-id (numerical). You can add additional topics after the introduction, if needed. Otherwise, add topics for each field.

On the Elliott screen, each field has a field number associated with it. Elliott uses this as key information to find the map-id for that field. When you define each field, the map-id for each field should follow the formula of:

$$\text{Map-Id(Field)} = \text{Map-Id(Introduction)} + \text{Field-No}$$

For example, if the map-id for the introduction is 5000, the field 1 map-id should be 5001 and field 2 map-id should be 5002, etc. Once you have generated this Windows help file, place it in the \NSI\HELP directory. Do not use long file names for your help file. The name must be unique and should not conflict with any existing help files in the \NSI\HELP directory.

## Change EL700U.CFG File

Let us assume your program's help-id (as determined by the "SH" API call) is "CP2400" and the help file you copy to \Elliott7\HELP directory is "CUSTOM.HLP" with the introduction help-id of 5000. Add the following section to your EL700U.CFG file



[Help]  
CP2400=CUSTOM 5000

If your EL700U.CFG file does not exist, create one. Refer to the EL700S.CFG file for more examples. However, **do not modify the existing EL700S.CFG**.

This instruction tells Elliott that the introduction for CP2400 can be found in the help file CUSTOM.HLP file with map-id 5000. When the current help-id is CP2400 and the cursor is not at any field (i.e. at menu level, or field number), clicking on the help button will bring up the Introduction section from help. Once you are on a field, Elliott will find the field number by looking to the left of the current field to find a text pattern like "99". Then it will add this field number to the introduction map-id to display the field level help (context sensitive help).

## Animation with Elliott

- **Compiler:** You will need to compile your COBOL programs with the Micro Focus Object COBOL (or Workbench) V4.0 compiler in order to animate for Elliott. You can contact Micro Focus if you need to purchase their Object COBOL V4.0 compiler.
- **Compilation Directive:** Compilation directive is usually determined by the COBOL.DIR file. This file, by default, should be in your <COBOL V4.0>\EXEDLL directory. However, it can also be placed in your search directory or the current directory. For Elliott V7.0, we will need you to put the following lines in your COBOL.DIR file:

```
ERRLIST
NOLIST
NOANIM
ANS85 ( SYNTAX )
OMF ( GNT )
SPZERO
OLDINDEX
NOTRICKLE
NOBOUND
ALIGN ( 4 )
NOALTER
NOQUERY
REMOVE "FUNCTION"
WARNING ( 2 )
CONFIRM
```

- **Generate Listing:** Sometimes, developers may wish to generate a full compilation listing for the CBL with all copy books expanded. To do so, you may remove the following two lines from the COBOL.DIR file:

```
ERRLIST
NOLIST
```

Then, when you compile your CBL program, the system should create a file with an LST extension. This file may serve as a valuable resource in finding out all the paragraphs and identifiers in copy books and is a good source for tracing COBOL programs.

- **Why Animate in Elliott?** This is a very effective way to find out what went wrong with your code. To animate Elliott V7.0, you will have to do it from a Windows 32-bit O/S machine.
- **How to Compile for Animation?** You should use the following DOS command to compile:

```
Use Micro Focus V4.0 Compiler
COBOL XYZ.CBL,NUL,,NUL ANIM
```

The system will then produce the following two files in the same directory:

XYZ.INT  
XYZ.IDY

Please include both files in the appropriate library files. For example, if the XYZ program is part of the AR module, you may construct an AR700E.LBT file that contains two lines like above and run the following command:

```
RUN LIBRARY AR700E.LBT
```

This will create the file AR700E.LBR. Copy this to the \Elliott7\PROGRAMS or \Elliott\PROGRAMS directory. It is not necessary to copy XYZ.IDY to the \Elliott directory since the XYZ.IDY file is part of the AR700E.LBR. The XYZ.IDY file knows where to find the XYZ.CBL at the time of compilation. If you do not include XYZ.IDY in the library file, then you will need to copy XYZ.IDY and XYZ.CBL into the \Elliott directory for animation.

In Elliott V7, the system supports two types of developer library files:

Enhancement: Programs designed as a standard add-on product for Elliott V7

Custom Mod: Programs designed for a specific customer

The standard enhancement library should have an "E" at the end while custom modification should have a "C" at the end. For example:

AR700E.LBR: This is a standard enhancement for the Elliott V7 A/R module

AR700C.LBR: This is a custom modification for the Elliott V7 A/R module

AR700C.LBR has higher priority than AR700E.LBR. If an identical program is changed in both AR700C.LBR and AR700E.LBR, the one in AR700C.LBR will prevail.

**How to Animate?** You can animate the above XYZ program by typing the following command at the DOS prompt from the Elliott startup directory, if you are running on Windows 95 or above:

```
ANIMATEW EL700
```

Make sure ELL700.INT exists in the \Elliott directory. Please refer to the Micro Focus Object COBOL Manual for more instructions on how to use Animation tools.

- **Is There Any Behavior in Elliott That May Be Different From DOS?** One of the biggest differences that you may find when animating Elliott is when you step through statements of API calls like "DF", "DL", "CF", "CL", and it does not immediately update the screen. The system is waiting for an API call that needs keyboard input to update all pending screen changes at one time. This is done in Elliott for performance. Therefore, even though you step through a statement that performs a "DF" or "DL" API call, the change may not be reflected on the screen right away. Do not be alarmed with this condition because this is an intentional design feature of Elliott. If there are no keyboard entry API calls (like "IN", "GK", "CN", "MB", etc.) for the last 50 pending screen updates, the system will update the screen upon the 50<sup>th</sup> update to the screen.
- **What if you need to change some of the system layer code?** Certain system layer code was not distributed with Elliott V7.0 source code and we do not foresee a need for to change it. For example, SCREEN.EXE or SCREENL.EXE is replaced by ELLIOTTSCRN.CBL in Elliott. We do not distribute the NWSMSCRN.CBL program. However, there are certain system layer programs that may have been modified, and we may distribute these to you with a special license agreement. The following is some example code:

```
BIDRPT.CBL  
COMPNO.CBL  
DEFERMNU.CBL  
FILERR.CBL  
PRINT30.CBL  
PRINT240.CBL
```

SPOOL30.CBL  
CALLLBR.CBL  
MAINTGEN.CBL

## Execute Elliott From Search Path

It is possible to execute Elliott from a search path. That is, you do not need to start Elliott from the \Elliott directory. You may want to do so for various reasons. One example is used here at NETcellent. We need to utilize this feature for developing custom modifications for various customers. For each customer's custom modification, we will keep a different directory to store the relevant files for this custom project. This directory will contain custom modification library files, source code, INT & GNT object code, and custom modification data. All standard programs and data will come from a search path. This way, we can effectively keep a small-sized directory for the custom project.

### Required files in project directory

In Elliott V7, you can start from a directory with only a few files:

**EL700.CFG**  
**COB32API.DLL**

The following files are optional. You may need to copy them into this directory depending on your needs:

- **EL700.INT**: If you need to animate in this directory.
- **ELIREG70.DAT**: By default, this file will be copied over from your application directory if not present.
- **ROBOEX32.DLL**: This file is for on-line help and will be needed only if this is the first time you use Elliott. Therefore, it is very unlikely that you will need this file.
- **BCXL32.DLL**: You will need this file if your application involves barcode printing.
- **BCDR32.DLL**: You will need this file if your application involves barcode printing.

You should make sure the following directory is in your search path:

<COBOL V4.0>\EXEDLL      This directory contains the compiler programs (i.e. f:\cobo\exedll)  
<ELLIOTT V7>              This directory contains Elliott V7 startup programs (i.e. f:\elliott7)

You should also make sure the following environmental variables are set:

Set cobdir=f:\cobo\exedll;f:\cobo\lbr  
Set cobcpy=f:\elliott7\source

To best way to do this is (1) add it to the autoexec.bat file; (2) add it to your network login script; (3) create a batch file to set up the necessary environment.

You should also set up the EL700.CFG file in the startup directory like the following:

```
[Path]
Mdrive=C
Mroot=\ELLIOTT7
Mprog=C:\PROJECT\XYZ;C:\ELLIOTT7;C:\ELLIOTT7\PROGRAMS
Mdata=C:\PROJECT\XYZ;C:\ELLIOTT7\DATA      (optional – can be blank)
Mhelp=
```

This will achieve the same result as DOS by setting environment variables for MPROG and MDATA to point to the directories where programs and data can be found. In this case, EL700.CFG file is under your project directory and you start up Elliott from your project directory.

If you are using EL700U.CFG file, you should also place it in your project directory. As you execute Elliott, the system will find library and data files from the startup directory first. If it can't find them, it will try from the search path in the MDATA and MPROG by the priority sequence.

With the ability to execute Elliott from a search path, you only need to put your modified code, library files and special data files in the project directory and this will significantly reduce the disk space requirement and keep your project directory down to a minimum and effectively manage your custom modifications.

## New API Call

### AP: Get SMA Values

This API returns various values from the Shared Memory Area. For example:

- Move 'AP' To Screen-Parameters
- Move 'EDITOR' To Screen-Literal
- Perform Screen-Routine

This returns the user's preferred Editor in Screen-Alpha-Field.

The following values can be obtained with this API:

- AUTOSKIP
- COMPANY-NAME
- COMPANY-NO (1<sup>st</sup> two digits in Screen-Alpha-Field)
- DOS-USER-ID
- EDITOR
- LOGIN-DATE
- LOGIN-TIME
- LOG-PATH
- HELP-PATH
- MACRO-PATH
- MAX-USERS
- MANIFEST
- MCMD
- MCNTRY
- MDATA
- MDRIVE
- MHELP
- MPROG
- MROOT
- MSYSTEM
- NSI-CFG-PATH
- Elliott-CFG-PATH
- ElliottUSER-CFG-PATH
- Elliott-MAX-USERS
- PROCESS-EVENTS
- PROCESS-ID (Unique nine-digit number identifying the running .EXE)
- REG-ADDR-1
- REG-ADDR-2
- REG-ADDR-3
- REG-COBOL-DEVELOPER
- REG-Elliott
- REG-LIC-NO
- REG-NAME
- ROOT-DIR
- SET-COMPANY-NO (Use 1<sup>st</sup> two digits in Screen-Alpha-Field to set the current Company No and to be returned by the COMPANY-NO API call)
- SHUTDOWN-FLAG
- STARTUP-PATH
- SUPPORT-SEGMENTED-KEYS
- SYSTEM-VERSION
- USE-ED

```

USER-FONT
VERSION
WAVE-PATH
WIN-USER-ID
WIN-VERSION
EXENAME (Find out the current EXE, like EL700.EXE or EL700DP.EXE, etc.)

```

## BT: Bar Text

This API call will set the left text area of the status bar to a Screen-Literal value. For example:

```

Move "BT" To Screen-Parameters.
Move "Hello" To Screen-Literal.
Perform Screen-Routine.

```

This will result in "Hello" being displayed on the left side of the status bar. To clear it, repeat the example above and move spaces to the screen-literal. Since this API only works for Elliott, you should check for the OS type in your program and only do so if you are running under the MS-WINDOWS-OS.

## DI: Device Interface

### Overview

The *DI* API allows for operation of selected serial port devices. As devices are added, this interface will be expanded. Currently, we support the following device with this API call:

Symbol CS 2000 Consumer Scanner

Screen Parameters	Comment
DI,dd,ff,pp	dd = device number: 01 = CS 2000 from Symbol Technologies  ff = function number; different for each device  pp=port number: 01 = COM1 02 = COM2 03 = COM3 04 = COM4  All functions return 'N' in SCREEN-ANSWER if there is a failure, with a negative return code in SCREEN-NUMERIC-FIELD, and an error message in SCREEN-LITERAL
	01 = Initialize the port and return number of barcodes in reader in SCREEN-NUMERIC-FIELD  02 = Return barcode data in SCREEN-AREA for the barcode number identified in SCREEN-NUMERIC-FIELD. The first byte is a barcode type identifier.  03 = Clear memory in the barcode reader.  04 = Restore the Com port. 05 = Power down the barcode reader.

Functions for CS 2000:

Sample Code for Symbol CS 2000 Consumer Scanner Interface:

```

* This is a sample program that will read content on Symbol
* Consumer Scanner CS 2000.
* Run This program by SET MSPL=FIX
Working-Storage Section.

Copy SCREEN.WS.
01 Bc-Cnt                               Pic 999.

Procedure Division.

* Read Number of Barcodes and Value in Screen-Numeric-Field
* The COMM Port will be initialized (& Occupied by this app)
  Move 'DI,01,01,01'                    To Screen-Parameters
  Perform Screen-Routine
* Read and Delete only if interface successful
  If Screen-Answer = "Y"
    Move Screen-Numeric-Field    To Bc-Cnt

* Read Individual Barcode
  Perform varying Screen-Numeric-Field from 1 by 1
    until Screen-Numeric-Field > Bc-Cnt
    or Screen-answer = 'N'
    Move 02                        To Screen-Column
    Perform Screen-Routine
    Display Screen-Literal
  End-Perform
* Delete Scanner Memory
  Move 03                          To Screen-Column
  Perform Screen-Routine
  End-If

* Power down the scanner to save battery
  Move 05 To Screen-Column
  Perform Screen-Routine
* Restore the COMM port so other application can use the COMM
* port
  Move 04 To Screen-Column
  Perform Screen-Routine
  Exit Program
  Stop Run
.

Screen-routine.
  Call 'NWSMSCRN' Using screen-Control
.

```

## EX: Execute a Program

This API call is used to execute an external EXE from inside Elliott. For example, if we wish to launch Elliott Export Processor program from choosing a menu item inside Elliott, then we can utilize this API call as following:

- Put the command (or filename) to be executed in SCREEN-ALPHA-FIELD (e.g., "el700me -e")
- Optionally, enter a start path in SCREEN-LITERAL.
  - If SCREEN-LITERAL is blank, it will use the path from SCREEN-ALPHA-FIELD, if there is one. If the command in SCREEN-ALPHA-FIELD does not contain a path, SMA-STARTUP-PATH is used as the start path.
- If SCREEN-ANSWER is "Y", it will pass the current company number to the process. It does this by using NWSMDLOG environmental variable and this feature is only applicable to the Elliott family EXE.

There is no return information; either the command can be launched or not. If it cannot be launched, Windows will put up an error message.

You can specify EX.2 if you need support for long filenames. If you use EX,2, you must place the entire command in SCREEN-AREA. This option allows for optional command-line arguments. If you specify a filename with one or more embedded spaces, place the filename in quotes.

You can specify EX,3 if you need to specify a filename with no arguments. This option allows you to specify a long filename and/or one with embedded spaces without quotes. This is the preferred option whenever no command-line arguments are specified.

### FA: File Access (Without File Handling)

This API can be used to retrieve an individual field from a specific record in a file without specifying the file in the program and without opening and closing the file. In its simplest form, one can, for example, retrieve a specific customer's name in a single RD API call. Using more API options and multiple API calls, one can list all the customer names in the file. This API is only available for the files that are available using DDF names.

Screen Parameters	Comment
FA,RD,id	<p>Read file and return field value</p> <p>Input:</p> <ul style="list-style-type: none"> <li>Id = package id (optional, SY is default)</li> <li>Passing-Note-File-Name = file, e.g., ARCUSFIL</li> <li>Passing-Note-File-Ref-Number = primary key, e.g. 000100</li> <li>Screen-Alpha-Field = DDF field name, e.g., CUS_NAME</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Screen-Alpha-Field = field value if successful and field is not numeric</li> <li>Screen-Numeric-Field = field value if successful and field is numeric</li> <li>Screen-Answer = "Y" if successful. "N" if not</li> <li>If not successful, Screen-Alpha-Field contains the file status code.</li> </ul> <p>Note:</p> <ul style="list-style-type: none"> <li>If the file is not already opened by a FA,OP call, it will be opened and closed automatically.</li> </ul>
FA,OP,id	<p>Open the file.</p> <p>Input</p> <ul style="list-style-type: none"> <li>Id = package id (optional, SY is default)</li> <li>Passing-Note-File-Name = file, e.g., ARCUSFIL</li> </ul> <p>Output</p> <ul style="list-style-type: none"> <li>Screen-Answer = "Y" if successful. "N" if not</li> <li>If not successful, Screen-Alpha-Field contains the file status code.</li> </ul>
FA,ST,op	<p>Start the file at a specified location</p> <p>Input:</p> <ul style="list-style-type: none"> <li>op can be one of the following: <ul style="list-style-type: none"> <li>= or EQ</li> <li>&gt; or GT</li> <li>&gt;= or GE</li> <li>&lt; or LT</li> <li>&lt;= or LE</li> </ul> </li> <li>Passing-Note-File-Name = file, e.g., ARCUSFIL</li> <li>Passing-Note-File-Ref-Number = primary key, e.g. 000100</li> </ul> <p>Output:</p> <ul style="list-style-type: none"> <li>Screen-Answer = "Y" if successful. "N" if not</li> <li>If not successful, Screen-Alpha-Field contains the file status code.</li> </ul> <p>Note:</p> <ul style="list-style-type: none"> <li>An OP (open) is required before this can call can be made.</li> </ul>
FA,RN	<p>Read next record and retrieve a field value</p> <p>Input:</p> <ul style="list-style-type: none"> <li>Passing-Note-File-Name = file, e.g., ARCUSFIL</li> <li>Screen-Alpha-Field = DDF field name, e.g., CUS_NAME</li> </ul>

	<p>Output:  Screen-Alpha-Field = field value if successful and field is not numeric  Screen-Numeric-Field = field value if successful and field is numeric  Screen-Answer = "Y" if successful. "N" if not  If not successful, Screen-Alpha-Field contains the file status code.</p> <p>Note:  A ST (start) is required before this call can be made.</p>
FA,RP	<p>Read previous record and retrieve a field value</p> <p>Input:  Passing-Note-File-Name = file, e.g., ARCUSFIL  Screen-Alpha-Field = DDF field name, e.g., CUS_NAME</p> <p>Output:  Screen-Alpha-Field = field value if successful and field is not numeric  Screen-Numeric-Field = field value if successful and field is numeric  Screen-Answer = "Y" if successful. "N" if not  If not successful, Screen-Alpha-Field contains the file status code.</p> <p>Note:  A ST (start) is required before this call can be made.</p>
FA,GF	<p>Get another field value from the current record.</p> <p>Input:  Passing-Note-File-Name = file, e.g., ARCUSFIL  Screen-Alpha-Field = DDF field name, e.g., CUS_NAME</p> <p>Output:  Screen-Alpha-Field = field value if successful and field is not numeric  Screen-Numeric-Field = field value if successful and field is numeric  Screen-Answer = "Y" if successful. "N" if not  If not successful, Screen-Alpha-Field contains the file status code.</p> <p>Note:  A RD (read), RN (read next) or RP (read previous) is required before this call can be made.</p>
FA,CL	<p>Close the specified file</p> <p>Input:  Passing-Note-File-Name = file, e.g., ARCUSFIL</p> <p>Output:  Screen-Answer = "Y"</p>

If you only need to get one field value from a file, a single RD call will open the file, retrieve the record, close the file and return the field value.

If you need to get multiple fields from a record, you could do multiple RD calls, or for better performance, you could do an OP call to open the file, an RD call to read the record and return the first field value, one or more GF calls to return additional field values for the same record, and finally a CL call to close the file.

To list records in a file, you need to do an OP call, an ST call, multiple RN calls until Screen-Answer = "N", and finally a CL call.

You may have multiple files open at the same time, currently up to 50.

Note: This API should not be used in situations where high performance is essential, as it takes significantly more CPU cycles to return a field value this way than by doing classic file I/O statements. This API set is intended for situations where performance is not an issue.

## GC: Get Contact

This API call will return the primary contact of a specific reference (customer, ship-to, salesman, etc.) to



the SCREEN-MENU area. You will need to setup the file name and primary key before you make this API call. For example:

```
Move "CPSHPFIL" To Passing-Note-File-Name
Move Ship-To-Key To Passing-Note-File-Ref-Number
Move "GC" To Screen-Parameters
Perform Screen-Routine
If Screen-Menu(70:30) Is Not = Spaces
    Move Screen-Menu(70:30) To Screen-Literal
    Move "DL,16,45,30" To Screen-Parameters
    Perform Screen-Routine
End-If
```

The above code will display the primary contact of a ship-to record starting row 16, column 45. Screen-Menu contains the returned record of SYCONTCT file. For the file layout of SYCONTCT, please refer to copy book SYCONTCT.FD. In this case, contact name is 30 characters long starting from position 70 in SYCONTCT.FD file.

## IN: Input (Change)

The *IN* API has been enhanced to allow the programmer to specify input as a file or folder. When this new option is used, F7 automatically will be available to browse for files or folders as appropriate.

Screen Parameters	Comment
IN,rr,cc,ww,tp	<p>t = F indicates this input field is a filename or a folder. When t = F, p can have the following values:</p> <p>p = F means the file may or may not exist.</p> <p>p = E means the user must input a filename that already exists.</p> <p>p = W means the file should already exist and a warning will be displayed if a new filename is selected.</p> <p>p = N means the file should not already exist and a warning will be displayed if it does.</p> <p>p = P means a folder (path) must be input and it may or may not already exist.</p> <p>p = M means a folder must be input and it must already exist.</p>

The following rules also will apply:

- If the user leaves the field blank, no verification will be done and a blank field will be returned to the application program.
- If a non-required filename is entered (Screen-Type-2 = F or W or N), the folder portion of the filename will be verified and must exist, even though the file does not have to exist.

Examples:

IN,04,04,50,FE will enable Browse for File and, when the user attempts to exit the field, the filename selected or typed will be checked, and, if it does not exist, a message will be displayed, and the user will not be able to complete the IN call until an existing file is selected or the field is blanked out.

IN,04,04,50,FW will enable Browse for File and, when the user attempts to exit the field, the filename selected or typed will be checked, and, if it does not exist, a warning message will be displayed, and the user can move to the next field.

IN,04,04,50,FP will enable Browse for Folder; the Make New Folder button will be available in the Browse for Folder dialog; and there is no validation of the existence of the selected folder.

IN,04,04,50,FM will enable Browse for Folder; the Make New Folder button will not appear on the Browse for Folder dialog; and the user will not be able to leave the field until an existing folder is selected or the field is blanked out.

## OW: Open Window (Change)

The OW API has been enhanced to allow the programmer to specify modality for the new window:

Screen Parameters	Comment
OW,sr,sc,er,ec,m	m = M indicates make this OW window modal. The default is non-modal.

## LF: List Files in a Directory

This API takes a filespec, like C:\WINDOWS\\*.\*, and returns the next file in the specified directory for each successive call.

Screen Parameters	Comment
LF,nn	<p>Input: SCREEN-LITERAL contains the filespec, with wildcards, that will be used for returning matching files.</p> <p>Output: SCREEN-ALPHA-FIELD: contains . the next matching file in the directory, without the directory name. If there is no more matching file, SCREEN-ALPHA-FIELD will return SPACES.</p> <p>SCREEN-NUMERIC-FIELD: contains the size, in bytes, of the returned file.</p> <p>Whenever SCREEN-LITERAL changes, the search will begin again at the beginning of the directory.</p> <p>Nn=99 means terminate the search; even if the next call has the same value in SCREEN-LITERAL as the previous call, the file returned after the nn=99 call will be the first matching file in the directory.</p>

## OL: Open List Window (Change)

### Overview

The OL API has been enhanced to allow the programmer to specify modality for the new window:

Screen Parameters	Comment
OL,sr,sc,er,ec,n	n = N indicates make this OL window non-modal. The default is modal.

## RG: Registry Access

### Overview

The RG API is for the Elliott application program to access the Elliott specific registry area. Elliott application programs can create new registry keys or values in the Elliott area, as well update and read these registries. By default, Elliott registry is stored under [\\HKEY\\_LOCAL\\_MACHINE](#) or [\\HKEY\\_CURRENT\\_USER](#). Then, follow the path of [\\...\\Software\\NETcellent\\Elliott\\7.0](#). Be aware that a user may not have access to the [\\HKEY\\_LOCAL\\_MACHINE](#) registry area. This API allows programs to access the registry in these two areas.

Screen Parameters	Comment
RG,NN,XX,T	<ul style="list-style-type: none"> <li>NN can be RD for read or UP for update</li> <li>XX can be LM stands for <a href="#">\\HKEY_LOCAL_MACHINE</a> or CU stands for <a href="#">\\HKEY_CURRENT_USER</a>.</li> <li>T is the data type.</li> </ul>

Even though Elliott allows various data types for registry values, all data is stored in the registry as a string data type and the Elliott RG API will convert the data back and forth. If you manually edit an Elliott registry value, then you must know the valid data format to avoid causing invalid data.

- D stands for date (formatting into 8 digits numeric of YYYYMMDD). In the registry, it will be stored as MM/DD/YYYY.
- T stands for time (formatting into 6 digits numeric of HHMMSS). In the registry, it will be stored as HH:MM:SS.
- A stands for alpha numeric and convert to upper case.
- L stands for literal and lower case allowed.
- N stand for numeric. The screen-numeric-field can store in any length as it is allowed and with any number of decimals. The value will be converted back and forth accordingly.

If you are reading a string field, the data will be returned to Screen-Alpha-Field. If it is a numeric field, the data will be returned to Screen-Numeric-Field. The same principle applies to Update registry. When you choose to "Update" the registry, if the registry value or key does not exist, then the system will automatically create it for you.

The Screen Literal will be used to store the Registry relative path. The registry will always start from [\\...\\NETcellent\\Elliott\\7.0](#). For example, if the screen literal contains "ItemSearchFilter\\IM\\StatusCode", it means it is looking for Key "ItemSearchFilter", subkey "IM" and value name "StatusCode". It can be as many sub keys you want as long it does not exceed the 80 character limit of Screen Literal.

The Screen Literal must contain a Key, therefore at least one "\\" must be present in Screen Literal. We do not wish to put the registry value directly into the Elliott Registry root. If Screen Literal does not contain "\\", then it is an error condition. The error code will be returned in Screen-Numeric-Field.

When you get an error with the API call, the value of Screen-Answer will be set to "N" and an error code will be returned in Screen-Numeric-Value. The possible error codes include:

- 1: There is no "\\" in Screen Literal.
- 2: The XX (HKEY) value is not CU or LM.

- -3: The NN value is not RD or UP.
- -4: The data type value is not correct.
- -5: The date, time or number is improperly formatted in the Registry
- 2: The requested key/value was not found on a read.
- Other error codes can be found in Windows Developing Reference as described in WINNT.H file.

## RU: Are You Sure (Change)

### Overview

The RU API has been enhanced to allow the specification of a message literal other than "Are you sure?":

Screen Parameters	Comment
RU	Same as before. Message is "Are you sure?"
RU,x	Message is in SCREEN-LITERAL. X = Y or N to specify the default button.

## SH: Set Help

This is not a new API call. However, more options have been provided to this API. Traditionally, you can set the Help ID by using the following:

Move "SH,02" To Screen-Parameters.  
Move "ARCUSMNT" To Screen-Alpha-Field.  
Perform Screen-Routine.

You now have a "PUSH" or "POP" option to construct a Help ID stack with a maximum of 20 deep. For example, in the beginning of your COBOL ARCUSGEN program, input the following lines:

Move "SH,02,PUSH" To Screen-Parameters.  
Move "ARCUSGEN" To Screen-Alpha-Field.  
Perform Screen-Routine.

Before exiting the COBOL program, add the following lines:

Move "SH,02,POP" To Screen-Parameters.  
Perform Screen-Routine.

The screen Help ID will point to "ARCUSGEN" as soon as you do a "PUSH" operation and will restore back to "ARCUSMNT" as soon as you exit "ARCUSGEN" program.

This API will only work in a Windows environment and will be ignored by V6.62 and V6.72 programs (versions released after 3/30/00). The purpose of this API is to provide Windows Help for all programs in Elliott, not just the program that is accessible from the menu.

## SW: Set Workstation

The SW API is called by the Setup program when the workstation ID is changed:

Screen Parameters	Comment
SW	Refreshes the workstation ID on the StatusBar (called by USERPREF).

## TK: Shipment Tracking

This API is used to support on-line shipment tracking in Elliott.

Screen Parameters	Comment
TK,01	Passing a length in numeric field, the system will return the possible shippers (up to 8) in Screen-Area (20 bytes each) and set Screen-Answer to "Y" or "N", according to if a valid shipper was found with the length. The number of shippers found is returned in Screen-Numeric-Field. If the actual number of shippers is greater than 8, it returns the actual number of shippers in Screen-Numeric-Field, even though Screen-Area only returns up to 8 shippers.
TK,02	Passing a Ship Via Code and a Tracking ID, the system will return the final links back. Screen-Answer = "N" means no valid links were found. "Y" means a valid link was found. The Ship Via Code will be passed through Screen-Area. The Tracking ID will be passed through TB-SF-Passing-Parameters. The links will be passed back through Screen-Menu.
TK,03	Passing the Carrier Code and a Tracking ID, the system will return the final links back. Screen-Answer = "N" means no valid links were found. "Y" means a valid link was found. The Carrier Code will be passed through Screen-Area. The Tracking ID will be passed through TB-SF-Passing-Parameters. The links will be passed back through Screen-Menu.
TK,99	Terminated (Close Files).

## TM: TTS Messaging

This internal API is used to temporarily hold DM calls inside a transaction loop. Instead of displaying a DM message and waiting for the user to press OK, the DM message is held in a table until the end of the transaction, when all held DM messages are displayed. This helps prevent unnecessary locking conflicts.

Screen Parameters	Comment
TM,00	Start holding DM messages instead of immediately displaying them. This call is automatically made when TTS is started.
TM,98	Stop holding DM messages and throw away any held messages. This call is automatically made when TTS is aborted.
TM,99	Stop holding DM messages. Display all held messages. This call is automatically made when TTS is ended.

## TP: Temporary Path

This API returns the Windows temporary path in SCREEN-ALPHA-FIELD, or, if a file is passed in SCREEN-LITERAL, the file is returned in SCREEN-ALPHA-FIELD, with the Windows temporary path included.

## TW: Temporary Workstation

This API is used to temporarily change the Workstation ID and then change it back. The primary purpose is to allow application code to manipulate the printer default. Since Elliott chooses a default printer by workstation ID, allowing the application code to manipulate the workstation ID can provide features such

as a different default printer by different location for picking ticket printing.

Screen Parameters	Comment
TW,01	Changes the Workstation ID to the value in SCREEN-ALPHA-FIELD.
TW,02	Restores the Workstation ID to its original value.

## UC: Update Counter

By default, Elliott screen updates will queue 50 display requests and update them in one single batch to speed up display time. The default value of 50 can be changed in the EL700CF.EXE setup program, which will affect all users globally. This behavior works fine under most situations. In some situations, the developer may wish to display a certain status immediately. The developer can change the default Update Counter value by using this API call. For example,

```
MOVE "UC,01,02" TO SCREEN-PARAMETERS
PERFORM SCREEN-ROUTINE
```

The value in Screen-Row means:

01 = Update

99 = Restore Default Value

The value in Screen-Column represents the new update counter value. Under the normal situations, the developer should restore the default value back at the end of its special operation by using the following code:

```
MOVE "UC,99" TO SCREEN-PARAMETERS
PERFORM SCREEN-ROUTINE
```

## WA: Wait

This API call causes Elliott to go to sleep for the number of seconds specified and yields CPU cycles to other processes in the system. This API call is typically used when a record lock is encountered. Instead of immediately trying to read the locked record again, it is suggested the program yield CPU cycles for 1 second with this API call before trying to read the locked record again. This is especially important in the Terminal or Citrix server environment. This API call is currently used in WAIT.PL and INWAY.PL.

Screen Parameters	Comment
WA	Wait for one second
WA,99	Wait for number of seconds as specified in 99.

## WV: Play A Wave File

This API call will play a wave file to give special sound effects that you might want to produce. For example:

```
Move "WV" To Screen-Parameters.
Move "BLIP.WAV" To Screen-Alpha-Field.
Perform Screen-Routine.
```

The Wave file should be in the WAVE subdirectory of the Elliott startup directory (i.e. \Elliott7\WAVE).

## VA: Verify Access to Secure Features

Version 7 of Elliott introduces a new series of security flags to control access by users to specific features in the software. At runtime, the VA,nn API is sent (where nn is a number identifying the security flag) and either "Y" or "N" is returned in SCREEN-ANSWER, indicating whether or not the user has authority to

perform the function. In addition, the security literal is returned in SCREEN-LITERAL.

The VA API will search for a flag setting in the following order:

1. The company-specific record for the user in the SYUSERS file.
2. The company-00 record for the user in the SYUSERS file.
3. The company-wide default setting in NSCTLFIL.

If the record is not found, then the API will continue to the next scenario. The company-specific and company-00 settings for a user can be set using the *Security Setup* menu under *Password Setup* from the *Utilities* menu on the main menu.

The company-wide default settings can be set using the *Global Security Setup* menu under *System* after selecting *Global Setup* under *Utilities* on the main menu.

VA,nn	Verifies whether or not SMA-USER-NAME has access to the feature identified by security flag nn.
	Returns Y or N in SCREEN-ANSWER and the flag name in SCREEN-LITERAL.
VA,00 VA,SM	Clears the NS Control File Cache, called whenever the Company changes. Returns the default Salesman for this user in SCREEN-ALPHA-FIELD
VA,BC	Returns the default Buyer Code for this user in SCREEN-ALPHA-FIELD
VA,pk,prc,nn	Verifies whether or not SMA-USER-NAME has access to the specified menu option, (e.g., VA,AR,MNT,01) where: pk = 2-character package (e.g., CP for Customer Order Processing) prc = process (MNT, INQ, PRC, RPT, UTL) nn = number matching the position within the menu  Returns Y or N in SCREEN-ANSWER

## Adding Additional Flags

To add a new security flag, perform the following steps:

1. Replace the first "undefined" entry in the appropriate section of SECURLIT.WS with the text that will display when the security flags are set in Elliott. The first 20 flags are reserved for system-level programs and should not be modified. The next 60 are reserved for Elliott application-level programs and the remaining are intended for custom modifications. You may also specify a different sort sequence for the order in which the flags are displayed on the security screen (SECURITY-SORT-SEQ) and a default value of "Y" or "N" (SECURITY-DEF-VALUE). When you are done, add 1 to the appropriate 01 TOTAL-... field, probably TOTAL-CUSTOM-SECURITY-NO.
2. Next, compile the following programs:
  - SYSECURS
  - NSCTLMN1
  - SYSECLIT
  - NSCTLINI
3. Finally, build the following libraries:
  - SY700C
  - RU700C

## Caching Considerations

For performance, the company-wide control file is not read for each call. Instead, it is cached until the user specifies a different company or when a VA,00 call is made. This means that default security settings that are changed by a user at one workstation will not affect any other users until those users log

off and back on or change companies.

## VE: Verify Email Address

This API verifies whether or not an email address passed in SCREEN-ALPHA-FIELD follows common rules for email addresses. If it does, SCREEN-ANSWER will return "Y". If it fails, SCREEN-ANSWER will contain "N", and, if it fails due to just a few invalid characters, a suggested email address will be returned in SCREEN-LITERAL.

Note that the rules for valid email addresses are somewhat vague, so this test just implements the most common rules. If the email address fails due a problem with the part of the email address before the "@", and it is a valid email address, you may enclose the portion of the address before the "@" in quotes – that will eliminate any checking of that portion.

Also, if you code "VE,@@", email addresses that begin with"@" and end with "@@" will return "Y" in SCREEN-ANSWER. This allows event variables that represent email addresses to be accepted.

## VS: Verify Supervisor

This API verifies whether or not the current user supervises (directly or indirectly) the user identified in SCREEN-ALPHA-FIELD. SCREEN-ANSWER will contain either "Y" or "N" when the API returns. This API is used throughout Elliott to make sure that a supervisor can access any information recorded by a subordinate.

Note that if you pass the current user in SCREEN-ALPHA-FIELD, SCREEN-ANSWER will contain "Y" when the API returns.

VS	Verifies whether or not SMA-USER-NAME supervises SCREEN-ALPHA-FIELD, either directly or indirectly.
	Returns Y or N in SCREEN-ANSWER.
VS,99	Clears the Supervisor Cache. Called whenever the Company changes

## Caching Considerations

For performance, the supervisor file is not read for each call. Instead, it is cached until the user specifies a different company or when a VS,99 call is made. This means that supervisor relationships that are changed by a user at one workstation will not affect any other users until those users log off and back on or change companies.

## EM: E-Mail

This is a set of API calls introduced after Elliott 6.X.060. Use them collectively. They will send out e-mails through the MAPI interface. Developers who use these API calls do not need to know how MAPI works. The following are the options that you can use with these API calls:

Screen-Parameters	Required/Optional	Comment
-------------------	-------------------	---------



EM,BG,nn,x	Required	<p>Begin E-mail Process</p> <ul style="list-style-type: none"> <li>• This is a required first call to begin the process of sending a message or using the Address Book. It logs on to the mail system. If the mail system is already connected, it uses that connection.</li> <li>• Screen-Column = nn (99 means Quiet mode)</li> <li>• x = M in position 10 of Screen-Control means start using interactive eMail client (MAPI). Note that this replaces the former EM,IN API.</li> <li>• Screen-Literal <ul style="list-style-type: none"> <li>◦ Input Profile Name (opt). If a Profile Name is not supplied, Ini-Prompt-for-Profile is checked to see whether to prompt the user to select a profile or automatically use the system default MAPI profile.</li> <li>◦ Output If the login fails, this will contain an error message.</li> </ul> </li> <li>• Screen-Alpha-Field = Profile Password (opt)</li> <li>• Screen Numeric Field <ul style="list-style-type: none"> <li>◦ Input ParentWindow handle (opt)</li> <li>◦ Output If the login fails, this will contain an error code that matches the error message in the Screen-Literal.</li> </ul> </li> <li>• Screen Answer <ul style="list-style-type: none"> <li>◦ Input "Y" = Display Status Messages on the Parent window's status Bar if supplied in Screen-Numeric-Field, or on the main Elliott StatusBar if not supplied (opt).</li> <li>◦ Output "Y" = MAPI is supported and the logon was successful. "N" = MAPI is not supported or the logon was not successful.</li> </ul> </li> <li>• Screen-Column = '99' signifies Quiet Mode (opt). Error messages are suppressed and the default profile is automatically used if one is not specified.</li> </ul>
EM,RR	Optional	<p>Return Receipt Requested (7.4E only)</p> <ul style="list-style-type: none"> <li>• Screen-Answer = "Y" = Request a return receipt.</li> <li>• Screen-Answer = "N" = Do not request receipt.</li> </ul>
EM,CA	Optional	<p>Clear Address (7.4E only)</p> <p>Clear any address sent so far. This is automatically done when a 'BG' call is made.</p>

EM,MA	Optional	<p>Maximum Number of Addresses (7.4E only)</p> <ul style="list-style-type: none"> <li>• The default is 100 if this API is not sent</li> <li>• Screen-Numeric-Field = Total Number of Addresses for TO, CC and BC.</li> <li>• Value under 100 will be ignored</li> <li>• This call can only be sent once and must precede any other address calls (TO, CC, BC).</li> </ul>
EM,TO	Required	<p>To Address or Name</p> <ul style="list-style-type: none"> <li>• Screen-Literal = Recipient Name or Address</li> <li>• Menu-Control = Address ID returned from GA or RN call</li> <li>• Screen-Numeric-Field = Length of Address ID</li> <li>• At least one e-mail address is required</li> <li>• You can execute this API call multiple times to send to multiple recipients. This is subject to the maximum email addresses allowed. The default is 100.</li> </ul>
EM,CC	Optional	<p>Carbon Copy (CC) Address or Name</p> <ul style="list-style-type: none"> <li>• Screen-Literal = CC Recipient Name or Address</li> <li>• Menu-Control = Address ID returned from GA or RN call</li> <li>• Screen-Numeric-Field = Length of Address ID</li> <li>• You can execute this API call multiple times. It is subject to the maximum e-mail addresses allowed.</li> </ul>
EM,BC	Optional	<p>Blind Carbon Copy(BCC) Address or Name</p> <ul style="list-style-type: none"> <li>• Screen-Literal = BCC Recipient Name or Address</li> <li>• Menu-Control = Address ID returned from GA or RN call</li> <li>• Screen-Numeric-Field = Length of Address ID</li> <li>• You execute this API call multiple times. It is subject to the maximum e-mail addresses allowed.</li> </ul>
EM,RN	Optional	<p>Resolve Name. It is used to resolve a possibly ambiguous name (7.4E only)</p> <ul style="list-style-type: none"> <li>• Input Screen-Literal = recipient name Screen-Numeric-Field = optional window handle of calling program</li> <li>• Output Screen-Literal = resolved name Menu-Control = Address ID from AddressBook Screen-Numeric-Field = Length of Address ID</li> </ul> <p><b>Note: This function will be removed in v7.7.</b></p>

EM,AD	Optional	<p>Show Address Book (7.4E only)</p> <ul style="list-style-type: none"> <li>The API call the address book facility to change the address</li> <li>Input Screen-Literal = Optional caption for the address dialog.</li> <li>Output Screen-Numeric-Field = Total number of addresses</li> <li>After this API, use the EM,GA API repeatedly until you have processed all the addresses the user selected.</li> </ul>
EM,GA	Optional	<p>Get Address (7.4E only)</p> <ul style="list-style-type: none"> <li>This API gets the next address returned from the address book facility.</li> <li>Output Screen-Answer = "Y" means an addressee was returned. "N" means no addressee returned. Screen-Literal = Addressee name Screen-Alpha-Field = 'FR' means a "From" name returned. 'TO' means a "To" name returned. "CC" means a "CC" name returned. "BC" means a "BCC" name returned. Menu-Control = Address ID from AddressBook Screen-Numeric-Field = Length of Address ID</li> </ul>
EM,SB	Optional	<p>Subject</p> <ul style="list-style-type: none"> <li>Screen-Literal = Subject</li> </ul>
EM,AT	Optional	<p>Attached File</p> <ul style="list-style-type: none"> <li>Screen-Area = Complete Path and File Name **Note that the path is required and the attached file must exist.</li> <li>Screen-Function-Values = Visible filename (opt) If this area is used, the name of the file which will be visible to the recipient will be the value here followed by .TXT.</li> <li>May be called up to 100 times per e-mail</li> </ul>
EM,TX	Optional	<p>Text Content of the Body of The E-mail</p> <ul style="list-style-type: none"> <li>Screen-Area = Text Line</li> <li>Screen-Area is a 160 bytes area with Screen-Literal make up the first 80 bytes and Screen-Alpha-Field make up the last 80 bytes</li> <li>Screen-Numeric-Field = number of characters in the line to include. If Screen-Numeric-Field = Zeroes and Screen-Area is blank, a new-line character (X"0a") will be provided.</li> <li>You may call this API multiple times to construct a multi-line E-mail body.</li> <li>The message body can't exceed 1 MB.</li> </ul>

EM,AB	Optional	<p>Abort the E-mail</p> <ul style="list-style-type: none"> <li>• Abort constructing the current e-mail. The System will release all resources allocated for the current e-mail that is being constructed.</li> <li>• The message and all its characteristics are ignored.</li> <li>• Use only after a successful "EM,BG". You do not need to use this API if "EM,BG" was not executed successfully.</li> </ul>
EM,SE	Required	<p>Send E-mail Message</p> <ul style="list-style-type: none"> <li>• Returns 'Y' in Screen-Answer if the message was successful. Receiving 'Y' does not guarantee the e-mail is sent. It simply indicates that MAPI has accepted the e-mail, (i.e. e-mails may not sent because MAPI may not be able to connect to the e-mail transport server). <ul style="list-style-type: none"> <li>◦ Screen-Numeric-Field will contain 0 if the message was sent; 1 if the message was cancelled by the user.</li> </ul> </li> <li>• Return 'N' in Screen-Answer if the message was not successful <ul style="list-style-type: none"> <li>◦ Screen-Numeric-Field will contain an error code</li> <li>◦ Screen-Literal will contain an error message.</li> </ul> </li> </ul>
EM,EX	Required	<p>Exit E-Mail and Disconnect from E-mail Services</p> <ul style="list-style-type: none"> <li>• This does a logoff from the mail system.</li> <li>• This is automatically called by ElliottSCRN at shutdown.</li> <li>• Follow this call with Cancel "ElliottMAPI".</li> <li>• Since the login process may be time consuming in certain environments, you may not want to call this API until all e-mails are sent. However, you should make this call as soon as possible after you are done sending e-mails.</li> </ul>

**Example:**

```

MOVE "EM,BG" TO SCREEN-PARAMETERS.
PERFORM SCREEN-ROUTINE.
IF SCREEN-ANSWER = "N"
    PERFORM NO-MAPI-SUPPORT-MSG
    EXIT PARAGRAPH
END-IF.

```

```

MOVE "EM,TO" TO SCREEN-PARAMETERS.
MOVE "sales@netcellent.com" TO SCREEN-ALPHA-FIELD.
PERFORM SCREEN-ROUTINE.

```

```

MOVE "EM,SB" TO SCREEN-PARAMETERS.
MOVE "Sales Promotion" TO SCREEN-LITERAL.
PERFORM SCREEN-ROUTINE.

```

```
MOVE "EM,TX" TO SCREEN-PARAMETERS.
MOVE "Dear Business Partner:" TO SCREEN-AREA.
PERFORM SCREEN-ROUTINE.
```

```
MOVE "EM,TX" TO SCREEN-PARAMETERS.
MOVE "There's a sales promotion going on at NETcellent."
    TO SCREEN-AREA.
PERFORM SCREEN-ROUTINE.
```

```
MOVE "EM,SE" TO SCREEN-PARAMETERS.
PERFORM SCREEN-ROUTINE.
IF SCREEN-ANSWER = "Y"
    PERFORM MESSAGE-SENT
ELSE
    PERFORM MESSAGE-NOT-SENT
END-IF.
```

If you need more examples of source code, please contact NETcellent. "EL700MAIL.CBL" can be provided to NETcellent's developers with more detail to show you how to construct your own e-mail program.

## Error Handling

Any Invalid E-mail API calls will result in a message box on the screen and 'N' in the SCREEN-ANSWER field. However, the process will continue. For example, specifying too many recipients will result in a message box display, but the message may still be sent with the EM,SE call.

Depending on your situation, it might be desirable for you to write your code to check if SCREEN-ANSWER is equal 'N' to determine if the situation needs special handling by the code.

## Setting E-mail Values While Printing

It is possible to manipulate the values of an e-mail message during the process of sending print lines to the output file, assuming that the output is destined for an e-mail message.

To change an e-mail value, do the following:

- Add the following COPY statements to your program:

```
Copy SetEmail.WS.
Copy SetEmail.PL.
```

- MOVE a value type as follows TO DETAIL-LINE:

TO	A primary recipient
CC	A carbon copy recipient
BC	A blind carbon copy recipient
SB	The subject line
TX	A line of text in the message body

- MOVE the value itself TO DETAIL-LINE(4:)
- PERFORM SET-EMAIL-OPTION

## Notes

1. You may specify as many TO, CC, and BC values as you wish.
2. The presence of any TO, CC or BC value means that all the original recipients will be replaced by the new recipient(s).
3. You may specify as many TX values as you wish. Each value will be followed by a CR/LF.
4. The presence of any TX value means that all the original text in the message body will be replaced by the new text.
5. The SET-EMAIL-OPTION paragraph will MOVE SPACES TO DETAIL-LINE after calling PRINT30 or PRINT240.
6. If the user specifies output should go to the printer or to disk, these COBOL statements will be ignored.

## EC: Encode

This API encodes a string in one of two ways:

- EN,01 Takes the string in Screen-Literal and encodes it using a secure algorithm. Specify the length of the string to encode in Screen-Numeric-Field. The encoded string is returned in Screen-Alpha-Field and the encoded string will be twice as long as Screen-Numeric-Field.
- EN,02 Takes the string in Screen-Literal and encodes it using a simpler algorithm that returns the encoded string in Screen-Alpha-Field. The encoded string is the same length as the input string.

NOTE: Application programs can use this API to encode a string. However, there is no API to decode a string that has been encoded with this API. Decoding of these strings is handled by the system layer.

## EV: Event Handling

This is a set of API calls introduced after Elliott 6.X.060 for 32-bit only. They provide the ability to register and trigger events that can cause subsequent actions to take place automatically (e.g., a receipt triggering an e-mail). SCREEN.WS and SCREENL.WS were modified to redefine SCREEN-AREA with EVENT-AREA, where event parameters can be passed.

In order for event handling to take place, it must be enabled in your registration file and turned on in your NSI control file.

The following are options that you can use with these API calls:

Screen-Parameters	Required/Optional	Comment
EV,BG	Required	Begin event handling. <ul style="list-style-type: none"> <li>• This is a required first call to begin the process of registering and triggering events.</li> <li>• This call is automatically taken care of whenever the Company number is set in Elliott.</li> </ul>
EV,RE,01	Required	Registers an event. <ul style="list-style-type: none"> <li>• Event-Program = the calling program ID</li> <li>• Event-Type = the event type</li> <li>• Event-Detail-File = the file this event is for</li> </ul>

		<p>(opt)</p> <ul style="list-style-type: none"> <li>• Event-Desc-or-Ref = the event description</li> <li>• Event-Detail-ID(1) = Name of 1st variable (opt)</li> <li>• Event-Detail-ID(2) = Name of 2<sup>nd</sup> variable (opt)</li> <li>• Event-Detail-ID(3) = Name of 3rd variable (opt)</li> <li>• Event-Detail-ID(4) = Name of 4th variable (opt)</li> <li>• Event-Detail-ID(5) = Name of 5<sup>th</sup> variable (opt)</li> </ul>
EV,RE,02	Optional	<p>Specifies additional variable names</p> <ul style="list-style-type: none"> <li>• Event-Detail-ID(1) = Name of 6th variable (opt)</li> <li>• Event-Detail-ID(2) = Name of 7th variable (opt)</li> <li>• Event-Detail-ID(3) = Name of 8th variable (opt)</li> <li>• Event-Detail-ID(4) = Name of 9th variable (opt)</li> <li>• Event-Detail-ID(5) = Name of 10th variable (opt)</li> </ul>
EV,TR	Optional	<p>Triggers a generic event (one with no parameters)</p> <ul style="list-style-type: none"> <li>• Event-Program = the calling program ID</li> <li>• Event-Type = the event type</li> <li>• Event-Detail-File = the file this event is for (opt)</li> <li>• Event-Desc-or-Ref = the file reference</li> </ul> <p>On output, Screen-Parameters is formatted as &amp;&amp; &lt;program&gt; &lt;type&gt; as defensive coding; see Notes, below.</p>
EV,TR,nn,mm,tt	Optional	<p>Triggers an event with a passed variable.</p> <ul style="list-style-type: none"> <li>• Event-Program = the calling program id</li> <li>• Event-Type = the event type</li> <li>• Event-Detail-File = the file this event is for (opt)</li> <li>• Event-Desc-or-Ref = the file reference</li> <li>• Screen-Alpha-Field or Screen-Numeric-Field = the passed variable <ul style="list-style-type: none"> <li>○ nn indicates the variable number</li> <li>○ mm indicates the maximum display length</li> <li>○ tt indicates the normal Screen-Types for formatting the variable.</li> </ul> </li> </ul>
EV,TR,99	Optional	<p>Signals that the triggered event is complete. This must follow any EV,TR,nn,mm,tt calls.</p> <p>On output, Screen-Parameters is formatted as &amp;&amp; &lt;program&gt; &lt;type&gt; as defensive coding; see Notes, below.</p>

EV,PR	Optional	Begins processing queued events. This happens automatically, whenever the 'SH' call (to set the Help-ID) is processed. It also may be called explicitly, for example, at the end of the Closing-Procedure in a program, to make sure queued requests are processed immediately.
EV,R*	Optional	Reprocesses all or specific queued requests that previously terminated with an error. <ul style="list-style-type: none"> <li>Screen-Literal = a specific WorkStation or blank, meaning all WorkStations</li> <li>Screen-Alpha = 'E' for E-mail events, 'T' for Tickler events, 'C' for all COBOL programs, 'C:programe' for a specific COBOL program, or blank for all events.</li> </ul>
EV,EX	Required	Terminates event handling in an application. <ul style="list-style-type: none"> <li>This is a required last call.</li> <li>This call is automatically taken care of whenever the Company number is set in Elliott.</li> </ul>
EV,VE		Verifies whether or not SMA-USER-NAME has access rights to the Event Key (Program passed in EVENT-PROGRAM and Type passed in EVENT-TYPE). Returns Y or N in SCREEN-ANSWER.

**Example:**

## Register-Receipt-Event.

Move 'EV,RE,01'	To Screen-Control
Move 'PO2002'	To Event-Program
Move 'RECVITEM'	To Event-Type
Move 'Receive Item'	To Event-Desc-or-Ref
Move 'Item'	To Event-Literal(1)
Move 'Desc 1'	To Event-Literal(2)
Move 'Desc 2'	To Event-Literal(3)
Move 'Qty Received'	To Event-Literal(4)
Move 'Qty on Hand'	To Event-Literal(5)
Perform Screen-Routine	

Move 'EV,RE,02'	To Screen-Parameters
Move 'Location'	To Event-Literal(1)
Move 'Allocated'	To Event-Literal(2)
Move 'Back Ordered'	To Event-Literal(3)
Perform Screen-Routine	
.	

## Trigger-Receipt-Event.

Move 'EV,TR,01'	To Screen-Control
Move 'PO2002'	To Event-Program
Move 'RECVITEM'	To Event-Type
Move Item-No	To Event-Desc-or-Ref
Move Item-No	To Screen-Alpha-Field
Perform Screen-Routine	

Move 'EV,TR,02,30,L'	To Screen-Parameters
Move Item-Description-1	To Screen-Alpha-Field



```

Perform Screen-Routine

Move 'EV,TR,03,30,L'      To Screen-Parameters
Move Item-Description-2   To Screen-Alpha-Field
Perform Screen-Routine

Move 'EV,TR,04,13,3-'     To Screen-Parameters
Move Rec-Trx-Qty-Received To Screen-Numeric-Field
Perform Screen-Routine

Move 'EV,TR,05,13,3-'     To Screen-Parameters
If Item-Mfging-Location = Rec-Trx-Location
    Move Item-Quantity-On-Hand
                                To Screen-Numeric-Field
Else
    Move Inv-Loc-Qty-On-Hand
                                To Screen-Numeric-Field
End-If
Perform Screen-Routine

Move 'EV,TR,06,13,3-'     To Screen-Parameters
If Item-Mfging-Location = Rec-Trx-Location
    Move Item-Quantity-Allocated
                                To Screen-Numeric-Field
Else
    Move Inv-Loc-Qty-Allocated
                                To Screen-Numeric-Field
End-If
Perform Screen-Routine

Move 'EV,TR,07,02,A'      To Screen-Parameters
Move Rec-Trx-Location     To Screen-Alpha-Field
Perform Screen-Routine

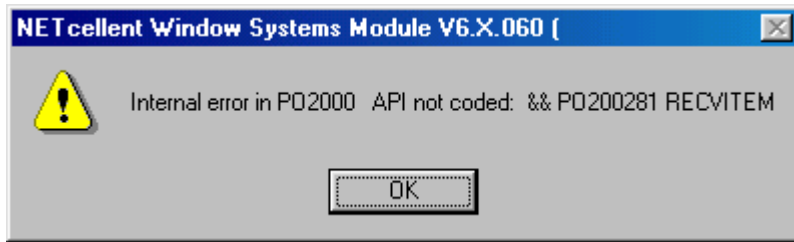
Move 'EV,TR,08,13,3-'     To Screen-Parameters
If Item-Mfging-Location = Rec-Trx-Location
    Move Item-Qty-BO       To Screen-Numeric-Field
Else
    Move Inv-Loc-Qty-BackOrdered
                                To Screen-Numeric-Field
End-If
Perform Screen-Routine

Move 'EV,TR,99'           To Screen-Control
Perform Screen-Routine
.

```

## Notes

When an event trigger is complete, the Screen-Parameters area is set as described above, as defensive coding. If the program does not update Screen-Parameters before performing the next Screen-Routine, a message similar to the following will occur:



This is an indication to the programmer that the API for triggering the event is in the middle of a loop where Screen-Parameters is not updated each time Screen-Routine is performed.

### Performance Considerations

Event processing presents very powerful capabilities, but it also can use significant resources. One can easily imagine a typical Elliott session automatically generating hundreds of events. Great care has been taken to minimize the performance impact of these events. In particular, extensive caching of different kinds are used:

- Registration events are cached on an as-needed basis.
- Generic trigger requests are cached in their entirety when the event handler first loads. This means the generic trigger requests added after startup will not be recognized until the next startup or company change.
- Specific trigger events are cached on a read-ahead basis as each Program/Type combination is first encountered, unless the number of outstanding requests for a particular Program/Type combination (e.g., PO2000/RECVITEM) exceeds the cache limit, set in EL700.CFG:

```
[Configuration]
Event-Cache-Max=100
```

It may be necessary to adjust this number, which defaults to 100, to maximize performance.

- See Event Logging in the **Debugging** section below to track activity and timing of event handling.

### Debugging

Event logging can be specified for a particular user by adding the following entry in EL700.INI in your C:\WINDOWS directory:

```
[Debug]
Log-Events=Yes
```

This produces a file, LOGEVENT.LOG, in the log directory showing the details of event registering, triggering and queuing during an Elliott session, as well as the total number of seconds spent in event processing code.

Normally, the event processing window is visible for a very short time. It is possible to have this window stay visible longer by adding the following entry in EL700.INI:

```
[Debug]
Events-Delay=nn
```

Where *nn* is a number from 1 to 99, indicating the length of the delay in seconds.

This keeps the event processing window on the screen for the specified number of seconds.

**TB: ToolBar**

TB,00	Clear the Amigo key information. Set the state and color of the amigo bitmaps.
TB,01	Set the Amigo key information from PASSING-NOTE-FILE-NAME and PASSING-NOTE-FILE-REF-NUMBER. Set the state and color of the amigo bitmaps.
TB,10	Remove a special function.
TB,11	Add a special function. It stays available until it is removed.
TB,20,nn	Disable a specific Amigo ToolBar button.
	nn: 01=Note; 02=Attribute; 03=Contact; 04=Event; 05=Link.
TB,21,nn	Enable a specific Amigo ToolBar button and optionally specify a special PASSING-NOTE-FILE-NAME and PASSING-NOTE-FILE-REF-NUMBER.
	nn: 01=Note; 02=Attribute; 03=Contact; 04=Event; 05=Link.
TB,31,nn,xx	Call the Amigo program identified by nn, using PASSING-NOTE-FILE-NAME and PASSING-NOTE-FILE-REF-NUMBER.
	nn: 01=Note; 02=Attribute; 03=Contact; 04=Event; 05=Link. xx: Blank or 01 = Start the specific program; 10 = Start the specific program only if at least one Amigo record exists.
TB,98	Delete all associated amigo records for the current amigo.
TB,99	Delete all associated amigo records for the amigo specified in PASSING-NOTE-FILE-NAME and PASSING-NOTE-FILE-REF-NUMBER.

**CO: Contacts**

The CO APIs provide a convenient way to process contact information during transaction entry and batch programs. In general, a CO,00 call is made to identify the target (e.g., a sales order) of any following CO calls. Then, one or more CO,01 calls are made to identify sources (e.g., the customer, the salesman). Then a CO,10 call can be made to determine the default contact and copy it to the target or a CO,12 call can be made to copy all the contacts from the source(s) to the target – in both cases making the contact button on the ToolBar “hot”. In batch mode, a CO,11 call can be made to copy the default contact to the target and optionally create a new contact from the contact name in SCREEN-LITERAL and the e-mail address in SCREEN-ALPHA-FIELD. Additional CO calls are documented below.

CO,00	Set target contact from PASSING-NOTE-FILE-NAME and PASSING-NOTE-FILE-REF-NUMBER
CO,01,xx	Set source contact. This API can be called up to 10 times to add 10 sources.
	xx = P means this is a primary source (check first for default contact).

	xx = PA means copy all contacts for this primary source when processing CP,10 or CP,11.
	xx = S means this is a secondary source.
	xx = Y means copy the primary contact for this source in addition to any default contact(s) when processing CO,10 or CO,11.
	xx = YA means copy all contacts for this source in addition to any default contact(s) when processing CO,10 or CO,11.
	x = N means do not copy this contact.
CO,10	Copy default contact from source(s) to target.
CO,11	Copy default contact from source(s) to target in batch mode.
	If SCREEN-ALPHA-FIELD is not blank, it is used as the default contact and the contact will be created, if necessary. In that case, SCREEN-LITERAL will be used for the new contact's name.
CO,12	Copy all contacts from source(s) to target.
CO,20	Discontinue updating the contact on the screen (previously set by CO,21).
CO,21,rr,cc,ll	Display the default contact on the screen at row rr, column cc, for length ll. Continue to update the screen whenever the contacts for the target record are updated until a TB,00 or a CO,20 call is made.
CO,30	Return the default contact information for the contact identified in PASSING-NOTE-FILE-NAME and PASSING-NOTE-FILE-REF-NUMBER.
	Upon return, SCREEN-ALPHA-FIELD will contain the e-mail address, SCREEN-LITERAL will contain the name, and SCREEN-NUMERIC-FIELD will contain the contact-ID. If no contact is found, these fields will contain SPACES or ZEROES as appropriate.
CO,99	Delete all contacts from the target.

## LK: Links

Default links are established by the *TB* calls. The *LK* APIs provide additional links functionality.

LK,00	Launch the Link whose type is in SCREEN-ALPHA-FIELD.
LK,01	Add a temporary link. SCREEN-ALPHA-FIELD contains the type. SCREEN-MENU Contains the Template which may or may not contain variables of the format @@VARn@.
LK,02,nn	Modify the temporary link (previous LK,01 call). SCREEN-ALPHA-FIELD contains the type. nn = the variable number to replace. SCREEN-LITERAL contains the value for the specified variable.
LK,91	Add a permanent link; otherwise, just like LK,01.
LK,92,nn	Add a permanent link; otherwise, just like LK,02,nn.
LK,99	Remove a permanent link created by LK,91 and LK,92. SCREEN-ALPHA-FIELD contains the type.

## TK: Tracking

The TK APIs will provide shipping tracking information.

TK,01	Passing a length in SCREEN-NUMERIC-FIELD, the system will return the possible Shippers (up to 8) in SCREEN-AREA (20 bytes each) and set the SCREEN-ANSWER TO "Y" or "N" based on if a valid shipper was found with the length. The number of shippers found is stored in SCREEN-NUMERIC-FIELD. If the actual number of shippers is greater than 8, return the Actual Number of Shippers so we can potentially tell the user that there is an overrun situation.
TK,02	Passing Ship Via Code and a Tracking ID, the system will return the final links back. SCREEN-ANSWER = "N" means no valid links were found. "Y" means a valid link was found. Ship Via Code will be passed through SCREEN-AREA. The Tracking ID will be passed through TB-SF-PASSING-PARAMETERS. The link will be passed back through SCREEN-MENU.
TK,03	Passing Carrier Code and a Tracking ID, the system will return the final links back. SCREEN-ANSWER = "N" means no valid links were found. "Y" means a valid link was found. Carrier Code will be passed through SCREEN-AREA. Tracking ID will be passed through TB-SF-PASSING-PARAMETERS. The link will be passed back through SCREEN-MENU.
TK,04	Terminated (Close Files).

## EX: Execute an EXE program

The EX API call provides a way for Elliott to launch another EXE inside of the Elliott program. You can use this API call to launch a custom program you developed or an existing Windows application EXE. You may also use EX API to start up a document and let system launch its default application program. To use the "EX" API call, follow the following steps:

- Put the command (or filename) to be executed in SCREEN-ALPHA-FIELD (e.g., "el700me -e").
- Optionally, enter a start path in SCREEN-LITERAL.
  - If SCREEN-LITERAL is blank, it will use the path from SCREEN-ALPHA-FIELD, if there is one. If the command in SCREEN-ALPHA-FIELD does not contain a path, SMA-STARTUP-PATH is used as the start path.
- If SCREEN-ANSWER is "Y", it will pass the current company number to the process (EXE conforms to the Elliott Startup process only).
- If your command line is longer than 80 characters, use "EX,2" instead, and you may use SCREEN-AREA, which is 160 characters, instead of SCREEN-ALPHA-FIELD, for the command. If you use the "EX,2" format, you cannot use SCREEN-LITERAL to specify the start path, as SCREEN-LITERAL is part of SCREN-AREA.

There is no return information; either the command can be launched or not. If it cannot be launched, Windows will put up an error message. The following is an example of this API Call:

```
MOVE "EX" TO SCREEN-PARAMETERS.  
MOVE "EL700ME -e" TO SCREEN-ALPHA-FIELD.  
MOVE SPACES TO SCREEN-LITERAL.  
MOVE "Y" TO SCREEN-ANSWER.  
PERFORM SCREEN-ROUTINE.
```

Below is an example of startup a CSV file and let system launch the default application for CSV (probably Excel). The "HY" (Hibernation) call will stop Elliott become the front application so the spreadsheet won't go to background:

```
MOVE "EX" TO SCREEN-PARAMETERS.  
MOVE "ABC.CSV" TO SCREEN-ALPHA-FIELD.  
MOVE "M:\ELLIOTT7\DATA\" TO SCREEN-LITERAL.  
PERFORM SCREEN-ROUTINE.  
MOVE "HY" TO SCREEN-PARAMETERS.  
PERFORM SCREEN-ROUTINE.
```

## YN: Get Yes or No Response to a Question

This API is similar to the RU API, except that the entire SCREEN-AREA is used for the text of the question, allowing for questions longer than 80 characters. Put "Y" in SCREEN-ANSWER if you want the question to default to "Yes" or "N" if you want the question to default to "No". SCREEN-ANSWER is returned with "Y" or "N", depending on the user's response.

## File Handling

Elliott V7 uses PSQL 2000 (and higher) databases. The following are some issues you should be aware of:

## TTS Support

TTS stands for Transaction Tracking System. It is a terminology used with Novell Netware® servers. TTS allows multiple updates to either all go through successfully or not go through at all if any one of the updates fail. This process of the operation can be broken down into three steps:

- Start Transaction
- Updates
- End Transaction/Abort Transaction

Once the transaction is started, the server will keep a roll back copy for each one of the update operations. If all updates are successful, then the application will issue an "End Transaction" to signal the server that all updates were successful. The server will release the roll back copy and make the update final. If for any reason the update fails, the application will issue an "Abort Transaction" command. Sometimes, after logging into the system, it will get a roll back copy and restore the system to the status right before the "Start Transaction" operation.

TTS support is important for Elliott and Elliott posting functions. If you turn on TTS, then during the posting process the system (file handler) will not lock files exclusively. The protection provided by TTS makes this unnecessary. This will allow on-line posting which is a great improvement from either overnight posting or having all users logout when you post.

Pervasive PSQL, 2000 and higher, provides excellent transaction support. With the Pervasive PSQL

database, you do not need to declare the files in a transaction set. From the point you declare "Start Transaction", the system automatically keeps a roll back copy for all updates for that connection. Once you declare "End Transaction", the system will make the update final and release the roll back copy. However, you cannot open or close a file during a transaction set.

One of the issues you should be aware of is a transaction set should not be too large. If you have thousands of records that need to be updated in a single transaction set, you should consider redesigning your program. The rolling back of data will usually work well if the number of updates is in the hundred range. However, as the transactions become larger, the roll back operation becomes very inefficient and may eventually crash your server when all resources are depleted. The following are few examples:

- G/L Year End Closing
- I/M Physical Count Posting
- COP Invoice with thousands of serial numbers on one invoice
- I/M or P/O transaction with thousands of serial numbers on one transaction

By design, these operations cannot be further subdivided into smaller operations. However, if you have a custom program that posts orders, you should start the transaction at the beginning of each order and end the transaction once an order is posted. The wrong way of writing your code would be to start the transaction with the opening procedure and ending the transaction with the closing procedure.

## Number of Open Files:

Elliott V7.0 can support up to 100 Btrieve files open simultaneously.

## Support Additional Keys:

If you decide to introduce a new key to a file, you can do so without recompiling all programs that need to access this file. This is true of Btrieve databases only. For example, if you decide that you need to add a key to the customer file zipcode field, all you have to do is the following:

1. Modify ARCUSFIL.SL to indicate Customer-Zip-Code is a key file with Duplicate values.
2. Recompile ARFILES.CBL and build the new ARPROGED.LBR file.
3. Install ARPROGED.LBR file and initialize A/R Customer File. (If you need to keep the original data, you can export the ARCUSFIL file first and import it after initializing ARCUSFIL.)

Now the customer file has the new index for Customer-Zip-Code. Even though you did not recompile the ARCUSMNT.CBL program, you still will be able to maintain the customer record.

## Segmented Keys

Elliott supports segmented keys in Btrieve which is required for supporting ODBC. All Elliott databases do not use segmented keys by default. However, if you need to use other tools to access Elliott Btrieve files, it is very likely you need to use a Btrieve database and the keys for each data file must be segmented as defined in the DDF. Otherwise, your tools may not produce the right results. This is especially true with ODBC type applications.

All new Btrieve data files created by Elliott V6.6/V6.7 DOS will be in a non-segmented key format. To convert non-segmented key Btrieve data files to segmented key format, you need to use the SQL2BTR.EXE utility provided with Elliott by NETcellent. Make sure all DDF files (\*.DDF, found in the \Elliott\DDF directory) have been copied to the DATA directory. By placing the SQL2BTR.EXE program under your \Elliott directory, execute the following commands for conversion:

## BLOAD SQL2BTR DATA

This will convert your DATA directory files from non-segmented key format to segmented keys. Once the file is in segmented key format, Elliott will support it for all I-O, Input and Output operations. Therefore, the only time you ever need to use the SQL2BTR utility is when you use DOS to create a new company.

With Elliott, the system can create new files in segmented key format. You need to make sure to check the flag "Support Segmented Keys Through DDF" at configuration time (EL700CF.EXE). You can only enable this flag if the system can find DDF files in the \Elliott\DDF directory (or whatever your root directory \DDF sub-directory is). If you wish to place DDFs in a different directory, you can also put the following line in your EL700U.CFG file:

```
[Path]  
Mddf=path-name
```

To support ODBC, depending on your application, you may also need to copy DDFs to your data directory. Your best approach will be to turn on Segmented Key Support and initialize data files only in Elliott.

## Non-Supported Operations

Not all operations supported by Micro Focus file handlers are supported by Elliott Btrieve file handlers. For example, if you have the following line in your COBOL code:

```
DELETE FILE ...
```

Then you will receive the following message:

```
File Operation Not Implemented, Oper=0008
```

In the DOS environment, the Btrieve file handler will simply ignore this line of code and will not do anything. In Elliott, the system will give you the above warning message and you can continue with your operation.

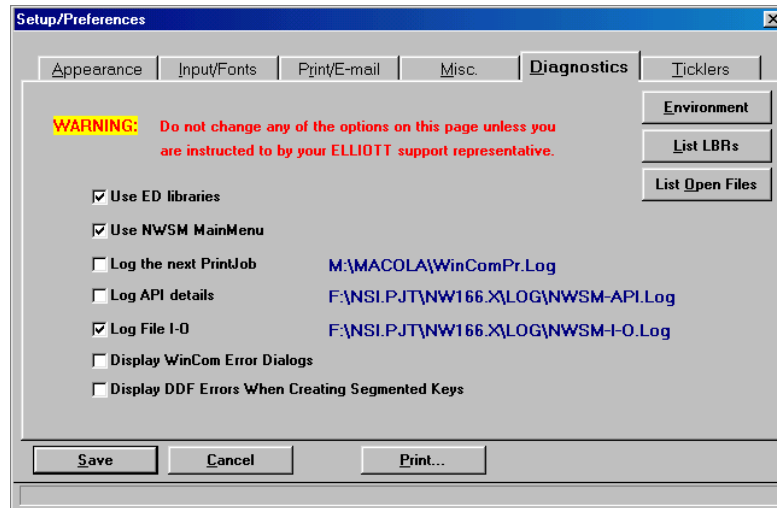
The best suggestion for you is to avoid using any file operation that is not supported by the Elliott Btrieve file handler. If you wish to delete a file, you can use the COBOL call by reference function call, "CBL\_DELETE\_FILE". This will achieve the same result.



## Problem Diagnosis

### Diagnostic Tools

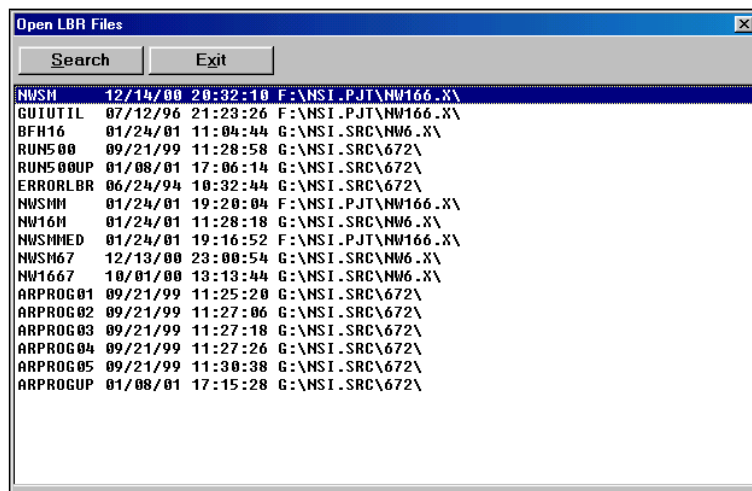
The diagnostic tools can be found under the “Setup Preference” tool button (or Ctrl-S) by choosing the “Diagnostics” tab. The following is how the screen looks:



### List Open LBRs

Clicking on this button, or pressing **Ctrl-Shift-L**, on any screen will display a window that lists all currently open library files with the path, date, time and size. This is helpful to answer the following questions:

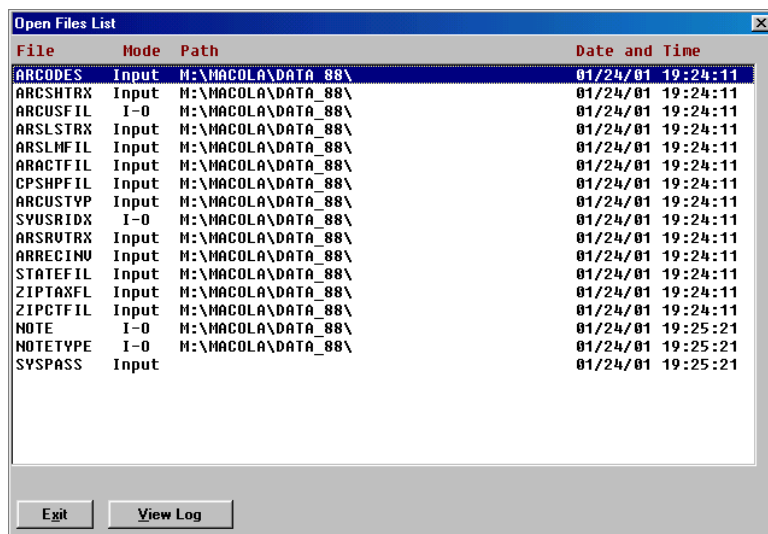
- Are users running an older version of Elliott?
- Are users running other developers' ED library files?



## List Open Files

Clicking this button or pressing **Ctrl-Shift-O** on any screen will display a window to list all currently open data files, with the open mode, path and open date and time. This can be used to get an overview of which files are being used.

Additionally, if I-O logging is being done, double-clicking on any file will list the current log information for that file only.



File	Mode	Path	Date and Time
ARCODES	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARCSHTRX	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARCSFIL	I-O	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARSLSTRX	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARSLMFIL	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARACTFIL	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
CPSHPFIL	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARCUSTYP	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
SYUSRDX	I-O	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARSRUTRX	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ARRECINW	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
STATEFIL	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ZIPTAXFL	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
ZIPCTFIL	Input	M:\MACOLA\DATA_88\	01/24/01 19:24:11
NOTE	I-O	M:\MACOLA\DATA_88\	01/24/01 19:25:21
NOTETYPE	I-O	M:\MACOLA\DATA_88\	01/24/01 19:25:21
SYSPASS	Input	M:\MACOLA\DATA_88\	01/24/01 19:25:21

## Use ED Libraries

If there are problems running Elliott and users are running other developers' ED library files, try to turn off the ED library files to determine if the cause of the problem is from the ED library files. To do so, you need to uncheck the ED library files flag and then exit out of Elliott. Once you start Elliott again your ED library files are off and you can test to see if the problem you experienced still happens.

## Use Elliott Main Menu

The main menu program controls the user count. With the original Elliott main menu program, each Elliott session was counted as one user. With the Elliott main menu, each workstation is counted as 1 user regardless of the number of Elliott sessions on that workstation. However, if your developer modified the Main Menu program, it is possible that you need to turn off the Elliott main menu in order to retain the original functionality. Doing so will cause the counting of each Elliott session as one user (because you will be running Elliott's original logic). Alternatively, you can ask your developer to modify their main menu program to conform to Elliott standards.

## Log the Next Print Job

Sometimes, your print output format may be incorrect. It is most likely caused by a printer driver problem. You should download the most current driver from your printer manufacturer's website. If after downloading the latest driver the problem still exists, our support representatives may instruct you to turn on this flag to create a print log file for diagnostic purposes.

## Log API details:

Turning on this switch will cause all Screen API calls to be logged in the “Elliott-API.Log” file. Once this flag is turned on, you can press **Ctrl-Shift-P** from any screen to see the API Log. If you place your mouse on the log file name in the diagnostic screen and click the right mouse button, you will also be able to see the API Log.

It is not recommended that you turn on this switch unless our support representatives ask you to do so. You should always turn it off immediately after the necessary log information has been created. Never allow two users to turn on this flag at the same time.

## Log File I-O:

Turning on this switch will cause all File I/O operations to be logged in the “Elliott-I-O.Log” file. Once this flag is turned on, users can press **Ctrl-Shift-F** in any screen to see the File I-O Log. If you place your mouse on the log file name in the diagnostic screen and click the right mouse button, you will also be able to see the File I-O Log.

It is not recommended that you turn on this switch unless our support representatives ask you to do so. You should always turn it off immediately after the necessary log information has been created. Never allow two users to turn on this flag at the same time.

## Display WinCom Error Dialogs

Elliott utilizes a product called WinCom to perform certain Windows functions like printing, memory management, application execution control, etc. During the execution of certain WinCom functions, it is expected to have some errors. Such errors can be ignored and the system, by default, will suppress these errors so they will not confuse users. However, there are certain errors that may be fatal and it is important that they are reported so we can make proper diagnoses.

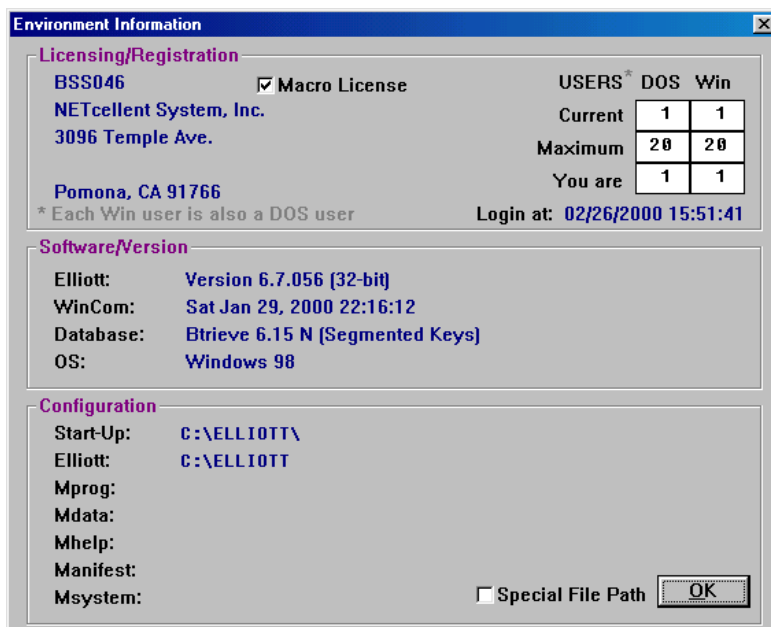
It is not recommended that you turn on this switch unless our support representatives ask you to do so. You should always turn it off immediately after the necessary log information has been created.

## Environment

Clicking on this button will display a window which gives you information about your current environment. This includes the following information:

- Licensing Information
- Concurrent Users
- Software Version
- Directory Configuration

This is a good tool to identify your environment without needing to go to many different places to find out the information:



**Environment Information**

**Licensing/Registration**

BSS046 ☒ Macro License  
 NETcellent System, Inc.  
 3096 Temple Ave.  
 Pomona, CA 91766

USERS*	DOS	Win
Current	1	1
Maximum	20	20
You are	1	1

\* Each Win user is also a DOS user Login at: 02/26/2000 15:51:41

**Software/Version**

Elliott: Version 6.7.056 (32-bit)  
 WinCom: Sat Jan 29, 2000 22:16:12  
 Database: Btrieve 6.15 N (Segmented Keys)  
 OS: Windows 98

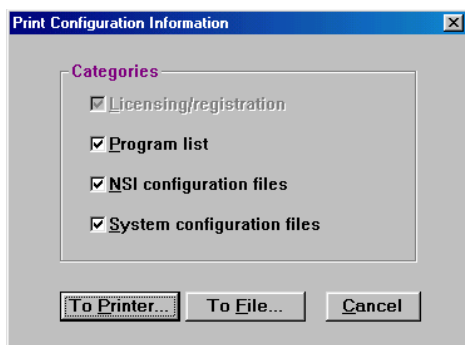
**Configuration**

Start-Up: C:\ELLIOTT\  
 Elliott: C:\ELLIOTT  
 Mprog:  
 Mdata:  
 Mhelp:  
 Manifest:  
 Msystem:

☐ Special File Path

## Printing of Diagnostic Information

Sometimes your system does not work correctly. Your support representative may ask you to print out the diagnostic information and ask you to fax or e-mail it for further analysis. You may access this printing function by going to "Setup Preference" and choose the "Print" button at the bottom of the screen.



**Print Configuration Information**

**Categories**

☒ Licensing/registration  
☒ Program list  
☒ NSI configuration files  
☒ System configuration files

## IOErrors.TXT

If there is a file access error in Elliott, the error will be saved in the IOErrors.TXT log file in the corresponding DATA directory. This information may be helpful for system administrators to audit the stability of the database without being in front of the user's terminal when file access errors happen.

## Activities Log

Activities Log is a new feature that captures many different activities. This includes User Login and Logout (including activities from the web), Mass E-mail (including all senders and receivers), Credit Card Charges, Refunds and Verifications and critical posting errors in COP, I/M and A/P. Currently, the only user interface to access this data is in the password setup screen (under special function) to view the User Login and Logout activities. If you wish to access the activities log information, you can find it in the SYACTLOG.BTR table.

## Most Frequently Encountered Problems

**Why do I get an extra page at the end of my print job?** – Most of the time, this problem is caused by your network client/printer setup. You can confirm this problem by sending the same print job to your local printer. If it does not print an extra page on your local printer, then it is certainly a network setting problem. The solution will depend on your network type and client:

- If you are using **Novell network with Novell Client**: You need to right click “Network Neighborhood” on your desktop and choose “Properties”. Under the configuration tab, choose “Novell Netware Client” and click the “Properties” button. On the Default Capture tab, uncheck the “Form Feed” box. If you have previously captured any printer port, un-capture them and then recapture them.
- If you are using **Microsoft for Novell client**, or **client for Microsoft network**, then the form feed is determined at the printer level. Go to “Start” -> “Settings” -> “Printers”. Right click on the printer that needs to be changed. Choose “Properties” and on “Printer Settings” tab, uncheck the “Form Feed” box.

**Why is printing to a dot-matrix printer slow?** – Elliott uses a Windows printer driver to print to dot-matrix printers. In many cases, it prints to a dot-matrix printer in graphic mode. As a result, it slows down printing significantly. The easiest way to solve this problem is to use the “Raw Data Pass Through” method, by choosing a font from 01 – 98 from the Print Option Window. You will then see the printer name become a printer port such as LPT1. When you use “Raw Data Pass Through”, you bypass the Windows printer driver. This method will restore the same speed as you would have experienced when printing in DOS mode. Windows 95 and 98 workstations support the “Raw Data Pass Through” interface. However, “Raw Data Pass Through” is not well supported in Windows NT/2000/XP workstations.

If you have to use the Windows printer driver to print, then the key to solving this problem is to choose the right font (built-in printer fonts instead of soft fonts). Use font “99” to force the font dialog box to display and list all the fonts supported by the printer driver. If there are no built-in fonts with the printer driver, maybe you can choose a different and compatible printer driver. If there are built-in fonts with the printer driver, however, Elliott is not using it by default. You can setup a dotmatrix.cfg file to force Elliott to pickup the built-in font. Please refer to Chapter 6, Printing, Font Selection for the Dot-Matrix Printers section.

**When printing with a Windows Printer, an 80-column report is compressed** – This is more likely a printer driver problem. You may try to use font 99 to force the font dialog to display to find the font and point size that Elliott selects. Elliott may have selected the only built-in font similar to “line printer” which only supports fonts of 8 point in size. For example, if you choose HP Laser jet 6P Enhanced driver, you will encounter this problem. On the other hand, if you choose HP Laser jet 6P standard driver, compression will not take place.

**When printing with a Windows Printer on a Windows NT workstation, it displays an error message “No Printer Name .... Is defined”** – Windows NT has a special way of concatenating the printer name, path and ID as the full printer name. Elliott has a limitation of 32 bytes for a printer name. Keeping your printer name short on Windows NT workstations will solve this problem. This is not a problem on Windows 95 or 98 workstations.

**Using the same printer driver at two workstations, one works, one doesn’t** – More than likely you

are using a different printer driver even though you think it's the same driver. Click on the printer name when the print option window displays. The system will display the printer driver it uses. Compare them on the two workstations and you may find that they are different.

**A file opened by an Elliott user is reported to be locked on a DOS workstation** – More than likely you are using Elliott with a local Btrieve engine while you are also using requester with a DOS workstation. The local Btrieve engine will create a .LCK file when opening a file in I-O and this will prevent the requester user from accessing it. Solution – Do not mix local and requester Btrieve engines in a network environment.

**The shading is too dark when faxing Laser Forms with WinFax** – You can setup the WinFax Printer to use an intensity value of 125 and higher. The default value of 100 will result in the shading being too dark.

**The text is too light when faxing a report with WinFax** – This is a known problem. You may choose to print bold from the "option" button of the Print Option Window.

**My system crashes when I try to print to a WinFax printer** – Make sure the controller for WinFax is loaded before you print to a WinFax printer.

**Using Raw Data Pass Through with LPT2, the capture output does not print until Elliott is closed** – This is an inconsistent problem and the reason is unknown as of this writing. We do know the auto endcap feature is not working consistently with LPT2. If you encounter this problem, try to use LPT1 or LPT3 for capture output. You may also specify a timeout option in the capture to solve this problem.

**Receive Btrieve Error 95 on System Password File** – This may be an indication of a network problem. Replace your network card, use the most current network card driver, or even change your network hub to see if it makes any difference. If you are running on a 100-BaseT network, you may also want to connect to a 10-BaseT hub to see if this resolves the problem.

**Receive Btrieve Error 20 on System Password File** – Mixing of Btrieve components is usually the cause for this problem. This is usually because multiple applications that use different Btrieve versions were installed. Elliott, by default, installs Btrieve components into the \NSI directory. However, there are other Btrieve applications that install Btrieve components into \WINDOWS or the \WINDOWS\SYSTEM directory. This may cause the system to get confused when trying to start Elliott as different versions of Btrieve components may co-exist on a workstation. This problem can usually be diagnosed by using the Smart Scout utility. Please refer to "Diagnose Btrieve with Smart Scout" later on in this Chapter.

**Receive Runtime Error 165** – This error means "incompatible version". However, if this is not a consistent problem, then the most likely cause for this problem is either the network card or network card driver. Download the latest network card driver from the manufacturer's web site and see if the problem is corrected. If the latest network card driver is not available, change to a different network card.

**Invoice alignment is off when using font 00** - Use the Raw Data Pass Through method (font 1 - 98) and usually this type of problem can be resolved.

**Can't shut down Elliott by closing Elliott Window** – When you try to shut down the Elliott Window by clicking on the "X" button on the top right corner, you get a message "Can't Shut Down Elliott from This Point". When you try to shut down Elliott, it will simulate generating ESC keys to the application. If the application does not accept the ESC key, then system cannot shut down Elliott. This only happens in a few places or if you have some custom written application that does not accept ESC keys.

**Can't use the mouse to position the cursor on a field** – Elliott uses the field number to move the mouse to an entry field. If the field you are trying to access does not have a field number (i.e. "1.") on the left side of the same line, then Elliott won't be able to figure out which field you are trying to access when you use the mouse to click on that field.

**When starting Elliott, the system does not prompt for a password** - If this is not your first session of Elliott, this is perfectly normal. Since you have logged in with your first session, there is no point in asking you to log in a second time. If you are using ticklers and ticklers are active in memory (check for a bell icon on the right side of your task bar), then this is normal as well.

However, if this is the first session and there is no other Elliott sessions running, this is probably caused by a previous Elliott session that terminated abnormally and the system thinks there is another session currently running. To resolve this problem, simply reboot your machine.

**When I print to the screen, the output alignment in Notepad does not look right** - If Notepad displays the output with an incorrect alignment, chances are you are using the word wrap feature. Turn off the word wrap feature from the "Edit" menu of Notepad. This may also be caused by an incorrect font. Normally, Notepad will use a mono-space font. However, if you choose a proportional font, then it may cause alignment issues.

**How do I control financial statements printing font pitch?** - If you use the Raw Data Pass - Through method, you are controlling the printing font pitch by the font you select (font 01 to 98). If you choose font "00" and let the system determine the printing font for you, then the system assumes all financial statements to be 132-column reports (as specified in the EL700S.CFG file). This assumption will work in most situations. However, sometimes you may want your balance sheet to be an 80-column report while the profit and loss is 240 columns wide. You may accomplish this by adding lines like the following into the [Reports-Width] section in the EL700U.CFG file under the \Elliott directory:

```
[Reports-Width]
BSSTMT=80
PLSTMT=240
```

Then the system will know that the Balance Sheet Statement is an 80-column report while the profit and loss statement is 240-columns wide. If the EL700U.CFG does not exist, simply create one. You can look at EL700S.CFG file for a sample reference. However, do not modify the EL700S.CFG file because NETcellent may update that file in the future. NETcellent will override any changes you made to EL700S.CFG. NETcellent does not distribute the EL700U.CFG file. The entries in the EL700U.CFG file override the EL700S.CFG file. Therefore, any changes that are unique to the user should be in the EL700U.CFG file.

The following are the spool names for financial statements and you may use them in the EL700U.CFG file:

BSSTMT	Balance Sheet
BSSCHD	Balance Sheet Schedule
PLSTMT	Profit & Loss Statement
PLSCHD	Profit & Loss Schedule
FINPOS	Change In Financial Position
WRKCAP	Working Capital Statement
CSHFLW	Cash Funds Flow Statement

Set them to the length that fits your layout specification. If you do not define them, the system will assume that they are 132-column reports (as specified in the EL700.CFG file).

**File Access Error: 013 on Defer Report Win File (File Not Found):** The DEFERWIN file stores the deferred processing reports to be executed for Elliott. This file will be created automatically when users send the first deferred job in Elliott (there is no need for file initialization). If users have not yet processed a deferred print job and try to access Deferred Report Processing in Elliott, they will get this error message.



## Data Execution Prevention and Elliott

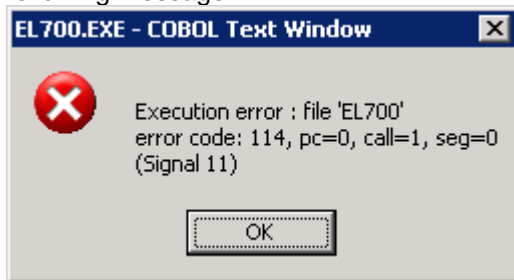
### Introduction

It is ironic that after decades of trying to improve how quickly and efficiently CPUs can run code, the newest, most fashionable processor feature is the ability to not run code. A new hardware feature has started to show up to prevent code execution called “execute disable” (XD) by Intel or “no execution” (NX) by AMD. Microsoft calls it Data Execution Protection (DEP) and is implemented in Windows 2003 Server SP1 and Windows XP SP2.

Basically, the DEP feature uses processor hardware to discourage the kind of virus, worm, and Trojan Horses attacks that look for buffer overrun errors in the operating system. Working with memory protection technology built into new CPUs with this hardware feature, Microsoft toughens the distinction between program and data areas in system memory – in other words, it stops any attempt to insert and execute code from memory locations set aside for data.

Legitimate programs, such as Java compilers that perform just-in-time code generation, execute instructions within data areas – and will be affected by this DEP feature. Elliott is in the same situation. Netcellent is committed to rewrite Elliott and come up with a new version in the future to work with DEP. In the mean time, Microsoft offers a new Control Panel dialog box for users to switch the DEP feature off and on for the entire system, or off for individual applications (like Elliott’s EXE).

Most likely your system is affected by this DEP feature if you start Elliott and you immediately see the following message:



Error 114 means “Attempt to access item beyond bounds of memory” which is raised by the Microsoft DEP feature. This article is intended to discuss (1) The condition when Elliott will be affected by DEP; (2) How to resolve it if Elliott stops functioning.

### Who Will Be Affected by DEP?

Elliott users who meet both of the following two criteria will be affected:

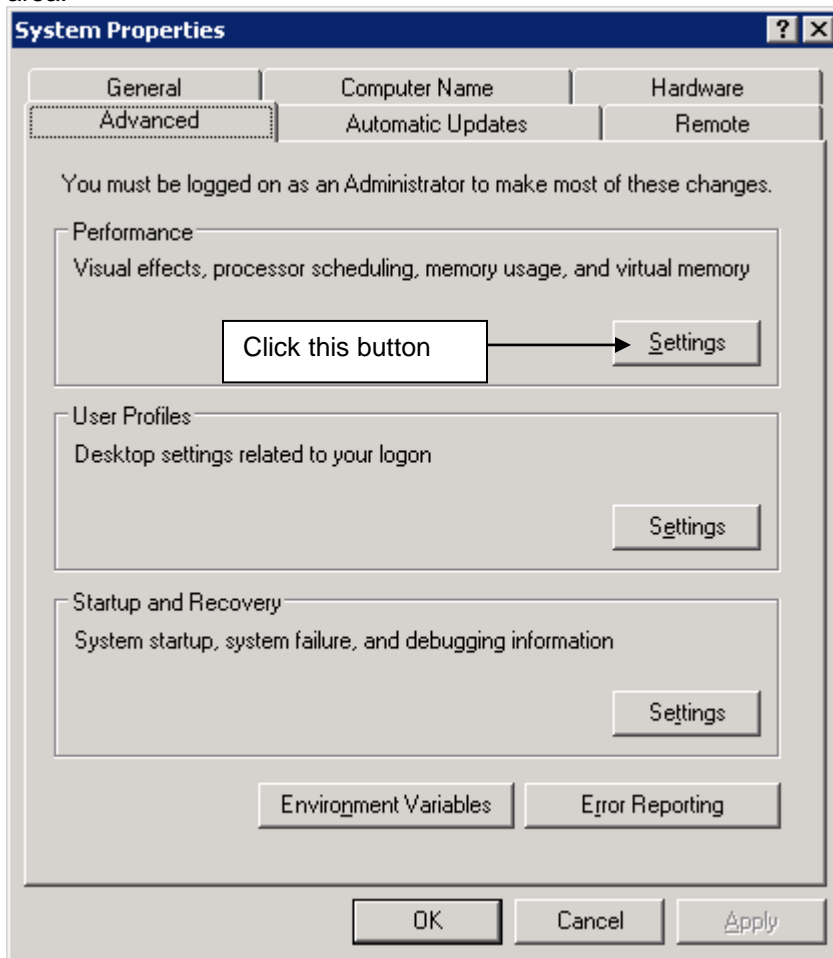
1. The user is running Windows 2003 Server SP1 or Windows XP SP2.
2. The user PC’s CPU has the hardware “execute disable” (XD) feature.

Some recent Intel Pentium 4 and Xeon CPUs have started to offer the XD feature. A smaller portion of Celeron CPUs have also started to offer this feature. Generally speaking, if your PC was purchased before 2005, then your CPU probably won’t have the XD feature. After 2005, more and more CPUs have this XD feature, which can cause the Elliott execution problem if working with Windows 2003 SP1 or XP SP2.

To check if your CPU is affected by the DEP feature, you must first run Windows 2003 SP1 or XP SP2. Right click “My Computer” and choose “Properties” (or use Control Panel and choose System).



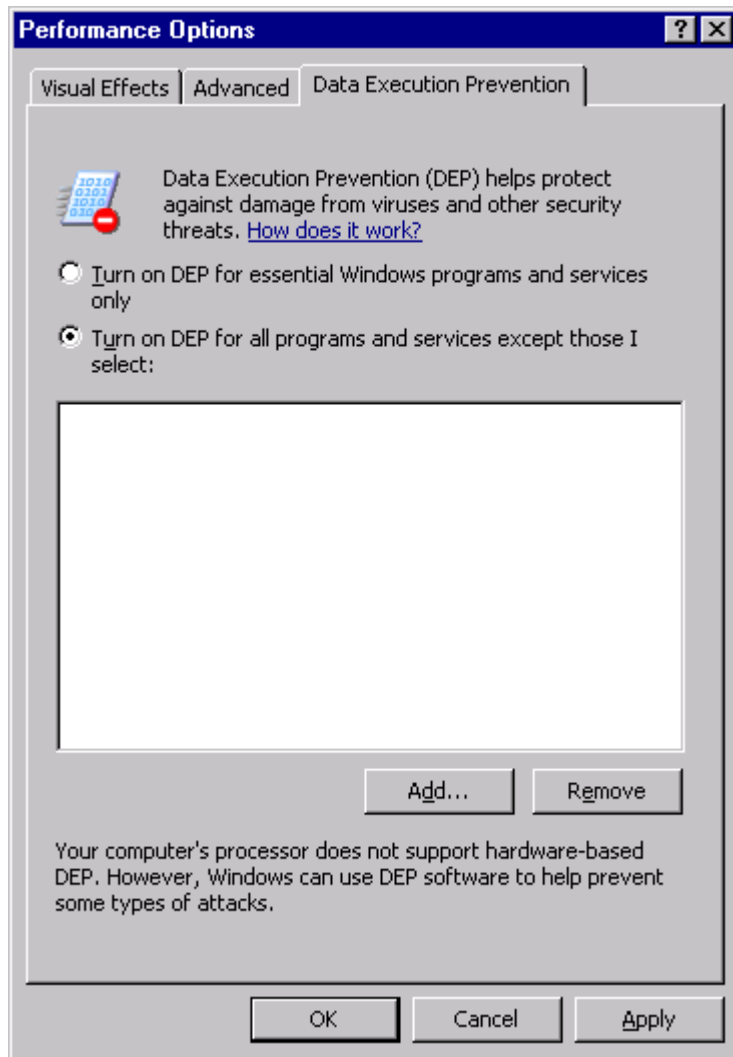
In System Properties, choose the “Advanced” tab and click on the “Settings” button in the “Performance” area.



The “Performance Options” window will show up. Click on the “Data Execution Prevention” tab. If you see a message at the bottom of the window saying:

**Your computer’s processor does not support hardware-based DEP.  
However, Windows can use DEP software to help prevent some types of attacks.**

then your PC should be able to execute Elliott without getting the startup error 114.



On the other hand, if this message does not show up, then it means your CPU supports XD and when you start Elliott you will receive the Error 114 message.

### ***How to Resolve DEP That Causes Elliott Error 114?***

If your system can not run Elliott due to the Data Execution Prevention (DEP) feature generating the Error 114 message, you must reconfigure your operating system. You have two choices:

- (1) Enable DEP for essential Windows programs and services only
- (2) Enable DEP feature for all programs, but add all Elliott EXE programs into the exception list

### ***Enable DEP for essential programs only***

This is the easiest solution. From the "Data Execution Prevention" tab, simply choose the option "Turn on DEP for essential Windows programs and services only." Click "Apply," then "OK."

This might be the best solution if you also have other applications that do not work due to the DEP feature. However, if you want to take advantage of the DEP feature to reduce potential attacks by viruses, worms or Trojan Horses, then you might want to consider using the second solution by adding those affected programs into the exception list.

### ***Add All Elliott EXE programs into the Exception List***

In the Data Execution Prevention tab, choose “Turn on DEP for all programs and services except those I select.” Then add all Elliott Execution programs into the list. The following are a list of Elliott EXE programs that you can find in the \Elliott7 root directory:

<b>EXE Name</b>	<b>Version</b>
EL700.EXE	V7.x
EL700CR.EXE	V7.x
EL700CR.EXE	V7.x
EL700DP.EXE	V7.3 only
EL700EV.EXE	V7.x
EL700GE.EXE	V7.x
EL700ME.EXE	V7.x
EL700RP.EXE	V7.3 only
EL700RW.EXE	V7.x
EL700ST.EXE	V7.x
EL700TK.EXE	V7.x
EL700US.EXE	V7.x

Since you will most likely execute Elliott from a mapped network drive, please make sure when you add these Elliott EXE programs to the exception list, you specify the mapped drive path.

### ***Elliott Control Flags***

#### **EL700.CFG file:**

The EL700.CFG file should reside in your Elliott default directory. It contains information about the path of Elliott V6.x software and the startup options. All users share this file and any changes to this file will affect all users. The following is how a typical EL700.CFG file looks:

[Path]

Mdrive=

Mroot=

Mhelp=

Mdata=

Mprog=

Msystem=

Manifest=

Mddf=

[Configuration]

Mcmd=MXX00

Version=6.7

Revision=056

Release=6.X

Default-Printer-Port=1

Update-Grid-Max=50

Use-Win-Prt-By-Default=Yes

Windows-Help=Yes

[Btrieve]

Local=Yes

Requester=No

Support-Segmented-Keys=Yes

[Report]  
First-Line-Bold=No  
First-Line-Shade=No  
Heading-Bold=No  
Heading-Shade=No  
Body-Bold=No  
Heading-Line=None

## Elliott Registry:

Elliott registry can be found at the following path:

\HKEY\_CURRENT\_USER\Software\NETcellent\Elliott\7.0

It contains information about users' preferences for Elliott. Changing the settings in the Elliott Registry will only affect the current users logged in. All Elliott Registries are string values. Even though you can change it with the Regedit.exe or Regedt32.exe utility, we suggest you do not use it unless absolutely necessary. Changing the registry incorrectly may damage your system to the point that you can't even start up your operating system and you may need to re-install your system. Proceed at your own risk. Almost all the values in the Elliott registry can be changed through the preference setup tool bar icon.

The following is what a typical Elliott V7.0 registry contains:

### \Preferences

User-Font=09x16 Courier  
Last-Login=EMK  
Autoskip=No  
Editor=Notepad  
Last-Company=00

### \Configuration

Workstation=JANE  
Local-Printers=3  
MACRO-Path=C:\ELLIOTT7\MACRO  
HELP-Path=C:\ELLIOTT7\HELP  
WAVE-Path=C:\ELLIOTT7\WAVE  
LOG-Path=C:\ELLIOTT7\LOG

### \Laser-Printers

Top-Margin=0.50  
Bottom-Margin=0.50  
Left-Margin=0.25  
Right-Margin=0.25

### \NonLaser-Printers

Top-Margin=0.00  
Bottom-Margin=0.00  
Left-Margin=0.00  
Right-Margin=0.00

### \Debug

Log-Printjob=No  
Use-Ed=Yes  
Log-API=No  
Log-I-O=No  
Disp-WinCom=No

Disp-DDF-Errors=No

**\Color**

Base Text Foreground=black  
Base Text Background=bright white  
Base Border Foreground=black  
Base Border Background=white  
Prompt Text Foreground=black  
Input Text Foreground=blue  
Input Text Background=bright yellow  
Window A Background=white  
Window B Background=white  
Window C Background=white  
Window D Background=white  
Window E Background=white  
Window F Background=white  
Window G Background=white  
Window H Background=white  
Window I Background=white  
Window J Background=white

**\Tickler**

Future-Items=Yes  
Quiet-Amount=1 hour

**Workstation:** This field is used to set the workstation ID. By default, this field is equivalent to the first login user of this workstation for Elliott. This field is important for print processing. This file is where the default print options for each report are saved based on the workstation ID. Therefore, **it is important that you make sure each workstation has a unique workstation ID.** Duplicate workstation ID's will cause different workstations to share the same printer name. However, different workstations inevitably will use different printer names in Windows. Duplicate workstation ID's will cause problems printing.

**Macro-Path:** This field is used to set the Macro Path directory. If you do not specify a value or leave this field blank, then the system will use the \MACRO directory under the Elliott startup directory to be the place to store macro files. If this field is set with a valid path, then the system will use this path to find the Macro file. You may want to do this if you feel each user should have their own private macro and not share with others (for compatibility or security reasons).

**Log-Printjob:** If this flag is set to "Yes", it means every time when printing to a printer, the system will not actually print to the printer. Instead it will create the following two files under the Elliott directory.

WINCOMPR.LOG Request & Apply Between Apps & Wincom  
WINCOMPR.OUT The actual output data to printer

The main purpose of these two files is for debugging purposes. So if the print output is incorrect, users can turn the flag on and generate these two files. Typically, the problem will either be a printer driver problem or a Wincom problem. By sending these two files to us, it will enable us to determine where the problem comes from and either provide a fix or suggest getting an updated printer driver.

**Use-Ed:** This flag, by default, will be set to "Yes". Even if the flag does not exist in this file, the default value is assumed by the system to be "Yes". If this flag is set to "No", then Ed libraries will not be used by the Windows System Manager. This includes RUN500ED.LBR, ??PROGED.LBR, EL700ED.LBR, ??PROGWE.LBR, etc. This flag can be used in situations where the ED library files are suspected of causing a problem. Setting this flag to "No" can quickly confirm whether that is the case or not. By setting this flag to "No", it will only affect this workstation and not others, since the NSI.INI file is usually set by workstations in their own C:\WINDOWS directory.



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## ***Problem Diagnostics***



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## Appendix B

### *Micro Focus Status Codes*

#### Quick Reference

001 Insufficient buffer space  
002 File not open when access attempted  
003 Serial mode error  
004 Illegal file name  
005 Illegal device specification  
006 Attempt to write to a file opened for INPUT  
007 Disk space exhausted  
008 Attempt to input from a file opened for OUTPUT  
009 No room in directory  
010 File name not supplied  
012 Attempt to open a file which is already open  
013 File not found  
014 Too many files open simultaneously  
015 Too many indexed files open  
016 Too many device files open  
017 Record error: probably zero length  
018 Read part record error: EOF before EOR or file open in wrong mode  
019 REWRITE error: open mode or access mode wrong  
020 Device or resource busy  
021 File is a directory  
022 Illegal or impossible access mode for OPEN  
023 Illegal or impossible access mode for CLOSE  
024 Disk input-output error  
025 Operating system data error  
026 Block I-O error  
027 Device not available  
028 No space on device  
029 Attempt to delete open file  
030 File system is read-only  
031 Not owner of file  
032 Too many indexed files, or no such process  
033 Physical I-O error  
034 Incorrect mode or file descriptor  
035 Attempt to access a file with incorrect permission  
036 File already exists  
037 File access denied  
038 Disk not compatible  
039 File not compatible  
040 National Language initialization not set up correctly  
041 Corrupt index file  
042 Attempt to write on broken pipe  
043 File information missing for indexed file  
044 Attempt to OPEN an NLS file in a non-NLS program  
045 Attempt to OPEN an NLS file using incompatible language definition  
046 NLS support module not found  
047 Indexed structure overflow

048 Attempt to divide by zero  
048-057 Host file status, not an RTS message  
055 Routine table overflow  
065 File locked  
066 Attempt to add duplicate record key to indexed file  
067 Indexed file not open  
068 Record locked  
069 Illegal argument to ISAM module  
070 Too many indexed files open  
071 Bad indexed file format  
072 End of indexed file  
073 No record found in indexed file  
074 No current record in indexed file  
075 Indexed data file name too long  
076 Can't create lock file in /ISAM directory  
077 Internal ISAM module error  
078 Illegal key description in indexed file  
079 COBCONFIG syntax error  
081 Key already exists in indexed file  
082 CALL convention not supported  
086 Remote file system failure  
100 Invalid file operation  
101 Illegal operation on an indexed file  
102 Sequential file with non-integral number of records  
103 Parameter cannot be passed BY VALUE  
104 Null file name used in a file operation  
105 Memory allocation error  
106 Dictionary error  
107 Operation not implemented in this Run-Time System  
108 Failure to initialize data division  
109 Invalid checksum in Run-Time System  
110 Generated code not supported by this RTS  
114 Attempt to access item beyond bounds of memory  
115 Unexpected signal  
116 Cannot allocate memory  
117 Bad collating sequence  
118 Symbol not found  
119 Symbol redefined  
120 Symbol string table of zero size  
121 Symbol is not in TEXT section  
122 Coblongjmp() called below level of cobsavenv()  
123 Unknown relocation type  
124 Communication failure during I/O request to the central file handler  
125 All locks/current transactions canceled due to exceeding time limit  
126 Record size exceeds system limit  
129 Attempt to access record zero of relative file  
135 File must not exist  
137 Illegal device specification - not mass storage  
138 File closed with lock - cannot be opened  
139 Record length or key data inconsistency  
141 File already open – cannot be opened  
142 File not open – cannot be closed  
143 REWRITE/delete in sequential mode not preceded by successful read  
144 Boundary violation  
146 No current record defined for sequential read  
147 Wrong open mode or access mode for read/start

148 Wrong open mode or access mode for write  
149 Wrong open mode or access mode for REWRITE/delete  
151 Random read on sequential file  
152 REWRITE on file not opened I-O  
153 Subscript out of range  
154 PERFORM nested too deeply  
155 Illegal command line  
156 Too many parentheses in compute statement  
157 Not enough program memory: object file too large to load  
158 Attempt to REWRITE to a line-sequential file  
159 Malformed line-sequential file  
160 Overlay loading error  
161 Illegal intermediate code  
162 Arithmetic overflow or underflow  
163 Illegal character in numeric field  
164 Run-Time subprogram not found  
165 Version number incompatibility  
166 Recursive COBOL CALL is illegal  
167 Too many USING items  
168 Stack overflow  
169 Illegal configuration information  
170 System program not found  
171 Japanese operations illegal with this RTS  
172 Recursive non-MF PERFORM is illegal  
173 Called program file not found in drive/directory  
174 Imported file not found  
175 Attempt to run intermediate code program, which has severe errors in it  
176 Illegal intersegment reference  
177 Attempt to cancel program failed  
178 Error during save  
179 Error during chain (program not found)  
180 End-of-file marker error  
181 Invalid parameter error  
182 Console input or console output open in wrong direction  
183 Attempt to open line sequential file for I-O  
184 ACCEPT/DISPLAY I-O error  
185 File malformed  
186 Attempt to open stdin, stdout or stderr with incorrect mode  
187 Run-Time System not found on \$COBDIR path  
188 Filename too large  
189 Intermediate code load error  
190 Too many arguments to CALL  
191 Terminal type not defined  
192 Required terminal capability description missing  
193 Error in variable length count  
194 File size too large  
195 DELETE/REWRITE not preceded by a read  
196 Record number too large in relative or indexed file  
197 Screen handling system initialization error  
198 Load failure  
199 Operating System error code lies outside expected range  
200 Run-Time System internal logic error  
201 I-O error in paging system  
202 Exported functionality error  
203 CALL parameter not supplied  
206 Reading unwritten data from memory

207 Machine does not exist  
208 Error in multi-user system  
209 Network communication error  
210 File is closed with lock  
211 Program not executable by Run-Time System  
213 Too many locks  
214 GO TO has not been ALTERED  
215 Cannot ANIMATE a program running COMMUNICATIONS  
216 Cannot initialize the named communications device  
217 Incompatible host for native code file  
218 Malformed MULTIPLE REEL/UNIT file  
219 Operating system shared file limit exceeded  
220 Attempt to execute more than one SORT or MERGE simultaneously  
221 SORT/MERGE error: see status keys  
222 SORT/MERGE error: see status keys  
223 SORT/MERGE error: see status keys  
224 External Language Initialization failure  
225 Dynamic load error – program component missing  
226 EXTERNAL file definition inconsistent  
227 EXTERNAL data definition inconsistent  
228 Could not allocate memory for EXTERNAL item  
229 SORT/MERGE module does not support EXTERNAL using/giving files  
230 Floating Point Support Module not found  
235 Error in animator communications channel  
236 Animated program has terminated unexpectedly  
237 Unable to initialize animated process  
254 Keyboard interrupt to ANIMATOR during ACCEPT

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## ***Micro Focus List of Messages***

### **001 Insufficient buffer space**

You have tried to open a file directly or indirectly and, although you have not exceeded your system's file limit, something in your system is unable to allocate enough memory space for this operation.

Although you can trap this error, you must do STOP RUN as soon as it is reported.

### **002 File not open when access attempted**

You have tried to access a file without opening it first.

Open the file with the open mode that you need and try the operation again. As this error implies that your program logic contains a mistake, you might want to terminate the run and recode your program.

### **003 Serial mode error**

You have tried to open a device as a relative or indexed file. You are trying to execute a device, not a program.

Open the device in the correct mode or close any open files, do STOP RUN and recode your program.

The name of your program is recognized by the operating system as a valid device. Rename your program.

### **004 Illegal file name**

A file-name contains an illegal character. This could be any character that is not part of the permitted character set or it could be the system-dependent delimiter, which on most systems is the space.

Try the file operation again using the correct file-name.

### **005 Illegal device specification**

Devices to which your COBOL program can write are defined by the operating system. You have tried to write to a device that is not defined by your system.

Try the operation again using a device name that your system recognizes.

### **006 Attempt to write to a file opened for INPUT**

You have tried to WRITE to file that is open for input only.

Close the file and open it with a mode such as I-O, which allows you to write to the file. As this error implies that your program logic contains a mistake, you might want to terminate the run and recode your program.

### **007 Disk space exhausted**

The disk is full.

This error can be trapped, but once it has been reported you must do a STOP RUN immediately to terminate your program's run. When your program has terminated, delete any files that you no longer need. Alternatively, if your operating system supports this, put a new disk in the floppy disk drive and redirect your program's file operations to this.

#### **008 Attempt to input from a file opened for OUTPUT**

You have tried to read from a file that is open for output only.

Close the file and open it with a mode such as I-O, which allows you to read from the file. As this error implies that your program logic contains a mistake, you might want to terminate the run and recode your program.

#### **009 No room in directory**

Either the directory is full or your program cannot find it.

Either delete any files that you no longer need or, if your operating system supports this, put a new disk in the floppy disk drive and redirect your program's file operations to this. Alternatively, specify a different drive or directory for your file operations.

#### **010 File name not supplied**

You have tried to open a file that you have declared as an external file, but have not named.

Specify the external file-name.

#### **012 Attempt to open a file which is already open**

You have tried to open a file which is already open and cannot be opened again.

Cancel your second attempt to open the file. If the fact that the file is already open is acceptable to you, continue to run your program.

#### **013 File not found**

The operating system has been unable to find a file, which you have tried to access in your program.

Ensure that you are in the correct directory or that a path to the file concerned exists. You can then try the file operation again. If the error is the result of a spelling mistake, then ask for the correct file and try the file operation again.

#### **014 Too many files open simultaneously**

You have tried to exceed the maximum number of files which you can have open at any one time. This can be a software or an operating system constraint, but you must not violate it.

Close some of the open files which you are not currently accessing and then try to open the relevant file again. You should be able to continue to run your program.

Depending on your operating system, you might be able to increase the maximum number of files you are allowed to have open. For example, on DOS, add the line

```
FILES=128
```

to your config.sys file. On Novell, add the lines

```
CACHE Buffers=0  
File Handles=128
```

to your shell.cfg file.

### **015 Too many indexed files open**

You have exceeded the maximum number of indexed files which you can have open at any one time. This can be a software or an operating system restraint, but you must not violate it.

Close some of the open indexed files which you are not currently accessing and then try to open the relevant file again. You should be able to continue to run your program. (Indexed files count as two files, one for data and one for the index.)

### **016 Too many device files open**

You have exceeded the maximum number of device files which you can have open at any one time. This can be a software or an operating system constraint, but you must not violate it.

Close some of the open device files which you are not currently accessing and then try to open the relevant file again. You should be able to continue to run your program.

### **017 Record error: probably zero length**

You have probably tried to access a record that has had no value moved into it.

Although this error is recoverable in the sense that it can be trapped, once it has been reported you must execute a STOP RUN statement immediately and then record your program to ensure that the COBOL record length is not zero.

### **018 Read part record error: EOF before EOR or file open in wrong mode**

A part record has been found at the end of a file. Consequently your run-time system treats the data file as a record, and not finding a full record, reports this error.

Ensure that the record size you give when you read from or write to a file is consistent.

### **019 REWRITE error: open mode or access mode wrong**

You are trying to do a REWRITE to a file that has not been opened with the correct access mode for this operation.

Close the file and reopen it in a mode, such as I-O, which allows you to do REWRITE operations on that file. As this error implies that your program logic contains a mistake, you might want to close any open files and then execute a STOP RUN. You can then recode your program to eliminate the logic error.



**020 Device or resource busy**

You have tried to open a file that is assigned to a device or resource (for example, a line printer) that is not available at this time.

You can trap the error status returned by open and retry the open at regular intervals until it succeeds.

**021 File is a directory**

You have tried to WRITE to a directory instead of to a file. Alternatively, the attributes are not set up correctly to allow you to access a file. That is, it is marked as read-only or you don't have sufficient rights to open it.

Recode your program so that it writes to a file and not to a directory. You need to either change your file access attributes or recode your program so that it does not violate the existing attributes.

**022 Illegal or impossible access mode for OPEN**

The mode in which you are trying to open a file violates the General Rule of COBOL for that type of file. For example, you might have opened a line sequential file in the I-O mode.

Open the file with a mode that is compatible with that type of file.

**023 Illegal or impossible access mode for CLOSE**

The mode in which you are trying to close a file is not possible for that type of file.

Close the file with a new access mode, which is compatible with that type of file, or execute a STOP RUN statement and recode your program.

**024 Disk input-output error**

You might have performed a READ after a WRITE or there might be either a verification failure or a parity error.

In some circumstances this error is fatal, but if it occurs during a read you can trap it and then do a close on the file before executing a STOP RUN statement.

**025 Operating system data error**

You are trying to set up terminal characteristics for a device which is not a terminal.

Recode your program.

**026 Block I-O error**

An error has occurred while you are trying to access a disk. This could be the result of a corrupt disk.

If you have a corrupt disk, try to run your program again using your backup copy.

**027 Device not available**

You are trying to access a device which either is not attached to your machine or, if attached, is not on-line.

Attach the device to your machine and ensure that it is on-line. Repeat the file operation.

#### **028 No space on device**

You have tried a file operation, such as a WRITE, for which insufficient space is available on your disk.

When your program has terminated you should delete some of the files or directories on your current logged in disk. Ensure that you delete sufficient files on your disk so that you have enough room to carry out successful file operations.

#### **029 Attempt to delete open file**

You have tried to perform a DELETE FD operation on an open file.

Close the file before performing the DELETE FD operation.

#### **030 File system is read-only**

The file system which you are using is read-only, which effectively means that it is write-protected, and you have tried to change a file in some way. For example, you might have tried to WRITE to a file or to DELETE information in it.

You should abandon your attempt to alter the file unless you can make your own personal copy of it. You should then be able to alter the contents of your copy, but not of the original source.

#### **031 Not owner of file**

You are trying an operation on a file but the file's owner has not given you the necessary permission for that operation. You could, for example, be trying to alter the access modes for a file which only the file's owner can do.

You should abandon your tried file operation unless the file's owner gives you the permission necessary to do the operation you want to carry out.

#### **032 Too many indexed files, or no such process**

You have tried to open an indexed file, but the number of files that you currently have opened is the system limit.

Alternatively, you could be trying to use a process ID which does not exist or which your operating system no longer recognizes.

You should close some of the indexed files which you are no longer accessing and you should then be able to open the file you require.

In this case you must REWRITE your code so that it uses a process ID which your system recognizes.

#### **033 Physical I-O error**

You have a hardware error of some type. Perhaps you have not put a disk in the relevant drive or

you might have tried to WRITE to a disk, but the processor detected that the hardware interface has failed.

You should try to correct the fault in your hardware. For example, put a disk in the necessary drive.

#### **034 Incorrect mode or file descriptor**

You are either trying to write to a file which is open for read purposes only or read a file which is open for write purposes only.

You should close the file and reopen using the correct access mode. As this error implies that your program logic contains a mistake, you might want to close any open files, execute a STOP RUN statement and then recode your program to eliminate the logic error.

Shareable files opened INPUT (read-only) by the COBOL system still require write-permission (from the operating system) to allow temporary locking to take place.

#### **035 Attempt to access a file with incorrect permissions**

You are trying a file operation which you do not have sufficient permission to achieve. For example, you could be trying to write data to a file which has been set up with the read attribute only.

If you are the owner of the file, you can alter the attributes of the file so that you have the permission needed to effect the particular file operation you were trying. If you are not the owner of the file, you cannot carry out that operation successfully, unless you copy the file and make the changes to the copy only. You cannot alter the source file.

#### **036 File already exists**

You are trying an inappropriate operation on an already existing file.

As this error implies that your program logic contains a mistake, you might like to recode your program to eliminate this mistake.

#### **037 File access denied**

Your attempt to access a file has been denied by the operating system. You might have tried to write to a write-protected file or you could have tried to read from an output device.

Alter the access permission on the relevant file. Access can be read-only, if you just want to read the contents of the file without making any changes, or it can be read and write in which case you can alter its contents.

#### **038 Disk not compatible**

You have tried to access a disk that is incompatible with the current version of your operating system. This could be because it was created under a previous version of the system or it could have been created under a completely different operating system. You would also receive this error if you tried to load a disk with a name that clashed with a disk that was already loaded.

If the error is a result of a clash of names, you can rename one of the disks and then you can load both disks together, if this is what you want.

**039 File not compatible**

You have tried to access a file that is not compatible with the structure of files under the current release of your software. This could be because the file was created either under a different operating system or under a previous version of your current system.

You should create a new copy of the file which has the correct structure.

**040 National Language initialization not set up correctly**

You have tried to use the additional language variants, but the environment or side file that is required to set up the language either has not been set up correctly, does not exist or is invalid.

This might be because you have the LANG environment variable set for use by another system in a format not recognized by this COBOL system.

Set up the required environment or side file before you try to run the program again.

Use the COBLANG environment variable to set the local information for the COBOL system.

**041 Corrupt index file**

Your run-time system does not recognize the control information for an indexed file because the index has been corrupted in some way causing the data in the file to be no longer accessible by your system. This error is recoverable in the sense that it can be trapped, but should you receive it you can do little except to close any open files and stop your program's run.

You should rerun your program using the backup copy of that file. If you have added a great deal of information to the file since you last took a backup, you might like to rebuild the file using the Rebuild utility, which reads the data (if this has not been corrupted) and builds a new index for it.

**042 Attempt to write on broken pipe**

One of the following has occurred:

Your program has created a process as a result of a DD-logical file-name mapping assignment (for example, the process might be a line printer spooler). The process was not created properly or has ended prematurely. This error occurs when your program tries to write to the process.

Your application has terminated abnormally or prematurely, thus breaking the pipe.

You can trap the error status returned by the write operation and open the file again.

**043 File information missing for indexed file**

The system has crashed on your program's previous run, while the file was open. Information was probably added to the end of the file, but the directory information was not updated and so that data cannot be accessed by your system. Alternatively, you have copied the indexed file from one disk to another but have copied either only the data part of the file or only the index.

If the error is the result of a crash, then whether you can access the necessary data or not is entirely system dependent. If, however, it is the result of a faulty copy, you should be able to restore the missing part of the file from the **.dat** or **.idx** file.

**044 Attempt to OPEN an NLS file in a non-NLS program**

The logical file name is preceded by "%NLS%", but the program which OPENS the file has been compiled without the NLS directive set: the OPEN fails.

**045 Attempt to OPEN an NLS file using incompatible language definition**

The NLS control information for a file in your program does not match the same NLS control information in the header of your index file. Alternatively, your index file has become corrupted.

Rebuild your index file or rerun your program using the backup copy of that file. If you have added a great deal of information since you last made a backup, you might want to rebuild the file using a utility that is able to read the data, if it is not corrupt, and build a new index for it.

**046 NLS support module not found**

Your system could not find the National Language Support module COBNLSMG.

Alternatively, your system cannot find **cobnls.dll** (OS/2), **cobnls.dle** (DOS), or **cobnls.dlw** (Windows).

Ensure that **cobnlsmsg.gnt** is present in either **utils.lbr** or in a directory on COBDIR, or, if your program is linked, ensure that **cobnlsmsg.obj** is linked in to it.

Ensure that **cobnls.dle** is present in **utils.lbr**, or that **cobnls.dlw** is present in a directory specified in COBDIR, or that **cobnls.dll** is present on the LIBPATH.

**047 Indexed structure overflow**

The structure of your indexed file contains a fault. You have probably tried to put another entry in the index when there is no room for it.

Alternatively, you have tried to access an old format indexed file, perhaps created using CIS COBOL.

If your index has no room for further entries, you should reorganize your file.

If you have tried to access an old format indexed file, you can run the Rebuild utility to check the consistency of this indexed file and construct a new indexed file if the old one was found to be corrupt.

**048 Attempt to divide by zero**

You are executing a program that is trying to perform a fixed-point divide by zero.

Alternatively, if you have the COBFSTAT environment variable set to HOSTSTAT, this could be mainframe file status code "90".

Either recode your program so that you can trap the error with an ON SIZE ERROR clause, or run your program without the RTS O switch set, or recompile your program without the CHECKDIV"OSVS" directive set.

**048-057 Host file status, not an RTS message**

If you have COBFSTAT environment variable set to HOSTSTAT, this is a mainframe file status code "9x", where x is given by subtracting 48 from the error number.

**055 Routine table overflow**

You have tried to load too many programs simultaneously.

Alternatively, if you have the COBFSTAT environment variable set to HOSTSTAT, this could be mainframe file status code "97".

Cancel any programs that you are no longer using or use fewer separate programs.

**065 File locked**

You have tried to open a file which has already been locked or opened for output by another user. Alternatively, you have tried to lock or open for output a file which another user already has open.

Your program can inform the system operator (if there is one) that it is unable to access this file and should wait until the other user has finished using the file and closes it. You should then be able to continue to run your program.

**066 Attempt to add duplicate record key to indexed file**

You have tried to add a duplicate key for a key which you have not defined as being able to have duplicates.

As this error implies that your program logic contains a mistake, you probably should recode.

**067 Indexed file not open**

You are trying to access an indexed file which you have not opened.

Open the file in the relevant access mode and then retry the unsuccessful file operation.

**068 Record locked**

You have tried to access a record which is currently locked by another user.

Your program can inform the system operator (if there is one) that the record is currently locked and you should wait until the other user has released the lock on that record. You should then be able to access the relevant record. You should not continually retry to gain access to the record without operator intervention, as this could result in your application hanging.

**069 Illegal argument to ISAM module**

This is the result of an internal system error.

Contact Technical Support who will help you discover the cause of your error and how it can be rectified.

**070 Too many indexed files open**

You are trying to open an indexed file, but you have already exhausted the system limit which specifies how many of these files can be opened at any one time.

Close some of the open indexed files which you are not currently accessing. You should then be

able to open the indexed files which you require and continue the program run.

#### **071 Bad indexed file format**

You are either using a file which has been corrupted or there is an internal system error.

If the disk you are using is corrupt, rerun your program using your backup copy of the disk. If this is not the cause of the error, then you should contact Technical Support who will help you discover the cause of your error and how it can be rectified.

#### **072 End of indexed file**

This is the result of an internal system error.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

#### **073 No record found in indexed file**

This is the result of an internal system error.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

#### **074 No current record in indexed file**

This is the result of an internal system error.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

#### **075 Indexed data file name too long**

When creating indexed files, the extension **.idx** is added to the user-defined file-name and so your file-name must not exceed x-4 characters in length, where x is the maximum length of the file name.

Rename the file with a shorter file name. That is, one that is less than 10 characters in length.

#### **076 Can't create lock file in /ISAM directory**

For some reason your system is unable to create a lock file in the /ISAM directory. One reason for this could be that in its previous run your program terminated abnormally (perhaps due to a power failure) leaving some files locked.

You need to manually remove all of the files that are still locked in the /ISAM directory before you can successfully run your program.

#### **077 Internal ISAM module error**

This is the result of an internal system error.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

#### **078 Illegal key description in indexed file**

This is the result of an internal system error.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

#### **079 COBCONFIG syntax error**

An error exists in the run-time configuration side file accessed via the environment variable COBCONFIG.

Check your syntax against your **COBOL System Reference**. You might have used incorrect syntax or syntax that is not compatible with the type of RTS tuneable you are configuring (this could include assigning an illegal value to the RTS tuneable).

#### **081 Key already exists in indexed file**

This is the result of an internal system error.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

#### **082 CALL convention not supported**

The CALL convention you have specified is not supported.

See your COBOL User Guide for a list of supported CALL conventions.

#### **086 Remote file system failure**

#### **100 Invalid file operation**

You have tried a file operation which violates a general rule of COBOL in some way. Most likely the cause of this error is that you have tried a REWRITE on a sequential file opened I-O, or on a relative file with access mode sequential also opened I-O, without preceding it with a successful read NEXT.

Recode your program to ensure that the REWRITE statement in error is preceded by a read NEXT.

#### **101 Illegal operation on an indexed file**

This is the result of an internal system error.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

#### **102 Sequential file with non-integral number of records**

You have specified an incorrect record length for a sequential file, the sequential file you are trying to access is corrupt in some way or the file which you have specified is not a sequential file.

Recode your program so that it specifies the correct type of file, or if the error is the result of a corrupt file, try to run the program again using a backup copy of that file.

#### **103 Parameter cannot be passed BY VALUE**



**104 Null file name used in a file operation**

You specified a data-name for a file name instead of a literal and the data item contained only spaces when you tried to open the file.

Recode your program specifying the correct file-name.

**105 Memory allocation error**

The run-time system is unable to allocate sufficient memory space to successfully carry out the tried operation, probably because of insufficient memory space on your system.

You should obtain more memory in which to run your program. Refer to your operating system documentation for details of how you can obtain more memory, if this is possible.

**Dictionary error**

This could be the result of a read or write error to file or disk, but it is more likely to be the result of an internal system error.

Alternatively, your application might have called too many programs without CANCELING them afterward, so that memory becomes exhausted during Animation.

Contact Technical Support who will help discover the cause of your error and how it can be rectified.

Ensure that as much memory as possible is available during Animation by CANCELING any program you do not currently need to access.

**Operation not implemented in this Run-Time System**

You are trying to perform a file operation which your run-time system does not support.

You should recode your program so that it does not try such operations or you should acquire a version of the run-time system that does support the operation.

**Failure to initialize data division**

The run-time system cannot load your program properly because the data needed to correctly initialize the Data Division has become corrupted.

You should compile your program again to try to obtain good intermediate code.

**Invalid checksum in Run-Time System**

The internal information in the run-time system has been ALTERED. The run-time system might have become corrupted or you might have illegally tried to change the internal run-time system information.

**Generated code not supported by this RTS**

Contact Technical Support who will help discover the cause of the error and how it can be rectified.

**Attempt to access item beyond bounds of memory**

A memory access violation has been detected by your operating system.

**Unexpected signal**

A signal the run-time system was not expecting has been caught.

**Cannot allocate memory**

For some reason, a part of your run-time system is unable to allocate sufficient memory to enable you to execute your code.

You should try to reduce memory usage by CANCELING programs that are not in use, then try the operation that caused this message again.

**Bad collating sequence**

This is an internal system error.

Please contact Technical Support who will help discover the cause of your error and how it can be rectified.

**Symbol not found**

You are unable to load your object file. You have tried to call a program that has not been specified in the COBPATH environment variable.

Check that your COBPATH has been set up correctly. If not, revise your COBPATH to include the program being called.

**Symbol redefined**

You are unable to load your object file because it has an entry point with the same name as a module already loaded.

Once your program has terminated, recode it to remove the naming duplication. Resubmit your program to your COBOL system.

**Symbol string table of zero size**

You probably have a malformed object file.

Once the program has terminated, you must correct your object file. If this does not work, contact Technical Support who will help discover the specific cause of your error.

**Symbol is not in TEXT section**

You have tried to call a subprogram that is not an executable program.

Alternatively, you have used the same name for a called program as for a previously defined data item.

Check that the subprogram being called is an executable one. If required, correct the subprogram's name in the calling program and resubmit it to your COBOL system.

Once your program has terminated, recompile it to remove the naming duplication. Resubmit your program to your COBOL system.

#### **Coblongjmp() called below level of cobsavenv()**

You might have returned control to a higher level in the CALL/PERFORM hierarchy than the level at which cobsetjmp was called. Coblongjmp must be called only from the same or from a lower level in the CALL/PERFORM hierarchy as cobsavenv was. See your **COBOL** system reference for detail of cobsavenv and coblongjmp.

Check and correct the logic of your program and then resubmit your program to your COBOL system.

#### **Unknown relocation type**

You are using incompatible versions of the object file and the COBOL run-time library.

Once the program has terminated, resubmit your object file to your COBOL system with the current version of your COBOL run-time library. If this does not work, contact Technical Support who will help discover the specific cause of your error.

#### **124 Communication failure during I/O request to the central file handler**

#### **125 All locks/current transactions canceled due to exceeding time limit**

#### **126 Record size exceeds system limit**

#### **Attempt to access record zero of a relative file**

The value specified in the RELATIVE KEY data item contains the value zero.

You should ensure that the value in the RELATIVE KEY data item is greater than zero, then continue to run your program.

#### **File must not exist**

The operating system has been unable to find a file which you have tried to access in your program.

Ensure that you are in the correct directory or that a path to the file concerned exists. You can then try the file operation again. If the error is the result of a spelling mistake then ask for the correct file and try the file operation again.

#### **137 Illegal device specification - not mass storage**

#### **138 File closed with lock - cannot be opened**

You are trying to open a file which you previously closed with lock, which violates one of the general rules of COBOL programming.

You cannot open the relevant file. As this error implies that your program logic contains a mistake, you might want to close any remaining open files, execute a STOP RUN statement and recompile.

#### **139 Record length or key data inconsistency**

A discrepancy exists between the length of a record, or the keys, which you have specified in your current program and its definition in the program in which it was first opened.

Your program has a fault, so you probably should edit your code and resubmit it to your COBOL system before running it again.

#### **141 File already open – cannot be opened**

You have tried to open a file which is already open and so cannot be opened again.

Cancel your second attempt to open the file and continue to run your program if the fact that the file is already open is acceptable to you. However, as this error implies that your program logic contains a mistake, you might want to close any open files, execute a STOP RUN statement and then recode.

#### **142 File not open – cannot be closed**

You have tried to close a file which is not open, which is impossible to achieve.

You can abandon your attempt to close the relevant file and continue to run your program. However, as this error implies that your program logic contains a mistake, you might want to close any open files, execute a STOP RUN statement and then recode.

#### **REWRITE/delete in sequential mode not preceded by successful read**

You have failed to do a successful read on a sequentially accessed file trying a REWRITE or DELETE on some of the information contained in that file.

If the previous read was successful then perform a read on the relevant file before you retry the unsuccessful REWRITE or DELETE operation. If the previous read was also unsuccessful, close the file, execute a STOP RUN statement and then recode your program before you next run it.

#### **Boundary violation**

You have tried to write a record to a variable length record file, the length of which is not within the defined range for that file.

Recode your program.

#### **146 No current record defined for sequential read**

The file position indicator in your file is undefined owing to a failed read/START or INVALID KEY condition. You have tried to read another record in the file, but as the current record is undefined the system cannot find the start of the record for which you have asked.

You should try a START operation and continue to do so until the file position indicator is updated successfully.

#### **Wrong open mode or access mode for read/start**

You have tried to carry out a read or START operation on a file which has not been opened for INPUT or I-O, or which is not open at all.

Open the file for I-O or for INPUT and you should then be able to continue to run your program.

However, as this error implies that your program logic contains a mistake, you might want to close any files which are open, execute a STOP RUN statement and then recode.

**Wrong open mode or access mode for write**

You have tried to write to a file in sequential access mode that you have not opened for OUTPUT or EXTEND, or you have tried to write to a file in random or dynamic access mode that has not been opened INPUT or I-O, or which is not open at all.

Close the file and reopen it with the correct open mode for the file type. However, as this error implies that your program logic contains a mistake, you might want to close any files that are open, execute a STOP RUN statement and then recode.

**Wrong open mode or access mode for REWRITE/delete**

You are trying to do a REWRITE or a DELETE on a file that you have not opened for I-O, or which is not open at all.

Close the file and reopen for I-O. However, as this error implies that your program logic contains a mistake, you might want to close any open files, execute a STOP RUN statement and then recode.

**151 Random read on sequential file**

You are trying to do a random read on a file which has sequential organization.

Read the file with the correct access mode. As this error implies that your program logic contains a mistake, you might like to close any files which are open, execute a STOP RUN statement and recode.

**152 REWRITE on file not opened I-O**

You have tried a REWRITE on a file that is not open I-O.

Close the relevant file and open it for I-O operations. You should then be able to carry out the REWRITE operation successfully. However, as this error implies that your program logic contains a mistake, you might want to close any open files, execute a STOP RUN statement and then recode.

**Subscript out of range**

A subscript which you have used in your program is out of the defined range. That is, it is either less than one or it is greater than the number of occurrences of the item.

You should recode your program.

**PERFORM nested too deeply**

This error usually results if you have used "GO TO" to jump out of the range of a PERFORM rather than to jump to an EXIT statement at the end of its range.

When your program has terminated you should to recode your program to ensure that the GO TO in question jumps to an EXIT statement at the end of the PERFORM's range.

**Illegal command line**

The run-time system does not recognize the command line format you have specified as being valid.

Alternatively, the generic command-line interpreter, which must be present if your program is to be run successfully, is not found on your system. Alternatively, you have set an invalid COBSW value. Rerun your application with a valid command line.

Make sure that the interpreter is present to enable your system to pick up the commands correctly and then rerun your program.

Reset COBSW to a valid value.

### **Too many parentheses in compute statement**

You have coded a COMPUTE statement which is too complex for your system to handle successfully.

You should recode your program. We strongly advise you to break the relevant COMPUTE statement into a number of simpler statements.

### **Not enough program memory: object file too large to load**

Either your program is too large for the available memory space, or the stack is full.

If you have specified the ON OVERFLOW /EXCEPTION clause in the relevant CALL statement, the error is recoverable. Any associated imperative statement is executed before the next instruction.

### **Attempt to REWRITE to a line-sequential file**

You have used the REWRITE statement in conjunction with a file whose organization is line sequential. The REWRITE statement cannot be used with line sequential files.

Close the file in error before executing a STOP RUN statement to ensure that you do not lose any data from it. Recode your program to make the organization of the file to which you want to do a REWRITE either sequential, indexed sequential, or relative.

### **Malformed line-sequential file**

A line-sequential file which you are trying to access is corrupt in some way.

Rerun your program using the backup copy of that file.

### **Overlay loading error**

An error has occurred while trying to load the intermediate code for an independent segment. The segment is either missing or corrupted in some way.

If the segment is missing, locate it. If you cannot find it or if it is present and corrupt, resubmit your program to your COBOL system.

### **Illegal intermediate code**

The intermediate code which is currently being processed is not valid code. You are probably trying to execute a corrupted file or one which has not been submitted to your COBOL system successfully.

You should resubmit your source program to your COBOL system to try to obtain uncorrupted intermediate code.

### Arithmetic overflow or underflow

You are executing a program that is trying to perform a floating-point divide by zero.

You should recode your program to avoid this illegal operation.

### Illegal character in numeric field

By default, the value which you enter into a numeric or numeric edited field is checked to ensure that it is numeric. You have entered either nonnumeric characters or uninitialized numerics into numeric or numeric edited fields: these are automatically space-filled and are thus classified as nonnumeric items.

You must adjust your code so that no invalid data is used. You can locate the invalid numeric data in your code by setting the +F switch on and animating your program until you receive this error. You might need to use one of the Compiler directives, BADSIGNS, HOST-NUMCOMPARE, COMPARE or SPZERO, to resolve invalid data in numeric fields. See your **COBOL** System Reference for details on these directives.

### Run-Time subprogram not found

You have tried to call a subroutine whose entry address has not been set up in your run-time system.

Check to see that you used a valid call number in the unsuccessful subroutine call. If not, revise your code to contain a call number which your system recognizes. If you did use a valid call number but still received this error, you should contact Technical Support.

### Version number incompatibility

One or more of the run-time support modules is incompatible with the run-time system you are using. The name of the incompatible support module is displayed.

Alternatively, the run-time system you are using is incompatible with the version of your COBOL system. Either "RTS" or the name of the run-time system file is displayed: **coblib.dll** (OS/2), **coblib.dle** (DOS) or **coblib.dlw** (Windows).

Reinstall the support module using your installation disks. Reinstall the run-time system file using your installation disk. If no support module name is displayed, you have performed one of the following:

Used intermediate code which has been produced on a version of your COBOL system that is incompatible with the run-time system you are using. Your RTS, therefore, cannot execute correctly any generated code you are producing or have already produced from this intermediate code.

Tried to execute a file which is not your COBOL system's intermediate or generated code.

### Recursive COBOL CALL is illegal

You have tried to call a COBOL module that is already active.

You should recode your program.

### **Too many USING items**

The list of items which you have supplied in a CALL....USING statement is longer than the run-time system can handle.

Once your program has terminated, recode it with group items rather than elementary items before rerunning it.

### **Stack overflow**

You have nested a PERFORM statement or a series of CALL statements too deeply.

Edit your program to reduce the number of levels in a nested PERFORM or CALL statement, then resubmit your source code to your COBOL system.

### **Illegal configuration information**

You have tried an operation for which your machine is not configured; the most likely cause of this is that Adis is not configured correctly.

Check that Adis is configured correctly. See your COBOL System Reference for details of how you can reconfigure Adis.

### **System program not found**

A system program, for example Adis or ExtFH, is not present on the current logged-in drive.

Ensure that all the system programs are available on the logged-in drive and copy those which are not currently present using your backup system disk. Once all the necessary system programs are available, you can run your program.

### **Japanese operations illegal with this RTS**

You are trying to perform Japanese operations with a non-Japanese run-time system, or you have used a Japanese version of your COBOL system to produce code, which you are now trying to run using a non-Japanese run-time system.

You should resubmit your program using a non-Japanese run-time system, or if you still want your program to perform Japanese operations, you should acquire a Japanese run-time system.

### **Recursive non-MF PERFORM is illegal**

You have tried full recursion of a PERFORM statement in a program that was submitted to your COBOL system with the OSVS parameter of the PERFORM-TYPE directive specified. That is, you have tried to end two PERFORMS with the same return address.

You should either resubmit your program to your COBOL system with a parameter other than OSVS specified for the PERFORM-TYPE directive, or recode your program so that each PERFORM has its own unique return address before you resubmit it to your COBOL system with the MF parameter of the PERFORM-TYPE directive specified.

### **Called program file not found in drive/directory**

You have tried to call a program which is not present on your current logged-in drive or directory



or in a directory pointed to by the COBDIR environment variable.

Once your program has terminated you should copy the relevant file into your logged-in drive or directory. If insufficient space is available, you should set the COBDIR environment variable to search the directory or drive on which the file is present when your program calls it. Refer to your **COBOL** System Reference for details of the COBDIR environment variable. Once you have taken these steps, run your program again.

### **Imported file not found**

You have tried to load a **.dll** file which contains references to another **.dll** file that cannot be found by the operating system.

Locate the missing file and ensure it is located on the default search path for your operating system.

### **Attempt to run intermediate code program which has severe errors in it**

You are trying to run a program that produced severe faults when you submitted it to your COBOL system with the run-time switch E turned off.

Alternatively, you could try to run the program with the E run-time switch set, though this might not give the desired results.

You should edit your source code to correct all the severe faults, resubmit it to your COBOL system, and then run the intermediate code that is produced.

When your program is being animated, Animator reports this error and enables you to continue to run the program.

See Also: E TRS switch

### **Illegal intersegment reference**

You might have a corrupted file. Alternatively, your code contains a segment reference for the Forward Reference Table, which is illegal.

Resubmit your source code to your COBOL system. If you receive this error again, contact Technical Support who will help discover the specific cause of your error.

### **Attempt to cancel program failed**

You have tried to remove a currently executing program, or its parents or grandparents, from memory.

Alternatively, you have tried to cancel a DLL, either directly or indirectly as an imported DLL, that contains an entry point which has been registered as an EXIT LIST function via the OS/2 API call DosExitList.

Once your program has terminated, you need to recode your program to ensure that you do not try to cancel a program (or its parents or grandparents) while it is still being executed.

Locate the erroneous DLL and ensure that the EXIT LIST function is removed before you cancel the DLL. If you cannot recode the DLL, you can set the O RTS switch to force a logical cancel on the DLL.

See also: O RTS switch

### **Error during save**

You cannot save the information which your program has generated. This can be caused by several different reasons, but one of the most common causes is that you have tried to build a module that is too large for the available memory space.

If the error is caused by a lack of space, you can either delete some of the files which you no longer need on your current disk or insert a new floppy disk to take the output from your program. You should then be able to rerun your program and save the information given by it.

### **Error during chain (program not found)**

You have tried to chain to another program which your system is unable to find.

Once your program has terminated, you should copy the relevant file to your logged-in drive or directory. If insufficient space is available, you should set the COBDIR environment variable to search the directory or drive on which the file is present when your program calls it. Refer to your **COBOL** System Reference for details of the COBDIR environment variable. Once you have taken these steps, run your program again.

### **End-of-file marker error**

A file-marker used to indicate that the end-of-file has been reached is missing from one of your files.

You should resubmit your code to your COBOL system or use a debugger to place the end-of-file marker at the end of the file. You can then rerun your program.

### **Invalid parameter error**

A parameter which you have used is not one which is recognized by your system. You have probably used a parameter for a run-time system subprogram which is not in the first 64K of the Data Division.

Revise your code to contain a parameter which is known by your system. That is, ensure that the parameter is in the first 64K of the Data Division.

### **Console input or console output open in wrong direction**

You are either trying to read input from the screen or write to the keyboard.

You should recode your program.

### **Attempt to open line sequential file for I-O**

You have tried to open a line-sequential file in the input-output open mode, but this mode is not supported for files with this organization.

When your program has terminated, you should recode your program to ensure that the file with organization line sequential is opened for input, output, or extend. You can then rerun your code.

### **ACCEPT/DISPLAY I-O error**

You have tried to read input from the screen, write to the keyboard or the ADIS module has not

been able to open your terminal's channels for I-O.

Your program logic contains a mistake, so you must recode.

### **185 File malformed**

### **186 Attempt to open stdin, stdout or stderr with incorrect mode**

You have tried to open either a standard input file with output mode or some other file in an incorrect mode.

### **Run-Time System not found on \$COBDIR path**

The run-time system cannot be found on the path you have set up in the COBDIR environment variable. Alternatively, you might not have installed your COBOL system correctly.

Ensure that the run-time system is in the path you have set up in the COBDIR environment variable. Alternatively, ensure that your COBOL system has been installed correctly. If it has not, you must reinstall your COBOL system.

### **Filename too large**

A file-name which you have used has more characters than the maximum number allowed by your operating system.

You should recode your program to check the length of the file in error and rename it with a shorter file name. You can then run your program again.

### **Intermediate code load error**

You are unable to load your intermediate code. You might have tried to load intermediate code that either has not been successfully produced or has been corrupted in some way.

Try to obtain good intermediate code, for example, by resubmitting (or submitting) your source code to your COBOL system. You should then be able to load your code and run the program successfully.

### **Too many arguments to CALL**

A CALL statement in your program cannot be successfully executed because of the number of arguments which you have used with it.

When your program has terminated, you can recode it using group items rather than elementary ones. You should then be able to run your program successfully.

### **Terminal type not defined**

Your terminal is not defined.

Your terminal type is undefined, so your operating system is unable to drive your terminal. Set up the necessary environment for your terminal.

### **Required terminal capability description missing**

A compulsory entry, for example cursor movement or clear screen, is missing from your terminal configuration database.

Add the missing entry to your terminal configuration database.

### **Error in variable length count**

The intermediate code which is currently being processed is not a valid operation. You are probably trying to execute a corrupt file or one which has not been produced.

You should resubmit your source code to your COBOL system.

### **File size too large**

A file which your program is accessing is too large for successful execution to continue.

When your program has terminated, you should recode your program spreading the data over more than one file to ensure that no file becomes too large for your operating system to handle. Having recoded your program, you can then rerun it.

### **DELETE/REWRITE not preceded by a read**

Before a DELETE or REWRITE statement can be successfully executed in sequential access mode, the last input-output statement executed for the associated file must have been a successful read. In your code, no read statement precedes your tried DELETE or REWRITE.

When your program has terminated, recode your program making sure that the last input-output statement to be executed before the DELETE or REWRITE is a read statement.

### **Record number too large in relative or indexed file**

The relative record key has exceeded the system limit, that is, the file is too large for the system to handle.

Alternatively, the record key which you have specified is too large for the system to deal with successfully, or the pointer to the record has been corrupted in some way so that it is either too large or it is not a multiple of the record length.

### **Screen handling system initialization error**

This error can be caused by one of the following:

Your display adapter is in the wrong mode.

Your screen handling interface has not been correctly initialized because your terminal does not have the required capabilities.

Your terminfo file is corrupted.

Memory has been incorrectly allocated.

If you are using a DOS or OS/2 system, the monitor must be in alphanumeric display mode rather than graphics display mode. You can set the display mode to a valid alphanumeric mode by using the DOS MODE utility and then rerunning your program.

If you are using a UNIX-type system, you must check that your terminfo file contains the correct entry for your terminal. Refer to your **COBOL** System Reference for details. If your terminfo file is corrupt or your screen handling interface has not been correctly initialized, you must advise

your system administrator of the problem and he must take steps to try to correct it. If your memory has been incorrectly allocated, you must rerun your program.

**Load failure**

The system cannot load a program, usually because of insufficient memory.

Alternatively, your program has run out of memory during the loading or reloading of a file. This occurs more frequently during Animation because of the extra memory required during Animation.

Make more memory available and then rerun your program.

Ensure that as much memory as possible is available during Animation by CANCELING any program you do not currently need to access.

**Operating System error code lies outside expected range**

A system call has returned an unexpected error number, which is not documented.

Contact Technical Support who will help discover the specific cause of this error.

**Run-Time System internal logic error**

The amount of memory available on your machine is so low that not even the run-time system can be fully loaded. Alternatively, your run-time system has stopped as a result of an internal logic error from which you cannot recover.

Free some memory and then you should be able to run your program successfully.

Contact Technical Support who will help discover the cause of your error.

**I-O error in paging system**

No room is available in your current directory or on the floppy disk which you are using for the paging file.

When your program has terminated, delete any files which you no longer need from your directory to make room for the paging file, or insert a new floppy disk.

**Exported functionality error**

You have either caused an internal run-time system error by invalid use of an exported function or the code produced by a preprocessor in your COBOL system contains errors.

Ensure that all of your external assembler applications call and use run-time system functions correctly before you try to run your program again. If you are using a preprocessor as part of your COBOL system, you should use the software as a standalone preprocessor to isolate the problem areas.

**CALL parameter not supplied**

The item you are trying to access in the Linkage Section of the currently executing program has not been initialized.

Recode your program to ensure that it contains all of the necessary parameters or check that it is a valid caller.

**206 Reading unwritten data from memory**

You are trying to read data which has not been written from the core file.

**207 Machine does not exist**

You have tried to access a machine that is not connected to your network or which is not on-line.

Make sure the machine is connected to the network and is on-line and try to access it again.

**Error in multi-user system**

This is normally caused by an unexpected error occurring in the network or file-sharing facilities. A corrupted network message also causes this error to be returned.

Retry the unsuccessful operation. If the error persists, contact Technical Support who will help discover the specific cause of this error.

**Network communication error**

This is normally given if an incorrect checksum has been received in a communications packet.

Your program should continue to execute after you have received this error, but results might be undefined.

**File is closed with lock**

You have tried to open a file which you have previously closed with lock.

Recode your program to avoid opening a file which has previously been closed with lock.

**Program not executable by Run-Time System**

You have tried to run a program that is incompatible with the current version of your run-time system, your object file or your COBOL run-time library. For example, your run-time system does not run a program linked using a different object file format or COBOL run-time library.

If your object file is incompatible with the current version of either your COBOL run-time library or your run-time system, you should relink with the current version of your COBOL run-time library.

**213 Too many locks**

You have either tried to exceed the maximum number of simultaneous record locks per file you can have or you have exhausted an operating system or network resource, for example dynamic memory.

Execute a COMMIT or an UNLOCK operation on the relevant file and you should then be able to continue to run your program. You should try not to retain a record lock for longer than is necessary.

**GO TO has not been ALTERED**

You have violated one of the general rules of COBOL programming.

Close any files which might be open, execute a STOP RUN statement and then edit your

program to avoid such illegal operations.

**Cannot ANIMATE a program running COMMUNICATIONS**

You have tried to animate a program which makes use of the communications module. This cannot be done as both Animator and the communications module need full use of the CRT.

You should run your program without the aid of Animator.

**Cannot initialize the named communications device**

A device driver is probably missing.

Ensure that all communications drivers are loaded before you try to run Communications.

**Incompatible host for native code file**

The .gnt file is not valid for the host processor.

You must resubmit your program to your COBOL system.

**Malformed MULTIPLE REEL/UNIT file**

Either your file header is not correctly formatted or you are not using a MULTIPLE REEL/UNIT file.

You should try to run your program again using a backup copy of the relevant file.

**Operating system shared file limit exceeded**

You have tried to exceed your operating system's limit on the number of shared files that you can have open simultaneously. As this figure is operating the system dependently, you should consult your Release Notes for details of how many shared files your system permits to be open at any one time.

Close some of the open shared files you are no longer accessing and retry the file operation.

**Attempt to execute more than one SORT or MERGE simultaneously**

You have coded your program in such a way that it is trying to execute more than one SORT or MERGE operation at the same time. For example, you might have coded a SORT statement in the input or output procedure of another SORT statement, an operation that is specifically prohibited under the rules of ANSI COBOL.

You should recode your program to ensure that it does not execute more than one SORT or MERGE at any one time.

**SORT/MERGE error: see status keys**

You have tried a SORT/MERGE operation which has been unsuccessful for some reason. You might have had too many files open when you tried a SORT/MERGE operation or the file which you are trying to access might be locked.

The action you should take depends on the situation in which it occurs. Check the status of each file (USING/GIVING) defined in the SORT statement.

Alternatively, you have set the TMP environment variable to point to a directory that does not exist.

The action you should take depends on the situation in which it occurs.

Either set TMP to point to a directory that does exist, or unset TMP.

## **224 External Language Initialization failure**

### **225 Dynamic load error – program component missing**

The run-time system cannot locate the root or overlay of a program that is currently loaded in memory.

Alternatively, you have insufficient memory to load your program.

Alternatively, the run-time system could not find enough file handles to open and, therefore, load the code.

Either the library that contained the program has been canceled or the program is no longer available in the program search path. Ensure that the program is available either on disk or in an open library.

Free some memory, use XM, or restructure your application so that it uses less memory.

Increase your operating system file handles limit.

### **EXTERNAL file definition inconsistent**

Two or more programs define the same external file but with different formats. For example, maximum and minimum record lengths might be different.

Make sure that all of your programs define the external file with the same format so that they are consistent. It is useful to have the file definition in a COPY file.

### **EXTERNAL data definition inconsistent**

Two or more programs are defining the same external data item, but the first loaded program has defined the size smaller than has the second or subsequent loaded program.

Make sure that both or all of your programs define the size of the external data item as being the same.

### **228 Could not allocate memory for EXTERNAL item**

### **229 SORT/MERGE module does not support EXTERNAL using/giving files**

You have tried a SORT or MERGE operation which has USING/GIVING files which are defined as EXTERNAL. The SORT/MERGE module does not support USING/GIVING files defined as EXTERNAL.

Recompile your program to use the callable SORT module (EXTSM).

### **230 Floating Point Support Module not found**



**Error in animator communications channel**

Animator has encountered system limits or conflicts resulting in communications errors. Perhaps two logins on the same UNIX system are trying to cross-session animate the same program file.

Copy the animated program file to a different directory and try the animation again.

**236 Animated program has terminated unexpectedly**

A program you are animating has terminated without following the standard run-time system shut-down process. The termination was probably either initiated by the user or caused by a severe run-time error.

Run your program without animation to determine if it runs successfully. If so, animate the program without cross-session or intra-session animation.

**237 Unable to initialize animated process**

Animator has encountered system limits in starting your program. The animated program cannot start because of either insufficient memory or too many processes running on the UNIX system.

Animate your program when the load on the system has been reduced. Run the program without animation to determine if it runs successfully. If so, animate the program without cross-session or intra-session animation. Ask your system administrator to expand the number of process slots and virtual memory page maps.

**Keyboard interrupt to ANIMATOR during ACCEPT**

While using Animator you have terminated your program with a keyboard interrupt.

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## Appendix C

### *Btrieve Status Codes*

#### Quick Reference

- 1: The operation parameter is invalid.
- 2: The application encountered an I/O error.
- 3: The file is not open.
- 4: The application cannot find the key value.
- 5: The record has a key field containing a duplicate key value.
- 6: The key number parameter is invalid.
- 7: The key number has changed.
- 8: The current positioning is invalid.
- 9: The operation encountered the end-of-file mark.
- 10: The key field is not modifiable.
- 11: The specified pre-imaging filename is invalid.
- 12: Btrieve cannot find the specified file.
- 13: Btrieve could not open the extension file for an extended file.
- 14: Btrieve cannot create or open the pre-image file.
- 15: The application encountered an I/O error during pre-imaging.
- 16: The application encountered an expansion error.
- 17: The application encountered a close error.
- 18: The disk is full.
- 19: The application encountered an unrecoverable error.
- 20: Btrieve Engine or Requester is inactive.
- 21: The key buffer parameter is too short.
- 22: The data buffer parameter is too short.
- 23: The position block parameter is not 128 bytes long.
- 24: The page size or data buffer size is invalid.
- 25: The application cannot create the specified file.
- 26: The number of keys specified is invalid.
- 27: The key position is invalid.
- 28: The record length is invalid.
- 29: The key length is invalid.
- 30: The file specified is not a Btrieve file.
- 31: The file is already extended.
- 32: The file cannot be extended. 33: Btrieve cannot unload.
- 34: The specified extension name is invalid.
- 35: The application encountered directory error.
- 36: The application encountered a transaction error.
- 37: Another transaction is active.
- 38: Btrieve encountered a transaction control file I/O error.
- 39: A Begin Transaction operation must precede an End/Abort Transaction operation.
- 40: The file access request exceeds the maximum number of files allowed.
- 41: Btrieve does not allow the attempted operation.
- 42: A file previously opened in Accelerated mode was not closed.
- 43: The specified record address is invalid.
- 44: The specified key path is invalid.
- 45: The specified key flags are invalid.
- 46: Access to the requested file is denied.
- 47: The number of files opened exceeds the maximum allowed.
- 48: The alternate collating sequence definition is invalid.

- 49: The extended key type is invalid.
- 50: The file owner is already set.
- 51: The owner name is invalid.
- 52: An error occurred while writing to the cache.
- 53: The language interface version is invalid.
- 54: The variable-length portion of the record is corrupt.
- 55: The application specified an invalid attribute for an AUTOINCREMENT key.
- 56: An index is incomplete.
- 57: An expanded memory error occurred.
- 58: The compression buffer length is too short.
- 59: The specified file already exists.
- 60: The specified reject count has been reached.
- 61: The workspace is too small.
- 62: The descriptor is incorrect.
- 63: The data buffer parameter specified on an Insert Extended operation is invalid.
- 64: The filter limit has been reached.
- 65: The field offset is incorrect.
- 66: The maximum number of open databases has been exceeded.
- 67: Btrieve cannot open the SQL data dictionary files.
- 68: Btrieve cannot perform the RI Delete Cascade operation.
- 69: The Delete operation specified a file that is damaged.
- 71: There is a violation of the RI definitions.
- 72: Btrieve cannot open the RI referenced file.
- 73: The RI definition is out of sync.
- 74: Btrieve aborted the transaction.
- 75: The server routing list is too small.
- 76: There is a conflict on the referenced file.
- 77: The application encountered a wait error.
- 78: Btrieve detected a deadlock condition.
- 79: A programming error occurred.
- 80: Btrieve encountered a record-level conflict.
- 81: Btrieve encountered a lock error.
- 82: Btrieve lost positioning.
- 83: Btrieve attempted to update or delete a record that was read outside the transaction.
- 84: The record or page is locked.
- 85: The file is locked.
- 86: The file table is full.
- 87: The handle table is full.
- 88: The application encountered an incompatible mode error.
- 89: A name error occurred.
- 90: The redirected device table is full.
- 91: The application encountered a server error.
- 92: The transaction table is full.
- 93: The record lock types are incompatible.
- 94: The application encountered a permission error.
- 95: The session is no longer valid.
- 96: A communications environment error occurred.
- 97: The data buffer is too small.
- 98: Btrieve detected an internal transaction error.
- 99: Btrieve Requester is unable to access the NetWare Runtime server.
- 100: No cache buffers are available.
- 101: Insufficient operating system memory is available.
- 102: Insufficient stack space is available.
- 103: The chunk offset is too big.
- 104: Btrieve does not recognize the locale.
- 105: The file cannot be created with Variable-tail Allocation Tables (VATs).

- 106: Btrieve cannot perform a Get Next Chunk operation.
- 107: The application attempted to perform a chunk operation on a pre-v6.0 file.
- 109: An unknown error was encountered either creating or accessing a semaphore.
- 110: Btrieve cannot access the archival logging configuration file.
- 111: The specified filename was not found in the archival logging configuration file.
- 112: The specified file is in use by another client.
- 113: Btrieve cannot find the archival log for the specified file.
- 114: The archival log for the specified file is invalid.
- 115: Btrieve cannot access the archival logging dump file.
- 130: Btrieve ran out of system locks.
- 132: The file has reached its size limit.
- 133: More than 5 concurrent users attempted to access the same data file.

*The Pervasive Software Inc. Btrieve Status Code Listing, incorporated in this Documentation, has been provided with the written permission of Pervasive Software Inc.*

## Btrieve List of Messages

### 1: The operation parameter is invalid.

The operation parameter specified in the call is invalid.

### 2: The application encountered an I/O error.

Btrieve encountered an error while reading from or writing to the disk. One of the following has occurred:

- The file is damaged and must be recreated.
- There is a large pre-image file inside a transaction and there is not enough space for a write to the pre-image file.

Note\*\* Pre-image files are used only for file versions earlier than v6.0.

- For Btrieve v5.x files, there is one pre-image file for multiple data files. For example, if you name the data files CUSTOMER.ONE and CUSTOMER.TWO, both files will have pre-image files named CUSTOMER.PRE.
- For pre-v6.0 Btrieve files that are larger than 768 MB, there is a conflict among locking mechanisms. The Btrieve file has not been corrupted. Your application can retry the operation until the conflict is resolved (that is, when the competing application releases the lock required by your application).
- A Btrieve engine version earlier than v6.0 is attempting to open a v6.x formatted file.

### 3: The file is not open.

The operation cannot be executed because the file is not open. The application must perform a successful Open operation before Btrieve can process any other operations.

This status code may also be returned if the application passed an invalid position block for the file or if the application passed a position block with a different client ID than the client ID used to open the file.

**4: The application cannot find the key value.**

Btrieve cannot find the specified key value in the index path.

Also, pre v6.x versions of server-based Btrieve could return this status code if two separate files have different alternate collating sequences (ACSs), but those ACSs have the same name. Never use the same name for different ACSs, regardless of the version of Btrieve you are using.

**5: The record has a key field containing a duplicate key value.**

Btrieve cannot add or update a record for the designated index because the record has a key field that contains a duplicate key value and the index does not allow duplicate values.

**6: The key number parameter is invalid.**

The value stored in the key number parameter is not valid for the file being accessed. The key number must correspond to one of the keys defined for the file. Valid key numbers are 0 through 118.

**7: The key number has changed.**

The key number parameter changed before a Get Next, Get Next Extended, Get Previous, or Get Previous Extended operation. The operation requires the same key number parameter as the previous operation because Btrieve uses positioning information relative to the previous key number.

Another related situation can also result in Btrieve returning this status code. That situation occurs when an application performs a Delete or Update operation immediately following a Get operation. If the application changes the value of the key number in the Delete or Update operation (from the value returned by the preceding Get operation), Btrieve will delete or update the record as requested and will not return Status Code 07, at least not at this point. However, Btrieve will return Status Code 07 on the very first Get operation performed after the deletion or update, even if that Get operation uses the same key value the application passed to the Delete or Update operation.

If you need to change key numbers between consecutive Get Next, Get Next Extended, Get Previous, or Get Previous Extended operations (or in Delete or Update operations as described in the preceding paragraph), use a Get position operation followed by a Get Direct/Record operation to reestablish positioning for the new index path.

**8: The current positioning is invalid.**

The current position must be established to update or delete a record. Perform a Get or Step operation to establish the current position.

This status code may also be returned if the application passed an invalid position block for the file.

**9: The operation encountered the end-of-file mark.**

This status code indicates one of the following conditions has occurred:

The operation encountered an end-of-file boundary or tried to read past the file boundary (end-of-file or start-of-file).

In a Get Next Extended, Get Previous Extended, Step Next Extended, or Step Previous Extended operation, the number of records satisfying the filter condition is less than the number of specified records to be returned and the reject count has not been reached.

When reading a file in ascending order according to an index path, Btrieve has already returned the last record in that index path. When reading a file in descending order according to an index path, Btrieve has already returned the first record in the index path.

When using the Get By Percentage operation, either the value supplied for the percentage is too high, that is it exceeds 10,000 decimal (0x2710), or the file contains no records.

**10: The key field is not modifiable.**

During an Update operation, an attempt was made to modify a key field that is defined as non-modifiable.

**11: The specified pre-imaging filename is invalid.**

This status code indicates that the filename specified does not conform to file naming conventions. Make sure the filename is valid for the environment. Status Code 11 can also have the following meanings in server-based versions of Btrieve:

An attempt was made to open a file that has .^^ as its extension. This extension is reserved for Btrieve to use during a continuous operation. (Continuous operations are used only in the server-based Btrieve environment.)

The data buffer for a Begin or End continuous operation is not set up correctly.

**12: Btrieve cannot find the specified file.**

Check the key buffer parameter to make sure the pathname is terminated with a blank or a binary zero. Also, check to be sure the file exists. When accessing a Btrieve file on a NetWare server, be sure that you have FILE SCAN rights to the directory in which the Btrieve file resides.

**13: Extended file error.**

Btrieve v5.x or earlier could not find the extension file for an extended file that the application tried to open. Extension files must be loaded on the logical disk drive specified when the extension was created. Both the primary file and its extension file must be online to access an extended file.

**14: Btrieve cannot create or open the pre-image file.**

There are four possible causes for this status code:

Note\*\* Pre-image files are used only for file versions earlier than v6.0.

Btrieve cannot create a new pre-image file because the disk directory is full. Btrieve must be able to create a pre-image file.

Btrieve cannot open the pre-image file to restore file integrity. If the pre-image file is erased or damaged, Btrieve cannot restore the file's integrity.

In the server-based Btrieve environment, or in the DOS or OS/2 client-based Btrieve environments, either use the RECOVER command in the Btrieve File Manager utility to retrieve the damaged file's data records in a sequential file or replace the file with its most recent backup.

In the Btrieve for Windows environment, use the Save command from the Data menu of the Btrieve File Manager utility to retrieve the damaged file's data records in a sequential file. Be sure to specify no indexes when executing the Save command in this situation.

Client-based Btrieve cannot assign a handle to the pre-image file because Btrieve was not started by a user with access rights to the pre-image file.

The file structure of a pre-image file created by Btrieve v6.x is different from the file structure of a pre-image file created by Btrieve v5.x. If you have an extraneous .PRE file in Btrieve v5.x format and you are using Btrieve v6.x, Status Code 14 is returned when you try to open the Btrieve file to which the .PRE file belongs.

#### **15: The application encountered an I/O error during pre-imaging.**

This status code indicates either the disk is full or the pre-image file is damaged.

Note\*\* Pre-image files are used for file versions earlier than v6.0. When this status code occurs, proceed as follows:

If the pre-image file is damaged, the integrity of the Btrieve file cannot be ensured.

In the server-based Btrieve environment, or in the DOS or OS/2 client-based Btrieve environments, either use the RECOVER command in the Btrieve File Manager utility to retrieve the damaged file's data records in a sequential file, or replace the file with its most recent backup.

In the client-based Btrieve environment, use the Save command of the Btrieve File Manager utility to retrieve the damaged file's data records in a sequential file. Be sure to specify no indexes when executing the Save command in this situation.

If the disk is full, erase any unnecessary files.

#### **16: The application encountered an expansion error.**

Pre-v6.0 versions of Btrieve return this status code when they encounter an error while writing the directory structure to disk prior to creating the expanded file partition. Either Btrieve cannot close the file or a new page was added to the file and Btrieve cannot close and reopen the file to update the directory structure. Check for a disk hardware failure.

#### **17: The application encountered a close error.**

Pre-v6.0 versions of Btrieve return this status code when they encounter an error while writing the directory structure to disk prior to closing the file. Either Btrieve cannot close the file, or a new page was added to the file and Btrieve cannot close and reopen the file to update the directory structure. Check for a disk hardware failure.

This status code may also be returned if the application passed an invalid position block for the file.

#### **18: The disk is full.**

This status code can be returned in the following situations:

The disk is full, and the file cannot be expanded to accommodate additional records. Erase any unnecessary files. If using a version of Btrieve prior to V6.0, you can possibly extend the file to gain additional disk space.

There is not enough space to append a new page to the data file. The pre-image file is out of disk space. If you are working with files created by Btrieve versions earlier than v6.0 and you are in a transaction, the pre-image file size increases for the duration of the transaction. If you receive this status, either reduce the number of operations in the transaction or obtain more disk space.



The NetWare owner name for the file is no longer valid and your application tried to insert or update records in the file, thus causing the file to expand. In this case, this status code is returned when Btrieve needs to add a page to the file, regardless of how much disk space is available. To check for an owner name, use the NetWare utility NDIR. To add an owner name, use either FILER (a NetWare text utility) or the NetWare Administrator graphical utility.

You can limit the amount of disk space available to each user in NetWare. This status code indicates an attempt was made to expand a Btrieve file beyond the amount of disk space allocated to the file's owner in NetWare.

**19: The application encountered an unrecoverable error.**

To ensure file integrity, recover the file as follows:

In the server-based Btrieve environment, or in the DOS or OS/2 client-based Btrieve environments, either use the RECOVER command in the Btrieve File Manager utility to retrieve the damaged file's data records in sequential file or replace the file with its most recent backup.

In the client-based Btrieve environment, use the Save command of the Btrieve File Manager utility to retrieve the damaged file's data records in a sequential file. Be sure to specify no indexes when executing the Save command in this situation.

**20: The Btrieve Engine or Requester is inactive.**

In DOS and NetWare, you must load Btrieve and, if applicable, the Btrieve Requester before generating any requests.

By default in the Windows environment, the Setup utility turns on the Client Engine Usage option. If you want to access server-based Btrieve but do not want to access client-based Btrieve, turn the Client option off and turn the Requester option on. If you want to access both client-based Btrieve and server-based Btrieve, turn the Requester option on and leave the Client option on.

Also, in the Windows environment, be sure that the Btrieve for Windows DLLs and WBTR32.EXE are in your PATH or in the top level of your Windows directory. In the OS/2 environment, be sure that the Btrieve DLLs are in your LIBPATH directory.

**21: The key buffer parameter is too short.**

The key buffer parameter is not long enough to accommodate the key field for the index path requested. Verify that the length of the key buffer equals the defined length of the key specified in the key number parameter. Only language interfaces that track the buffer length can return this status code.

**22: The data buffer parameter is too short.**

The data buffer parameter is not large enough to accommodate the length of the data record defined when the file was created or the entire record including its variable portion. Verify that the length of the data buffer is at least as long as the file's defined record length.

For Get or Step operations, Btrieve returns as much data as it can and a Status Code 22, indicating that it cannot return the entire record.

For an Insert operation, Btrieve does not insert the record if the data buffer is shorter than the fixed-length portion of the record.

For an Update operation, if the data buffer is too short to contain the fixed-length portion of a record, Btrieve does not update the record.

For the Create operation, the last key defined in the file specification has the segmented attribute set, but has no definition for additional segments. Either remove the segmented attribute for the key or add the definition(s) for the missing segment(s).

For the Create, Stat, and Create Index operations, the data buffer is not long enough to contain all the file specifications, the key specifications, and (if specified) the alternate collating sequence definition.

For the Get By Percentage or Find Percentage operation, the data buffer length is less than 4 bytes.

For the Version operation, the data buffer length is less than 5 bytes.

A status code 22 may indicate file corruption, especially in files with variable length records. You should rebuild the file if it is corrupt.

**23: The position block parameter is not 128 bytes long.**

Only older language interfaces that track the position block length can detect and return this status code. None of the currently-shipping language interfaces return Status Code 23.

**24: The page size or data buffer size is invalid.**

Two possible reasons for receiving this status code are as follows:

The page size is invalid. The page size must be a multiple of 512 bytes and cannot exceed 4,096 bytes.

During a Create operation, the page size is the first file specification Btrieve checks. A Status Code 24 at this point may indicate an invalid data buffer parameter.

In versions prior to Btrieve v6.1, this status code can be returned from the Open operation. In this case, Btrieve cannot open the file because the file's page size exceeds the Largest Page Size configuration option. To successfully open the file, you must increase the value of the Largest Page Size configuration option and then reload Btrieve. Btrieve v6.1 will not return Status Code 24 from the Open operation.

**25: The application cannot create the specified file.**

Btrieve can return this status code if an application attempts to create a Btrieve file, but the disk directory or the disk itself is full. If the application is creating a file over an existing file, Btrieve returns this status code when the existing file is open or when the operating system prevents the operation for some other reason (for example, in NetWare the file is flagged transactional).

If you are using NetWare, some pre-v6.0 versions of Btrieve can also return Status Code 25 if the HOLD parameter in NET.CFG or SHELL.CFG is set to ON, and the application attempts to create a Btrieve file on a network drive. (The HOLD parameter is set to OFF by default.) Creation of the Btrieve file on a local drive will be successful regardless of the value of the HOLD parameter.

**26: The number of keys specified is invalid.**

The number of keys specified for the page size is invalid. The number of key segments must be within the following limits:

Page Size	Max. Number Key Segments
512	8
1,024	23

1,536	24
2,048	54
2,560	54
3,072	54
3,584	54
4,096	119

**27: The key position is invalid.**

The key field position specified is less than 1 or exceeds the defined record length for the file. Either the key position is greater than the record length or the key position plus the key length exceeds the record length.

**28: The record length is invalid.**

The record length specified (plus overhead for duplicates, record usage count, variable record pointers, key pointers, and blank truncation information) must be less than or equal to the page size minus 8 bytes and greater than or equal to 4 bytes.

**29: The Key length is invalid.**

The key length specified must be greater than 0, but cannot exceed 255 bytes. The length of a binary key must be an even number. Btrieve requires that each key page in the file be large enough to hold at least eight keys.

If the page size is too small to accommodate eight occurrences of the specified key length (plus overhead), either increase the file's page size or decrease the key length.

**30: The file specified is not a Btrieve file.**

Either Btrieve did not create the file or a version of Btrieve earlier than v3.x created it.

This status code can also indicate that the first page of the file is damaged. Use a backup copy of your data file.

If you are trying to recover from receiving Status Code 30 and you suspect that the header page of the source file might be damaged, try using the File Manager utility or File Manager utility to create the new Btrieve file with a description file.

**31: The file is already extended.**

This status code is returned by pre-v6.0 client and VAP-based versions of Btrieve if an application tried to extend a file that has already been extended. A file can be extended only once. Files on a NetWare v3.x or NetWare v4.x server using the Btrieve NLM cannot be extended. Also, Btrieve v6.x does not support the extended files feature.

This may also be error: **3103 Server name not found by Pervasive Network Services Layer.**

The search for a target server name was unable to resolve an address after searching NDS, bindery, named pipes, and DNS. Some possible causes include:

- No common communication protocol is available between the server and the client. To check this, use the Setup utility to check the Supported Protocols setting of the requester (under communications Requester section) and the server (under Btrieve Communications Manager and Scalable SQL communications Manager sections). Ensure that there is a common protocol (either SPX or TCP/IP) between the server and the requester.

- For Windows NT: The MicroKernel engine is not running.
- For Netware:

The server Addressing Protocol (SAP) filtered out the server name. SAP is used in NetWare 3.x and can be used in version 4.x. This type of filtering is common on WAN environments.

NWCALLS.DLL and/or NWIPXSPX.DLL is missing when using the Win16 client. This is especially likely if the Win32 clients are functioning but the Win16 clients are not. These are NetWare system files that can be obtained from Novell's web site (<http://www.novell.com>).

- For NetWare using TCP/IP: The server name is not in the DNS.
- For Windows NT or OS/2 Warp Server: Named pipes are used in these two operating systems to resolve server names. The networking at the operating system level was unable to find the target named pipe.

Check the Pervasive Event Log (PVSU.LOG) for more information.

### **32: The file cannot be extended.**

This status code is returned by pre-v6.0 client and VAP-based versions of Btrieve if an application tried to specify a file that cannot be extended. Possible causes for receiving this status code are that the directory is full, the disk is full, or the disk is write-protected.

This may also be error: **3104 The Pervasive Network Services Layer encountered a permission error.**

This status code is relevant to Windows NT and OS/2 Warp only.

Permission to access the target named pipe is denied. If you receive this status code:

- Verify that you have access to the inter process communication mechanism.
- Ensure that your passwords are identical if you have the same user name on two systems.

### **33: Btrieve cannot unload.**

This status code is returned by Btrieve for DOS if you attempt to unload Btrieve when you have loaded another terminate and stay resident (TSR) program after you loaded Btrieve. Unload the other TSR before unloading Btrieve.

This may also be error: **3105 No available transport protocol for the Pervasive Network Services Layer.**

No transport protocol that is common to both the target server engine and clients is available. For example, Status Code 3105 could be caused by a client using SPX when the server engine only has TCP/IP available. To check this, use the Setup utility to examine the Supported Protocols setting of the client (under the Communications Requester section) and the Supported Protocols setting of the server (under the Btrieve communications Manager and Scalable SQL Communications Manager sections). For more information on the Setup utility, refer to the Pervasive SQL User's Guide.

**34: The specified extension name is invalid.**

This status code is returned by pre-v6.0 client and VAP-based versions of Btrieve if an application specified an invalid filename for the extended partition. Check the validity of the filename.

This may also be error: **3106 The Pervasive Network Services Layer encountered a connection failure.**

The Pervasive Network Services Layer was able to establish a transport connection at the client side, but the connection attempt at the target side failed. Some possible causes are:

- The Btrieve or Scalable SQL engine is not running on the server.
- The network is overloaded.
- The connection path is invalid.
- You have more than one mapped drive to the same server.
- You are trying to access a Btrieve engine on a Windows NT server and the Accept Remote Requests setting of the Btrieve Communications Manager on that server is set to No. See the Pervasive SQL User's Guide for more information.

Check the Pervasive Event Log (PVSW.LOG) for more information if you receive this status code.

**35: The application encountered directory error.**

Either a Get Directory operation specified a drive that does not exist or a Set Directory operation specified an invalid pathname. Check the validity of both the drive and the pathname.

This may also be error: **3107 The Pervasive Network Services Layer is out of memory.**

The Pervasive Network Services Layer has insufficient memory to continue.

**36: The application encountered a transaction error.**

Btrieve tried to perform a Begin Transaction operation without configuring Btrieve to allow transactions. Run the Btrieve Setup utility and specify a higher value for the Number of Transactions configuration option. Next, stop and then restart Btrieve so that your changes will take effect.

On a workstation that is running both client-based and server-based Btrieve, be sure that both the client engine and the server engine are configured for transactions.

In server-based Btrieve, all servers that are running server-based Btrieve and to which the workstation is attached must be configured for transactions, even if the files involved in the transaction are located on only one of the servers.

This may also be error: **3108 The Pervasive Network Services Layout detected an invalid session.**

The application attempted to use a network session that was not recognized by the Pervasive Network Services Layer. If the error persists, contact Pervasive Software Customer Support.

**37: Another transaction is active.**

The application issued a Begin Transaction operation while another transaction was active by the same client (it can be an NLM or application). Btrieve does not accommodate nesting transactions.

**38: Btrieve encountered a transaction control file I/O error.**

Btrieve encountered an error when it tried to write to the transaction control file. Possible causes for receiving this status code are that the disk is full, the disk is write-protected, the transaction control file (BTRIEVE.TRN) that is created when you load Btrieve has been deleted or the transaction control file is flagged read only.

This may also be error: **3110 The network layer is not connected.**

The application attempted to use a network connection that is no longer active. This happens when the session with the Pervasive Network Services Layer is still valid, but was dropped by the network. Stop and restart the application.

**39: A Begin Transaction operation must precede an End/Abort Transaction operation.**

The application issued an End or Abort Transaction operation without a corresponding Begin Transaction operation. Make sure that each End or Abort Transaction operation in your program is executed only after a successful Begin Transaction operation.

This may also be error: **3111 Failure during send to the target server.**

The Pervasive Network Services Layer attempted to send an application request to the target server and encountered a network specific error from the target. Check the Pervasive Event Log (PVSW.LOG) for more information.

You can receive this error when the server's Btrieve Communication Manager or Scalable SQL Communication Manager's Number of Sessions setting is too low. To resolve this, increase the Number of Sessions setting for these two components using the Setup utility. Refer to the Pervasive.SQL User's Guide for more information on the Number of Sessions setting and the Configuration Utility.

**40: The file access request exceeds the maximum number of files allowed.**

This status code is returned by pre-v6.0 client and VAP-based versions of Btrieve if an application tries to access more than the maximum number of files allowed within a transaction. The maximum number of different files that can be accessed during a logical transaction is set when Btrieve is configured.

This may also be error: **3112 Failure during receive from the target server.**

The Pervasive Network Services Layer attempted to receive data from the target server and encountered a network specific error. Check the Pervasive Event Log (PVSW.LOG) for more information.

**41: Btrieve does not allow the attempted operation.**

This status code is returned for one of the following reasons:

The application tried to perform an operation that is not allowed at this time. Btrieve does not allow some operations under certain operating conditions. For example, Btrieve returns this status code if the application attempts to perform a Step operation on a key-only file or a Get operation on a data-only file.

If running NetWare Btrieve, the key number parameter of a continuous operation call is not 0, 1, or 2.

Also, Btrieve prohibits certain operations during transactions because they have too great an effect on the file or on Btrieve's performance. These operations include Set Owner, Clear Owner, Extend, Create Index, and Drop Index.

**42: A file previously opened in Accelerated mode was not closed.**

Either the application tried to open a Btrieve v5.x file that was previously accessed in Accelerated mode by Btrieve v5.x and never successfully closed or the application tried to open a file for which Btrieve v6.x encountered an unrecoverable error during a Set or Clear Owner operation. The file's integrity cannot be ensured.

In the server-based Btrieve environment or in the DOS or OS/2 client-based Btrieve environments, either use the RECOVER command in the Btrieve File Manager utility to retrieve the damaged file's data records in a sequential file or replace the file with its most recent backup.

In the Btrieve for Windows environment, use the Save command from the Data menu of the Btrieve File Manager utility to retrieve the damaged file's data records in a sequential file. Be sure to specify no indexes when executing the Save command in this situation.

Another possible cause for receiving Status Code 42 is that your application tried to open a v5.x-formatted Btrieve file using a v5.x Btrieve engine. However, that same file was previously accessed by a Btrieve v6.x engine which failed to close the file successfully due to a crash. Btrieve v5.x does not understand the format of a pre-image file created by Btrieve v6.x.

This may also be error: **3114 The routing table of the Pervasive Network Services Layer is full.**

The Pervasive Network Services Layer's Server Routing Table is full. This table normally grows dynamically as needed. Verify that you are not in a low memory condition.

**43: The specified record address is invalid.**

This status code is returned for one of the following reasons:

The record address specified for a Get Direct/Record operation is invalid. The address is outside the file's boundaries. It is not on a record boundary within a data page or on a data page or the record at the specified address has been deleted. For a Get Direct/Record operation, specify the 4-byte address obtained by a Get Position operation.

When using Btrieve with NetWare and the files are Btrieve v5.x files, this error may indicate a file access conflict. For example, client 1 has a file locked in an exclusive transaction and client 2 is reading records from the same file and tries to update a record that the transaction inserted. If client 2 reads the record and then client 1 aborts the transaction, client 2 receives this status code when issuing the Update operation.

For a find Percentage operation that is seeking a percentage based on a record's physical location within the file, the specified record address is invalid.

The file may be corrupt and you must rebuild it.

This may also be error: **3115 Pervasive Network Services Layer encountered a transport failure.**

The Pervasive Network Services Layer encountered a WinSock (Win32, Win16) or Berkeley Sockets (OS/2) error while creating the local transport endpoint on the client side. Check the Pervasive Event Log (PVSW.LOG) for more information.



**44: The specified key path is invalid.**

The application tried to use the Get Direct/Record operation to establish an index path for a key whose value is null in the corresponding record. Btrieve cannot establish positioning based on a null key value.

Some earlier versions of Btrieve return Status Code 82 in this situation; therefore, you should write your application to check for both of these status codes.

**45: The specified key flags are invalid.**

The key flags specification on a Create operation is inconsistent. If a key has multiple segments, the duplicate, modifiable, and null attributes should be the same for each segment in the key. Also, you cannot use the allseg or anysegs key attributes in a key-only file.

This status code is also returned if an attempt is made to specify a different alternate collating sequence for two or more segments of a segmented key.

**46: Access to the requested file is denied.**

This status code is returned for one of the following reasons:

The application opened a file in read-only mode and tried to perform an Insert, Update, or Delete on that file.

An attempt was made to perform an Insert, Update, or Delete on a file that is flagged read-only to NetWare or DOS.

The owner name required for updates was not specified correctly when the file was opened.

**47: The number of files opened exceeds the maximum allowed.**

The number of files opened in Accelerated mode exceeded the number of buffers available in Btrieve's cache. When a file is opened in Accelerated mode, Btrieve reserves one of its cache buffers for the file. Btrieve always reserves five empty buffers for index manipulation. In client-based versions of Btrieve prior to v6.0, you should reconfigure Btrieve both with a smaller /P configuration option (to allocate more buffers) and a larger /M option. You will not encounter this error either in v6.x client-based Btrieve or in server-based Btrieve.

**48: The alternate collating sequence definition is invalid.**

This status code is returned for one of the following reasons:

The first byte of an alternate collating sequence definition (the identification byte) does not contain the hexadecimal value AC (for user-defined ACSs) or AD (for locale-specific ACSs). Make sure that the first byte contains the proper value.

You are using Btrieve v6.x with the Create Btrieve Files in Pre-v6.x Format configuration option turned on and you attempt to create a Btrieve file that contains a key with a locale-specific alternate collating sequence.

You attempt to add an index with a locale-specific alternate collating sequence to a file in Btrieve 5.x format.

**49: The extended key type is invalid.**

This status code is returned for one of the following reasons:



You try to create a file or an index with an invalid extended key type or you try to assign an alternate collating sequence to a binary key or key segment. You can assign an alternate collating sequence only to a string, lstring, or zstring key type.

You define an index requiring an alternate collating sequence, but no alternate collating sequence definition exists (either in the file or in the key definition passed in the data buffer).

You define an alternate collating sequence with case insensitivity. These two definitions are incompatible. Only Btrieve v6.0 interprets this condition as an error. In Btrieve v6.15, Btrieve creates the index using the first ACS in the file.

You attempt to create a Btrieve file that contains multiple alternate collating sequences, but your server or workstation has a version of Btrieve loaded that predates v6.1.

You are using Btrieve v6.x with the Create Btrieve Files in Pre-v6.x Format configuration option turned on and you attempt to create a file with a numeric key.

**50: The file owner is already set.**

The application tried to perform a Set Owner operation on a file that already has an owner. Use the Clear Owner operation to remove the previous owner before specifying a new one.

**51: The owner name is invalid.**

The possible causes for this status code are as follows:

If the application received this status code after a Set Owner operation, the owner names specified in the key buffer and data buffer did not match.

If this status code occurred during an Open operation, the application attempted to open a file that has an owner name assigned to it. The application must specify the correct owner name in the data buffer. Make sure that the owner name is null-terminated in the data buffer and that the data buffer length is set long enough to include the owner name plus the null terminator.

If an NLM application received this status code when accessing a file in continuous operation mode, then the client ID of the calling NLM differs from the client ID of the application that originally put the file into continuous operation mode.

**52: An error occurred while writing to the cache.**

**53: The language interface version is invalid.**

An application tried to access a file containing variable-length records with a language interface from Btrieve v3.15 or earlier. To access files with variable-length records, you must use a v4.x or later interface.

This may also be error: **3125 The Pervasive Network Services Layer was unable to resolve the Novell Directory Services name into a NetWare server name.**

The Pervasive Network Services Layer was unable to resolve the Novell Directory Services name into a NetWare server name. This occurs on Windows 95 workstations with the Microsoft Service for Novell Directory Services in cases where the system is unable to load the Windows 95 Requester support modules. Ensure that the Requester Win95 support modules are installed and available, and that NWCALLA.DLL is available on the Windows 95 workstation.

**54: The variable-length portion of the record is corrupt.**

During a Get or Step operation, Btrieve cannot read all or part of the variable-length portion of a record. Btrieve returns as much data as possible to the application. This status code usually indicates one or more pages used to store variable-length records are corrupt. Check the data buffer length returned by Btrieve to see how much of the record was returned.

In the server-based Btrieve environment or in the DOS or OS/2 client-based Btrieve environments, either use the RECOVER command in the Btrieve File Manager utility to retrieve as many as possible of the damaged file's data records in a sequential file or replace the file with its most recent backup.

In the Btrieve for Windows environment, use the Save command from the Data menu of the Btrieve File Manager utility to retrieve as many as possible of the damaged file's data records in a sequential file. Be sure to specify no indexes when executing the Save command in this situation.

This may also be error: **3126 The Pervasive Network Services Layer was unable to resolve the given filename into a valid path.**

Check that the given filename is a valid file format.

**55: The application specified an invalid attribute for an AUTOINCREMENT key.**

The application tried to specify either the segmented or duplicate attribute for an auto increment key type. An auto increment key cannot be part of a segmented key and cannot allow duplicates.

**56: An index is incomplete.**

An index can be damaged if a Create Index operation (31) or a Drop Index operation (32) is interrupted before it runs to completion. Perform a Drop Index operation to completely remove the damaged index from the file and then rebuild the index with the Create Index operation, if so desired.

**57: An expanded memory error occurred.****58: The compression buffer length is too short.**

The application tried to read or write a record that is longer than the value specified for the size of the compression buffer. Reconfigure Btrieve using the Btrieve Setup utility, specifying a higher value for the Largest Compressed Record Size option.

**59: The specified file already exists.**

This status code is returned for the Create operation if the application specified -1 in the key number parameter and the name of an existing file in the key buffer parameter. If you want to overwrite the existing file, remove the -1 from the key number parameter. If you want to preserve the existing file, alter the filename specified in the key buffer parameter.

**60: The specified reject count has been reached.**

Btrieve rejected the number of records specified by the reject count before a Get Next Extended, Get Previous Extended, Step Next Extended, or Step Previous Extended operation found the requested number of records that satisfy the filtering condition. Check the first two bytes returned in the data buffer for the number of records that were retrieved.

**61: The work space is too small.**

The Get Next Extended, Get Previous Extended, Step Next Extended, and Step Previous Extended

operations use a buffer as work space. This status code indicates that the work space (set by default to 16 KB) is not large enough to hold the filtering data buffer structure and the largest record to be received.

**62: The descriptor is incorrect.**

The descriptor (data buffer structure), which is passed for a Get Next Extended, Get Previous Extended, Step Next Extended, or Step Previous Extended operation, is incorrect. The descriptor length (the first two bytes of the data buffer) on the extended operation call must be the exact length of the descriptor. This requirement does not apply to the data buffer length option, which can still be declared longer than necessary.

On a Get Direct/Chunk operation, the descriptor structure in the data buffer is incorrect or it is inconsistent (either internally or in respect to the data buffer length). See the discussion of the Get Direct/Chunk operation in the Btrieve Programmer's Manual available with the Btrieve Developer Kit.

**63: The data buffer parameter specified on an Insert Extended operation is invalid.**

An Insert Extended operation provided an invalid buffer. Either the buffer length is less than 5 bytes or the number of records specified is 0. Correct the buffer length or the number of records.

**64: The filter limit has been reached.**

During a Get Next Extended, Get Previous Extended, Step Next Extended, or Step Previous Extended operation, a rejected record was reached. No other record can satisfy the given filter condition going in the direction that the operation specified. This is applicable only if the first segment of the key that the key number specified is also used as the first term of the filtering field.

**65: The field offset is incorrect.**

The field offset in the extractor of a Get Next Extended, Get Previous Extended, Step Next Extended, or Step Previous Extended operation is invalid based on the length of the retrieved record. Make sure that the field offset is a valid value (from 0 through the record length minus 1).

This may also be error: **8001 The Services DLL encountered an error while allocating memory.**

Memory could not be allocated. Verify that your system resources are not exhausted.

**66: The maximum number of open databases has been exceeded.**

The application has tried to open too many databases configured for referential integrity checking at one time. See your database product documentation for more information on referential integrity.

This may also be error: **8002 The component ID string was not found.**

The Services DLL attempted to retrieve an ID from a component and the component did not have an ID. This status code results from an error in the application.

**67: Btrieve cannot open the SQL data dictionaries.**

This status code may indicate that an application opened a data file containing referential integrity (RI) definitions, but Btrieve cannot open one of the data dictionary files (FILE.DDF or RELATE.DDF) or the configuration file (DBNAMES.CFG).

A database that uses RI has a database name. You must log in to the database by using the database name. Btrieve must be able to find the DBNAMES.CFG file that contains the definition of the database name:

If the database name is defined in the Btrieve for Windows v6.15 engine, make sure that the DBNAMES.CFG file is in your Windows directory.

If the database name is defined in the Btrieve for DOS v6.15 engine, make sure that the DBNAMES.CFG file is in the DBNames directory.

If the database name is defined on a NetWare server, make sure that DBNAMES.CFG is in the SYS:SYSTEM directory on that server.

Regardless of whether DBNAMES.CFG is on a workstation or a server, make sure that the FILE.DDF and RELATE.DDF files for the named database are placed in the dictionary location that the DBNAMES.CFG file defines. Refer to your database product documentation for more information about referential integrity.

This may also be error: **8003 Thunk path is not accessible to the Services DLL.**

Smart Component Management cannot find the address of the Win32 APIs.

**68: Btrieve cannot perform the RI Delete Cascade operation.**

Btrieve cannot enforce the Delete Cascade rule on a file under referential integrity control because the record that the application attempted to delete has more than 16 levels of descendants. Delete records from the lower levels and then try again to delete the record that the application was attempting to delete initially. Refer to your database product documentation for more information on referential integrity.

**69: The Delete operation specified a file that is damaged.**

The application encountered an error while Btrieve was attempting to enforce the Delete Cascade rule in response to a Delete operation. This status code indicates that the related file has been damaged and must be recreated.

Refer to your database product documentation for more information on referential integrity and the Delete Cascade rule.

This may also be error: **8005 API not initialized.**

You may receive this status code when an error causes an API to not initialize properly. Check the Pervasive Event Log (PVSW.LOG) for more information. This may also be error: **8006 the specified component was not found.**

Smart Component Management cannot operate on the component because it was not found. Check the Pervasive Event Log (PVSW.LOG) for more information.

**71: There is a violation of the RI definitions.**

If you have attempted an Insert operation on a file under referential integrity control, you may receive this status code if a foreign key value in the record to be inserted does not have a corresponding primary key in the referenced file.

If you are performing an Update operation, there are two possible causes for this status code:

You are attempting to change the value of a primary key.

You are attempting to change the value of a foreign key to a value that does not exist for the defined primary key.

If you have attempted a Delete operation, the restrict rule is being enforced and a primary key value in the record you are trying to delete references a foreign key in the referenced file. Refer to your database product documentation for more information on referential integrity.

This may also be error: **8007 Error retrieving Win32 version information.**

An error occurred while retrieving the Win32 version information from the operating system. This error should not occur and it indicates a problem with your Windows environment. Contact Pervasive Customer Support.

## **72: Btrieve cannot open the RI referenced file.**

The referenced file cannot be found at the location specified by FILE.DDF and DBNAMES.CFG. Be sure that the referenced file is in one of the data file locations that the DBNAMES.CFG file specifies for the named database:

If the DBNAMES.CFG file is defined on a server, verify that the file location does not contain a drive letter.

If the DBNAMES.CFG file is defined in the client engine, make sure that the drive letters are the same (and map to the same location) as specified in DBNAMES.CFG.

Refer to your database product documentation for more information about referential integrity.

This may also be error **8008: Information mismatch in component ID.**

You may receive this status code when an application has specified multiple platforms, types or versions in a component ID. The Services DLL therefore cannot bind to the correct component.

## **73: The RI definition is out of sync.**

You have attempted to open a file for which the referential integrity (RI) definition either disagrees with the definition in RELATE.DDF or refers to a database not found in DBNAMES.CFG. This status code can also occur on an insert or delete operation, or on an update operation that would change a foreign key. Refer to your SQL database documentation for more information about repairing RI definitions.

This may also be error: **8009 Required information missing in component ID.**

You may receive this status code when a component ID string is missing required information such as:

- Platform
- Type
- Major/Minor functional level

## **74: Btrieve aborted the transaction.**

This is an informative status code. A pre-v6.x version of NetWare Btrieve replaced an End Transaction operation with an Abort Transaction after detecting an error for a Transaction Tracking System (TTS) file inside the transaction. In addition, Btrieve executed the Abort Transaction operation.

Status Code 74 will not be returned by v6.x NetWare Btrieve or by client-based Btrieve because TTS has a different meaning to v6.x NetWare Btrieve and client-based Btrieve ignores the TTS flag.

This may also be error: **8010 Error while opening a file to retrieve component ID.**

The Services DLL attempted to open a file in order to retrieve a component ID and the file did not exist.

**75: The server routing list is too small.**

If you use SET BRQPARMS=/S:1 with the Btrieve for OS/2 Requester, this status code occurs after you tried to either open a file or get the version number of server-based Btrieve. To solve this problem, set /S to 2 or higher. Do not set /S so that it defaults to 1.

You can also receive this message if there is a Btrieve file open that has not been updated to Btrieve v6.0.

**76: There is a conflict on the referenced file.**

The application has attempted to perform an Update, Insert, or Delete operation on an RI-controlled file that references another file. The application cannot open the referenced file for referential integrity checking because it is already opened in Exclusive mode. Wait until the referenced file is closed or is opened in a mode other than Exclusive and then retry the operation. Refer to your database product documentation for more information on referential integrity.

This may also be error: **8012 Required information for binding rule is missing.**

You may receive this status code when required information is missing, such as:

- Platform type
- Major/minor functional level

**77: The application encountered a wait error.**

This is an informative status code. You must retry the operation yourself; Btrieve does not automatically retry the operation. Server-based Btrieve returns this status code in one of the following situations:

A wait lock bias is specified for an operation, but another user has locked the requested resource.

The application is currently processing a wait transaction and tried to access a file that another user has locked.

When you are using the Btrieve Requester to access Btrieve, the Requester waits and retries if a requested resource is locked. When a server-based application is accessing Btrieve and the requested resource is locked, a wait is also required. In this case, Btrieve would be expected to perform the wait. Since this would occupy Btrieve and lock out other users who might be trying to release the requested resource, Btrieve does not perform the wait. Instead, it returns a Status Code 77 and the server-based application must retry later.

This may also be error: **8013 Error locating a component.**

An error occurred while opening an operating system directory to search for a component. Check the Pervasive Event Log (PVSW.LOG) for more information.

**78: Btrieve detected a deadlock condition.**

The application should clear all resources (for example, by aborting or ending the transaction, or releasing all record locks) before proceeding. This breaks the deadlock allowing other applications to access the resources for which they are waiting.

**79: A programming error occurred.**

Although very rare, it is possible to receive this status code when there is a malfunction that Btrieve cannot specifically detect or from which Btrieve cannot recover. Retry the operation again. If the error persists, there may be system corruption. Try to clear the system by rebooting and then try the operation again.

**80: Btrieve encountered a record-level conflict.**

Btrieve did not perform the Update or Delete operation because of a record-level conflict. For example, station A reads a record, station B reads the same record and updates it, and then station A attempts to update the record. The application should reread the record prior to resending an Update or Delete operation. Alternatively, the application can employ record locks to avoid conflicts.

In pre-v6.0 client versions of Btrieve, a page-level conflict would also produce this error. For example, station A reads a record, station B reads and updates a different record on the same data page, and then station A attempts to update the record it read.

This may also be error: **8016 Invalid instance specified.**

This error occurs when an application passes an instance handle to the Services DLL that is invalid.

**81: Btrieve encountered a lock error.**

This status code can result from one of the following conditions:

The Btrieve lock table is full. Decrease the number of locks that the application uses or use the Btrieve Setup utility to specify a higher value for the Number of Locks option.

The application tried to unlock one record that is locked with a multiple record lock, but the record position stored in the data buffer does not correspond to any record locked in the associated file.

The application tried to unlock a single-record lock with a multiple-record lock or vice-versa.

You try to open a file in multi-engine file sharing mode on a local drive and the DOS SHARE.EXE program is not loaded.

You manipulate a file (that is, you open and then lock all or part of the file) in multi-engine file sharing mode on a local drive and the DOS SHARE.EXE program runs out of locks. Load the SHARE program and specify a higher value for the /L and /F options.

You redirect the lock file to a local drive with the /I option and the DOS SHARE.EXE program is not loaded.

This may also be error: **8017 Invalid version information structure.**

This error occurs when an application tries to free a version information structure and the Services DLL determines that the version structure is invalid.

**82: Btrieve lost positioning.**

When performing a Get Next or Get Previous operation on a key with duplicates, the application tried to retrieve a record that was deleted or whose key value was modified by another application. Use a Get Equal or a Get Direct/Record operation to re-establish positioning. (See Status Code 44 for a related positioning problem.)



This may also be error: **8018 Item not found by Services DLL.**

This error occurs when an application requests that the Services DLL free an item and the Services DLL determines that the item did not originate from the Services DLL.

**83: Btrieve attempted to update or delete a record that was read outside the transaction.**

The application tried to update or delete a record within a transaction, but the record was not read within the transaction. The application must read the record within the transaction before attempting to modify the data.

This may also be error: **8019 Library not accepting API requests.**

This error occurs when the Services DLL cannot accept requests. In a multithreaded application, this can occur when one thread attempts to make a request while other threads are overloading the Services DLL. In this situation, subsequent retries should clear the error.

**84: The record or page is locked.**

The application tried to apply a no-wait lock on a record that is currently locked by another application or the application tried to access a file in a no-wait transaction while another application holds one or more active record locks in that file.

This status code can also occur if the application tried to update or delete a record locked by another application.

The application can use either of the following recovery methods:

Retry the operation until it is successful. Under light-to-moderate network use, this may be the simplest and quickest solution.

Use the wait option (+100/+300) instead of the no-wait option (in versions of Btrieve that support the wait option).

Btrieve may return this status code on an Insert operation when it attempts to lock an index page to update the key value specified for a newly inserted record. If another user has already locked the record in question, then Btrieve returns a Status Code 84 when it attempts to update the key value. Have your application check for this status code and retry the operation if the status code is returned.

This may also be error: **8020 Error loading component.**

You may receive this status code when the Services DLL receives an operating system error when trying to load a component. Check the Pervasive Event Log (PVSW.LOG) for more information. If there is no information in the Pervasive Event Log related to receiving a status code 8020, refer to "Diagnosing Load Errors" in the "Component Architecture" chapter of the User's Guide.

**85: The file is locked.**

Any of the following can cause this status code to occur:

Client-based Btrieve has a file open, and another workstation that has the Requester loaded tries to open the same file. Btrieve cannot open the file since it cannot obtain exclusive access. The workstation that has the Requester loaded receives Status Code 85.

In Btrieve clients, a Status Code 85 can occur on an open, insert, update, or delete operation for a file under heavy usage by multiple clients. Btrieve must momentarily have exclusive access to the file during



these operations and retries the operation several times before returning this error. In this case, the application can re-issue the operation.

Btrieve v6.15 has a pending modification (insert, update, or delete) as an incomplete system transaction in a file that has been opened in multi-engine file sharing mode. If multiple clients attempt to access (Get/Step) or modify (insert, update, or delete) the shared file, Btrieve for DOS v6.15 returns this status code. An access operation can get this error only if the writing phase of the system transaction has started. If you are a developer and you want more information about system transactions and this error, refer to the Btrieve Programmer's Manual available with the Btrieve Developer Kit.

Another workstation has the Requester loaded and has a file open and client-based Btrieve tries to open the same file.

While one user has a file locked in an exclusive transaction, another user attempts to lock all or part of that file.

In NetWare Btrieve, a file is in transition into continuous operation mode. A retry will eventually work.

In NetWare Btrieve, you have two Btrieve files with the same filename, but different extensions (for example, INVOICE.HDR and INVOICE.DET). One file is open and in continuous operation mode, causing Btrieve to generate a delta file (for example, INVOICE.^^^). Btrieve returns Status Code 85 if you attempt to open the second file.

**86: The file table is full.**

Using the Btrieve Setup utility, specify a higher value for the Number of Open Files configuration option.

This may also be error: **8022 Component not initialized.**

You should not receive this status code except when using a multithreaded application where one thread has shut down a component and the others continue trying to use it.

**87: The handle table is full.**

Using the Btrieve Setup utility, specify a higher value for the Number of Handles configuration option.

This may also be error: **8023 Invalid filename passed to Services DLL.**

You may receive this status code when the Services DLL receives a filename that does not exist.

**88: The application encountered an incompatible mode error.**

This status code can indicate one of the following situations:

- If an application opens a file in Exclusive mode, all other applications get this status code when they try to open the same file in any mode.
- If an application opens a file in any mode other than Exclusive, all other applications get this status code when they try to open the same file in Exclusive mode.

If a client opens a file in multi-engine file sharing mode, all other clients get this status code when they try to open the same file in single engine file sharing mode.

Similarly, if a client opens a file in single engine file sharing mode, all other clients get this status code when they try to open the same file in multi-engine file sharing mode.

If a client opens a file in Accelerated mode and multi-engine file sharing is enabled, all other clients get this status code when they try to open the same file in any mode.

If another workstation has the Requester loaded and has the file open, applications running Btrieve for DOS v6.15 get this status code when they try to open the same file in single engine file sharing mode. In NetWare Btrieve's continuous operation mode, this status code can also indicate one of the following situations:

You have attempted to remove a file from continuous operation, but the file is not in a continuous state. You have attempted to include two files that have the same name but different extensions in continuous operation.

You have attempted to include a file in continuous operation, but the file is already in a continuous state.

This may also be error: **8024 Invalid function name.**

You may receive this status code when an application asks to import a function that does not exist.

**89: A name error occurred.**

**90: Redirected device table is full.**

This status code is applicable only to server-based Btrieve v5.x or earlier.

The DOS Requester's redirection table or server routing table is full. This occurs if you attach to additional servers or map to additional drives after you loaded the Requester. Reload the Requester specifying a larger number for either the Number of File Servers (/S) option or the Number of Mapped Drives (/R) option.

This error also occurs if you detach from a server and attach to a different server. Once a workstation has attached to a server, the Requester does not remove its name from the server routing table.

**91: The application encountered a server error.**

You can receive this status code in the following situations:

The Requester cannot establish a session with the server. Either server-based Btrieve is not loaded or the server is not active.

The setting for the Number of Remote Sessions configuration option is too low. Return to the server-based Btrieve Setup utility and specify a higher value for this option.

An application specified a path for a file and did not include the volume name in the path.

In the NetWare server-based environment, the Btrieve Message Router (BROUTER.NLM) has not been loaded and the following situation has occurred: an NLM that uses both BROUTER.NLM and Btrieve to make remote calls (and which therefore includes the server and volume name when performing an Open operation) has attempted to open a remote file. Because BROUTER.NLM does not interpret the server name, Btrieve attempts to do so but cannot.

This may also be error: **8027 Required attribute missing in component ID.**

You may receive this status code when an application program does not specify a required attribute in the component ID.

**92: The transaction table is full.**

The maximum number of active transactions was exceeded. Using the Btrieve Setup utility, specify a higher value for the Number of Transactions configuration option.

**93: The record lock types are incompatible.**

The application tried to mix single-record locks (+100/+200) and multiple-record locks (+300/+400) in the same file at the same time. All locks of one type must be released before a lock of the other type can be executed.

**94: The application encountered a permission error.**

You can receive this status code in the following situations:

The application tried to open or create a file in a directory without the proper privileges. Btrieve does not override the network privileges assigned to users.

The designated server is in the server routing table, but your particular workstation is not logged into that server.

Served-based Btrieve and client-based Btrieve (versions earlier than Btrieve v6.15) are trying to access the same file at the same time.

The application tried to access a Btrieve file using Netware Runtime support using the given username. Specifically, one of the following situations exists regarding the supplied username:

The User is not a valid user on the NetWare Runtime server. Note\*\* NetWare Runtime is a Novell product that was made available with NetWare SQL v3.00. NetWare Runtime is not available through Btrieve Technologies.

The user does not have the appropriate rights to access the file.

The username is SUPERVISOR. For security reasons, Btrieve does not allow you to use SUPERVISOR as a username when enabling NetWare Runtime support.

This may also be error: **8030 Return buffer too small for information.**

This error occurs when an application passes the Services DLL a buffer in which to return information and that buffer is not large enough to contain the information.

**95: The session is no longer valid.**

In server-based Btrieve, the previously established session is no longer active due to an error at the workstation, at the file server, or on the network. Verify that the workstation is still attached to the server and then unload and reload the Btrieve Requester.

This status code can also indicate that the maximum number of sessions for server-based Btrieve has been reached. Use the Communication Statistics option of the server-based Btrieve Monitor utility to see if the maximum number of SPX sessions has been reached. If so, use the Btrieve Setup utility to specify a higher value for the Number of Remote Sessions configuration option. For more information, see the Btrieve Installation and Operation manual for server-based Btrieve.

In server-based Btrieve, this error could indicate a time delay problem if the workstation does not receive a response back from the server in an appropriate time frame or after an appropriate number of retries. Refer to your network configuration documentation for information on increasing timeout and retry

parameters.

**96: A communications environment error occurred.**

You tried to attach to NetWare Btrieve on a server, but the SPX connection table or the Btrieve client table is full. Use the server-based Btrieve Setup utility to specify a higher value for the Number of Remote Sessions configuration option. For more information, see the Btrieve Installation and Operation manual for server-based Btrieve.

An NLM application that calls the Btrieve NLM can return Status Code 96 in either of the following situations:

Not all of the clients have been properly reset.

The Btrieve NLM was loaded with too small a value for its /s (sessions) parameter. This /s parameter is not the same as BSPXCOM's /s parameter.

Btrieve v6.15 returns this status code if you try to run a Btrieve application, but the Btrieve clients table is full. Use the Setup utility to specify a higher value for the Number of Clients configuration option.

This may also be error: **8032 Component ID is invalid.**

You may receive this status code when a component ID string was found, but it may be invalid because it is too short, too long or contains invalid characters.

**97: The data buffer is too small.**

The application either tried to read or write a record that is longer than 0xFC00 (64,512 decimal) bytes (a Btrieve for DOS v6.15 internal allowable value), or a record that is longer than the current settings for Btrieve or the Btrieve Requester allow, as follows:

For an Update, Insert, or Create operation, the application receives this status code if the data buffer length it specifies for the record exceeds Btrieve's message buffer length.

For a Get, Step, or Stat operation, the application receives this status code if Btrieve's message buffer is shorter than the length of the data Btrieve would return, regardless of the data buffer length specified in the application.

For a Get Chunk or Update Chunk operation, the total size of the retrieved or updated chunk exceeds Btrieve's message buffer length. To avoid receiving Status Code 97 in Btrieve for DOS v6.15, observe the 0xFC00 limit on data size. In the NetWare Btrieve environment, the effective message buffer size is the smaller of the values specified for the Largest Record Size option (from the Btrieve Setup utility and used by BSPXCOM) and the Message Buffer Size (/D) option (specified when the Btrieve Requester was loaded). Therefore, to avoid receiving Status Code 97 in this environment, perform one or both of the following steps:

Increase the size of the message buffer by using the Btrieve Setup utility to specify a higher value for the Largest Record Size option.

Reload the Btrieve Requester and specify a higher value for the Message Buffer Size (/D) option.

**98: Btrieve detected an internal transaction error.**

A pre-v6.x version of NetWare Btrieve detected an error while executing the operation on a NetWare Transaction Tracking System (TTS) file. The application can perform only an Abort Transaction operation at this point.

Neither v6.x NetWare Btrieve nor client-based Btrieve will return Status Code 98, because TTS has a different meaning to v6.x NetWare Btrieve and client-based Btrieve ignores the TTS flag.

**99: Btrieve Requester is unable to access the NetWare Runtime server.**

The DOS Requester returns this status code when NetWare Runtime server support is enable (/C:1) and the Requester either detects no existing connection or cannot find a valid login username. SUPERVISOR is not a valid username, even if supplied with the correct password. If the Requester cannot find a login username other than SUPERVISOR, there is no valid name to pass.

This may also be error: **8035 Invalid API for NetWare platform.**

You may receive this status code when an application makes a call to an API that is not supported on the NetWare platform.

**100: No cache buffers are available.**

This status code, which can be returned by Btrieve version 6.0 and later, indicates that Btrieve has used all the cache buffers it allocated at load time. Use the Btrieve Setup utility to increase the value for the Cache Allocation configuration option.

If running server-based Btrieve (v6.0 or later), you also can change the Number of Remote Sessions configuration option to decrease the number of concurrent Btrieve users.

**101: Insufficient operating system memory is available.**

This status code, returned by server-based Btrieve v6.0 and later, indicates that there is not enough operating system memory available to perform the requested operation. To fix this problem, perform one or more of the following:

Use the Btrieve Setup utility to decrease the value for the Cache Allocation configuration option.

Use the Btrieve Setup utility to decrease the value of the Number of Remote Sessions configuration option (thereby decreasing the number of concurrent Btrieve users).

Add memory to the server.

**102: Insufficient stack space is available.**

This status code, returned as a run-time error by Btrieve v6.0 and later, indicates that Btrieve has run out of stack space. To increase the amount of stack space available to your application, re-link the application, setting the stack size to a higher value. Btrieve returns this message only to Btrieve for Windows applications that call WBTRCALL.DLL or NLM applications that call Btrieve on the local server.

**103: The chunk offset is too big.**

This status code, returned by Btrieve v6.0 and later, indicates one of the following possible situations:

A Get Direct/Chunk operation has specified an offset beyond the end of the record, either explicitly or through the use of the next-in-record bias to the sub function value. Unless Btrieve returns this status while processing the first chunk, the operation was partially successful. Check the data buffer length parameter immediately after the call to see how much data (and therefore how many chunks) Btrieve retrieved.

An Update Chunk operation has specified an offset that is more than one byte beyond the end of the

record. In this situation, Status Code 103 indicates that Btrieve made no changes to the record.

This may also be error: **8039 Invalid operating system handle specified.**

You may receive this status code when an operating system handle to a component ID string is invalid. This can occur when an application erroneously modifies a handle obtained using the GetFileVersionByHandle or the GetFileSizeByHandle functions.

**104: Btrieve does not recognize the locale.**

In Btrieve versions 6.0 and later, the Create or Create Index operation returns this status code to indicate that the operating system was not able to return a collation table for the country ID and code page specified. Check that the application specified the locale's country ID and code page correctly and that the operating system is configured to support the country ID and code page.

This may also be error: **8040 CRC check on component ID failed.**

A routine CRC check on the component ID failed. You may receive this status code when an application erroneously alters a component ID.

**105: The file cannot be created with Variable-tail Allocation Tables (VATs).**

In Btrieve version 6.0 or later, the application specified that a Btrieve file should be created with Variable-tail Allocation Tables (VATs). However, the application failed to specify that the file was to use variable-length records (a precondition for files to use VATs).

**106: Btrieve cannot perform a Get Next Chunk operation.**

In Btrieve version 6.0 or later, the application called the Get Direct/Chunk operation to retrieve a chunk from a record and used the next-in-record bias on the descriptor sub function. However, after the application established its position in the record (but prior to this call), the target record was deleted.

**107: The application attempted to perform a chunk operation on a pre-v6.0 file.**

In Btrieve version 6.0 or later, the application tried to use either a Get Direct/Chunk operation or an Update Chunk operation on a pre-v6.0 formatted file.

**109: An unknown error was encountered either creating or accessing a semaphore.**

This status code is returned by server-based Btrieve (v5.15 and v6.x) when a transaction would cause more than 65,535 pages to be written to a pre-image file (for pre-v6.0 Btrieve files) and the version of Btrieve that returns the error cannot handle such a large pre-image file.

Break the transaction into two or more smaller transactions.

**110: Btrieve cannot access the archival logging configuration file.**

**111: The specified filename was not found in the archival logging configuration file.**

**112: The specified file is in use by another client.**

**113: Btrieve cannot find the archival log for the specified file.**

**114: The archival log for the specified file is invalid.**

**115: Btrieve cannot access the archival logging dump file.**

**130: Btrieve ran out of system locks.**

This status code is returned by v6.x versions of server-based Btrieve and can indicate a temporary condition in which no system locks are currently available. For example, a single client is performing a very large transaction, one in which thousands of records are being modified.

Many clients are performing large transactions concurrently.

A client can receive Status Code 130 whether or not it is in a transaction. In some cases, a client can simply retry the failed operation. If other clients have released system locks in the interim, the retried operation may succeed.

If a client in a transaction receives Status Code 130, end or abort the transaction. If the transaction is very large, consider breaking it into multiple, smaller transactions.

You can also use the Setup utility to lower the number of system locks devoted to explicit locking. To do so, lower the values assigned to the Number of Locks and/or Number of Remote Sessions options.

**132: The file has reached its size limit.****133: More than 5 concurrent users attempted to access the same data file.**

In the Developer Kit version of client-based Btrieve, you have attempted to access a Btrieve file by more than five Btrieve engines at the same time. The Developer Kit version of client-based Btrieve limits the number of concurrent users of a file to five engines.

**139: Record Length Or Key Data Consistency**

**Problem:** This indicates that there is a mismatch between data files and the version of the software or that there is a problem with the index portion of the file.

**Solution:** Run the Rebuild File Utility against the specified data file. Verify that you do not have any modifications or enhancements to the affected package. If you do, contact the vendor that sold you the modification/enhancement. Reinstall the program diskettes. If the above steps do not correct the problem, contact your Authorized Elliott Reseller.

This may also be error: **7061 Your Pervasive Database engine expired on <date>.** Please contact Pervasive Software for more information.

You may receive this status code when your temporary user license for the database engine has expired. Contact Pervasive Software to obtain a permanent user license key. This may also be error: **7062 Your Pervasive Database engine will expire on <date> because you have a temporary license key.**

You may receive this message when you start the MicroKernel and you have a temporary license key. This is an informational message only that reminds you when your license will expire. Contact Pervasive Software to obtain a permanent license key. This may also be error: **7063 your user count license limit has been reached.**

The maximum allowed users for the database engine has been reached. Please contact Pervasive Software if you need additional users for your license. To check the current setting for maximum users, run the User Count Administrator:

1. Click Start, Point to Programs and then to Pervasive SQL 7.
2. Select the User Count Administrator.



The User count Administrator displays the current maximum user license and allows you to add additional licenses. Refer to Getting Started with Pervasive.SQL for more information.

**3000: The MicroKernel router encountered a memory allocation error.**

The MicroKernel router could not internally allocate memory. Check the Pervasive Event Log (PVSW.LOG) for more information.

**1001: The lock parameter is out of range.**

This status code is obsolete in MicroKernel versions 7.0 and later.

Version 6.x MicroKernels returns this status code when the value specified for the Number of Locks configuration option is out of range. Pre-v6.0 MicroKernels returned this status code when the value specified for the Multiple Locks configuration option is out of range.

**1002: A memory allocation error occurred.**

Make sure that the workstation has enough memory to load all the programs it requires. For workstation versions of the MicroKernel or client requesters, the insufficient memory may apply to conventional memory, expanded memory, or both.

**1003: An invalid memory size parameter was specified.**

Ensure that the value for the Cache Allocation configuration option is large enough to accommodate the required cache size. See the Pervasive SQL User's Guide for more information.

**1004: A page size error occurred.**

This status code is obsolete in MicroKernel versions 7.0 and later.

The value of the Page Size configuration option must be an even multiple of 512 and it must be between 512 and 4096, inclusive.

**1005: The pre-image or lock file drive parameter is invalid.**

You must specify a valid drive letter for the Pre-Image/Lock File Drive configuration option.

Note: Pre-image files are used only for pre-v6.0 files. Lock files are used only for v6.0 and later files opened in MEFS mode.

**1006: The pre-image buffer parameter is out of range.**

The Extended Operation Buffer Size configuration option must be between 0 and 64,000, inclusive. Both the v6.15 and v7.0 MicroKernel return Status 1006 for this reason.

The Pre-Image Buffer Size configuration option must be between 1 and 64, inclusive. The pre-image file is used in pre-v6.0 files and by v6.0 and later MicroKernels that are loaded with the Create Files in Pre-v6.x Format configuration option set to yes.

**1007: The files parameter is out of range.**

For pre-v6.0 engines, the Open Files configuration option must be between 1 and 250, inclusive. For v6.0 and later engines, refer to the Pervasive SQL User's Guide for valid range information.



**1008: The initialization parameter is invalid.**

The specified configuration options contain invalid or unidentifiable values.

**1009: The transaction filename parameter is invalid.**

This status code is obsolete in MicroKernel versions 7.0 and later.

The filename specified for the Transaction filename configuration option is not valid. Ensure that the transaction filename is correct.

**1010: An error occurred during the access of the transaction control file.**

This status code is obsolete in MicroKernel versions 7.0 and later.

The MicroKernel is unable to create, open, read, or write to BTRIEVE.TRN or MKDE.TRN. Set the TRNFILE setting in the BTI.INI file to C:\.

**1011: The compression buffer parameter is out of range.**

The Compression Buffer Size configuration option is out of range. Refer to the Pervasive SQL User's Guide for valid range information.

**1012: Invalid /n:option.**

This status code is obsolete in MicroKernel versions 6.0 and later.

The Maximum Number Of Files In A Transaction configuration option is invalid. Valid values are 0 to 18; the default is 12.

**1013: The task list is full.**

In the Windows environment, this status code is returned if the task entry table is full. You can change the value for the Number of Tasks option using the Setup utility. For more information, refer to the Pervasive SQL User's Guide.

In the DOS environment, this status code is returned if the BREQUEST or BREQNT requesters are used without the /t parameter when BTRVID calls are present in the application. Reload the requester with a non-zero value for the /t parameter. For more information on the DOS Requester parameters, refer to Getting Started with Pervasive SQL.

**1014: Stop warning. The application still has files or transactions active.**

In the OS/2 environment, the MicroKernel returns this status code when an application calls the BTRVSTOP function while files are still open or while a transaction is still active. The application must close all files and end all transactions before calling BRRVSTOP.

**1015: One of the pointer parameters passed to the MicroKernel is invalid.**

One of the printer parameters passed into the MicroKernel is invalid. The MicroKernel checks for invalid pointers (and therefore only returns this status code) if you put the following line under the [BTRIEVE] heading in your initialization file: CHKPARMS=YES. By default, the MicroKernel performs no printer checking.

**1016: The MicroKernel is already initialized.**

This status code is obsolete in MicroKernel versions 6.0 and later.

The MicroKernel returns this status code if you attempt to initialize the MicroKernel when it is already initialized. To reinitialize the MicroKernel, close all files, end/abort all transactions, and issue Btrieve operation 25 using the BTRV API before calling the initialization function.

**1017: The Btrieve Requester is unable to find the resource file WBTRVRES.DLL.**

WBTRCALL.DLL returns this status code when it cannot find the resource file WBTRVRES.DLL. Place the WBTRVRES.DLL file in the same directory as the WBTRCALL.DLL file.

**1018: The application attempted to call the MicroKernel from a Btrieve callback function.**

The Windows MicroKernel does not allow a task to call the MicroKernel from a Btrieve callback function. You can only use the callback function with Btrieve for Windows.

**1019: The MicroKernel cancelled the current Btrieve operation at the request of the application's Btrieve callback function.**

The application's MicroKernel callback function returned a nonzero value indicating that the application wants to terminate the current operation immediately. When the MicroKernel receives such a cancellation request, it attempts to terminate the currently executing operation and ceases to call the callback function for the duration of that operation. The MicroKernel may be unable to cancel the operation. However, if successful in doing so, the MicroKernel returns this status code.

**1020: Btrieve Requester Interface communications error.**

The MicroKernel loader and requester Interface returns this status code when it cannot send a message to the MicroKernel. This occurs when Windows is shutting down or when you terminate the MicroKernel using Ctrl+Alt+Delete. This is an informational status code only. No action is required. Your application continues the shutdown process. You also receive this status code when running an application that prevents Windows from processing messages.

**1021: The MicroKernel failed to initialize.**

The MicroKernel could not complete its initialization tasks. Check the MicroKernel's console or error log for a message that specifies the problem that prevented the MicroKernel from initializing. The NetWare MicroKernel displays the message on the server's system console and it also writes the message to the Pervasive Event Log (PVSW.LOG), which is located at SYS:SYSTEM. The Win32 workstation MicroKernel displays the message in the console message window and writes the message to the Pervasive Event Log (PVSW.LOG), which is located in the WINDOWS\SYSTEM or WINNT\SYSTEM32 directory. The Windows NT server MicroKernel does not display a message, but writes the message in the Pervasive Event Log (PVSW.LOG), which is located in the WINNT\SYSTEM32 directory.

Correct the problem, using the Setup utility if necessary and retry the operation. If you are using a NetWare MicroKernel, you must first correct the problem, then unload and reload the MicroKernel before you can retry the operation.

**2000: Internal error.**

The Btrieve requester encountered an internal error. Check the Pervasive Event Log (PVSW.LOG) for more information.

**2001: The memory allocation is insufficient.**

In an OS/2 environment, the Requester cannot allocate enough memory for the parameters specified with

the BRQPARMS environment variable. In a DOS environment, reduce the value specified for the /D configuration option.

**2002: The option is invalid or out of range.**

In an OS/2 environment, either one of the options specified with the BRQPARMS environment variable is invalid (such as /P instead of /D) or the value specified for a parameter is out of range. Check the SET BRQPARMS statement to make sure it is correct.

**2003: The Requester does not allow local access to the specified file.**

The application attempted to access a file stored on a local drive. The configuration of the MicroKernel installed at the client machine does not allow access to local files.

This status code has been supplemented in Btrieve 7.0. For a list of the new status codes, see "Status Code 2003 replacement".

**2004: SPX is not installed.**

Install the NetWare SPX v2.0 or later communications software for OS/2.

**2005: An incorrect version of SPX is installed.**

Install the NetWare SPX v2.0 or later communications software for OS/2.

**2006: There is no available SPX connection.**

SPX has already established the maximum number of sessions it can handle. To increase the maximum, edit the NET.CFG file. Refer to your NetWare documentation for more information about NET.CFG.

**2007: A pointer parameter is invalid.**

One of the pointer parameters passed to the MicroKernel is invalid. Check the program to ensure that the pointer parameters are correct.

**2008: Router cannot find engine.**

The MicroKernel Router cannot communicate with the 6.15 engine. This status code is only used with Scalable SQL v4.0.100.

**2009: Cannot load MicroKernel Router component.**

The Btrieve requester cannot load the MicroKernel Router. This can occur if the DLL fails to load or fails to obtain the necessary DLL entry point.

**2010: Thunk not possible-the Win32 MicroKernel router could not be found or is incompatible.**

You may receive this status code when the system is configured for thunking and the path is not accessible. This can occur if a necessary system file cannot be found (for example, kernel32.dll). It can also occur if the required system calls (for example, Win32s library) are not available.

**2011: Btrieve requester resource DLL not loaded.**

The resource DLL controls options that you can set with the Setup utility. You may receive this status code when the resource DLL is either missing or incompatible with the current version of the requester. If this happens, the MicroKernel reverts to its default settings and continues to run.

**2012: The Btrieve requester encountered an operating system error.**

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3001: Local access is unavailable to the MicroKernel router.**

A call to the MicroKernel failed. This is most likely the result of an incorrect configuration. For example, if the MicroKernel is unavailable because of configuration settings and the file to be opened is local, then the MicroKernel router returns this status code.

**3002: The MicroKernel router resource DLL is unavailable.**

The MicroKernel router returns this status code when its resource DLL is either missing or incompatible with the current version of the router. If this happens, the MicroKernel reverts to its default settings and continues to run.

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3003: The MicroKernel router detected an incompatible network component.**

The networking services component is not compatible with this version of the MicroKernel router. The most likely cause is that the Networking services DLL has been replaced by an older version.

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3004: The MicroKernel is not responding to the MicroKernel router.**

The MicroKernel is not responding to requests from the MicroKernel router. Verify that the MicroKernel is running.

**3005: The MicroKernel router encountered an operating system error.**

The MicroKernel router encountered an unexpected error from the operating system, such as a shared memory failure.

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3006: The MicroKernel router detected an invalid session.**

The session information contained in a position block is invalid. This status code occurs for one of the following reasons:

The application is trying to use a position block for a file that resides on a remote server and for which the connection has been previously terminated via a B\_STOP (25) or B\_RESET (28) operation.

The application is trying to use a position block for a file that resides on a remote server and that encountered an abnormal network error on a previous operation.

**3008: Invalid configuration for MicroKernel router.**

This status code results from an invalid configuration. For example, if the Local, Remote, and Thunk options have all been set to No, the router has no valid path to take. If this happens, set one of these options to Yes, depending on your setup.

**3009: NETAPI.DLL is not loaded.**

The MicroKernel router could not find NETAPI.DLL (or NETAPI32.DLL in OS/2).

**3010: NetWare API DLLs are not loaded.**

The MicroKernel router could not find the NetWare API DLLs.

**3011: Thunk not possible - the Win32 MicroKernel router could not be found or is incompatible.**

This status code is only relevant to the Win 16 MicroKernel router. You may receive this status code when the Use Thunk option is set to Yes and the thunk path is not accessible. Possible causes include:

- The Win32 MicroKernel Router DLL does not exist or is not compatible.
- The Win32s routines failed to initialize.

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3012: Local engine is not accessible to the MicroKernel router.**

Access to the local engine is not possible because it is not loaded or could not be launched. You can receive this status code if you try to access a local file on a client and you do not have a Micro-Kernel workstation engine installed or if you try to access a local file on a server and the MicroKernel server engine is not running.

If you have a only a server engine installed and your Pervasive Event Log (PVSW.LOG) contains Status Code 3012 warning entries, perform the following steps:

To Turn Off Local Engine support:

1. Click Start, point to Programs, then to the Pervasive folder.
2. Select Setup (Win32 or Win16).
3. Select the MicroKernel router component.
4. Select the Local setting and change it to Off.
5. Select the Scalable SQL Requester component.
6. Select the Local Usage setting and change it to Off.
7. Click Save and then Exit.

**3013: The remote engine is inaccessible to the MicroKernel router because the networking component is not loaded.**

Access to the remote engine is not possible because the MicroKernel router could not initialize the networking component. Possible causes include:

- The Remote option is incorrectly set to No.
- The required networking component could not be found or is not compatible.

**3014: The MicroKernel router cannot find an engine.**

The MicroKernel router could not complete the operation because it did not find an engine (local or remote) that could process the operation. Possible causes include:

- The target network operation system is not available.
- The target engine is not available.

In a Windows 3.x environment, you are using a shared drive name that contains a space. To resolve the condition, remove the space from the shared drive name. For example, if you connect to a server named "D Drive", change the share name to "D\_Drive".

**3015: The MicroKernel router encountered an initialization error.**

An unexpected error occurred during the initialization of the MicroKernel router. Check the Pervasive Event Log (PVSW.LOG) for more information.

**3016: The MicroKernel router encountered an internal error.**

The MicroKernel router encountered an internal error. Check the Pervasive Event Log (PVSW.LOG) for more information.

**3017: Data buffer of the local engine is too small.**

You may receive this status code when the requester has more data to send the MicroKernel than the MicroKernel's buffer can handle. This status code is only relevant to an engine running locally; it does not apply to client/server environments. Some possible solutions include:

- Specify a higher value for the Communications buffer size parameter in the Setup utility.
- Use smaller buffers in Btrieve operations.

**3018: The file is already closed.**

You may receive this status code when the MicroKernel router is shut down and is not accepting any more requests.

**3019: The MicroKernel router encountered a semaphore error.**

A semaphore error occurred while trying to establish contact with the local engine. Check the Pervasive Event Log (PVSW.LOG) for more information.

**3020: An error occurred while loading the MicroKernel.**

You may receive this status code when an error occurs while loading the MicroKernel or when access to the server and client machine's shared memory objects are unavailable.

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3021: The MicroKernel router received a badly formatted data packet.**

The MicroKernel router rejected the response from the engine because it was badly formatted.

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3022: The MicroKernel router could not send the request to the remote engine because the specified data buffer length resulted in a data packet object that is too large.**

A request to the MicroKernel router specified a data buffer length that resulted in a data packet size greater than 64 KB because the MicroKernel router adds some packet overhead as it forms the data packet.

Check the Pervasive Event Log (PVSW.LOG) for more information.

**3023: The task table of the MicroKernel router is full.**

An internal table used by the MicroKernel router to manage tasks is full. This error should only occur in Win 16 environments and indicates that a large number of applications are using the Win 16 MicroKernel router at the same time.

*The Btrieve® Status Code Listing, incorporated in this Documentation, has been provided with the written permission of Pervasive® Software Inc.*

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## Appendix D

### ***Barcode Error Codes***

Outlined below is a complete list of barcode printing error codes and their respective description.

**32500**

Incomplete number of UPC-A characters. Must be 11, 13 (2 Digit supplement) or 16 (5 Digit supplement) digits.

**32501**

Incomplete number of UPC-E characters. Must be 6, 8 (2 Digit supplement) or 11 (5 Digit supplement) digits.

**32502**

Incomplete number of EAN/JAN characters. Must be 7, 9 (2 Digit supplement) or 12 (5 Digit supplement) digits.

**32503**

Incomplete number of EAN/JAN characters. Must be 12, 14 (2 Digit supplement) or 17 (5 Digit supplement) digits.

**32504**

Incomplete number of PostNet characters. Must be 5, 9 (Zip+4) or 11 (Zip+4+DP) digits.

**32505**

Illegal character for this symbology.

**32506**

Illegal character for this symbology. Character must be in ASCII range 0...127.

**32507**

Illegal character for this symbology. Character must be numeric.

**32508**

Illegal character for this symbology. First digit must be a '0'.

**32509**

Missing a required placement of one or more zeros for UPC-E.

**32510**

Too many characters for this symbology.

**32511**

Software Logic error, unknown symbology type.

**32512**

Returned string too long for given buffer.

**32513**

Software Logic error, contact manufacturer.

**32514**

Barcode value does not translate into a valid symbol for the current symbology.

**32515**

Invalid device context specified.

**32516**

Invalid barcode symbology specified. Check documentation for valid range.

**32517**

Invalid barcode ratio specified. Check documentation for valid range.

**32518**

Invalid rotation specified. Check documentation for valid range.

**32519**

Invalid magnification specified. Check documentation for valid range.

**32520**

Invalid units specified. Check documentation for valid range.

**32521**

Invalid bar width specified. Check documentation for valid range.

**32522**

Invalid bar height specified. Check documentation for valid range.

**32523**

An error occurred while attempting to create the specified font.

**32524**

An error occurred while attempting to select the specified font.

**32525**

An error occurred while attempting to draw the caption text.

**32526**

Software Logic error, unexpected character encountered in translation output string.

**32527**

Given character is not supported in Demo version of the software.

**32528**

Feature unsupported in Demo version of the software.

**32529**

Out of memory.

**32530**

A required DLL could not be loaded.

**32531**

The specified data will not fit in a PDF417 symbol. The maximum size of PDF417 symbol is approximately 2700 characters, if error correction level zero is used. The higher the error correction level, the fewer data characters can be used. Decrease the error correction level or split your data into 2 or more separate barcodes.

**32532**

Error generating EDAC for a PDF417 symbol. Contact manufacturer.

**32533**

Error generating data code words for a PDF417 symbol. Contact manufacturer.

**32534**

Error generating symbol character for MaxiCode symbol. Contact manufacturer.

**32535**

The data characters would not fit in the symbol. Try decreasing the length of the input data or changing the mode to four (4) to increase the message capacity.

**32536**

Invalid MaxiCode mode. Range is 2 through 6.

**32537**

Error generating the primary and secondary messages. Contact manufacturer.

**32538**

Error drawing the MaxiCode center bullseye. Contact manufacturer.

**32539**

Error drawing the MaxiCode modules. Contact manufacturer.

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