SouthWare Excellence Series™

Rev 15

Upgrade Release Notice

Release Version

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SouthWare Excellence Series
Revision 15 Upgrade
"Doing More with Less"
Highlight Summary

We are very excited to introduce Revision 15 of the SouthWare Excellence Series. This revision launches a new user experience via the concept of Live Portals as well as providing solutions to other key user requests.

We have used the theme of "Doing More with Less" to focus our efforts on allowing you to do more with your business software with less resources. With today's business challenges you need to make sure you're getting all the productivity you can from the people in your organization.

The concept of Live Portals is a cornerstone of this revision. Live Portals let you manage your work in SouthWare through interactive web pages that both provide data and let you perform common tasks. But the major improvements available through this concept don't interfere with any of the SouthWare features you are accustomed to using, so your transition to this revision should be very smooth.

We encourage you to read through this release notice and pay particular attention to features such as:

- ✓ Live Portals
- ✓ Free NetLink WebProcessor
- ✓ Interactive Reporting Grids
- ✓ E-Mail Integrations
- ✓ Integrated Activity Reporting
- ✓ Google Charts
- ✓ Pivot Table Reporting
- ✓ Automatic e-mailing of Forms
- ✓ Sales Opportunity Tracking
- ✓ Remote User option
- ✓ NetLink Shopping Cart
- ✓ New Simplified Implementation Tools

The upgrade has minimal file conversion so it won't take long to be up and running.

With the new platform of Rev 15 we look forward to being able to bring you powerful yet simple new capabilities during the coming months. And we're excited that you can take advantage of our new simpler user experience while at the same time retaining all the features that you know so well.

Thanks for choosing SouthWare.

The Folks at SouthWare

Live Portals

Introducing...... the next generation of user experience!
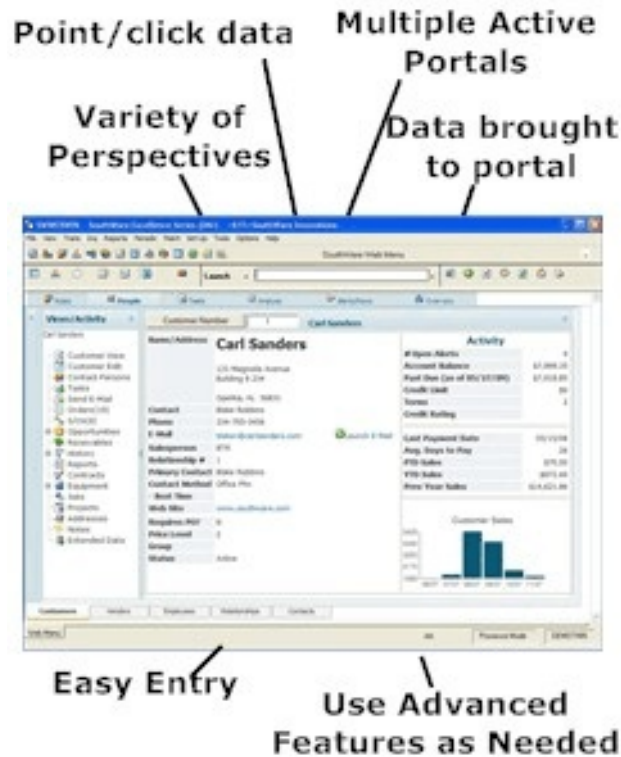
SouthWare Live Portals provide a new user-experience "wrapper" around the SouthWare products.   With Live Portals you get the best of both worlds:

✓   You get a simple but powerful way to perform the common functions of your job via intuitive web pages.
✓   You still have instant access to any of the other functions available in SouthWare.

 Live Portals preserves the features you like about SouthWare while providing a better way to get work done.

What is a Live Portal?
Live portals is the concept of providing a way for users to interact with SouthWare products via intuitive, dynamic web pages. Web pages are a familiar paradigm to most folks today, and using this approach helps minimize training and ensure efficiency. In previous revisions SouthWare introduced the concept of Personas as static web page portals. Now Live Portals builds on that concept to create dynamic ("live") rather than static portals.

SouthWare has blended several different technologies to create Live Portals. The result is a user experience that has the familiarity of a web page but provides functionality more similar to a program. Key benefits of Live Portals include:

★ **More Integrated Data** - Live Portals bring related data to you instead of making you find it in various places in the system.
★ **More Access to Functions You'll Use** - Live Portals integrate functions from various modules so you don't have to find them in the menus.
★ **Less Complexity** - Live Portals hides features that don't need to be seen by most operators.
★ **Less Navigation** - Live Portals are designed to minimize keystrokes and navigation.

How Do I Use Live Portals?
The first time you log in for a SouthWare session after loading this upgrade you will see a brief introductory screen and then you will be taken to SouthWare's Web Menu. The default starting view is "WIMAIN" which provides a tabbed desktop for the different Live Portals you use. You can use the features of the Overview tab to set the Web Menu as your default and to set defaults for other features of Live Portals.

■ An "Overview" tab summarizes the Live Portals and lets you configure some of the defaults you can use.
■ A "Roles" tab gives you access to the different persona roles you use.
■ A "People" tab gives you access to all the available info about the people you work with.
■ A "Tasks" tab lets you see and process your tasks (requires TaskWise license).
■ An "Analysis" tab gives you access to several data summary portals (subject to security).
■ An "Alerts/News" tab gives you access to the current status of any alerts and recent company News items (requires TaskWise license).

To access any of the categories you simply click on the tab. Then click on any of the info or options available to bring new data or functions to your desktop.

Multiple Active Portals
Once you open a Live Portal it will stay active until you log off or exit the Web Menu program. This means that you can switch back and forth between portals, and when you return to a portal it will be in the same state that you left it. It's like having multiple tasks on your desk at the same time that you can switch between as needed.

Each Active Portal is maintained in its appropriate tab, so switching is much simpler than having lots of stacked windows on your screen:
♦ When you switch back to a major category (such as "Tasks") the tab will show the last page you were displaying in that category.
　♦ If you have been in multiple sub-tabs (such as multiple Roles) then when you switch back to a sub-tab it will also show the last page you were displaying in that sub-tab.

So for example, let's say you are reviewing a service contract for a customer from the service manager portal. Here's a sample of how you might use portals over the next few minutes:
☺ You have some questions about the customer so you click on the People tab and bring up the customer view.
☺ You pull up a list of all the equipment you have sold to the customer and start reviewing the details.
☺ Then you get a phone call from a customer. You click on the Tasks tab and add a new task to record the call.
☺ Then you click on the People tab and you see the last page you were viewing. Within the Customer view you even bring up the same contract details you were

viewing in your Roles portal.

Concept of Moving "Forward" to do work
With software you often select functions to move forward and build up a stack of windows. This is useful but can get confusing as you shuffle between windows and close windows trying to get "back" to where you were.

With Live Portals you no longer need to go "back" - you can simply continue to move *forward* doing your work. If you happen to move to a portal that is already active you'll be right back where you were. But you don't need to build up a long navigation stream and then close all those windows. The pages you've used remain active, but they stay within their tabs so they're available if needed again but are not "loose ends" you need to close.

What Live Portals Are Available?
It would be misleading to try to include a full list of the available Live Portals. At the time of release there are over 250 different primary pages contained within Live Portals, and we continue to add new portals and functions to existing portals. We will make some of these available as FLASH updates for Rev 15. So instead of a complete list we'll outline a few key sub-portals for each category:

♦ Role Portals - you now have a Live portal for each Persona Portal available in previous revisions. These have been turned from static portals to NetLink requests to take advantage of Web Grids, Google charts, and other Live Portal technology.
♦ People Portals - there are separate "hubs" of info for customers, vendors, employees, TaskWise relationships, and TaskWise contacts. Within each hub there is an overview along with available listings and search functions. When you select a record for more info you will see a record "hub" that integrates all the related info for that company/person into a single place. There are dozens of Web Grids, Charts, and entry screens available.
♦ Task Portals - there are various task lists, task add functions, task edit functions, and task review functions built into this hub.
♦ Analysis Portals - there are separate hubs to analyze areas of data such as Sales Orders, Service Orders, Sales Opportunities, Contacts, etc. Within each hub there are various Web Grids and other page options.
♦ Alerts/News - this provides various Web Grid analysis of open alerts and provides access to news topics (including adding new topics)

Can I Enter Data in a Live Portal?
Yes. Live Portals utilize ImportMate to provide the ability to add, edit, and selectively delete data shown in portals. At the time of initial release there are several editing pages within the portals and several more will be added in the weeks following the initial release.

For example, with Live Portal pages available at the initial release you can:
• Add customers
• Edit customer name/address info
• Add customer notes
• Edit employee basic info
• Add employee notes
• Add Sales Prospects
• Add Sales Opportunities
• Edit Sales Opportunities
• Add tasks
• Edit tasks

- Delete tasks
- Edit relationship info
- Edit service orders
- Edit service order line items
- Delete service order line items
- Edit basic stock item info
- Add a vendor
- Edit vendor name/address info
- Add a vendor note
- Add contacts
- Edit contacts

Security within Live Portals

There are various methods of securing the data and functions available in Live Portals:

- **NetLink Request Access Mask** - This allows you to restrict access to a request based on a masking code defined in the requests and in the requestor records. See the NetLink documentation for more information.
- **Operator/Group Access** - This allows you to restrict access to a request to a single operator or operator group. See NL-01-02, field 6, for more information.
- **Conditional Template Security** - This allows you to secure selected portions of a web page template based on operator security. See "Template Security Comments..." in the NetLink section of this release notice for more information.

Using the Live Portal interface applies the normal SouthWare security checking to all SouthWare programs. This security is in addition to the options above.

Updates to Live Portals

Because many of the files associated with Live Portals are company specific, you now have a new folder named swupd15 that resides in your SouthWare run directory.

- When you log in, the system checks the contents of this folder for the file UPDATE.00.
- If this file exists, the program compares the Created Date in UPDATE.00 against the last updated date in your company record XX0302 field #15: Last SouthWare Update.
- If the date in the company record is less than the date in UPDDATE.00 the extract packager will load all the new records into that company and copy any files in swupd15/nlhtml to the appropriate directory.

Other Notes

- You may need to add the SouthWare Server as a local intranet zone to ensure that Live Portals work correctly without browser security errors.
- Some browser add-ons may interfere with Live Portals in WebProcessor mode. For example, if you have installed a search add-on that manipulates all URLs, this may interfere with the WebProcessor handling of URLs. If the SouthWare Web Menu detects this issue it will try to help you correct it, but some products you may have to deactivate or uninstall if they manipulate browser URLs.
- You must have internet access to view Google charts.

Remote Employees

A new license option is available for employees who want to access Live Portals from browsers outside of SouthWare. This could include employees on the road, working from home, outside salespersons, etc. The Remote Employee license lets them use the Live Portal features without being logged into a SouthWare session.

An employee can log in to Live Portals using either of two licenses:

Internal License Seat
You may use a standard license seat to access Live Portals. In the Requestor record (NL-01-03) you may access field 13 and enter "S". This option would likely be used when an employee normally works in the office and wants to use that license seat when logging in from out of the office.

Remote Employee License Seat
You may use a remote employee license seat to access Live Portals. This option is used when an employee does not have access to a SouthWare login and does not need all of the functionality of the standard SouthWare login session.

Auto-Assign Option
You may also specify that the system should auto-assign the license seat for an employee based on license seat availability. This is specified in NL-01-03 field 13 as well.

For an auto-assign employee the program first tries to use a Remote Employee seat. If no Remote Employee license seats are available the program will then use a SouthWare Internal License Seat if one is available.

This method has the advantage of best utilizing available seats. However, if you don't have enough seats licensed you may find that people who normally log on to SouthWare to do their work won't be able to log in.

Remote Access Functions
When logged into Live Portals remotely via a browser you may use all of the Live Portal functions except for those that are special capabilities of the SouthWare WebView browser. At the time of release the primary special capability not available to Remote Employees is the Call to SouthWare programs that require user interaction.

Internal License Limitations
"I" type requestors were allowed in previous revisions, and we are honoring that capability by allowing an "I" type requestor without an internal license seat. However, we expect Remote Employees will increasingly be used as an alternative to a standard login license so we will be requiring an internal license seat for use of new features. ***Certain new features such as Live Portals are not available to "I" type requestors accessing NetLink from outside a SouthWare login session unless they are using an Internal or Remote Employee license.***

Live Portals features require an internal license. To access Live Portals from an

outside browser you must use an Internal license seat or a Remote Employee license seat. If you try to use one of these features for an "I" type requestor without the appropriate license the page will simply return an error message explaining that this feature is not available without the proper license.

At the time of release the features that require an Internal License seat for use by Internal requestors accessing from an outside browser include:
•   Any standard Live Portal pages
•   Web Grids
•   Google Charts
•   XML Data Output
•   Conditional Security for Templates
•   Variable Template Names
•   Variable Primary Files

As new features are added to Live Portals they will continue to be restricted to users that have a valid internal license seat (normal SouthWare login seat or Remote Employee seat).

E-mail Enhancements
E-mail is now a vital part of business communication. With Revision 15 you have several powerful features to help you use e-mail for communication.

●   **New E-Launch System!**
The E-Launch System allows you to send e-mails to your business contacts with a single click. The E-Launch System takes advantage of an intuitive user interface and a set of E-Mail Launch IDs to make it simple to send e-mails. Instead of executing a report or other process and then choosing to send it as an e-mail, the E-Launch System is designed specifically for sending e-mails and is streamlined to save you time. E-Mail Launch IDs determine how the e-mail will be formatted and delivered and can be defined as a "one-click" send or as some defaulted fields for a new e-mail.

What is E-Launch?
An E-Launch is simply a pre-programmed launch of an e-mail message. An E-Launch button appears amongst a set of buttons at the upper left corner of most SouthWare windows. Clicking on this button will show you all of the available Launch IDs in a hierarchical menu based on link values (customer, vendor, etc.). Each Launch ID is based on a primary file and specifies details about what to launch, how to format the e-mail and who to send it to.

How it Works
When you select a Launch ID, the report or other process is executed (if applicable) and the output of that report or process is "Send E-mail". If the Launch ID specifies that the e-mail parameters should be skipped, then the e-mail will be automatically sent. Otherwise, an e-mail parameter window will be shown. Just about any report or process that could be e-mailed in the past can now be e-mailed through the E-Launch system.

E-Launch Set Up

The primary set up for the E-Launch feature is the definition of E-Launch records. You must also have Send IDs defined for any e-mail technologies you plan to use.

XX-09-17 E-Mail Launch ID Maintenance
In this program you may define each pre-programmed e-mail that you want to launch. Several standard launch IDs are available so that you can use these as examples in creating your own.

Each E-Mail Launch ID is based on a primary file and will be available in the E-Launch user interface when a link value exists for that primary file. The Launch ID potentially defines all necessary fields to send an e-mail so that no user interface is required.

1. E-Mail Launch ID:
Enter a unique ID for a new E-Mail Launch ID, or enter/lookup the key of an existing record. This may be up to 15 characters long.

2. Description:
Enter a description of this E-Mail Launch ID to help you identify it. This is shown in the E-Launch user interface.

3. Launch Type:
Choose the launch type for this Launch ID. This indicates which report or process will be run (if any) when this Launch ID is selected from the user interface.

M	Menu Reference - Executes a menu reference at launch time and the output will be used in the e-mail.
N	No Launch - Doesn't execute a separate process at launch time and can be used for simple e-mails or templates.

O	Object/RCF Packet - Executes an object (including RCF Packet types) at launch time and the output will be used in the e-mail.
P	Program - Executes a program at launch time and the output will be used in the e-mail.
S	Special - Executes a special process at launch time and the output will be used in the e-mail. (For Future Use)

4. Launch Process:

Specify the process in which to execute at launch time. The process is based on the launch type and is skipped if "No Launch" is the Launch Type.

5. Primary File:

Enter or lookup the primary file for this Launch ID. The primary file determines when this Launch ID is available via the user interface. When link values are populated, only Launch IDs that match the link values will be shown. For example, if the e-mail is meant for a customer, AR01 should be used and it will be available any time the customer link value is populated. The primary file also determines the primary file for data dictionary variable replacement in the e-mail address(es), subject, and body fields.

6. E-Mail Send ID:

Enter or lookup the Send ID to be used for this Launch ID. The Send ID determines how the e-mail will be sent and is defined at XX-05-12.

7. E-Mail Address(es):

Enter up to 20 e-mail addresses for the Launch ID. When you enter multiple addresses you should separate addresses by a semi-colon (;). You may use data dictionary variables in this field and may use the Lookup option to help you specify the field you want to use.

8. Subject:

Specify the subject of the e-mail in this field. You may use data dictionary variables in this field and may use the Lookup option to help you specify the field you want to use.

9. Body:

Specify the body of the e-mail in this field.

> **Body Source:**
>
> Specify where the body contents should come from:
>
> | T | Template - You will enter the body directly in the template (up to 2000 characters). You may use data dictionary variables in this field and may use the Lookup option to help you specify the field you want to use. |
> | --- | --- |
> | F | Text File - You will define the body in a separate text file and will then specify the file name. You |

may use data dictionary variables in this field.

    H   HTML File - You will define an HTML-formatted body in a separate file and will then specify the file name. You may use data dictionary variables in this field.

    P   Print Output - The body will contain the text of the form output.

10. PDF Attachment?:

Specify whether the launch process output should be a PDF attachment. This option is not available for "No Launch" types or Launch IDs that specify the Body Source as "Print Output".

If you specify to create a PDF attachment you may also define the following:

- Override PDF Printer
- PDF Attach File Name Format - The default for this is "temp/<NAME>" which means that the PDF file name will be created in the temp directory using SouthWare's standard print output file name. Here you may optionally change this file name format.

11. Skip E-Mail Parameters?:

Specify whether the Launch ID should stop at the e-mail parameter screen or not. If you choose to skip the parameters the e-mail parameters will be automatically provided from this Launch ID and the e-mail screen will not be displayed.

12.Extract ID:

Here you may specify an Extract ID for use with the Extract Packager tool.

How to Create a "One-Click" Launch ID

To create an E-Mail Launch ID that will send e-mail with a single click you must:
1.   Specify to Skip E-mail Parameters in the E-Launch ID.
2.   If using Outlook, ensure that the Send ID's Autosend E-mail option is set. (XX-05-12, field 5).
3.   Make sure that the Launch Process doesn't have any user interface. If the launch process is a report with numerous parameters, consider creating an RCF packet to record those parameters.

Using E-Mail Launch IDs as E-mail Templates

You can specify E-Mail Launch IDs as templates for e-mails by specifying that they are "No Launch" types and have a primary file of "XX99".

If you select Empty E-mail or any of the Launch IDs from the "Other" category (which are Launch IDs with a primary file of XX99), you can select templates from the drop down in the "Send E-mail" window.

Launch an E-Mail Launch ID via Program Call or Object

You can launch a specific E-Mail Launch ID at any time by executing the following:

    SWEMLEXE/P [nnnnnnnnnnnnnnn]

where nnnnnnnnnnnnnnnn is the E-Mail Launch ID

You can use this syntax to execute an E-Mail Launch ID from anywhere an object can be executed from.

- **New E-Mail Address Selector**
  When preparing to send e-mails, you now have the ability to lookup e-mail addresses in a way that is similar to how you use address books in popular e-mail applications. The new e-mail address selector works just like other selectors in SouthWare, such as the FYI field selector. All e-mail addresses in SouthWare are included in a tree on the left. The list of selected addresses show on the right side. E-mails are organized by operators, salespersons, groups, customers, and vendors.

  The selector also suggests e-mail addresses for current link values at the top of the tree. Any link values that are populated and have e-mail addresses associated with them will be listed at the top for easy selection.
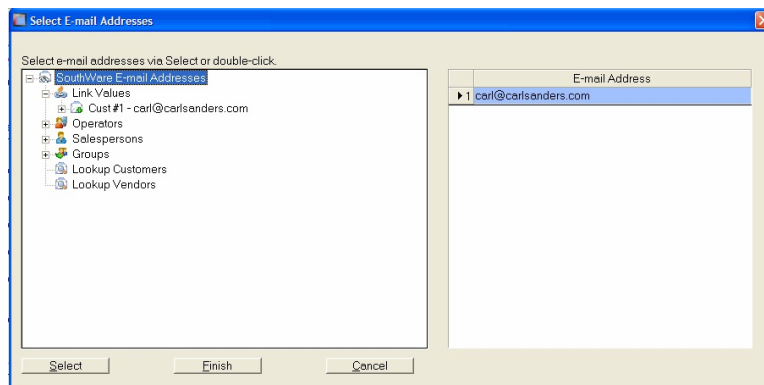
- **Option to E-Mail a Report as an Attached PDF File**
  You now have the option to e-mail a report or listing as an attached PDF file. In previous revisions a report could be e-mailed only as a textual body of the e-mail, and there was not an option to include any other contents in the e-mail body. Now you can create an attractive PDF file and send it as an attachment while also including a message in the body of the e-mail.
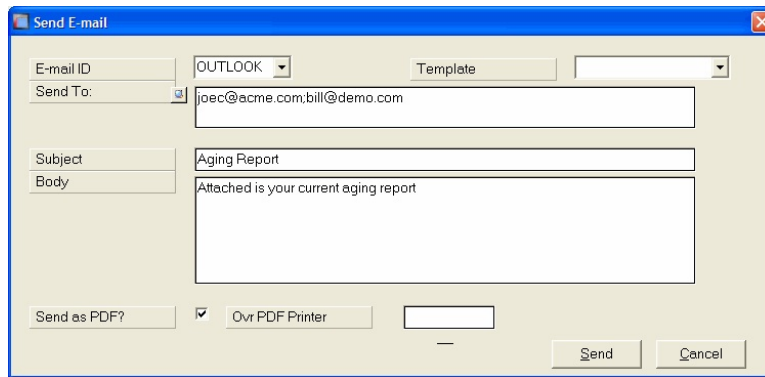
  This feature is utilized by the E-Form Delivery system and the E-Launch System. In addition, there is a new parameter in the "Send E-Mail" user interface. You also have the ability to override the PDF printer to be used when creating the PDF attachment.

  NOTE: This option is only offered when a Send ID has the "Ask for Attachment?" option set (XX-05-12, field 5). This is to ensure that your e-mail application will be able to handle a file attachment.

- **Updated "Send E-Mail" User Interface**
  The send e-mail user interface has been enhanced and simplified. This user interface is used whenever you choose an output option of "Send E-mail" and

also via the E-Launch System.

E-Mail ID:
This is the send ID for the e-mail launch. You may select an ID via the drop-down list.

Template:
This allows you to select an E-Launch template. The program will use the template to automatically fill in fields in the e-mail message.

Send To:
This contains the addresses(es) for the e-mail. Multiple e-mail addresses should be separated by semi-colons (;).

Subject:
This contains the subject the message.

Body:
This contains the body of the message unless the body is a separate file.

Send as PDF?:
Select this option to attach the print output as a PDF file (applies only when there is a print output).

Override PDF Printer:
Here you may optionally override the PDF printer.

If the e-mail Send ID uses a command line a button allows you to view/edit the command line if needed.

When the information is ready to send you click on the Send button.

Other General

● **NetLink WebProcessor**
Your SouthWare system now includes a WebProcessor version of SouthWare

NetLink *without licensing NetLink*! This gives you the power of NetLink for Live Portals without the complexity and setup of a web server.

SouthWare WebProcessor is a unique technology that gives the functionality of a web page server within a SouthWare login session. The WebPage menu program in SouthWare actually controls the URL requests from the browser window to communicate directly with NetLink.

See "NetLink WebProcessor Mode" in the NetLink section for more information.

● **Separate E-Mail and Fax Send IDs per Workstation**
You may now define a default send ID for both e-mailing and faxing in your workstation records. In previous revisions you could define one default send ID.

In the workstation record (XX-05-02) field 11 now has the following fields:

Fax ID:
Enter the default Fax send ID for this workstation if applicable.

E-Mail ID:
Enter the default E-Mail ID for this workstation if applicable.

Default E-Send Type:
If you entered both a default Fax and default E-Mail then specify which should be the default method when you choose the Send option for a report.

Conversion Note
The Rev 15 upgrade conversion will populate these fields so that your defaults remain the same. If your default was Fax, it will remain Fax. If it was E-Mail, it will remain E-Mail.

● **Service order web zoom view now works for history or open**
You may now use a template-type zoom web view for a history service order. In the zoom view record (XX-09-01 field 5) you may define a history template as well as the template for the open service order. A standard history template is provided for the SOWEB view.

This is applicable only if you use the Template method rather than the standard URL.

● **Purchase order web zoom view now works for history or open**
You may now use a template-type zoom web view for a history purchase order. In the zoom view record (XX-09-01 field 5) you may define a history template as well as the template for the open purchase order. A standard history template is provided for the POWEB view.

This is applicable only if you use the Template method rather than the standard URL.

● **Company Totals Statistics for Excel Period History**
You may now access Company Totals for Excel Period History. See "Option to reference Relative Excel Period History fields in Web Templates" below for an example use of this data.

These fields have been added as new Data Dictionary files:
- XV81 Vendor Summary Info
- XV82 Customer Summary Info
- XV83 GL Acct Summary
- XV84 Job Header Summary
- XV85 Job Detail Summary
- XV86 Employee Summary
- XV87 Rental Item Summary
- XV88 Stock Item Summary
- XV89 Customer Equipment Summary
- XV90 Contract Header Summary
- XV91 Equipment Summary
- XV92 Service Code Summary
- XV93 Technician Summary

● **Option to reference Relative Excel Period History fields in Web Templates**
You may now use Excel Period History fields as variables in html templates by referencing specific periods using relative indicators.

Background
Data dictionary fields in the 600-series refer to XL History files that are stored per period and year. The data dictionary fields require the user to identify the following info PER FIELD:
- Period or Year to date (Default to Period to date)
- Year Increment/Decrement (zero means current year)
- Period Increment/Decrement (zero means current period)

Html templates used in WebViews do not have runtime parameters, so in previous revisions you could not use these types of fields in templates since they required runtime parameters to indicate the period/year.

New Feature
Now you can indicate the period/year as part of the variable name so that you can supply the needed parameters for these 600-series fields. This gives you the ability to encode TREND DATA for display or graphing into HTML pages.

For example, several graphs in the Live Portals utilize 600-series to extract data from XL Period History.

Feature Components
Current Year and Period
    The current year and period are determined by the computer's system date.

New Parameters
- @PTD_YTD=X (P or Y) DEFAULT IS PTD IF UNSPECIFIED
- @YRINCR=(+nn or -nn) DEFAULT TO CURRENT YEAR
  - Plus 1 is future year
  - Minus 1 thru minus 5 is from G/L Control record comparatives years
  - Minus 6 thru minus 10 is from G/L Fiscal file
- @PDINCR=(+nn or -nn) DEFAULT TO CURRENT PERIOD
  - plus 13 or minus 13 are the maximum allowed (maximum of 13 periods in a fiscal year)

Note: If the CURRENT YEAR AND PERIOD are in the G/L Control Future year, this means YRINCR plus 1 is not available.

Syntax

The syntax for referencing these type of fields as variables is:

@var_dd_xxxxyyyy_(YRINCR=-yi)(PDINCR=-pi)_@

where

xxxx is the Data Dictionary file
yyyy is the Data Dictionary field
yi is the optional increment/decrement from the current year
pi is the optional increment/decrement from the current period

For example, let's say that you want to reference the Total Customer Sales for last year as of 4 periods ago. The file XV82 contains Customer Summary info. Field 601 contains Total Customer Sales. So to reference this field in a web page template you would insert the variable:

@var_dd_XV820601_(YRINCR=-01)(PDINCR=-04)_@

This tells the system to display Total Customer Sales using a year increment of -01 (last year) and a period increment of -04 (four periods prior to the current period).

<u>Other Examples</u>

@var_dd_ap010601_(PDINCR=-03)_@	3 periods ago
@var_dd_ap010601_(YRINCR=-01)(PDINCR=-03)_@	last year 3 periods ago
@var_dd_ap010601_(PTDYTD=Y)(PDINCR=-03)_@	YTD as of 3 periods ago
@var_dd_ap010601_(PTDYTD=Y)(YRINCR=-01)(PDINCR=-03)_@	last year YTD as of 3 periods ago

ReportMate

● **Integrated Activity Reporting for Customers, Vendors, Stock Items**
With special ReportMate reporting files you can now review and analyze all the activity for customers, vendors, and stock items. This special reporting consolidates all the related data from various modules into a chronological listing of activity. You can see the sequence of everything that happened and when it happened.

For more details see the related sections in the Accounts Receivable, Accounts Payable, and Inventory/Sales sections of this release notice.

● **Optional Admin Cost Analysis for Customer and Vendor Integrated Activity**

Reporting

A special option is available for the Customer and Vendor Integrated Activity Reporting that helps you analyze the profitability of a customer or vendor. You can define standard administrative/overhead costs for the different types of activity transactions. You can then include a profitability analysis as part of the Integrated Activity Reporting.

The premise behind this feature is that the profitability of a customer is not completely represented by sales numbers. For example, let's say you have two customers who each have $10,000 in sales. To determine the "net" profit provided by each customer you need to consider factors such as:

- cost of sales
- number of sales orders
- number of collection calls required
- number of followup calls, e-mails, etc.
- number of payments processed
- etc.

If customer A buys a low volume of high margin items and customer B buys a high volume of low margin items then customer A provides more gross profit. But if customer A is also very "high maintenance" and requires a lot of phone calls, e-mails, and followup then that is also a profitability factor in determining "net" profit. This feature is designed to help you better determine this factor.

A standard activity report format for customers including admin costs is WICUSAC2. It is available from the customer Live Portal (People, select a customer, History, Activity Report w/Value).

To use this feature

To activate this feature you must set up estimated administrative/overhead costs for the different types of transactions you have for a customer or vendor. These are defined in RM-04-10, Estimated Admin Costs:

> **NOTE:** Remember that these are only estimated overhead costs - no accounting is done for the numbers you enter here. Their value is only as a relative comparison between customers/vendors of the cost of doing business.

1. Customer Admin Costs:
   Select this field to set up or maintain the estimated administrative costs for customer-related transactions. These are:

   - Task - estimated overhead cost to handle a customer-related task.
   - Project - estimated overhead to set up and administer a customer-related project.
   - Sales Order - estimated admin overhead to process a sales order.
   - Invoice - estimated admin overhead to process an invoice.
   - A/R Document - estimated admin overhead to process an A/R payment or other document.
   - Service Order - estimated admin overhead to process a service order.
   - Service Contract - estimated admin overhead to set up and

process a contract.
- • Job - estimated admin overhead to set up and process a job.
- • Customer Return - estimated overhead cost to process a customer return.

2. Vendor Admin Costs:
Select this field to set up or maintain the estimated administrative costs for vendor-related transactions. These are:

- • Task - estimated overhead cost to handle a vendor-related task.
- • A/P Document - estimated admin cost to handle and record an invoice, credit, or other A/P document for a vendor.
- • Check/Payment - estimated admin cost for processing a check or payment to a vendor
- • Purchase Order - estimated admin cost for recording and processing a purchase order.
- • Vendor Return - estimated overhead cost to process a vendor return.

● **Option to Display Google Charts in FYI Chart Tab**
When you use the Charts tab in FYI you now have the option to display the chart as a Google chart. Buttons at the top of the display now allow you to toggle between the Google chart and the Microsoft chart display format. The last option you used for a format will be saved and will be the default the next time you access the tab.
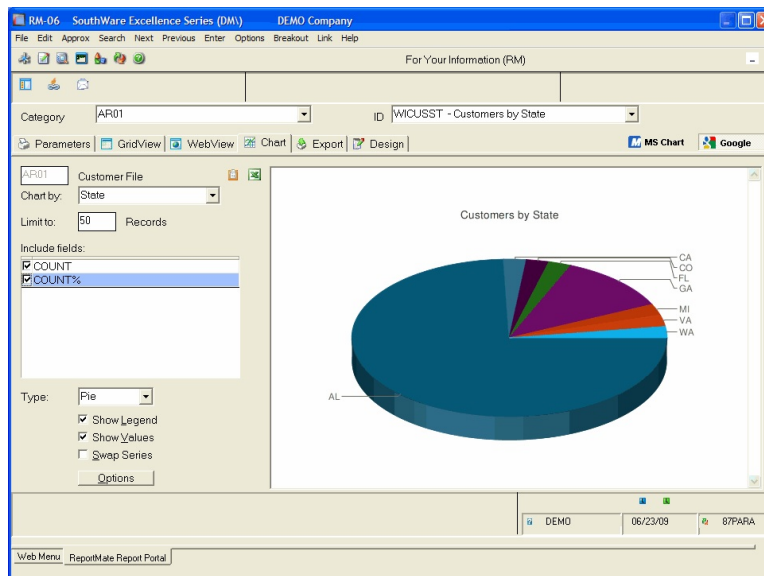
Note: You must have internet access to view Google charts.

● **New Status Flags for Sales Order Status**
The sales order header Data Dictionary file (RS07) now contains status flags that match the special statuses used in the Sales Order Manager program (IS-04-07). You can use these flags to report on your sales orders by status.

- **New Status Flags for Service Order Status**
  The service order header Data Dictionary file (SV04) now contains status flags that match the special statuses used in the Service Order Manager program (SV-04-06). You can use these flags to report on your service orders by status.

- **New Service Order Totals for Technician**
  Service order totals are now available for each technician. In the technician Data Dictionary file (SV18) you may now access the following totals:

  - # S/O Count
  - # S/O Quotes
  - # S/O Scheduled Today
  - # S/O Entered (status "E")
  - # S/O Dispatched (status "S")
  - # S/O In Process (status "P")
  - # S/O Closed (status "C")

- **Option to Call FYI and Auto-select a Tab**
  You may now create objects or special calls to the FYI portal that specify the tab you want to display. The automatic switch ("A") can be supplemented with a second switch which contains one of the following values:
  - P - Parameters
  - G - Grid
  - W - WebView
  - C - Chart
  - E - Export
  - D - Design

  For example, you could use the following call:

  RMFYITAB/A/C [MYRPT]

  to call the format MYRPT and automatically display the Chart tab.

NetLink

- **NetLink WebProcessor!**
  Beginning with Rev 15 each SouthWare system now includes a WebProcessor version of SouthWare NetLink *without licensing NetLink*! This gives you the power of NetLink for Live Portals without the complexity and setup of a web server.

  SouthWare WebProcessor is a unique technology that gives the functionality of a web page server within a SouthWare login session. The WebPage menu program in SouthWare actually controls the URL requests from the browser window to communicate directly with NetLink.

  ### How it Works
  When you are calling web pages within the SouthWare web menu program the program evaluates each called link to determine if it is calling NetLink (based on the "URL for NLNETUPD.OBJ" field in the NetLink control record setup). In WebProcessor mode when you launch a web page that would normally call a web server NetLink job, the SouthWare web menu program instead intercepts the call and runs NetLink without using a web server. NetLink creates a temporary file

with the resulting web page, and the SouthWare web menu displays the resulting file.

Automatic Setup if Full NetLink not Licensed
NetLink WebProcessor is automatically installed on each SouthWare system beginning with Rev 15, and if you don't have NetLink licensed the WebProcessor is automatically configured for you. *You don't have to understand NetLink to start using it in WebProcessor mode.* Then if you want to upgrade to a full NetLink license and use a web server it is very simple to change the configuration.

If you already have NetLink set up on your system then your settings will remain the same. You can choose to activate WebProcessor as outlined below.

Switching Between WebProcessor and WebServer Mode
If you have licensed the full NetLink product and have set up a web server you may choose whether to use the WebProcessor or web server mode of NetLink. A field in the NetLink control record (NL-01-01, field 9 "Other Security") controls this option:

Use SouthWare Web Processor?
> Enter "Y" to use WebProcessor mode when calling NetLink pages from within SouthWare's WebPage menu. This will create the pages without using a web server. If you have not licensed NetLink this field will automatically be "Y".
>
> Enter "N" to use a web server for NetLink requests from within SouthWare's WebPage menu. You must have licensed NetLink and have it set up on a web server in order to use this option.

Performance Notes - WebProcessor versus WebServer
The relative speed of loading pages with WebProcessor versus WebServer will depend on several factors. Because the WebProcessor mode uses the same runtime as your login session the performance depends on how heavily your system is loaded:
• **WebServer is typically faster for light to medium system loads** - A dedicated run session using the WebServer will likely be faster as long as ample system resources are available.
• **WebProcessor tends to have better scalability** - The WebProcessor doesn't need to start a new system process so it is more scalable without performance loss when your system is heavily loaded with requests. Since the WebServer has to start a new runtime process for each request it will slow down significantly when system resources are scarce.

Special Notes
• Any form submitted to the WebProcessor must have a unique ID. The WebProcessor uses this ID to identify the form within the browser.
• In order for the WebProcessor to operate, it must be able to properly interpret the URL for each navigation. Some search tools, such as My Web Search, Smiley Central, and My Fun Cards can conflict with the WebProcessor's ability to interpret the URL and must be uninstalled in order for the WebProcessor to work properly. If the WebProcessor suspects that you have a conflict, you will be prompted to remove the conflicting tool.

- **New Web Grid Option for a ReportMate report**
  You may now use ReportMate* to automatically create NetLink web pages that contain a powerful interactive data grid (the DHTMLX grid control licensed from DHTMLX, LTD.). The Live Portals contain dozens of examples of using Web Grids.
  This option is subject to the Internal License Limitations explained in the Remote Employee section of the release notice.

With Web Grids, ReportMate and NetLink automate the HTML and Javascript coding needed to insert a ReportMate report into a page as a DHTMLX grid. In your HTML template you simply insert the "@var_include_rm*n*_@" variable (where *n* is the number of the ReportMate format within the request type) and it will be replaced with all the code necessary to create the grid.

Background

> In previous revisions SouthWare introduced the ability to present data in a NetLink page from a ReportMate format as a grid using #Grid. While #Grid had many useful features, it also had the significant limitation of being an ActiveX control that would work only on Internet Explorer (since ActiveX is a Windows-only technology). The DHTMLX grid is a javascript-based control with a superior feature set that is also compatible with all popular browsers and platforms. You may continue to use #Grid where it is supported, but SouthWare will use the DHTMLX grid in future development.
>
> SouthWare has created a software wrapper around the DHTMLX grid so that little or no knowledge of javascript is required to use the grid with SouthWare. SouthWare intends to add to this wrapper in the future to expose even more of the functionality of DHTMLX grid.

Features of the Web Grid
Here are some of the key features available with the SouthWare Web Grid

implementation of DHTMLX grid:

Standard Features
These are features that are available in any Web Grid created from ReportMate:
- Print – You can print the data shown in the grid. This function creates a separate page with the data shown as a table for print format. *(Applies only if you are displaying the toolbar.)*
- Sorting of columns – You may click on any column header to sort the grid records by the values of that column. You may then toggle between ascending and descending sorting.
- Refresh – You can reload only the data for the grid by rerunning the ReportMate format. This function does not redisplay the entire html page, but only refreshes the records shown in the grid. *(Applies only if you are displaying the toolbar.)*
- Copy to Clipboard – You may copy the data in the grid to the clipboard of your workstation so that you may copy it into another program. *(Applies only if you are displaying the toolbar.)* Please note that there is a potential security issue in using the clipboard in Firefox.
- Access to FYI features – When using a Web Grid from within a SouthWare login session you may zoom directly from the grid to the FYI portal (if you have appropriate security access) to edit the format or view the data in any of the other FYI views. *(Applies only if you are displaying the toolbar.)*

Optional Features
These are features that you may easily activate for a Web Grid. SouthWare has provided options in the NetLink ReportMate parameters record (NL-01-04) that let you use these features as desired.
- Column Filters – If you activate filters an entry field appears at the top of each column. You may enter a filter value at the top of a column to limit the displayed records to those that match the filter. All the records are still in the grid, but those that don't match the filter are hidden. This lets you interactively change the grid without even rerunning the report.
- Totals – If you activate totals the grid will show a totals row at the bottom that displays totals for each numeric column in the grid. One powerful feature of totals is that they total only the records currently shown in grid, so as you use filters to hide certain records the totals will automatically change to reflect only the shown records.
- Output to Excel – You may choose to allow a user to send the grid data to Microsoft Excel as a worksheet. *This feature works only on Internet Explorer in Windows, and requires security to be enabled or prompted for running ActiveX controls.*
- Pivot Tables – Pivot tables are a dynamic summarization of data currently shown in grid. The pivot table concept allows you to summarize any single numeric column in the grid by any two other fields in the grid. You may change the summarization interactively to analyze any and all fields in the grid without running the report again.

Advanced Features
There are also many advanced features for those who want even more functionality from Web Grids:
- Preview Pane - SouthWare has designed a preview pane function that can easily be added to a custom page. It uses AJAX technology to load a preview for the currently highlighted record in the grid. It requires that

the html template include a "myOnRowSelected*n*" script function where *n* is the number of the ReportMate format within the NetLink request. *You can look at any of the Live Portals that offer record selection to see how this is done.*

- Record Select function - SouthWare has designed a record select function that allows you to launch a separate Request to show more info for a selected record. This feature requires that the template page include a "myOnRowSelected*n*" script function where *n* is the number of the ReportMate format within the NetLink request. You should also have a "myOnRowDblClicked*n*" function to handle double clicking on a record instead of clicking on the select icon.

- Customizable script - The Web Grid technology uses a script file that contains the Javascript to support the functions. You can create a customized version of this file for selected reports to modify the script functions.

How To Use the Web Grid

SouthWare has pre-programmed some of the many features available with the DHTMLX grid. With this functionality you can easily turn any ReportMate/FYI format into a Web Grid. The steps to use a Web Grid are:
1. Create a ReportMate/FYI report with the data you want to see
2. Create the NetLink report parameters record (NL-01-04) for the report
3. Create a NetLink request that will run the report
4. You must refer to an html template that includes the variable @var_include_rm*n*_@ (where *n* is the ReportMate number within the request type) at the point in the page you want to display the grid

When you run the NetLink request the NetLink/ReportMate technology will replace the variable with all the script code needed to produce the Web Grid.

NetLink ReportMate Parameters
In the NetLink parameters for the report (NL-01-04) you may now choose the following option for field 6, "Format Include Data":

D   DHTMLX grid

If you choose this option the following format features are available to control the resulting grid:

7. Format Options:
        Here are the parameters you may define for a DHTMLX grid:

        Grid Width
                This is the width of the grid within the page in pixels or percent.
                The grid will display a scroll bar as needed.

        Grid Height
                This is the height of the grid within the page in pixels or percent.
                The grid will display a scroll bar as needed.

        Show Toolbar?
                This determines whether the toolbar is shown above the grid.

The toolbar allows the user to create a print view of the grid, refresh the grid, copy the contents to the clipboard (as tab delimited) and optionally toggle a preview pane, export to Excel, toggle a pivot table, and execute FYI.

- Excel?

This determines whether users can export the grid to Microsoft Excel or not (only applies if Show Toolbar? is "Y"). *This feature is available only in Internet Explorer on Windows where ActiveX controls are enabled or prompted.*

Record Key Definition

Dhtmlx grid uses a record key and is needed for events in the grid. The record key is used in the event logic to display other pages or launch programs, etc. Examples of the need for record key are the selector icon launch or the preview pane display. This key should be unique to ensure that sorting and other features work properly.

In this field you specify where the record key comes from for this format. The valid values are:

- First field in format: This means that the first field in the RM format will be used as the record key.
- First field in format (don't include in grid): This means that the first field in the RM format will be used as the record key and that that field is not displayed in the grid. This is useful for keys that are not user friendly such as the TW contact key.
- First portion of the record (not just the key): This means that the first portion of the FD buffer will be used as the key. This many times includes more than just the key and the key may not be in the proper position. Those familiar with the FD layout may prefer this method. This also ensures that the key is unique.

    Note: When accessing records such as stock numbers that have two fields in the key it is important to use the record key to ensure that grid events get the whole key.

Show Selector Icon?

This determines whether the green right arrow that is used to select the record in the row is shown in the grid or not. You would need to code for an event if this icon is to do something.

Show Totals?

This determines whether totals are shown in the grid. For each numeric accumulating field in the grid, the total will appear at the bottom if this is "Y".

Show Filters?

This determines whether the filters option is shown in the grid underneath the column headings and before the first row of the grid. This allows users to filter the data in the grid as they type it

in.

Note: A new field was added to the RM Parameters (Field options) that specifies whether the Grid filter shows as a drop down combo box or not. This can be accessed from the RM Field Selection Wizard or regular RM format maintenance. Currently, the combo will default to "yes" for Salesperson and Location fields.

Has Preview Pane?
This determines whether there is sufficient javascript, etc. to show a preview pane for this grid. If this is "Y", then the preview pane toggle button will also appear in the toolbar.

Has Event Handler?
This determines if any events are fired in the grid. If you are going to respond to events (such as row selected or double click, etc), you would need to set this to "Y" and code the javascript in the template accordingly.

Show Pivot Table?
This determines if the user can view a pivot table from the data that is in the grid. A pivot table is a data summarization tool that will total, average, or count data from a grid. The user can set up and changes the summary's structure by selecting different fields and actions. This "rotation" or pivoting of the summary table gives the concept its name. If this option is "Y", then users can click on a "Toggle Pivot Table" button in the toolbar of the grid. The following fields will be the default values for the pivot tables (though a user could change them at runtime).

Action
This is the mathematical operation performed for the pivot table. The current options are:
> Sum
> Minimum
> Maximum
> Average
> Count

If you want to summarize data by totaling a field, you would select "Sum". If you wanted to get an average of a particular field, you would select "Average".

Action Column
This is the column in the grid in which the action will be performed on. For example, if you wanted to total YTD Sales, you would choose "Sum" as the action and "YTD Sales" as the Action Column.

'X axis' Column
This is the column in the grid that appears in the X axis. These will be the columns in the pivot table.

'Y axis' Column

This is the column in the grid that appears in the Y axis. These will be the rows in the pivot table.

8. Grid Script ID:
This is the javascript and html that is used in place of the @var_include_rmn_@. Most of the time, you should use *DEFAULT. If you want to customize the script and you understand how the dhtmlx grid, etc. works, you can create a new grid script ID and select it here.

Advanced Features

In order to code advanced features such as preview panes or selecting of records you need to write javascript code to respond to the events from the grid and do the functions that you need. The following events are being exposed in the *DEFAULT grid script id:

-       onRowSelected: To use this event, simply create a javascript in the header if the HTML template named MyOnRowSelectedn (where "n" is the rm format include number). The function should be declared like:

            function myOnRowSelected1(rowID,cellInd){...}

-       OnRowDblClicked: To use this event, simply create a javascript in the header if the HTML template named MyOnRowDblClickedn (where "n" is the rm format include number). The function should be declared like:

            function myOnRowDblClicked1(doublerowID,doublecellInd){...}

If you would like to modify the standard script, you can create an alternate script id to use. You should be familiar with how the Dhtmlx grids work before attempting to create your own script. It would be a good idea to use *DEFAULT as a start. You can create the script at the operating system level (in the nlhtml directory) or you can you can create it in NL-01-11 (NetLink Grid Scripts). If you create it in NL-01-11, the program will ask if you would like to create the script file if it doesn't already exist. You can modify the script from NL-01-11, if you wish as well.

●   **Option to Create Google Charts for NetLink via ReportMate**
You may now create a Google Chart from a ReportMate report* used in Netlink! This unique and powerful function gives you the summarized efficiency of a chart along with the optional details of a report. Live Portals have many examples of Google charts that help you spot trends and status at a glance.
This option is subject to the Internal License Limitations explained in the Remote Employee section of the release notice.

Note: You must have internet access to view Google charts.

Google charts via ReportMate are not just a picture - they are pictures with all the details behind them.
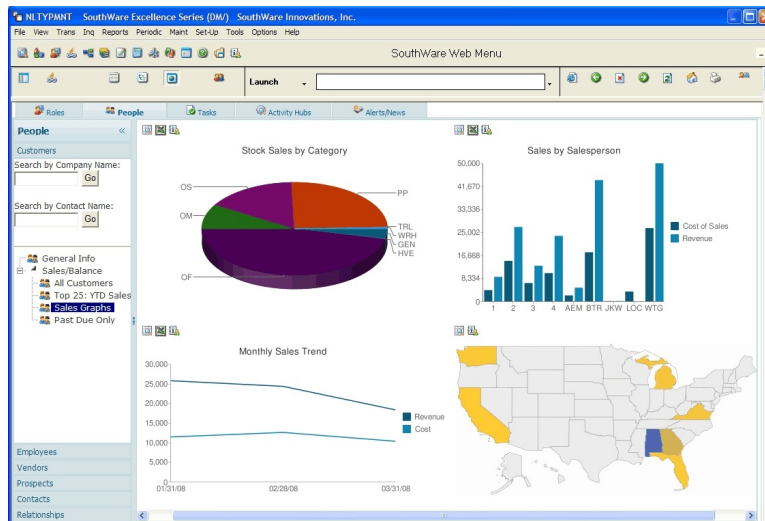
With NetLink's Google Charts you get:
• Web page display of Pie, bar, line, and even map charts that summarize data
• Instant web page display of the actual summarized data being shown in the chart
• Optional zoom to the details behind the summarized data. This is via FYI, which gives you access to all the view tabs.

> **Note:** To use Google charts you must be connected to the internet and able to access Google's web site. If you are not connected, a message will display instead of the chart.

How To Use Google Charts in a NetLink Web Page

SouthWare has pre-programmed the functionality to turn ReportMate data into a Google chart. The steps to do this are:
1. Create a ReportMate/FYI report with the data you want to see. Typically you need to sort/subtotal the data field you want to chart.
2. Create the NetLink report parameters record (NL-01-04) for the report including defining the chart parameters.
3. Create a NetLink request that will run the report.
4. You must refer to an html template that includes the variable @var_include_rm*n*_@ (where *n* is the ReportMate number within the request type) at the point in the page you want to display the grid

When you run the NetLink request the NetLink/ReportMate technology will replace the variable with the URL parameters to display the Google chart. It will also insert the script elements to add the interactive zoom and display options for the chart.

NetLink ReportMate Parameters

In the NetLink parameters for the report (NL-01-04) you may now choose the following option for field 6, "Format Include Data":

C   Google Chart

If you choose this option the following format features are available to control the resulting chart:

To define options for a Google chart, access the RM parameters record (NL-01-04), field 6, 7, and 8. In addition to the fields stored in this record, there is also some "learn records" with more details about exactly how the Google chart will be displayed. See below for details about each of the options:

7. Format Options:
Here are the parameters you may define for a Google Chart:

Chart Width
This is the width of the chart in pixels. The chart will be an image displayed in the webpage and this is the width (in pixels) of that image. See "A Note on Chart Size" below.

Chart Height
This is the height of the chart in pixels. The chart will be an image displayed in the webpage and this is the height (in pixels) of that image. See "A Note on Chart Size" below.

A Note on Chart Size
Google places a limit of 300,000 pixels on the largest possible area for all charts (except maps). As the maximum height or width is 1000 pixels, examples of maximum sizes are 1000x300, 300x1000, 600x500, 500x600, 800x375, and 375x800.

For maps, the maximum size is 440 pixels wide by 220 pixels high.

Show Toolbar?
If this option is set to "Y", then a toolbar will appear above the Google chart in the webpage allowing the user to optionally view the chart data, optionally export to Excel (from within SouthWare only), and view the data in FYI grid (within SouthWare only). If it is set to "N", then the toolbar will not be shown.

Excel?
This option is only allowed if the "Show Toolbar?" option is set to "Y". If this option is "Y", then users may Export to Excel if within SouthWare. If this option is "N", then the Excel icon is not shown in the toolbar.

Show Chart Data?
This option is only allowed if the "Show Toolbar?" option is set to "Y".
This option controls access to a display table that shows the data for the chart. This lets you see not only the chart but the data that created it.

- Set this option to "Y" to allow users to view the data used to create the chart.
- Set this option to "N" to remove the icon option for viewing this data.
- There is also an "A" (automatic) option in which the data will appear when the page is loaded. If this option is not chosen, the user will have to click on the toolbar option to "Toggle Chart Data". *The user can always hide this data as well.*

Data Position

This option applies only if the "Show Chart Data?" field is set to "Y".

This option controls where the chart data table appears in relation to the chart already on the page. Chart Data can appear in 5 different positions:
- Above
- Below
- Left
- Right
- Over

8. Chart Script ID:

The chart script ID is the HTML and Javascript syntax required to show the Google Chart on a webpage. This script is inserted into the webpage after variables have been replaced. There are 2 standard script IDs. One is *DEFAULT and will be used by most charts, regardless of type. The other is *MAP, which is a script file especially for map type charts. These chart scripts can be modified to meet your own purposes, but it's a good idea to start with one of our standards and make your own copy.

Chart Display Options (F5 key)

In order to specify how the chart looks, you will define options exactly the way you do in the FYI Chart tab. When you add a chart format record this screen is automatically displayed. In change mode you may access the screen using the F5 key.
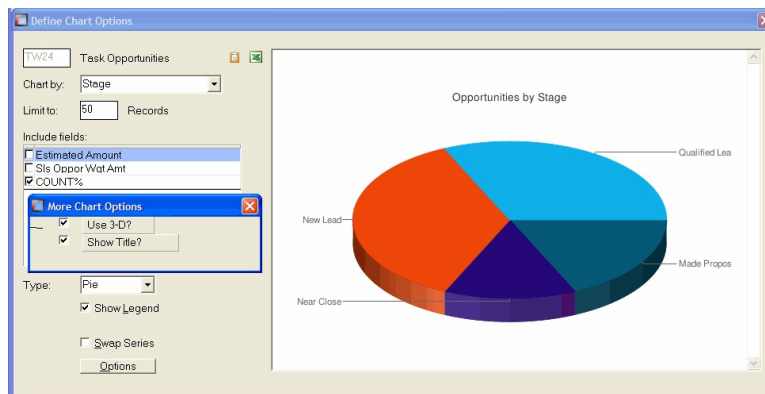
In this screen you simply set the parameters as needed to produce the chart you want. This functions the same as the FYI Chart tab, except that the chart displayed will be the Google chart. Some options are not available for Google chart and will not appear in this mode. The options will be saved in special NetLink "learn records" so that the chart will use those parameters in the resulting webpage chart.

Internal License Limitations
This option is not available to "I" type requestors accessing NetLink from outside a SouthWare login session unless they are using an Internal or Remote Employee license. This technology was developed for use in internal Live Portals which require an internal license. To access Live Portals from an outside browser you must use an Internal license seat or a Remote Employee license seat. If you try to use this technology for an "I" type requestor without the appropriate license the page will simply return an error message explaining that this feature is not available without the proper license.

- **Optional Grid Pivot Table**
  You have the option to create a pivot table from the data in a grid. A pivot table is an analysis tool that summarizes the data in a grid in a variable manner. A pivot table takes the "flat" data of a grid (two-dimensional) and summarizes the flat data, giving it depth. You may use a pivot table on numeric data to obtain totals, minimums, maximums, or averages.
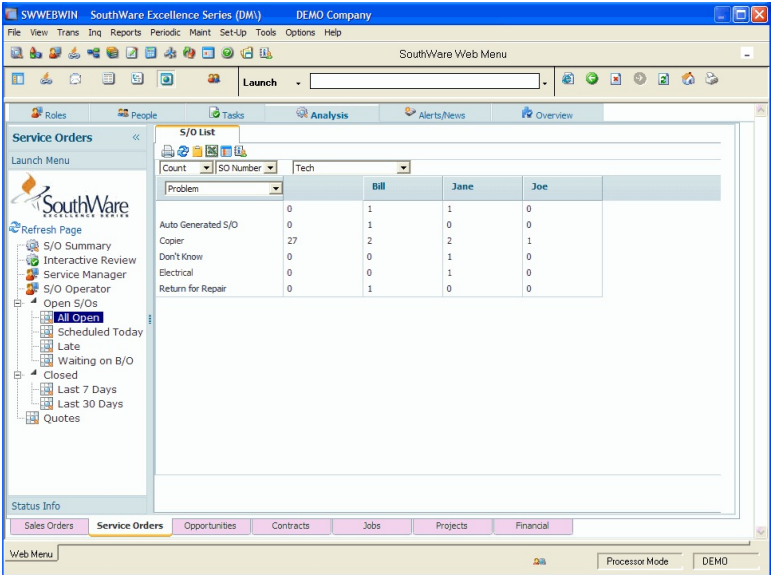
Pivot Table showing S/O Problems by Tech for Open S/Os

To define a pivot table for an FYI grid you simply choose this option for the related NetLink format record. In field 7 Format Options the following questions apply to pivot tables:

> **Show Pivot Table?**
>> This determines if the user can view a pivot table from the data that is in the grid. A pivot table is a data summarization tool that will total, average, or count data from a grid. The user can set up

and changes the summary's structure by selecting different fields and actions. This "rotation" or pivoting of the summary table gives the concept its name. If this option is "Y", then users can click on a "Toggle Pivot Table" button in the toolbar of the grid. The following fields will be the default values for the pivot tables (though a user could change them at runtime).

Action
This is the mathematical operation performed for the pivot table. The current options are:
- Sum
- Minimum
- Maximum
- Average
- Count

If you want to summarize data by totaling a field, you would select "Sum". If you wanted to get an average of a particular field, you would select "Average".

Action Column
This is the column in the grid in which the action will be performed on. For example, if you wanted to total YTD Sales, you would choose "Sum" as the action and "YTD Sales" as the Action Column.

'X axis' Column
This is the column in the grid that appears in the X axis. These will be the columns in the pivot table.

'Y axis' Column
This is the column in the grid that appears in the Y axis. These will be the rows in the pivot table.

You may change these defaults when you display the pivot table, but these defaults provide an initial pivot table view.

●　　**Option to Output XML Data from ReportMate to NetLink**
You now have the option to output XML-formatted data from ReportMate* to use in a NetLink request. You may use this option to output data from a ReportMate format as a temporary XML data file during a NetLink request and then reference that temporary file within the NetLink template.
This option is subject to the Internal License Limitations explained in the Remote Employee section of the release notice.

This feature is implemented as a new NetLink ReportMate Parameters option (NL-01-04, field 6):

X-XML Choose this option to format the data as an XML file. You define the tags and template file like for any ReportMate XML job. When NetLink runs the format it will use the XML option and create a temp file in the NetLink tmp directory.

You may reference the resulting filename in your NetLink template using

the variable name:

rm*n*_xmlname

where "*n*" is the number of the ReportMate report within the NetLink request (i.e. rm1.xmlname, rm2.xmlname,.....,rm9.xmlname). For example, the variable "@var_rm2_xmlname_@" will be replaced with the XML file name created by the 2nd ReportMate format used in the request.

- **New Variable Template Name for Requests**
  You may now use more than one template with a single request*. This allows you to create a request that uses multiple templates and then provide the template name as part of the URL calling the request.
  * This option is subject to the Internal License Limitations explained in the Remote Employee section of the release notice.

  To use this feature you must specify that the template name for a NetLink request is "@template". This then becomes a variable name that must be supplied each time you run the request.

  For example, there is a standard request to add a Task that is called WITASKADD. There is a quick entry and a standard entry of task data. The request has "@template" as the template name.

  - To call the request for quick entry the URL includes "@template=witaskaddqk.htm".
  - To call the request for standard entry the URL includes "@template=witaskadd.htm".

- **New Override Primary File for a Request**
  You may now use a single request to do variable replacements for different WebView primary files*. This would typically be used in conjunction with the Variable Template File feature since if you change the primary file you probably are also using a different template. This is used in the Live Portals to do some AJAX retrieval of data without the need for a separate request for each data retrieval needed.
  * This option is subject to the Internal License Limitations explained in the Remote Employee section of the release notice.

  To use this feature you must specify the primary file for WebView variable replacement via the variable name "@primaryfile". NetLink will use the value of @primaryfile to determine the primary file to use for the WebView replacement.

  There is a standard "@getdata" request type. This request type has "@template" as the template name and is used in several Live Portals to retrieve a single field such as a date. To retrieve the date the URL sends both the template name as @template and the primary file as @primaryfile.

  For example, when you edit a customer in the Live Portal the system checks the timestamp of the record before doing an update. To get the current timestamp the page does an AJAX call. The URL includes:

request_id=@getdata	select the @getdata request
@primaryfile=ar01	set the primary file to AR01
@cust_no=@var_cust_no_@	set up the customer link value
@template=getar010092.txt	a special template that contains only the variable AR010092 (timestamp)

The AJAX call runs the request which sets up the customer link value, processes the template name with AR01 as the primary file, and returns the value to be tested in the page.

- **Template Security Comments to Conditionally Exclude HTML Code at Runtime**
  This advanced feature allows you to hide certain parts of a web page template, typically based on an operator's security access, by putting special comments around sections of the page*. This feature is similar to the existing feature where you can secure portions of a web template for a group/operator.
  This option is subject to the Internal License Limitations explained in the Remote Employee section of the release notice.

  To use this feature in a template the related request type must process the template as a WebView (NL-01-02, field 9) (which is the same requirement for the feature of securing based on group/operator). The difference this feature offers is that you can control the output of the template based on several parameters. New parameters may be added in the future.

  To Mark a Section of the Template for Conditional Exclusion
  Within a template you can surround any portion of the text with the following syntax:

  <!-- @conditional_start:param1=value1;param2=value2;..._@ -->
  …
  <!-- @conditional_end_@> -->

  All of the parameters must be followed by an "=" (equal) sign and a value. The pairs must be separated by a ";" (semicolon). All of the parameters in the string must pass in order to be shown on the resulting webpage. *Nested conditional statements are not supported.*

  The current valid parameters are:

  grpoper
  > This parameter should have a value of a SwiftMate operator or group (example: grpoper=admin or grpoper=demo).

  haslaunch
  > This parameter allows a value of "y" or "n". This is a test to see if you currently have the ability to "launch" SouthWare programs (That you are logged on and using the SouthWare WebMenu). Live Portals use this parameter to hide calls to SouthWare programs from users who are not logged in to SouthWare.

  seclevel
  > This parameter should specify a security level value (0-9) based on security as defined in SwiftMate.

  secsystem
  > This parameter should specify a Security System number (2 digits or the

2-letter abbreviation) associated with the SouthWare module.

Let's say you have a table that you want to display only if the user has security of 7 in Inventory Control. The example table is below:

```
<table>
<tr><td>Sensitive Field:</td><td>Emotional</td></tr>
<tr><td>Secure Field:</td><td>Guarded</td></tr>
</table>
```

The new code with the conditional syntax is:

<!-- @conditional_start:seclevel=7;secsystem=06_@ --> (or *secsystem=IC*)
```
<table>
<tr><td>Sensitive Field:</td><td>Emotional</td></tr>
<tr><td>Secure Field:</td><td>Guarded</td></tr>
</table>
```
<!-- @conditional_end_@> -->

Let's say you want to display a hyperlink and button only when the user is logged into SouthWare and can execute a program:

<!-- @conditional_start:haslaunch=y_@ -->
```
<a href="http://?@swobj=program"><img src="launch.jpg"></a>
```
<!-- @conditional_end_@> -->

When the resulting web page is actually sent to the browser the comments will be removed, and the enclosed text will be removed unless the specified criteria is met.

● **Optional Internal History**
  You now have additional control over which internal requests are logged in history. With the introduction of Live Portals the volume of NetLink internal requests will increase. You may now specify which internal requests need history since many frequently-used request types may not need to be logged.

  Control Record Option
  In the control record (NL-01-01, field 9 Other Security) there is a global option:

  Keep Internal Request History?:
  Enter "N" to skip the logged history for requests from Internal Requestors. This will eliminate the logging of all Internal requestor requests.

  Enter "Y" to keep or selectively keep history for Internal Requestors. You may then indicate in each request type (NL-01-02) for internal requests ("I" type) whether history should be kept for that request.

  Request Type Option
  If your control record option indicates that you want to keep history for Internal Requestors then you may specify which request types should be logged (NL-01-02, field 9 Advanced Features):

Keep Internal Request History?

Applies only if requestor type for this request is "I" and your NetLink control record indicates to keep Internal Request History.
Specify whether you want to keep history for this particular request. This allows you to selectively log the use of some internal requests without logging all of them.

- **Automatic Cleanup of Old NetLink Temporary Files**
The system now cleans up temporary files needed for NetLink processing. Each time a SouthWare operator logs on the system will delete any temporary NetLink files that are dated prior to the current system date. This prevents the temporary directory from becoming too large and eliminates the need for manual clearing of the directory.

- **New Standard Request Types**
The system now automatically provides the following request type categories that help you organize your request pages:

  H   Handheld pages
  A   AJAX processing (used as background processing request)
  W   Web Interface (used for Live Portals)

- **Manager Test Allows WebProcessor or External Browser Mode**
When you use the NetLink manager to test a request type you now have the option to test in either the WebProcessor mode (run without a web server) or External Browser mode (with a web server). A checkbox at the lower left lets you toggle External Browser mode on and off.

- **New Shopping Cart**
NetLink now has improved shopping cart functionality. A completely new set of pages use Live Portal technology to provide an out-of-the-box, interactive, simple-to-use online shopping experience via NetLink. This includes functions such as:
  - The shopping options and existing cart are integrated into a series of tabs that give the "feel" of a single program rather than a series of pages.
  - The marketing catalog is presented as an interactive tree.
  - Catalog categories and search lists are presented as interactive folders of items that you can display in different ways and sequences.
  - Customers can easily select items from past purchases to make repeat orders simple to do.
  - You can interactively edit the contents of the shopping cart without navigating through a lot of pages.
  - You can shop and build a cart before logging on as a returning customer, then log on to activate customer pricing and info.
  - Standard promotional pages allow you to frequently change the promotions within your shopping site. These are designed so that you can modify these promotional pages without any impact on or knowledge of NetLink technology.

The NetLink requests related to the Shopping Cart use the naming convention "WISHOPxxxxxxxxxxx". Here is an outline of some of the key requests utilized in a single sample view:

WISHOPMAIN
Container for
all shopping

WISHOPCART
Container for
Catalog and Cart

WISHOPCATHOME
Promotional page
for Catalog Start

WISHOPREVIEW
Summary of Cart
with Edit and
Submit Options

WISHOPCATALOG
Container for shopping
functions

WISHOPAD.TXT
Promotional Ads
for Left Bar

WISHOPRECENT
List of Recent
Purchases with
One-click select

WISHOPFOLDER
Multi-view display
of Catalog and
Search Items

Shopping Tabs
The Shopping Cart container utilizes three tabs to integrate the shopping
experience:

Shop for Items
> This tab contains the catalog, search, and recent purchases functions.
> This tab stays active, so if you are shopping and switch to another tab
> then back to this tab the tab state will remain unchanged.

Address
> This tab contains order header info such as address and shipping
> method. For a customer this automatically defaults from the customer
> record. For a non-customer this info must be entered before you can
> submit the order.

Review/Submit
> This tab displays a summary of the order header info (including totals)
> and the items selected for the cart. You may edit quantities or delete
> items from the cart while in this tab. When you are ready to submit there
> is a button to accept payment info and submit the order.

Catalog Tree
The Catalog tree is loaded from the Marketing Catalog (IS-07-20). If you have
defined images for catalog entries then these images are displayed as thumbnails
beside the catalog entries.

Display Folder
When you select a category from the catalog or enter a search value the results
will be displayed in a "folder" control. This control allows you to choose different

views and sort sequences for the items, and changing the view or sequence does not require reloading the folder.

<u>Select an Item</u>
When you select an item from a search folder or Recent Purchases list *the item is added without navigating to a new page*. A message appears indicating that the item is added. You can then continue to select items as needed.

<u>Related Items</u>
If a selected item has related stock items these will be displayed in a table underneath the added item message. You can then select items from this table and they will be added in the same manner.

<u>Item Zoom</u>
The request WISHOPITEM displays details for an item when shopping. The default layout uses the image file defined in the stock record.

Note: The template for WISHOPITEM also will display any Catalog notes you have attached to the stock item (Notes with a category of "C").

<u>Item Search</u>
The Item Search function will use the stock key word index to find items. They will be displayed in the Display Folder.

Note: Remember that you can add stock notes to the key word search. In the Inventory/Sales control record (IS-08-02, field 24, Keyword Notes Category) you can indicate that certain notes categories should be included in the search. For example, if you use the "C" category for catalog notes you can specify "C" in the control record so that the words in the notes will be included in the stock search.

- **Maximum Post String Size Increased to 10,000 characters**
  The maximum post string size has been increased from 5,000 characters to 10,000 characters. This provides better ability to send long text strings from forms.

- **Increased Text Field Size**
  The size of the special fields "IMPORT_TEXT_2000A" and "IMPORT_TEXT_2000B" are now increased to 5000 characters to handle the full size of SouthWare TEXT-type fields. The names have been left unchanged to provide compatibility with prior revisions.

- **Miscellaneous Performance Improvements**
  Several coding changes have been made in the NLNETUPD program to reduce some processing overhead. Since the performance of an individual NetLink request is dependent on many different factors it is not determinable whether improved performance will be noticeable on any given request.

- **Web Menu Option to Interrupt a Long ReportMate Job**
  When you are running a NetLink request in Web Menu (such as Live Portals grids) you have the option to press [F8] to interrupt a job. This works similar to the normal abandon process in SouthWare reports. If you choose to abandon the job the grid will show the records processed so far but will not process any more records.

This is particularly helpful if you accidentally start a long job and just want to stop it so you can go on to what you really meant to do.

- **Administrator Requests now have Special URL Tag**
  The special administrative functions now use an identifier of "admin_id" instead of "request_id". This helps eliminate administrative overhead from normal NetLink requests.

- **Improved Handling of Session Numbers**
  NetLink's assignment of session numbers has been revised to ensure that processing won't be affected if the sequence of session numbers is corrupted by other system problems. NetLink now uses both the last sequence number and the history of sessions to determine session numbers.

- **Template Allows Selection of Primary File for WebView Variable Replacement**
  You may now utilize the WebView variable replacement technology within NetLink templates. This allows you to replace variables that can be referenced via link values using the same technology as web page Zoom Views. In the NetLink request type Advanced Options (NL-01-02, field 9) there are two related fields:

  Process Template as WebView?
  > Enter "Y" if you want the NetLink request to pre-process the template for this request using the WebView variable replacement technology. This technology will replace variables that have the syntax "@var_dd_xxxxnnnn_@" with the corresponding Data Dictionary values. See the related discussion in XX-09-01 of the SwiftMate manual for more information.

  - O/R Primary File
  > If you answered "Y" to Process Template as WebView, you have the option to specify an override primary file for the variable replacement process. By default the system will use "XX99" as the primary file. If in the NetLink request you will be establishing a link value for a field such as customer, order, stock item, etc. then you may specify an override primary file.
  >
  > For example, the Live Portal request "WICUSEDIT" is the page that lets you edit basic customer address info. The template wicusedit.htm is a form to let you see the current value of fields and edit them. To provide the current values for the fields in the form:
  > - the request specifies "Y" to process the template as a WebView
  > - the request specifies an override primary file of AR01
  > - the call to the WICUSEDIT request includes the variable "@cust_no=xxxxxxx" to set up the customer number as a link value
  > - the template shows the current values of the form fields using variables such as "@var_dd_AR010002_@" for the customer name.

  This feature was released early as a FLASH update for Revision 14.

TaskWise

● **New Sales Opportunity Tracking Subsystem**
You may now track all of your sales opportunities within TaskWise! A sales opportunity includes any potential sale whether it is to an existing customer or a sales prospect. You can record, track, and analyze your sales opportunities to make sure you get the most success possible.

With Sales Opportunity Tracking:
•   You'll always have instant status on your sales opportunities pipeline
•   You can track multiple opportunities for the same prospect or customer
•   You can track the success of a larger campaign (project)
•   You can track opportunities through stages
•   You can analyze success against different competitors
•   You can estimate the value of your pipeline based on probability of closing
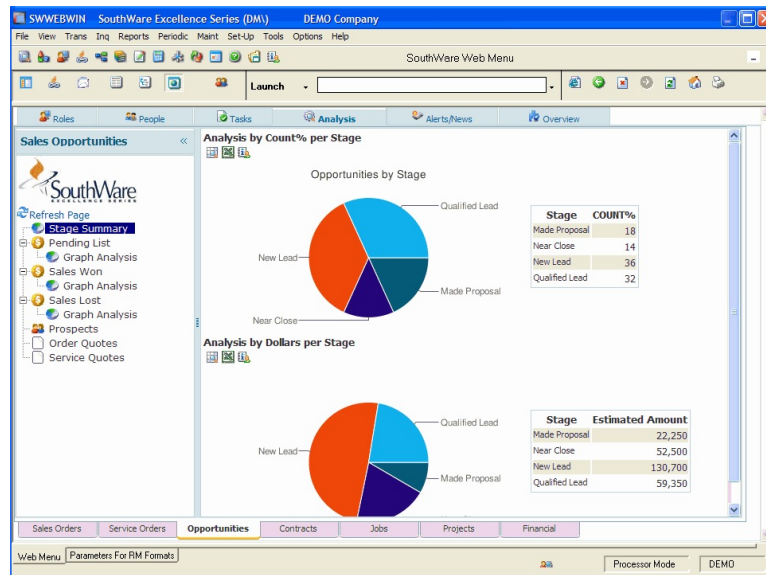
How to Activate Sales Opportunities
Sales opportunities are tracked as a special type of task. This gives your opportunity tracking all the flexibility and supporting features already available for tasks.

To activate this feature you simply need to have a designated Task Type for Sales Opportunities. This is specified in the TaskWise control record, TW-05-01, field 13:

Sales Opportunity Type
Specify a single task type to use for identifying Sales Opportunities. If a task is assigned this type it will be considered a Sales Opportunity.

We recommend you create a new Task Type of "Sales Opportunity", but you can use another type if you wish. Once you enter a type here the Sales Opportunity features will be activated for any tasks with this type.

In this same field you may optionally define default probability percentages for each stage. As you change stages for an opportunity these become the default probability percentages for the selected stage.

Creating a Sales Opportunity

You may enter a Sales Opportunity in the same way you enter other tasks, but use the Sales Opportunity Type for the task type. A new plus field labeled "Stage" displays on the task entry screen. This field displays the current stage, and you may click on the field to access the following additional information:

Stage

You may choose any of the stages defined in the TaskWise control record (TW-05-01).

Potential Amount

Specify the estimated potential sales amount from this opportunity if you close the sale.

% Likely

Specify the likelihood of closing this sale as a percentage. This defaults from the TaskWise control record.

Weighted Amount

This is computed by multiplying the Potential Amount by the % Likely percentage. This amount lets you total expected amounts from your sales pipeline with an adjustment for how likely they will occur.

Profit %

Here you may specify an estimated profit percentage. This can help you better evaluate the value of different opportunities.

Est Profit Total

This is computed by multiplying the Potential Amount by the Profit %. This can be helpful in analyzing opportunities.

Competitor (1 thru 5)

Here you may enter up to five different competitors for this opportunity. This information is for reference on this opportunity, and it can also be used to analyze your success versus different competitors.

Competitors

The Sales Opportunity system includes a simple file of Competitor IDs and Names (TW-05-21). From the Search List for Competitors in a task you may press [F3] to go to the maintenance and add new competitors as needed.

Other Opportunity Info

Because a Sales Opportunity is a task you can use all of the available task features such as:
•   Adding text details
•   Assigning it to a project
•   Adding notes
•   Adding Extended Data
•   Entering target dates/times
•   Linking the task to documents

- etc.

<u>Sales Opportunity Live Portals</u>
Within Live Portals there are available lists and zoom details for Live Portals. From the Analysis category there is a special Opportunities tab. Within this tab you may create different lists of opportunities and zoom to an opportunity. Within the Opportunity Zoom you have options such as:

- Updating the status and estimated value of the opportunity
- Zooming to Edit the opportunity task (when logged in to SouthWare only)
- Adding or accessing a related sales quote
- Adding or accessing a related service order quote
- Clicking on a Related Tasks tab to create or review related tasks (such as calls, appointments, meetings, assignments, etc.)
- Clicking on a tab to analyze competition for the opportunity
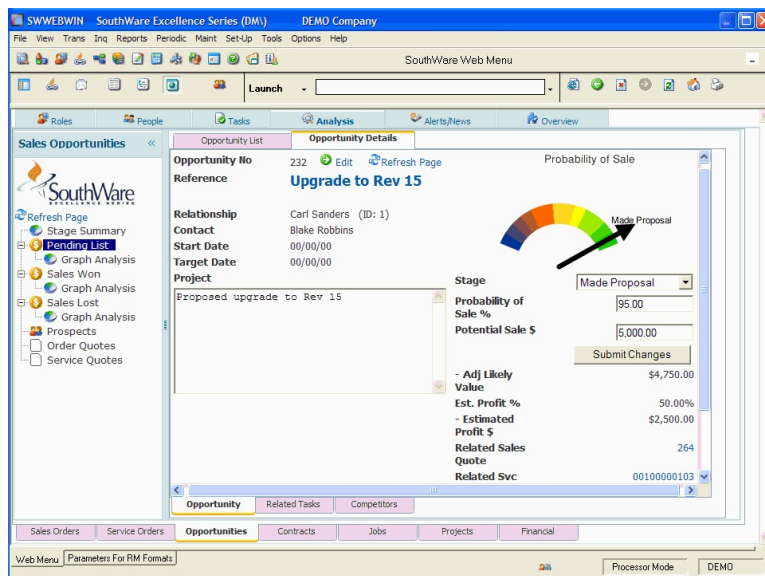
- **New Auto-Setup Option**
  When you access the TaskWise control record for the first time the program will now ask if you want to use the auto-setup feature. If you answer "Y" the program will automatically set up default control record values, set up default types, set up default operators, and set up relationships and contacts.

  You're then ready to go! You can change the setup as needed, but you don't have to do anything else to start using TaskWise.

- **Search for E-Mail Addresses Now Includes Contacts**
  When you search e-mail addresses in an e-mail field within SouthWare the search list will now include any related TaskWise contact e-mail addresses. This allows you to see any defined e-mail address for a relationship when searching e-mail addresses.

Contacts are also included in the e-mail selector list.

● **Ability to copy notes to a forwarded task**
When you forward a task you now have the option in the forwarding parameters to allow any notes to be copied to the forwarded task.

This feature was released early as a FLASH update for Revision 14.

ImportMate
● **Option to Delete Selected Records via Import**
You now have the option to use ImportMate to delete records from selected files. This gives you a powerful delete tool that still provides the same validation protection as the standard entry programs. This delete option is useful for a mass delete of records and for delete of records via NetLink technology (such as the delete of a task in the Task Live Portal).

To use this feature you simply define an import format with an update option of "D" for Delete in field 6 Update Code:

D - Delete
Specifies that the purpose of the format is to delete records from the Target File. Any records processed for this format will be deleted (subject to validation that it is okay to delete the record).

This feature is available for the following files:
• AP01 - Vendor file
• AR01 - Customer file
• IV01 - Stock file
• IV05 - PO Header file
• IV06 - PO Line Item file
• JC02 - Job Header file
• JC03 - Job Detail file
• RS07 - Order Header
• RS08 - Order Line Item file
• SV01 - Service Code file
• SV02 - Contract Header file
• SV03 - Contract Detail file
• SV04 - Service Order Header file
• SV06 - Service Order Detail file
• SV07 - Equipment Model file
• TW01 - Relationship file
• TW02 - Contact file
• TW10 - Tasks file

How This Works
When ImportMate processes a format with the Delete Update Code it calls the related maintenance program to delete each record. The standard logic from the maintenance program determines that it is OK to delete the record, then deletes the record. This ensures that the result is the same as if you had deleted the record through the maintenance program. For example, if there are other steps necessary for the delete (such as the delete of related records in another file) these will be handled by the maintenance program.

- **Option to Import Data Directly from OLE DB Connection Via SQL**
  You now have the option to use ImportMate to pull data directly from a data source that can be accessed via Microsoft's OLE DB (including ADO and ODBC) technology. This includes ODBC data sources and databases that provide OLE DB access such as SQL Server. With this option you don't need to dump data from the source file to a text or other file for importing - ImportMate connects to the data source and extracts the data. You may define the SQL statement for the extracted data, which also gives you the option to manipulate the incoming data.

  For example, if you are converting data into SouthWare from another software product that has ODBC access, you can now use ImportMate to bring that data directly into SouthWare without needing to first go into the other product and extract fields. If the source system has two fields (such as First Name, Last Name) that need to go into a single SouthWare field, you could use the SQL statement to combine these into a single field (e.g. FirstName||' '||LastName combines the two fields into a single field in the incoming data).

  This option is provided through ImportMate as another Data Source Type (IM-01, field 4):

  6 - OLE DB Connection via SQL
    (Available for Windows workstations only)
    Select this option if you want to use an OLE connection such as ODBC to directly import data from a SQL query. With this option ImportMate does not extract data from an exported text file, but instead uses the ADO technology and a SQL statement to directly access the source data into a source view. This option is available if the other product provides OLE access to its data through ODBC drivers or some other method.

    This Source Type has some key advantages over other Data Source types:
    1.   You don't need to export data from the other system.
    2.   You may manipulate the incoming data via the SQL statement (see examples below under "SQL SELECT").
    3.   You can use ranges, selection criteria, etc.
    4.   You may combine data from multiple Data Source tables into a single view "table" for importing

    If you select this option you must then specify the following information for the connection:

    Connection String:
        Specify the connection string needed to connect to this data source. This is the string ImportMate will use to connect to the OLE data.

        Connect String Wizard
        A wizard is available to help you determine the Connection String. You may press [F4] in this field to display a Windows utility called Data Link Properties. In this utility you should select the appropriate OLE data source, choose to connect via a Connection String, and Test the Connection. When the Test Connection is successful you may exit the utility. ImportMate will then read the last connection string used in the utility and default

this value into the field. You may edit the string if necessary.

SQL Select:
Here you must specify a SQL SELECT statement to use to extract data from the Data Source. The SQL statement will result in a row/column "view" of the extracted data, and ImportMate will import from the data in this view.

You may use the [F3] Available Tables option to display a list of the table names for the Data Source. This helps you identify the Table(s) from which you will be importing data.

Selecting All Fields from a Table
When you select a table from the Available Tables list the program will automatically insert the SQL statement "SELECT * FROM (tablename)" which selects all fields. This gives you access to all the fields in the table for the importing of data.

Useful SQL option examples
- Selective fields (extract only a few fields from source)
  - SELECT (fieldname), (fieldname), (fieldname), (etc.) FROM (tablename)
- Combine multiple source fields into a single incoming field
  - SELECT FirstName||' '||LastName, (other fields) FROM (tablename)
- Assign Different Names to incoming fields (with "AS")
  - SELECT CustAddress5 AS CustZip FROM (tablename)
- Compute fields (and assign names to the result)
  - SELECT SUM(Percent * 100) AS PercentInteger FROM (tablename)
  - SELECT SUM(UnitPrice * Qty) AS ExtPrice FROM (tablename)
- Selective Records (extract only records that meet criteria)
  - SELECT (fields) FROM (tablename) WHERE (conditional statements)
- Combine data from multiple Data Source tables into a single importable view (using SQL joins)
  - SELECT (table1.field), (table1.field), (table2.field), table2.field) (etc.) FROM (table1), (table2) WHERE (table1.field) = (table2.field)

Defining Import Fields for an OLE Connection
When you define the import fields for the format you will be asked to enter the field tag name to import from the "view" (either the default field name or the name you assigned with the "AS" clause in the SQL statement). The available tag names display in a drop-down list in the tag field.

For more information about the available fields you may use the Lookup option. This runs the SQL String to extract data and displays a list of the

available fields from the view along with:
- • Data from the first record in the table (so that you can see a sample value for each field)
- • A reference beside the fields that are already being imported with this format (so you can see if a field is already being imported and where it's going)

Running an import for an OLE Connection

When you run an import that uses OLE for the Data Source the program does not ask for an import file since there is no intermediate file. The program will:
- • Connect to the data source using the Connection String
- • Execute the SQL statement to extract data into a "view"
- • Process each record in the view and import data as specified in the format

● **WebEntry Import Data Source Type (for NetLink)**

ImportMate now supports a Data Source Type of "NetLink WebEntry". This type is designed to make it simpler to use a NetLink web page form to add or update SouthWare data.

In previous revisions you needed to figure out text positions for each field in the import format and then create a NetLink import definition file that specified how NetLink should write the fields from the web page form into an importable file that matched those positions. Now all you have to do is specify the form field name to import into a field and ImportMate will take care of the related NetLink setup to create an import definition file..

The import format maintenance shows the following additional option for Data Source (IM-01, field 4):

NW - NetLink WebEntry

This indicates that you will be importing data entered in a NetLink web page form. ImportMate will help automate the steps needed to link the import format with the data provided by NetLink from the web page form.

A format with this option has the following special features:

File Type - The Import File Type (field 5) will automatically default to Fixed Position Text since this is the format provided by NetLink.

Import by Form Field Name rather than Position - When you specify to import a field the program will ask for a form field name (rather than a text position). You can then simply enter the input field name from the form. This will default to the Data Dictionary ODBC name, so if you use Data Dictionary descriptions in your form then the default will match your form. But if you have other field names you simply enter them to override the default.

Hidden Assigned Text Positions - As you define Form Field names the program will automatically assign them text positions in the Fixed Position Text file, but these positions are hidden and you don't need to define them. As you adjust your format by adding or removing Import fields the program will automatically adjust the assigned positions.

Text Fields - If you specify to import a TEXT type field the program will automatically default to IMPORT_TEXT_2000A (or B) as the form field name since this is the special name NetLink uses for long text fields (up to 5000 characters).

Create NetLink Import Definition Text File - When you finish editing the format the program will automatically create the import definition text file needed to instruct NetLink how to write the Fixed Position Text file so that it matches the assigned positions of the fields. This file is created in the NetLink template directory (default of "nlhtml") and has the name "imxxxxxxxx.txt" where "xxxxxxxx" is the import format name. You will need to reference this file in any NetLink request that imports data using this import format.

How this works
NetLink extracts the data sent from a web page form and writes it to an importable Fixed Position Text file. An optional format file tells NetLink which fixed position to use for each field.

The NetLink WebEntry option in ImportMate automatically creates the optional format file. ImportMate assigns positions to the fields you specify in the format, then writes the optional format file to tell NetLink what fields to write to which position. This happens behind the scenes so that all you need to do is make sure your field names in the format match your form field names and that you reference the option format file in the NetLink request that launches the import. And later if you change the format the optional format file will automatically be recreated to match the import definition.

● **Option to Import Based on XML Attribute Tags**
You may now import tag-delimited data (XML) based on attributes within the tags. In previous revisions ImportMate could import XML data based only on tag names. This resulted in two potential issues:
1.   If the tag in the data contained an attribute, ImportMate did not recognize the tag as matching the tag name in the format.
2.   If the data to be imported was defined as an attribute rather than a separate tag, ImportMate could not access the data.

ImportMate now handles both these situations.

Example
For example, let's say you need to import the key and one other data field for a record. A basic XML file might use the following structure:

```
<xml>
   <record>
        <key>12345</key>
        <name>Fred</name>
        ......
   </record>
</xml>
```

In this case you would simply define an import format for tag-delimited data that uses a record tag of "record", a tag for the key field of "key", and a tag of "name" for the data field.

But what if the file doesn't have a separate tag for the key. For example, an XML file might use the following structure:

```
<xml>
   <record id="12345">
        <data name="Fred">
        ......
   </record>
</xml>
```

In this case the key value cannot be referenced by a unique tag name, but must be referenced via the "id" attribute of the "record" tag. And the data must be referenced via the "name" attribute of the "data" tag.

Importing Attributes

If you have this situation you may specify that the data to import is actually contained in an attribute within a tag. Here's how to define this in the import format (IM-01, field 4 Data Source):

Process Tag Attributes?
> Enter "Y" if the incoming file uses tag attributes. This will cause the field definition information to ask for an optional attribute for each imported field.

Attribute ID
> If the record key value is to be imported as an attribute of the record tag, enter the attribute here. In our example above, "record" would be the record tag and "id" would be the Attribute ID. If you leave this blank the import will ignore any attributes in the record tag.

In the import format details for each imported field an additional parameter is available after you specify the tag:

Attribute
> Here you may optionally enter an attribute within the tag that contains the data to be imported. If you enter an attribute the import will get data that has this attribute within the specified tag. If you leave this field blank any attributes will be ignored and the data will be assumed to be within beginning and ending tags with the specified tag ID.

> **Notes:**
> •   You may not specify an attribute for a TEXT type field (long text) since these require special handling and should not be defined as an attribute.
> •   For a detail file with a related header such as order detail, po line, etc, the program will compare the field tag and attribute ID for key fields to the header format key field tag and attribute ID to determine if the key values can be defaulted from the header. With attributes this will match on both the tag and attribute instead of just the tag.

● **New Import register options**
There are several new options for the import register. These help you get more

detail when you need it and skip details that you don't need.

Here are the options available now for import registers:

Print Format Option:

L   Long - this format prints the data as data pairs, one pair per line. This makes the register longer but provides for easy readability. The register would look like:

                variablename1=value1
                variablename2=value2
                etc.....

S   Short - this is the format used in previous revisions. This provides a shorter register by printing field headers together and then field data on subsequent pages.

N   No Register/Audit - this format does not print any report or register for the import process. This is useful for high-volume repetitive updates that don't need an audit trail. You also should choose this option if you use the FM Audit system for the target file since changes made by ImportMate are automatically recorded in the FM Audit system.

The following options apply only if you are printing a register.

Print Errors only?
Specify "Y" to print only the validation errors.

- Include data?
(Applies only if you specified to print errors only.)
Specify "Y" to print the import data values so you have the info to research the error. Specify "N" to print only the error information.

- Include all audit lines?
(Applies only if you specified to print errors only.)
Specify "Y" to print an audit line for each import record even if there are no errors.
Specify "N" to print an audit line only for records that have errors.

Print Error if not found?:
(This option applies only to formats that have "Change Only" or "Delete Only" update code.)
Answer "Y" to print an error message if the specified record is not found to update or delete.

Print Error if already exists?:
(This option applies only to formats that have "Add Only" update code.)
Answer "Y" to print an error message if the record to be added already exists.

● **Import meter readings based on equipment model and serial number**
You may now import meter readings as long as you know the equipment model and serial number for a piece of equipment. In previous revisions you needed to have all the components of the customer equipment record key in order to import readings.

When you import into SV17, the Meter Readings File, you may now assign the

following fields:

- Customer Number (field 3)
- Contract Number (field 4)
- Customer Equipment Line Number (field 5)

When you assign these fields you must be importing fields 1 and 2, the Equipment ID and Serial Number. The program will find the related customer equipment record for these values.

● **New Importable Files**
The following files are now importable:

AR04 - Salesperson File:
This import allows for add and change.
1.   The only assign field is the salesperson #. If assign, it gets the last one on file and increments by 1. The assign only works if all records in the file are numeric.
2.   Email address is updated (field 13)
3.   Checks salesperson security (XX-03-02 field 15) if changing a record. The record will not be modified if the logon operator does not have security to access that salesperson.

SV18 - Technician File:
This import allows for add and change.
1.   Assign fields are technician #, name and phone.

       Technician - finds last technician # and increments by 1 (only works if all technician #'s are numeric). Name and phone are assigned from the employee record.
2.   Must have at least one territory already setup (SV-07-08) to import the technicians.
3.   Validates location, dispatch operator if not blank, and service territories.
4.   Checks service location for security (XX-03-02 field 14) if changing a record. The record will not be modified if the logon operator does not have security to access that location.

SV11 - Equipment Category:
This import allows for add and change
1.   Assign fields are Category. Finds last category and increments by 1 if all records in the file are numeric.
2.   If multi-skills flag in control record is "N", sets skills code to "N/A"
3.   Checks equipment flag in control record - if "N", no records will import.
4.   If category meter flag is "M" but user does not have multi-meter licensed, the record will not import.
5.   Validates skills code and will import as error if not valid.

XX05 - Field Filter Values

XX08 - Country Codes

XX46 - Valid Extended Data Field Values

- **Increased Import Record Size**
  You may now import records with record sizes up to 10,000 characters. In previous revisions the maximum record size was 5000 characters.

- **Import Log File Now Shows Details of Invalid Key**
  When an import job encounters an invalid key (missing or invalid) the import log file will now show more details about the data to help you diagnose the problem. The report will show all imported fields for the record (unless the Audit Report option is disabled).

- **Import BillTo/ShipTo Addresses on Sales orders for Non-AR customers**
  Importing addresses for miscellaneous customers will no longer create/import into the ship-to/bill-to files. The order header already contains this information for history purposes. NetLink customers have been particularly affected by this for web orders since the sequence number could create duplicates.

  For regular customers, importing sales orders will work as in the past by creating an Mnnnnn (where nnnnn is a sequential number) ID for each new Bill to or Ship to Address.

Service Management

- **Meter Reading Entry in Grid**
  Meter readings are now entered via a grid for single meter readings or for all machines for a contract. You can define defaults for your entry session and then quickly walk down the grid entering readings along with service usage and comments as needed.

Enter Meter Readings for Contract

Meter Readings for Contract (SV-06-02-03)
This option lets you display all metered equipment on a contract in a grid for

efficient entry of readings for the contract.

Meter Readings for Equipment (SV-06-02-04)
This option lets you display metered equipment by equipment ID for entry via a grid.

● **New Meter Verification Features in Contract Billing**
The contract billing process (SV-02-01) now includes a sophisticated contract review and error correction process for metered billing.

After you enter parameters the program now automatically builds temporary files of the contracts to be billed. A summary grid shows each contract to be billed and has a checkbox that lets you toggle whether it is billed.

Contract Headers for Pre-Billing

You may zoom to a list of the contract detail records and their summary status.

Contract Details for Pre-Billing

From a contract detail you may zoom to a list of equipment/meters billed for that service. A summary shows any errors.

Equipment	Serial#	Meter	Base Price	Overage Price	Adjusted Usage	#Days	Old Avg/Day	New Avg/Day	%Variance	Error#	Error Message	In Date	Out D
205	ZX56876	*N/A*	995.00	.00	148.0	1	.0	148.0				06/24/09	06/2
205	ZX56877	*N/A*	995.00	.00	297.0	1	.0	297.0				06/24/09	06/2

Contract Equipment Details for Pre-Billing

Meter-related errors are recapped on the summary grid. If a contract has errors, by default it is not "checked" for billing. You may highlight a contract with errors and click on an Errors button to review and fix the errors. Errors include:

> (1) Missing initial reading
> (2) Missing current reading
> (3) Abnormal usage
> (9) Other machine meters setup problem

Options available to correct errors include:

> •   Option to auto-generate initial meter readings
> •   Option to enter missing readings - displays a grid of missing meter readings and allows you to key in the readings
> •   Option to edit abnormal readings - displays a list of abnormal readings - you may zoom on one to edit/delete it
> •   Option to see list of equipment that has errors (a machine may have multiple meters with errors) - you can then zoom to meter reading entry

After you correct errors you may press a button to recalculate the billing - the error status is then updated.

When you are finished reviewing, correcting, or selecting/unselecting contracts to bill you press "Update" to continue with billing.

● **Option to use Automatic Estimated Meter Readings based on Average Usage**
You now have the option to specify that the system should use Automatic Estimated Readings when there are missing meter readings for a billing cycle. This lets you bill average daily usage if there is no actual reading taken for a billing period.

There is a new flag in the SV Contract Header (SV-07-01, field 13, "Auto-Estimate missing meter readings?") that will be tested during SVINVGEN contract billing when the service pricing code is <E>quipment (and there is an incremental rate defined in the customer equipment record. If this flag is set to

"Y" the system will create an estimated reading when needed.

● **New Billing Class allows for Multiple Equipment-type Contract Details**

This program (SV-07-21-06) allows you to set up and maintain equipment billing classes. These are used to classify equipment into different categories so that equipment on the same contract can be billed using different rates.

1. Equipment Class:
Enter a class code (up to five characters) to identify this class of equipment. You may assign a class to each equipment model.

2. Description:
Enter a description for the class that helps you identify it.

The billing class is used in the following files:
• **Equipment Model** - You may specify a billing class for an equipment model.
• **Contract Detail** (optional) - You may specify a billing class for an equipment type contract billing ("E" type). This allows multiple "E" type contract detail records since the billing class can specify which contract equipment applies to each contract detail service and meter rate.

● **New Meter reading Lifetime Accumulations per Machine**
The system now stores a Lifetime history of meter usage for a machine (SV-07-03). The totals include:
• Total Lifetime usage
• Lifetime days in service
• Avg usage/day

- **Meter reading billing history**
  The system now stores additional meter reading billing history details. Detailed meter reading billing history includes the following for each billing:
  - Billed Date
  - Billed Order/Line No.
  - Billed days in service
  - Billed usage
  - Avg usage/day

- **New Program to recalculate average meter usage per machine**
  A new program has been added as SV-06-12. With this program you may initialize or recalculate the average usage for your metered equipment items. *This is particularly useful if the usage varies significantly through the year (such as minimal usage during the summer) and you want to adjust the averages that will be used for any estimated readings.*

  Conversion/Recalculation:
  Specify whether you want to recalculate all records specified below or calculate only records that currently have a zero average usage.

  Range of Dates:
  Enter a range of meter reading dates to use. The program will use Billing Dates if available. Otherwise it will use available Reading Dates.

  Note: Any readings found which are more recent than the Last Billed Reading for that machine/meter will be skipped.

  Range Of Customer Numbers:
  Specify a range of customer numbers to process or press [Enter] for All.

  Range of Contract Numbers:
  Specify a range of contract numbers to process or press [Enter] for All.

  Active Contracts Only?:
  Specify whether you want to include only active contracts. Normally you should include only active contracts, particularly if meters are reset between contracts.

  The program will then process the meter readings specified and update the average usage for the related customer equipment records.

- **Contract Form Options**
  The contract addendum can be printed in SV-03-02-03. The contract will print each contract detail record and then list each customer equipment record assigned to that contract. If the contract detail has price that comes from meter readings and the meter billing rates for that service will print. If the contract also has services where the price is based on each piece of equipment, the rate will print next to each customer equipment record. This rate comes from SV-07-03 field 21 Base Price. There is a report parameter to not print these reference prices if you choose. The equipment class will print for each customer equipment record.

- **Option to Modify Contract Form Via SouthWare Forms**

You now have the ability to modify the Contract form thru Forms Adapter. There is now a Service Contract under Other Forms and the released text file is SFSVCONTR.TXT. There are flowmods available for each subarea to modify when data prints on the form. They are flowpoints SVCONPRT 8401-8434:

Subarea:BODYSTAR	SVCONPRT	8401	SV02
Subarea:CONDSTAR	SVCONPRT	8402	SV03
Subarea:CONDET	SVCONPRT	8403	SV03
Subarea:CONDET1	SVCONPRT	8404	SV03
Subarea:CONDET2	SVCONPRT	8405	SV03
Subarea:CONDET3	SVCONPRT	8406	SV03
Subarea:CONDET4	SVCONPRT	8407	SV03
Subarea:CONDET5	SVCONPRT	8408	SV03
Subarea:CONDET6	SVCONPRT	8409	SV03
Subarea:CONDET7	SVCONPRT	8410	SV03
Subarea:CONDET8	SVCONPRT	8411	SV03
Subarea:CONDET9	SVCONPRT	8412	SV03
Subarea:CONDTXT	SVCONPRT	8413	SV03
Subarea:CONDMTR	SVCONPRT	8414	SV03
Subarea:CONDEND	SVCONPRT	8415	SV03
Subarea:EQUIP	SVCONPRT	8417	SV08
Subarea:EQUIP1	SVCONPRT	8418	SV08
Subarea:EQUIP2	SVCONPRT	8419	SV08
Subarea:EQUIP3	SVCONPRT	8420	SV08
Subarea:EQUIP4	SVCONPRT	8421	SV08
Subarea:EQUIP5	SVCONPRT	8422	SV08
Subarea:EQUIP6	SVCONPRT	8423	SV08
Subarea:EQUIP7	SVCONPRT	8424	SV08
Subarea:EQUIP8	SVCONPRT	8425	SV08
Subarea:EQUIP9	SVCONPRT	8426	SV08
Subarea:EQUPEND	SVCONPRT	8427	SV08
Subarea:EQUPTOT	SVCONPRT	8428	SV02
Subarea:BODYEND	SVCONPRT	8432	SV02
Subarea:CONT1	SVCONPRT	8433	SV02
Subarea:CONT2	SVCONPRT	8434	SV02

- **Text Entry on Contract Detail Record**
  There is a new field in the contract detail to allow you to enter more than 3 lines of description about that service. SV-07-02 field 4 description now has a plus box which takes you to Text Entry to allow you to enter up to 5000 characters of information about that contract. This additional information will print on the contract addendum. If you need this text to print on the contract, it will be best to modify the form in Forms Adapter and change the subarea CONDTXT to print TEXT as 50,65, or 80 across.

  @SUBAREA_START=CONDTXT
  @COL=12, <TEXT80>
  | Other possible datanames are TEXT50,TEXT65,TEXT80
  @SUBAREA_END=CONDTXT

- **Option to import meter readings based only on Equipment Model and Serial Number**

  See the related discussion in the ImportMate section of this release notice.

- **Zoom View option for Equipment Model**
  There is now a standard Zoom View for Equipment Model.

- **New Inquiries**
  Several New Inquiries are available:
  - Meter Reading History
  - Contract Period History
  - Equipment Model History
  - Customer Equipment History
  - Technician Period History
  - Service Code Period History

  These new Inquiries allow drill-down via Report Card-type zoom. You may zoom on the details to see the details behind the summaries.

- **Option to zoom from Billing History Inquiry to Meter Billing History**
  For meter billings you may now zoom from the Billing History Inquiry to the Meter Billing History Details behind the billing.

- **Equipment Profitability Details Report**
  A new report (SV-05-04-09) lets you analyze the profitability of your equipment. You may print this report in summary or with document details for equipment billing/cost/profit.

- **Skipped Meter Readings Report**
  A new report (SV-05-04-14) provides a list of meters that were not billed (skipped) during a billing cycle because of missing meter readings. This helps you review and identify problems with meter readings.

- **Standard FYI Reports for Meter Info**
  There are several standard FYI report formats provided for meter-related info including:
  - SV-05-04-11 - Meter Reading Billing History (MTRRDGHS)
  - SV-05-04-12 - Abnormal Meter Reading Report (ABNORMUS)

- **New Excellence Period History of Sales**
  There are three new Excellence Period History Files that include the following history fields:
  - Count
  - Quantity
  - Sales$
  - Cost$

  These history totals are accumulated separately for:
  - Equipment Sales
  - Contract Billings
  - Supplies
  - Service Order Parts
  - Service Order Labor
  - Service Order Other

  This history is available for:
  - Contract Header (SV-07-01)

- Equipment Model (SV-07-05)
- Customer Machine (SV-07-03)

● **New Employee Categories for Analysis**
The employee file now allows you to categorize your employees for analysis purpose into the following categories:
- Service
- Sales
- Admin

Technician is also a category, and an employee is assumed to be a Technician if a Technician ID is assigned to the employee.

Company totals are available for analysis. See "Company Totals Statistics for Excel Period History" earlier in this release notice.

ExecuMate now:
- gathers employee counts per department
- provides data to calculate sales/employee department per financial statement column

New fields in XV08 Data Dictionary for company totals:
- XV08 121-128 Admin Dept Active Employee Counts/Ratios
- XV08 131-138 Sales Dept Active Employee Counts/Ratios
- XV08 141-148 Service Dept Active Employee Counts/Ratios
- XV08 151-158 Technician Dept Active Employee Counts/Ratios
- XV08 161-169 Total Active Employee Counts/Ratios

● **Restore Billed Service Order**
You now have the option to reinstate a billed service order if you discover that a billing mistake was made on that service order and you have not yet run End of Day processing for the bill that was created. This allows you to make corrections and then redo the billing.

To restore a billed service order you can go into SV-01-01-03 Service Order Entry and at field 1 choose F4 – Credit/Copy/Quote option. Option 5 in this list now allows you to "Reinstate a billed Service Order". When you choose this option you may then enter the service order number to reinstate and the following will be updated:

- The service order is reinstated, the invoice number is marked as VOID, and the service bill is deleted from the service invoice file.
- Any Job Cost Entries are reversed with credits updated to J Trx File (JC0101).
- Technician Excel History Record is reversed.
- Contract header is reversed. Billed amount and billed cost is reduced.
- Contract detail record is reversed. Amount and cost billed to date is reduced.
- The customer equipment record is reversed. Billed amount and cost is reduced and also the # of s/o's.

If the service order was a partial billing and is still in the service order open file then the program will delete the service bill and will remove the billed status on

the service order line items.

If you want to disable this feature for an operator then set SV0717 field 22: Disable Reinstating a S/O to Y.

This feature was released early as a FLASH update for Revision 14.

● **Unlimited Split Schedules for a Service Order**
The split schedule maintenance program has been changed to accept split schedules in a simple maintenance program and display them in a grid (on Windows systems). Prior to this change there was a limit of 10 split schedules.

> **Note:** If you would like to revert to the original 10 split limit you may set the environment variable SWENV-CLASSIC-SPLIT-SCHED-MNT to Y.

This feature was released early as a FLASH update for Revision 14.

● **Simplified method to assign equipment to an SV Contract**
This change is implemented in SV-07-03, Customer Equipment, in the [F4] option to assign customer equipment records to a contract.

The new features provides an easier way to select the customer equipment records that should be assigned to a contract. The list of unassigned customer equipment records now displays in a grid. You can select the customer equipment records to add to the contract and then choose the "Update" Button to assign them.

> **Note:** If you are on a non-graphical workstation then the list will display with a Y/N option. You may mark each item with a Y and then choose the Update button to assign the equipment items to the contract.

This feature was released early as a FLASH update for Revision 14.

● **Technician Scheduler Board can now be viewed in inquiry mode on graphical workstations**
The SV Technician Scheduler board (SV-01-02-01) has been enhanced to provide inquiry mode for graphical workstations. Prior to this change, only non-graphical workstations could inquire on the technician scheduler board based on the SV operator option to view the technician scheduler board in inquiry mode.

This feature was released early as a FLASH update for Revision 14.

SouthWare Forms
● **New E-Forms Delivery System**
You can now automatically deliver customer forms and vendor POs electronically. This new system is included as part of SouthWare Forms and incorporates the electronic sending of documents as part of the normal forms printing.

With the E-Forms Delivery system you can:
• Automatically E-mail or fax a form
• Specify:
  • which customers/vendors have e-form delivery
  • how to send the e-form

- who to send it to (including copies for internal people)
- whether to skip the printing of a form that will be e-delivered

This system is available for the following forms:
- Sales Invoices
- Customer statements
- Order acknowledgments
- Order quotes
- Rental Contracts
- Service Quotes
- Service Invoices
- Vendor Purchase Orders

How This Works

This system is added as an optional companion process for the printing of customer-related forms and vendor POs. As each form is printed the program checks to see if the related customer/vendor has E-Forms Delivery defined. If so, the program checks to see if the printing of the form is to be skipped and will skip the printing if specified.

Note: If you use PDF Archiving this will be done regardless of the skip printing option. E-Forms Delivery does not affect PDF Archiving AND does not use the PDF archive file.

After you confirm that the forms are OK, the program will then review the documents processed in the print batch and will send any that need E-Forms Delivery. This is done AFTER you confirm the forms are OK since the sending can't be undone if you need to rerun the forms printing.

For each document with a related E-Form Delivery record the program will create the appropriate form for delivery. For example:
- A form to be sent as a PDF attachment will be printed to a PDF file and then attached to an e-mail.
- A form to be sent within the body of an e-mail will be spooled and then inserted into an e-mail.
- A form to be faxed will be printed to the designated fax device.

E-Form Delivery Setup

Here are the components of setup for E-Form Delivery:

SF-03-03 Delivery Types

The delivery type file lets you set up different combinations of forms and delivery methods. You might just need one record for each form type to be delivered (e.g. e-mail customer statement, e-mail order acknowledgment, fax purchase order). But you have the potential to define multiple types for a single form (e.g. e-mail standard statement, e-mail custom statement form in text form, e-mail custom statement as attached PDF file, etc.). This gives you flexibility to handle various exceptions within your e-form delivery needs.

1. Delivery Type:

Enter a unique ID for a new Delivery Type, or enter/lookup the key of an existing record. This may be up to 15 characters long.

2. Description:
Enter a description of this Delivery Type to help you identify it in a search list.

3. Forms Type:
Choose the related form type for this E-Form Delivery. Valid options are:

AR01   A/R Invoice
AR21   A/R Statement
OE01   Order Entry Invoice
OE02   Order Acknowledgment
OE03   Interactive Quote
PO01   Purchase Order
PS01   Point of Sale Invoice
PS02   POS Layaway Interactive
R101   Collections Invoice
RD01   Rental Contract
SV01   Service Invoice
SV04   Service Quote

4. Record Type:
Specify whether this e-delivery is via E-mail or Fax.

5. E-Send ID:
Specify the e-send ID to use for delivery (as defined in XX-05-12).

6. SF Override Key:
Normally you should leave this field blank. The e-form delivery will use the same form layout as the normal print job.

You may optionally specify the key to a different form override definition than the one used for normal form printing. This would be useful if you print on preprinted forms (that already have labels and lines) but when you e-mail the form you need to use a form layout that includes labels and lines.

7. Subject:
For an e-mail delivery you may specify the Subject line for the message. You may include variables from the Data Dictionary so that the message is customized for each form.

8. Body:
This field applies only to e-mail type records.
This field allows you to define the body of the e-mail that will be created:

Body Source:
Specify whether the body contents should come from:
T   Template - you will enter the body in the template - you may then enter the text (including variables) in the Body field shown on the screen. This allows up to 2000 characters.

F	Text File - you will define the body in a separate text file - you must then specify the file name (including variables as needed)
H	HTML File - you will define an HTML-formatted body in a separate file - you must then specify the file name (including variables as needed)
P	Print Output - the body will contain the text of the form output

9. PDF Attach?:

This field applies only to e-mail type records.
Specify whether the form output should be a PDF attachment or should be included in the body of the e-mail.

If you specify to create a PDF attachment you may also define the following:
- Override PDF Printer
- PDF Attach Filename Format - The file created as a PDF attachment is placed in a directory for your e-mail program to retrieve. By default this is the "temp" directory. Here you may optionally override the default filename format for the temp file.

10. Cross Reference Defaults:

Here you may define some defaults to help you efficiently set up the related customer or vendor cross reference records for this Delivery Type:

Activate Xref from IM?

Specify whether you want the import of a new customer/vendor to automatically activate the default Delivery types when importing "Has E-Form..." fields.

Fax Number

If this is a Fax delivery type you may enter the default source for a fax number.

E-Mail Addresses

If this is an e-mail delivery type you may enter the default source for e-mail addresses.

Skip Printed Form?

When you create a cross-reference this will control whether the Skip Printed Form flag defaults to "Y" or "N". Choose the default most likely for this Type.

11. Active?:

Specify whether this Delivery Type is active. The purpose of this field is to:
- Allow you during setup of a new Delivery Type to work on its related cross-references without any forms being

sent.
- Allows you to globally turn off a Delivery Type without changing the cross-reference records.

12. Extract ID:
Here you may specify an Extract ID for use with the Extract Packager tool.

SF-03-01 Forms Control Record
In Field 5 of the Forms Control Record you may now specify Default Delivery Types for each form type. These will be the defaults if you use the grid to activate delivery for a particular form.

SF-03-04 E-Form Delivery Maintenance Grid

This program allows you to quickly define which customer/vendors are to receive which forms. It provides an interactive grid which lets you choose a form and then review/edit which customers or vendors receive e-form delivery of that form.

When you choose this program you must select a form type (from the types that have Delivery Types defined). The program will then show a grid of all the customers or vendors and allow you to activate and edit their Form Delivery info. These are the same options you may maintain from the customer maintenance and vendor maintenance programs except that you have access to all records at once.

When you click on a row to activate delivery for that record then the defaults from the Control Record (SF-03-01 field 5) will be used. If there is not a default then you must manually enter the settings.

Batch Processing
There are Batch Options for updating all or a group of records. You may select multiple rows via Shift or Control keys and then click on the Batch Options button to perform operations on all the selected records.

Customizing the Grid
You may use SouthWare's LFMT technology to modify the layout for this grid (the file is "AR01" for customers and "AP01" for vendors). The LFMT will not eliminate any fields, but will append any fields in the LFTM to the end of the grid. You may also use the LFMT to add selection criteria that limit the records shown.

E-Form Delivery Options per Customer/Vendor
You may create or maintain the E-Form Delivery options for individual customers or vendors from their respective maintenance programs:

Customer Maintenance (AR-07-01)
Click on the E-Forms Delivery button in the Quick Access buttons in the upper right of the screen. This lets you easily review and edit the setup for any delivery of forms for the customer.

Vendor Maintenance (AP-06-01)
Click on the E-Forms Delivery button in the Quick Access buttons in the upper right of the screen. This lets you easily review and edit the setup for the delivery of Purchase Orders to the vendor.

DocTransfer Note:
If you use DocTransfer for a customer or vendor you may not set up Delivery types.

● **New Standard A/R Statement Form with Fonts**
A standard statement form that uses fonts and other Windows printer features is now provided with the custom forms files.

Accounts Receivable
● **New Customer Integrated Activity Reporting**
With special ReportMate reporting files you can now review and analyze all the activity for a customer. This special reporting consolidates all the related data from various modules into a chronological listing of activity. You can see the sequence of everything that happened and when it happened.
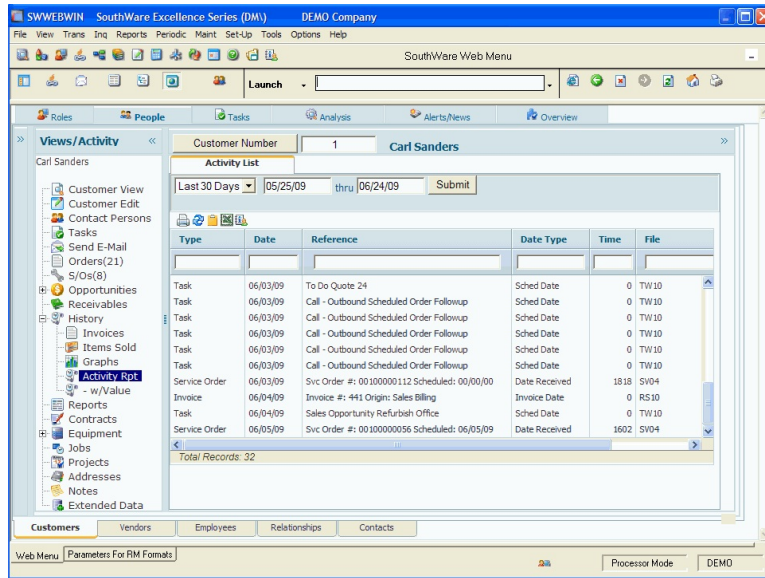
Customer Integrated Activity - RM20

This file consolidates information from the following customer-related activity files:

- Tasks
- Projects
- Sales Orders
- Invoices
- A/R Documents (open and history)
- Service Orders
- Service Contracts
- Jobs
- Customer Returns

To define a report with this file you need to create a format with a single customer number (via a range) and a range of dates.

Dates

> Each reporting transaction has a date to provide the chronological perspective. If a type of transaction has different start/end dates, two reporting transactions are created:
> - Task - scheduled date and date completed
> - Service orders - received date and close date
> - Contracts - start date and expire date
> - Projects - estimated start and actual complete

Reference

> Each reporting transaction has a reference that summarizes the transaction. This provides a way to create a common report from diverse types of transactions.

A standard activity report format is WICUSACT. It is available from the customer Live Portal (People, select a customer, History).

See also "Optional Admin Cost Analysis for Customer and Vendor Integrated

Activity Reporting" in the ReportMate section.

Accounts Payable

● **New Vendor Integrated Activity Reporting**
With a special ReportMate reporting file you can now review and analyze all the activity for a vendor. This special reporting consolidates all the related data from various modules into a chronological listing of activity. You can see the sequence of everything that happened and when it happened.

Vendor Integrated Activity - RM21
This file consolidates information from the following vendor-related activity files:

- Tasks
- A/P Documents (open and history)
- Checks/Payments
- Purchase Orders (open and history)
- Vendor Returns

To define a report with this file you need to create a format with a single vendor number (via a range) and a range of dates.

A standard activity report format is WIVNDACT. It is available from the vendor Live Portal (People, select a vendor, Activity History).

See also "Optional Admin Cost Analysis for Customer and Vendor Integrated Activity Reporting" below.

● **New One-Click Access Buttons in Vendor Maintenance**
Buttons have been added to the one-click access area in vendor maintenance (AP-06-01). You may use these buttons to access related info for a vendor:
- Vendor inquiry
- Check inquiry
- Pay To addresses
- Excellence Period History
- PO E-Form Delivery settings

Inventory/Sales

● **New Stock Record Integrated Activity Reporting**
With special ReportMate reporting files you can now review and analyze all the activity for a stock item. This special reporting consolidates all the related data from various modules into a chronological listing of activity. You can see the sequence of everything that happened and when it happened.

Note: The major distinction between this reporting file and the stock ledger is that this file includes open transactions.

Stock Integrated Activity - RM25
This file consolidates information from the following stock-related activity files:

- Inventory Ledger
- Sales orders

- Service orders (open and history)
- Purchase orders (open and history)
- Open receivings transactions
- Open inventory transactions
- Physical count transactions
- Warehouse transactions (open and history)
- Work orders
- Rental transactions
- Customer returns
- Vendor returns

To define a report with this file you need to create a format with a single stock number (via a range), one or all locations (via a range), and a range of dates. If the end date is zeros or blank it will default to 99999999.

- The range of locations do not apply to warehouse trx. The location is determined by the logon operator. If the location is in the location range, it will print the trx for that location only.

A standard activity report format is WISTKHST. It is available from the stock Live Portal (Inventory Manager role, select a stock item, History).

● **Optional Use of Fonts for Customer Price List**
The customer price list (IS-05-05-02) now supports the use of proportional fonts during printing. This can be helpful when you mail or e-mail price lists to customers.

To use this feature you must print with a page style. See the related printer features in the SwiftMate doc for more information.

● **Optional Use of Fonts for Stock Price List**
The stock price list (IS-05-05-01) now supports the use of proportional fonts during printing. This can be helpful when you mail or e-mail item price lists to customers.

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ExecuMate
● **New Auto-Setup Option**
If you are installing ExecuMate on your system you now have the option to use an automatic setup feature. This lets you answer a single question and then be ready to use ExecuMate.

When you access the ExecuMate control record (XM-04-01) for the first time a question will ask "Use standard setup for ExecuMate?". If you answer "Y" the program will automatically create a default setup for all ExecuMate features. *You're then ready to go* - run a gather and start using ExecuMate to analyze your business data!

The auto-setup feature does the following:
- Fills out all the fields in the XM control record
- Creates default cash flow assumptions

- Creates statistic record types for each application
- Creates default graph formats
- Creates default "Company Totals" profit center
- Creates a default XM operator

● **New Information in XM Gather**
   During the ExecuMate Gather process (XM-02) the program now:

   • Gathers employee counts per department
   • Provides data to calculate sales per employee department per financial statement column.

● **New Company Totals**
   You now have numerous new fields in the XV08 Data Dictionary for company totals:
   • XV08 121-128 Admin Dept Active Employee Counts/Ratios
   • XV08 131-138 Sales Dept Active Employee Counts/Ratios
   • XV08 141-148 Service Dept Active Employee Counts/Ratios
   • XV08 151-158 Technician Dept Active Employee Counts/Ratios
   • XV08 161-169 Total Active Employee Counts/Ratios

Job Cost
● **Option in Job Details to look up all Cost Code parts**
   In the Job Detail maintenance program (JC-02-04) you may now look up valid cost code parts (via [F4]) in addition to looking up existing job detail records ([F3]) for the job.

Credit Card Interface
● **New ActiveX Interface for PCCharge**
   You may now choose to interface to PCCharge via an ActiveX interface that eliminates the passing of data via text files. This is more compliant with recommended PCI security standards.

   This feature was also released as an update for Revisions 13 and 14.

● **Interface to Ingenico 6650 Pinpad Device for PCCharge Users**
   An interface with PCCharge was developed for the Ingenico 6550 Pinpad device. This device integrates a card swipe with a pinpad device.

   See the writeup in the related Rev 14 FLASH notice for more details on using this device.

   This feature was released early as a FLASH update for Revision 14.

SQLSync
● **Includes Updates via NetLink Technology**
   NetLink now automatically sets up the appropriate environment options to update SQLSync with data changes made via NetLink. In past revisions you were required to insert these options in the config file used by NetLink. The system now maintains a text file of environment variables needed for SQLSync, and this text file is automatically used by NetLink.

- **Option to Delay installation of SouthWare SQL/ODBC**
  If SouthWare ODBC is not configured, any operators with SwiftMate security of 7 or above are asked to configure SouthWare ODBC each time they log in. You can now choose to deactivate SouthWare ODBC until you are ready to implement SouthWare ODBC at a later time.

  This question about configuring SouthWare ODBC will now be asked only once for an installation. If you choose not to configure at that time you must access the SQL Tools Manager (XX-08-09-06) to reactivate it. The SQL Tools Manager has also been enhanced to better inform about the status of SouthWare ODBC.

  This feature was released early as a FLASH update for Revision 14.

Developer

- **New Optional Global Developer Libraries**
  You now have the option to add custom code to all SouthWare programs that you recompile. Empty developer copy libraries SWDEVLOP.WS and SWDEVLOP.PL are provided for this use.

  These are copied into SWMESG.WS and SWMESG.PL respectively so that a recompile will include the code in the developer libraries.

- **SQLSync Now Includes Updates via I2OPNCOM Technology**
  I2OPNCOM developer technology now automatically sets up the appropriate environment options to update SQLSync with data changes made via I2OPNCOM. In past revisions you were required to insert these options in the config file. The system now maintains a text file of environment variables needed for SQLSync, and this text file is automatically used by I2OPNCOM.

Conversion Notes

Below are some notes you should read **before** loading this update.

<u>System Requirements</u>
- ***Runtime required***
  - ***-   Windows - 8.1 runtime (available on Rev 15 product CD)***
  - ***-   Unix - 8.1 runtime***
  - ***-   Thin Client - 8.1 (available on Rev 15 product CD)***
  - *-   Aculaunch - 8.1*
- Compiler Required (Developers only)
  - **-   8.1**
- Minimum Hardware
  - -   Pentium 1 ghz or equivalent
  - -   At least 512 mb per Windows workstation, 1 gigabyte for use of Live Portals - more is recommended to use Live Portals since the browser will require more memory to keep several simultaneous pages loaded
- Disk Space
  - -   Should be similar to Rev 14. Allow for up to a 10% expansion.

<u>Steps Before You Load the Upgrade</u>
- Post pending transactions. This is not mandatory but is good practice.
- Make a good (tested) backup of your data and run directory.
- Rebuild all data files using vutil to ensure the integrity of the data files prior to the conversion. If you have not been doing this regularly you may recover more disk space than any additional space required for Rev 15.
- If you have sufficient disk space you can plan on running parallel.
  - -   If you will be using Rev 15 in a new environment/directory make sure you plan to change any macros, icon paths, config paths, etc. that must be adjusted for the new file paths.
  - -   If you remove or rename the old run directory you may need to re-register any Windows controls that were registered from the old directory. This should be handled automatically but you may need to verify if you have problems after installation.

<u>Recommended Approach</u>
NOTE: SouthWare <u>highly</u> recommends that you install Rev 15 in your **current** run directory:
  - -   back up your current SouthWare system into a separate directory
  - -   delete all programs (files that end in ".OBJ") in the SouthWare program directory
  - -   delete sort files (files such as "Z*.FIL" and "RMRN*.FIL") in the SouthWare temp directory
  - -   install Rev 15 into your current SouthWare programs directory
  - -   run the Rev 15 conversion in your current SouthWare directory.

  You may change to a new directory for Rev 15, but because of OfficeLink files, spool files, NetLink files/paths, macrobmp directories, desktop icon paths, etc., it is much easier to convert in the same directory where SouthWare is currently running. To run parallel we recommend you copy your Revision 14 system to another directory.

- Turn on overwrite protect or save sequential files for records that you don't want

to be overwritten by standard SouthWare records.

Loading the Upgrade
- Install Rev 15 in your existing environment. Use the normal installation steps for a new system.

Running the Conversion Process
After you load the update the first logon session in Rev 15 will automatically run the conversion process. *There are few conversions so this should not take long.*
- **Locking Other Users Out of the System**
  It is a good idea to log out and lock other workstations before running the conversion. You may use the Workstation Abort process and Workstation Lockout process described in XX-02-01. This essentially puts you in single-user mode for the conversion. After the conversion you may use the Status Manager to unlock other workstations.
- The **rebuild of the SouthWare ODBC Data Dictionary** is included in the conversion. For REV15 SouthWare is now using a separate swodbc folder named swodbc15. The conversion/install will copy the files it needs from the swodbc directory. After the conversion you may delete the swodbc folder from the SouthWare run directory.

The First Time You Log On to Rev 15 (Windows workstations only)
- **Interactive Release Notice** - The first time each operator logs in to Rev 15 the menu program automatically executes an object "REV15". This object displays a help topic that provides a welcome and overview of highlights of Rev 15.
- **Register Windows Controls** - Selected Windows controls will be re-registered as needed for updated versions.
- **Administration privileges** - Because you will be installing new files and UDD for ODBC during your first login, you must be logged into your server with administrator privileges to ensure that your SWODBC Server and DSN's get updated correctly. All the activex controls (such as grids) will also be re-registered after the conversion. If you are converting to a different directory, it's important that you have administration privileges when the controls register to ensure that your windows registry is updated correctly.

File Changes

Below is an overview of the files changed via conversion programs by this update.

Product	Files	Reason
SwiftMate	Workstation	Add separate fax and e-mail ID
TaskWise	Task Sales Opportunity	New file
	Competitors	New file
	Opportunity/Competitor Xref	New file
NetLink	Control file	• Add 3 additional categories and description for each • Add history flag - option to suppress history for internal request • Add flag to indicate which SW server method is used for SWWEBWIN
	NetLink Request Types	New fields
Forms	Delivery Type	New file
	Delivery Xref	New file
Accounts Receivable	Commissions Due	Increased SouthWare and user filler
	Commissions Detail	Increased SouthWare and user filler
	Billing Commissions	Increased SouthWare and user filler
ImportMate	Formats	New fields and options