



Enspire Administrators Guide

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Chapter 1

Accounting Periods

The Accounting Periods Maintenance dialog allows you to add and modify accounting periods and determine when your fiscal year begins.

Enspire gives you the option of using 12 or 13 accounting periods. Typically, if you use 12 accounting periods, the periods are divided according to the months of the year. If you use 13 accounting periods, they are typically divided into four-week segments. The date your fiscal year begins establishes the beginning date for the first accounting period.

You must figure taxable income on the basis of a tax year. A “tax year” is an annual accounting period for keeping records and reporting income and expenses. The tax years you can use are:

- A calendar year is 12 consecutive months beginning January 1 and ending December 31.
- A fiscal year is period of 12 consecutive months that does not match a calendar year and that is normally matched to a unique business cycle.

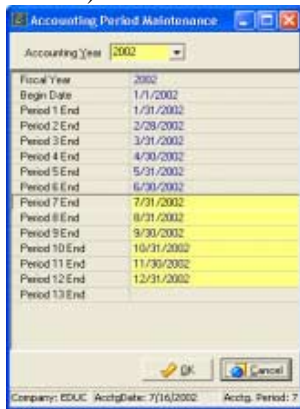
Key Terms and Phrases

- Adding Accounting Periods – An ending date for each accounting period you want to use.
- Modifying Accounting Periods – To change the ending date of an accounting period:
- Deleting Accounting Periods - In Enspire, you cannot delete accounting period

Adding Accounting Periods

In Enspire, you do not actually add accounting periods. Rather, you provide an ending date for each accounting period you want to use.

1. Open the Accounting Period Maintenance dialog (Administration > System Control > Accounting Periods).



2. Select an Accounting Year.
3. Type an ending date for each accounting period.
4. Click OK.

Modifying Accounting Periods

To change the ending date of an accounting period:

1. Open the Accounting Period Maintenance dialog (Administration > System Control > Accounting Periods).
2. Type the new ending date for each accounting period you want to modify. (Note: Enspire will not modify periods prior to the current date).
3. Click OK.

Deleting Accounting Periods

In Enspire, you cannot delete accounting periods

Chapter 2

Company Maintenance

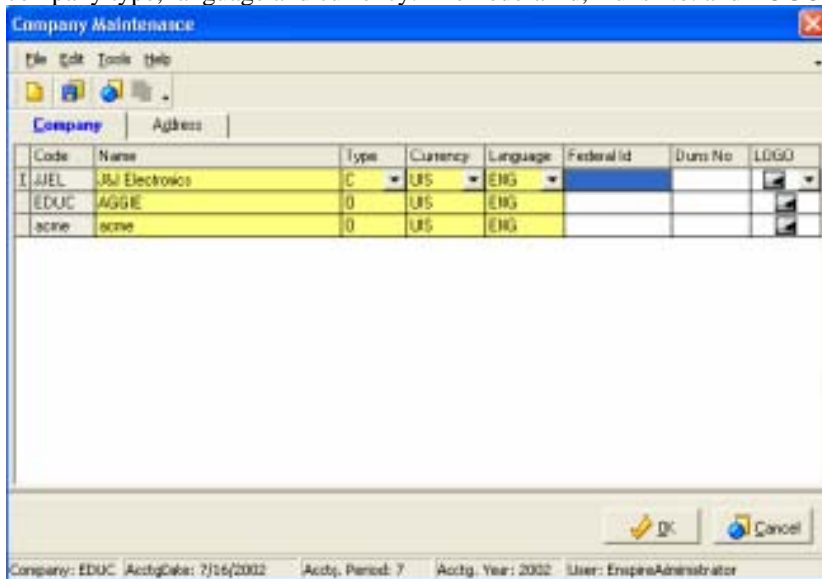
The Company Maintenance dialog allows you to modify company information. Company information includes Code, Name, Type, Currency, Language, Federal Id, and Duns Number LOGO. Within the address tab, address and telephone information reside. The Company Maintenance dialog appears when you select Administration>System Control>Companies.

Key Terms and Phrases

- Company - The Company section of the Company Maintenance dialog is where you add a new company and assign the company type, language and currency
- Address - The Company Address section of the Company Maintenance dialog is where you add address, zip code and telephone information.

Company

The Company section of the Company Maintenance dialog is where you add a new company and assign the company type, language and currency. The Federal Id, Duns No. and LOGO are optional entries.



- Code - Code is the user-defined company identifier. This code is alphanumeric and can be up to four characters long.
- Company Name - Company Name is the user-defined description of the corresponding code or ID. The description is alphanumeric and can be up to 25 characters long.
- Company Type - Company Type determines whether you operate each of your companies separately or combine the general ledgers of two or more companies for accounting purposes. The available types are as follows:
 - C) Consolidated - This option is intended to combine the general ledgers of multiple companies. It is reserved for future use.
 - O) Operating - This option is used for most companies. It treats each company as a separate entity and does not allow any interaction between companies.
- Language - Language is the language used at the company. For information on languages, see Languages.
- Currency - Currency is the currency used at the company. For information on currencies, see Currencies.
- Federal ID - Federal ID is the company's federal tax ID number.
- Duns Number - Duns Number is the company's Dun and Bradstreet number.

Address

The Company Address section of the Company Maintenance dialog is where you add address, zip code and telephone information. To add address information, select the address tab and double click the company demographics box.

You are now at the address box. Simply input the desired information.

- Street Address - Street Address is the company's address.
- City - City is the city where the company is located. It is selected when the Zip Code is added.
- State - State is the state where the company is located. It is also added when the Zip Code is selected.
- Zip - Zip is the company's zip code. The user must use Lookup to select a Zip Code. Either, type in a zip code and select enter or select the Lookup button.
- Country - Country is the country where the company is located.
- Telephone - Telephone is the company's telephone number. It is an optional field.
- Fax - Fax is the telephone number for the company's fax machine. It is an optional field.

Chapter 3

Location Control

The Location Control dialog gives you the ability to establish consistent naming for cities, localities, counties, states, and countries. Enspire includes the proper names.

Key Terms and Phrases

- Location Control Module - Location Control maintains Enspire's state, city, county and zip code information.
- United States and Canada -Enspire provides location information for the United States and Canada as part of its standard package.
- Foreign Countries - Information for foreign country locations is not provided, however, the capability to add foreign information does reside within Location Control.
- Adding/Updating -Adding/Updating keeps information current in Location Control. Methods include automated updates via Enspire's DTS package and manual updates. The automated updates are made available from Independent Systems. Independent Systems provides the Location and Taxing information that comes pre-populated as part of the Enspire installation. Enspire only provides this initial population of data. To continue automated updates, contact Independent Systems at:
- Independent Systems

Internet: <http://www.taxrates.com>

E-mail: johnp@raxrates.com

Address: 526 Crescent Boulevard, Suite #216

Glen Ellyn, IL 60137 USA

Telephone: (630) 858-4067

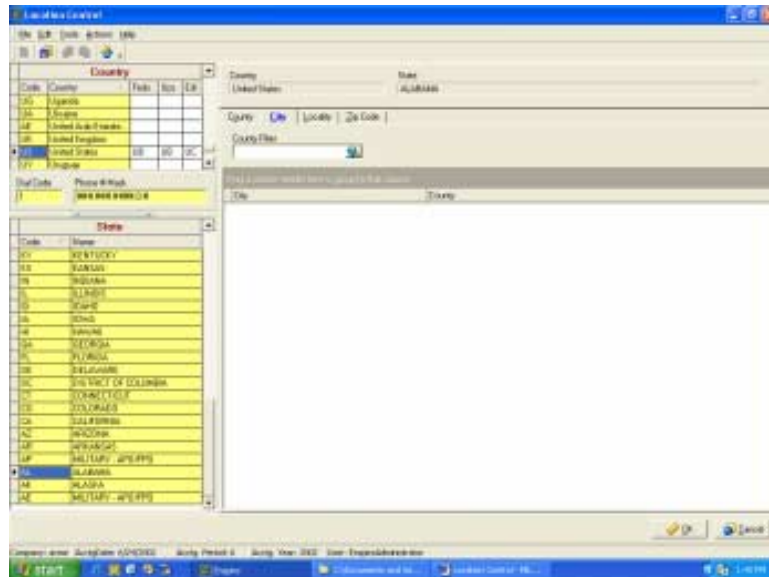
Fax: (630) 790-0280

Accessing Location Control

Selecting Administration/System Control/Location Control in Enspire accesses Location Control.



This is the base Location Control Screen



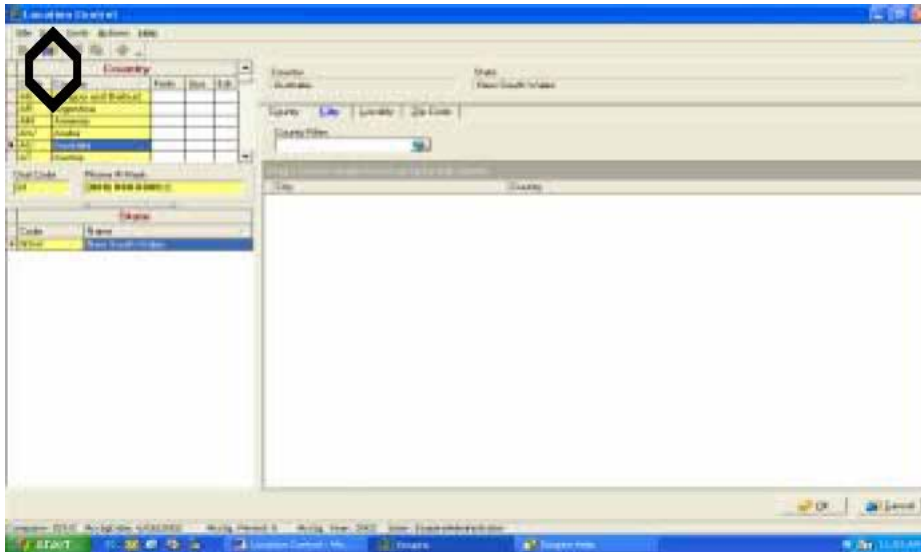
United States and Canada

Information concerning the United States and Canada does not need to be loaded initially. Enspire provides this information as part of its standard package.

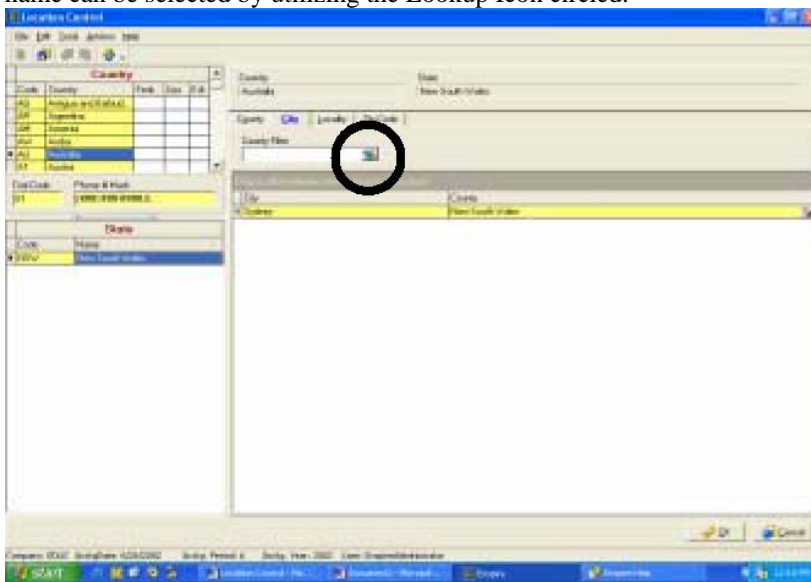
Adding Foreign Country Locations

Ensfire does not provide location information for foreign countries. The user must add this information. In order to do this, execute the following steps:

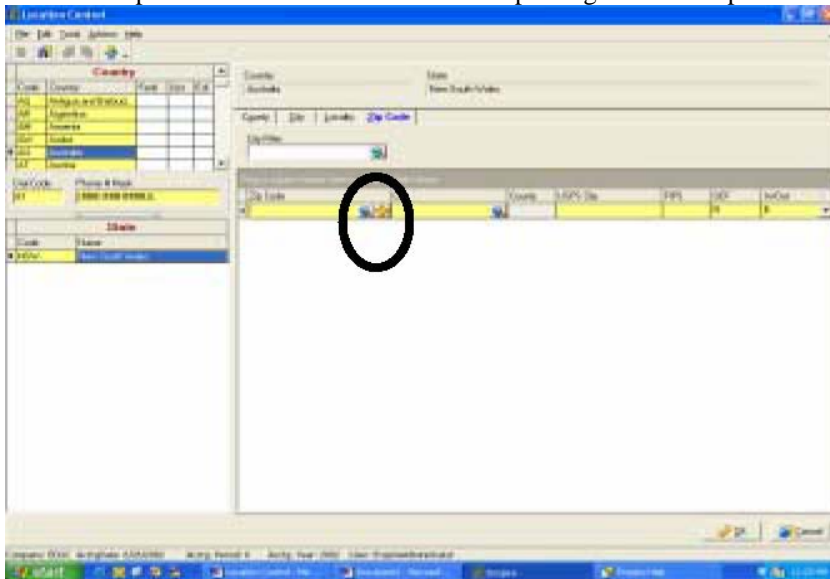
1. Click in the State section of Location Control and select the insert key. Next, type in the state code and the state name. Save the record.



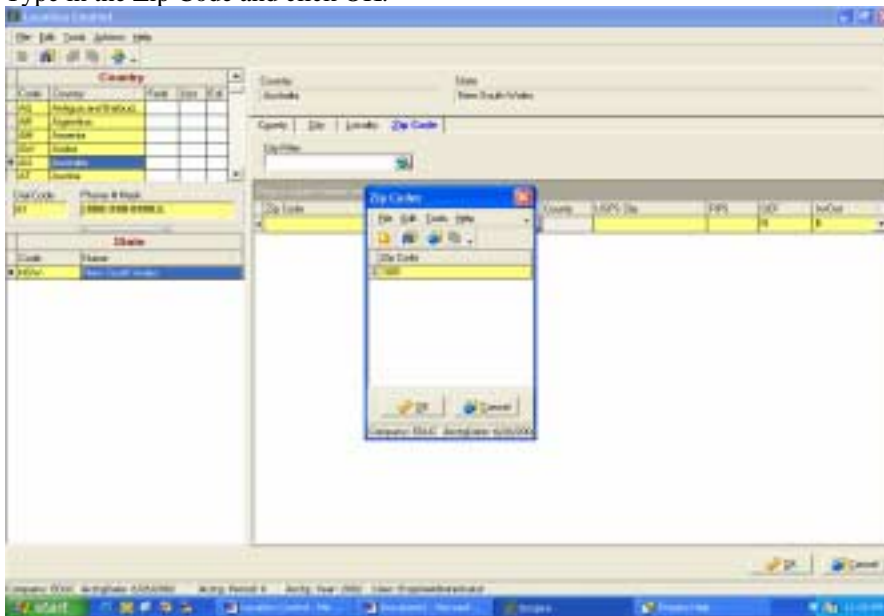
2. Select the County tab, hit your insert key, type in the county name and execute save.
3. Select the city tab and hit the insert key. Type in the city name and county name and save. The county name can be selected by utilizing the Lookup Icon circled.



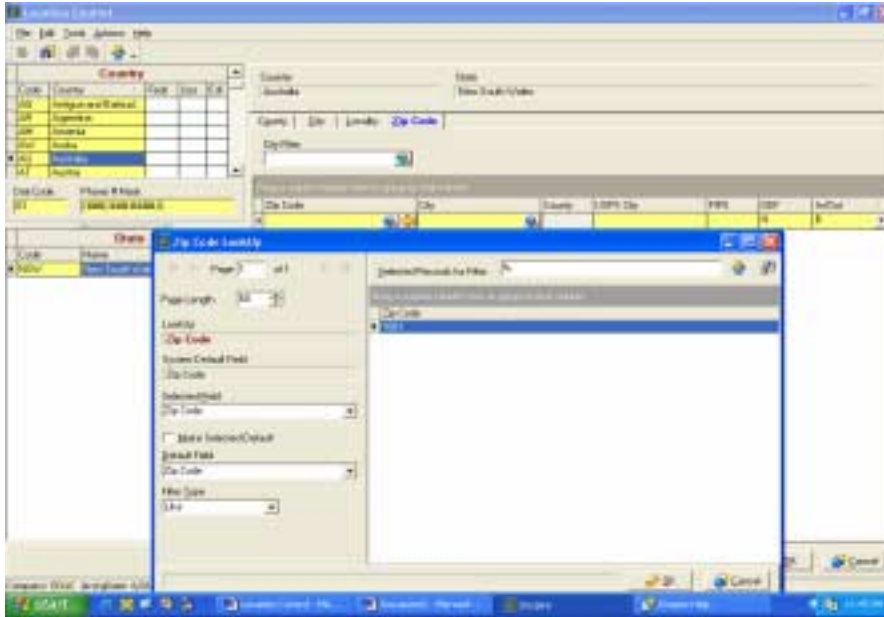
4. Select the zip code tab and hit insert. Select the plus sign to add a zip code.



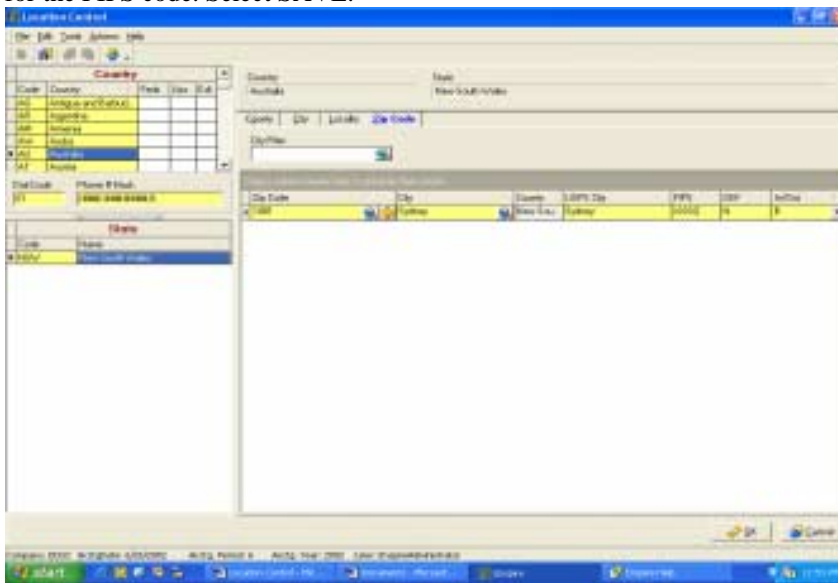
5. Type in the Zip Code and click OK.



6. Select the search icon to lookup the zip code.
7. Select the zip code to select.



8. Enter the city and USPS city (may also be looked up by selecting the search button) and four (4) X's for the FIPS code. Select SAVE.



9. Adding a foreign zip code is complete.

Adding/Updating Location Control

Location Control updates can be done manually or automatically. The preceding section, Adding Foreign Country Locations, instructs the user in making manual adjustments.

This section will focus on the tasks required to automatically update Location Control. In order to update automatically, the customer must purchase the information from Independent Systems. Independent Systems is the provider of the data utilized by Enspire to populate Location Control initially. Once the information has been received, perform the following tasks to execute an automatic update.

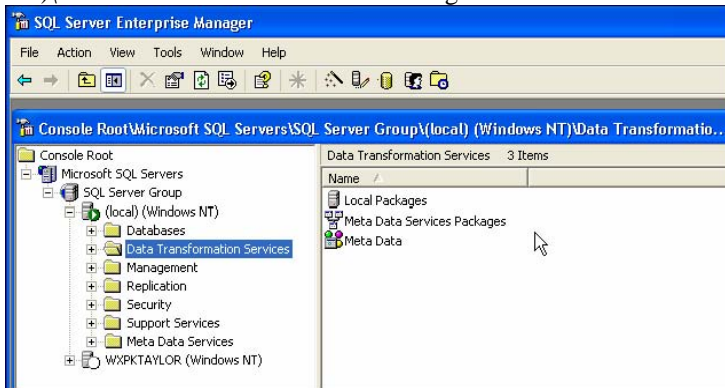
1. Download Tax and Zip Upload Package.zip from the Infor web-site (www.Infor.com). Log in, click on the Software Updates and select Enspire Updates.



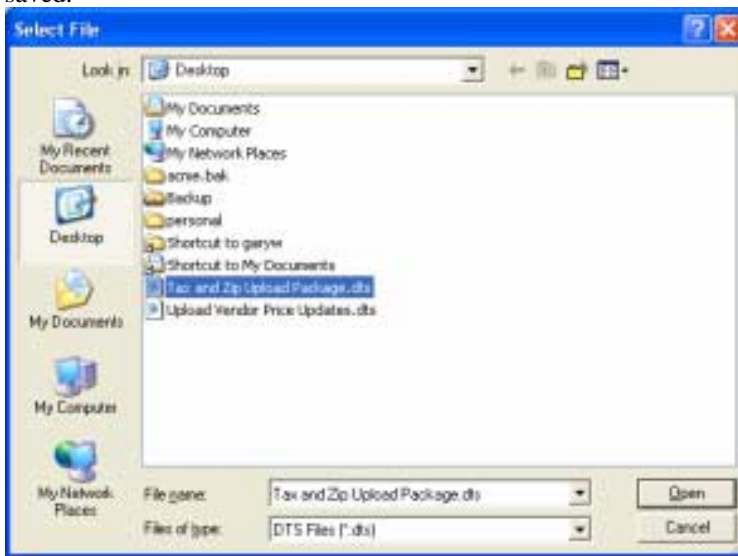
2. The select Enspire Tools and Utilities, save the zip file, and unzip it to the desired location.



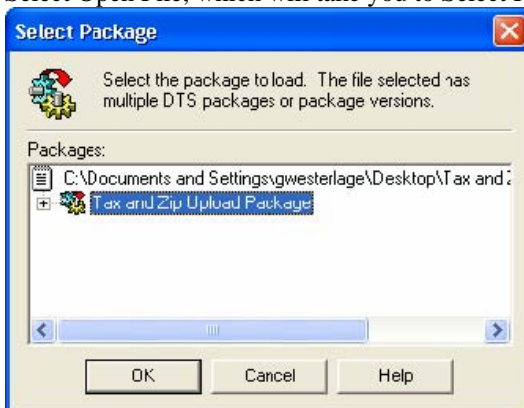
- Open SQL Server Enterprise Manager to \Microsoft SQL Servers\SQL Server Group\local (Windows NT)\Data Transformation Services and right select Data Transformation Services.



- Left select Open Packages and map directory to location that Tax and Zip Upload Package.dts was saved.



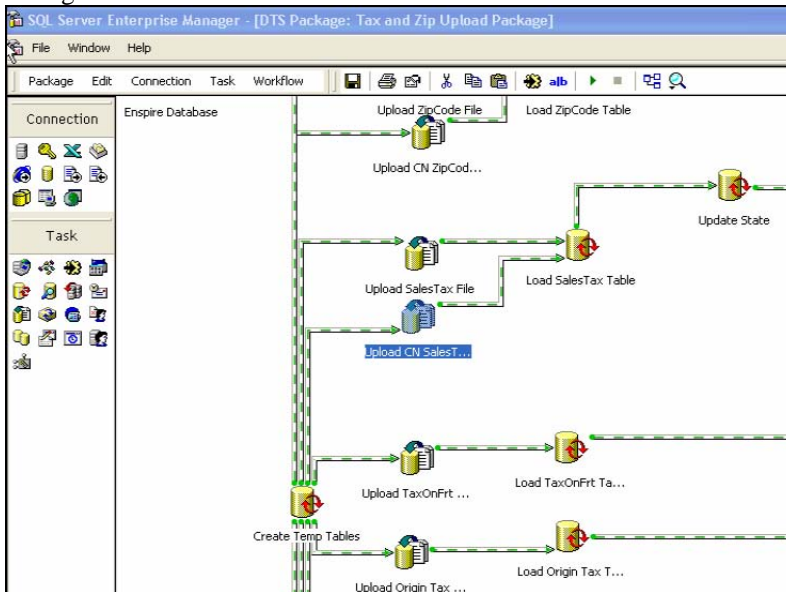
- Select Open File, which will take you to Select Package.



- Select which package version to utilize and click OK.
- In the DTS screen select Package and then Save As to convert from a Structured Storage File to an SQL Server File. To do this select the pop down window next to Structured Storage File, highlight SQL Server and click OK. This will permanently save the DTS package in your database.

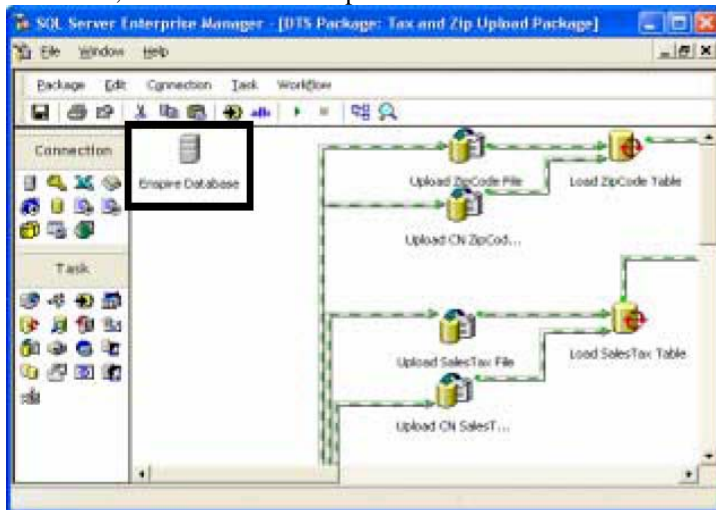


8. You are now in SQL server DTS Package: Tax and Zip Upload. This completes downloading and saving Data Transformation Services.

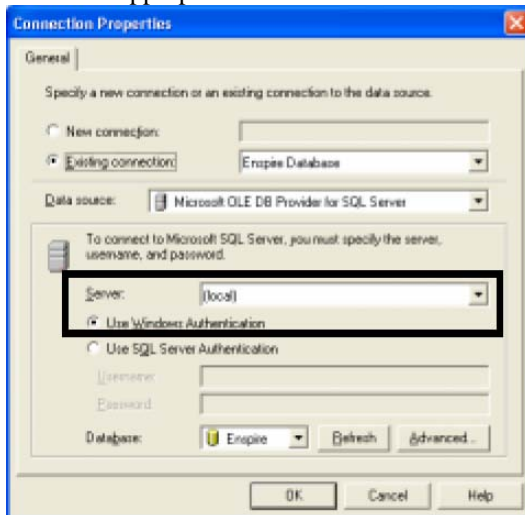


10. The next step in completing the update process is mapping the source files from Independent Systems to SQL servers DTS Package: Tax and Zip Upload.

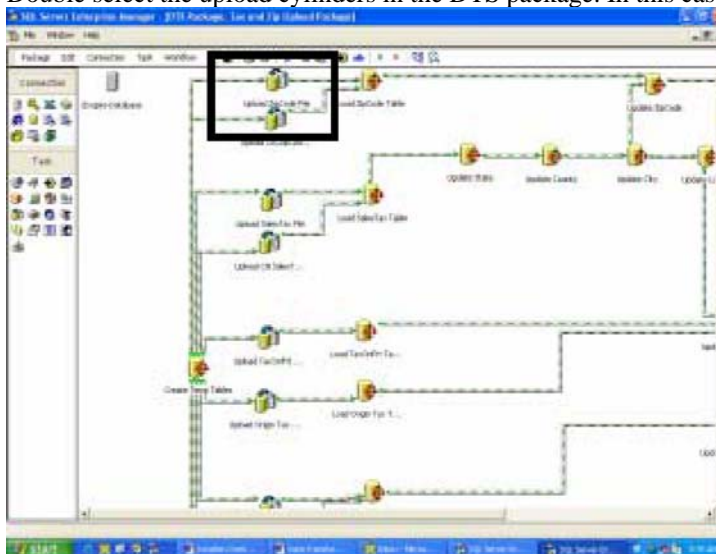
- a. To do this, double click the Ensfire Database button.



- b. Select the appropriate server from the Server drop-down menu and click OK.



- c. Double select the upload cylinders in the DTS package. In this case, it is the upload zip code file.



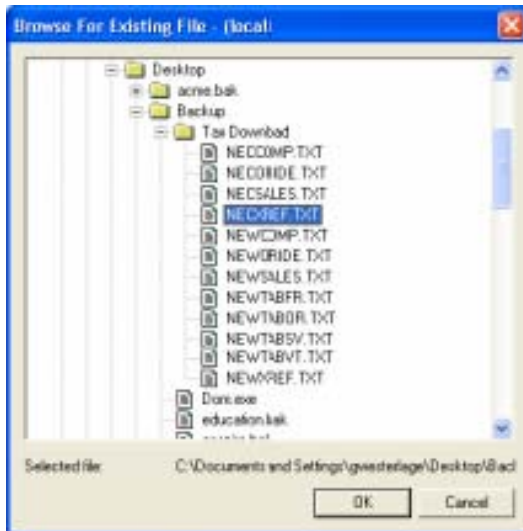
This will take you to the Bulk Insert Task Properties screen.



- d. Select in the Source data file box and scroll to the end to find the file name. Click on the ellipse to map to the Source data file.
- e. Map to the location of the desired file and double select or click and select open. (Note: This must be repeated for each of the upload cylinders. There are a total of ten (10) files that must be uploaded. This DTS package provides information for Location and Tax jurisdiction and must be executed entirely. The corresponding Upload and .TXT Files are listed below).

Upload Cylinders	.TXT Files
Upload ZipCode File	NEWXREF.TXT
Upload CN ZipCode File	NECXREF.TXT
Upload SalesTax File	NEWSALES.TXT
Upload CN SalesTax File	NECSALES.TXT
Upload TaxOnFrt File	NEWTABFR.TXT
Upload Origin Tax File	NEWTABOR.TXT
Upload Override File	NEWORIDE.TXT
Upload CN Override File	NECORIDE.TXT
Upload Locality File	NEWCOMP.TXT
Upload CN Locality File	NECCOMP.TXT

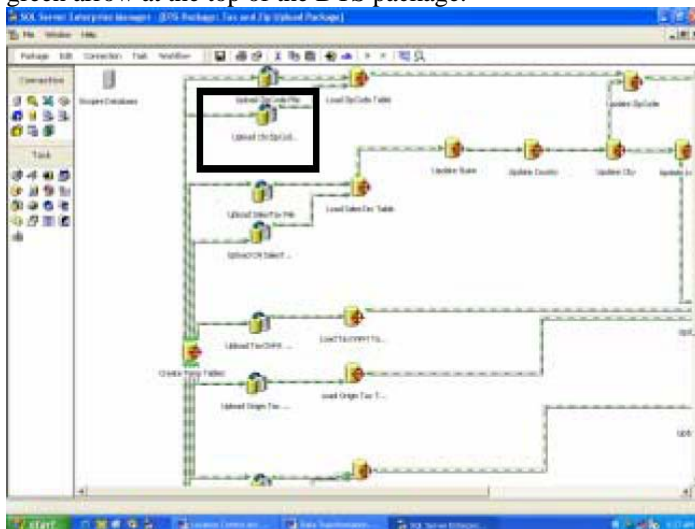
- f. Click OK to return to the main DTS Screen

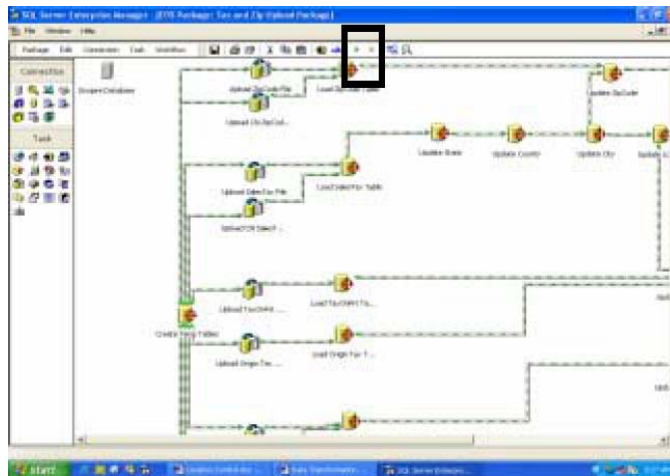


- g. Select the next upload cylinder and repeat the file upload process. Continue to repeat the process until all ten (10) files are uploaded.

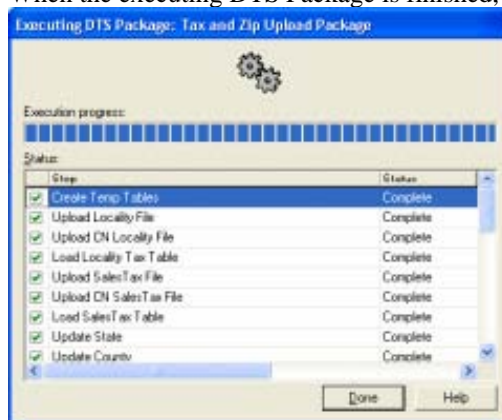


- h. Once the ten (10) files are uploaded, all that remains is to execute. To do this, simply select the green arrow at the top of the DTS package.






- i. When the executing DTS Package is finished, Select DONE and the update is complete.

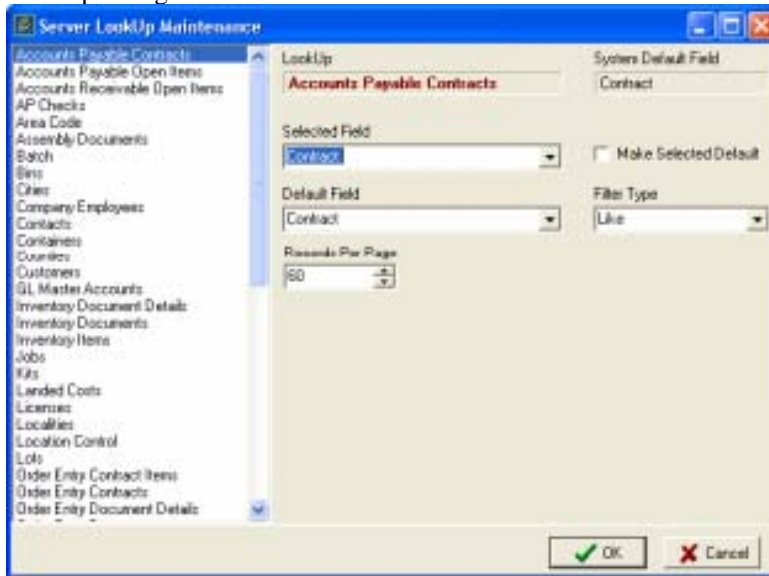


Chapter 4

LookUp Control

The LookUp dialog applies to all Ensfire programs that include a LookUp field and allows you to search for a specific record based on the criteria you provide.


The dialog below appears when you select the LookUp button () in a lookup field, or choose the Open command (CTRL+O) in any of the programs that enable lookups. For example, in the Item Master dialog, choosing Open displays the Item LookUp dialog and allows you to search for the item you want to open. In the Order Entry dialog, the Customer field allows you to select the LookUp button to display the Customer LookUp dialog and search for a customer.



Key Terms and Phrases

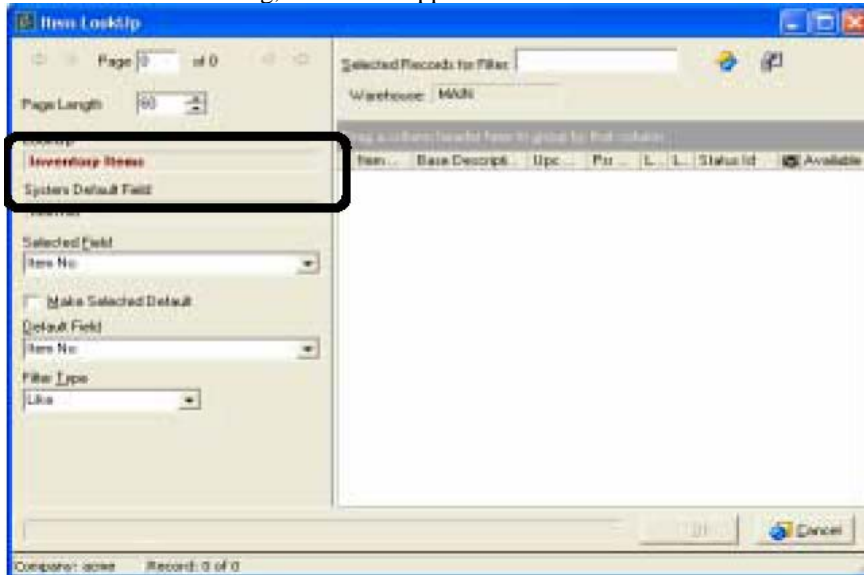
- Selected Records for Filter - Allows you to type a new value for the lookup.
- LookUp - Displays the type of information you are looking up. For example, if you click the LookUp button in the Item Master dialog, then Items appears
- System Default Field - The field Enspire uses to look up records. For example, in Vendor Maintenance, the System Default Field is Vendor.
- Selected Field -Allows you to select a different field for looking up records. This field applies only to the current lookup unless you select Make Selected Default. For example, if you are in Vendor LookUp and want to lookup vendors by name instead of number, you select Vendor Name here.
- Make Selected Default - Uses the Selected Field as the default field for performing lookups. Your selection here remains in effect until you change it.
- Default Field -Allows you to override the System Default Field. The field you select here becomes the new default and remains in effect until you change it. The LookUp dialog determines the options that appear in this field. For example, the Vendor LookUp dialog contains different options than the Customer LookUp dialog.
- Filter Type - Determines the filter applied when you perform a lookup.
- Records per Page – Determines the number of records displayed.

Selected Records for Filter

Selected Records for Filter  allows you to type a new value for the lookup. After you type the value, select **Fetch** to retrieve the records for the lookup.

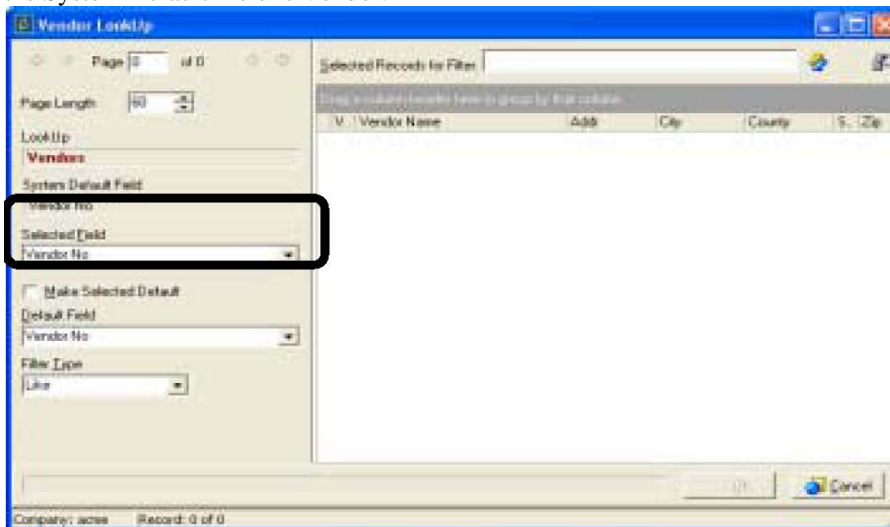
LookUp

LookUp displays the type of information you are looking up. For example, if you select the LookUp button in the Item Master dialog, then Items appears here.



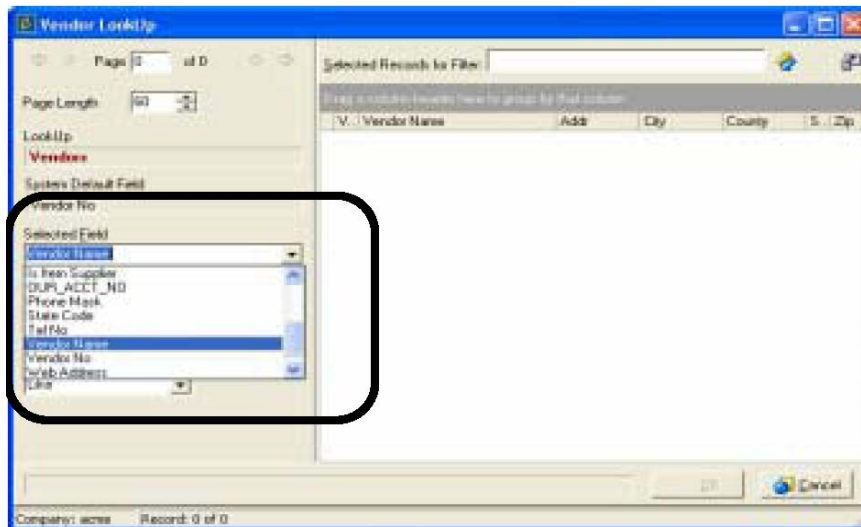
System Default Field

System Default Field is the field Ensphere defaults to look up records. For example, in Vendor Maintenance, the System Default Field is Vendor.



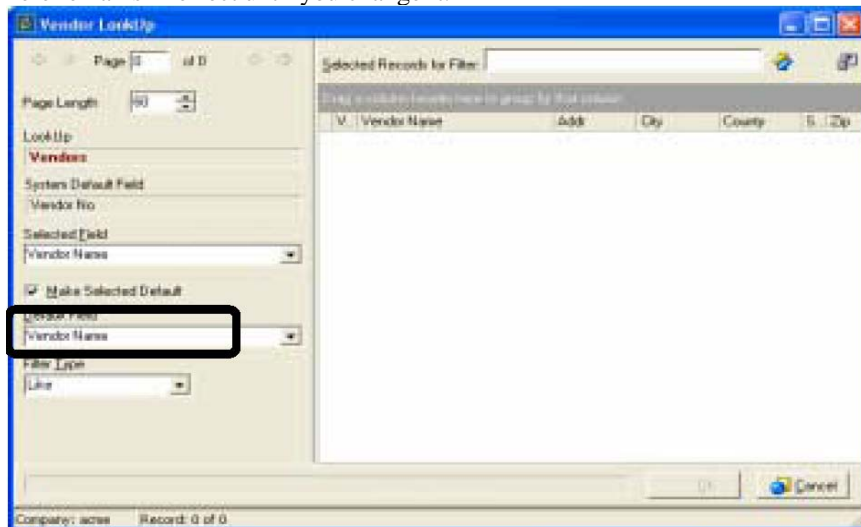
Selected Field

Selected Field allows you to select a different field for looking up records. This field applies only to the current lookup unless you select Make Selected Default. For example, if you are in Vendor LookUp and want to lookup vendors by name instead of number, you select Vendor Name here. The LookUp dialog determines the options that appear in this field. For example, the Vendor LookUp dialog contains different options than the Customer LookUp dialog.



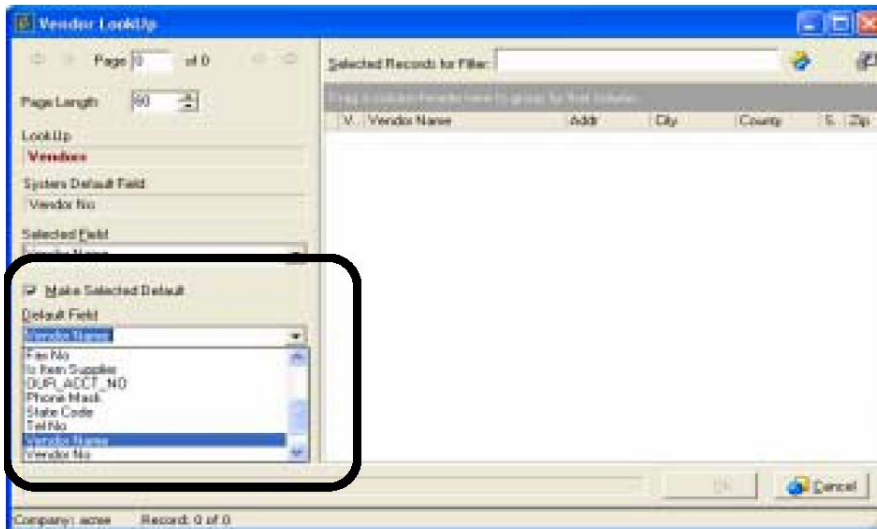
Make Selected Default

Make Selected Default uses the Selected Field as the default field for performing lookups. Your selection here remains in effect until you change it.



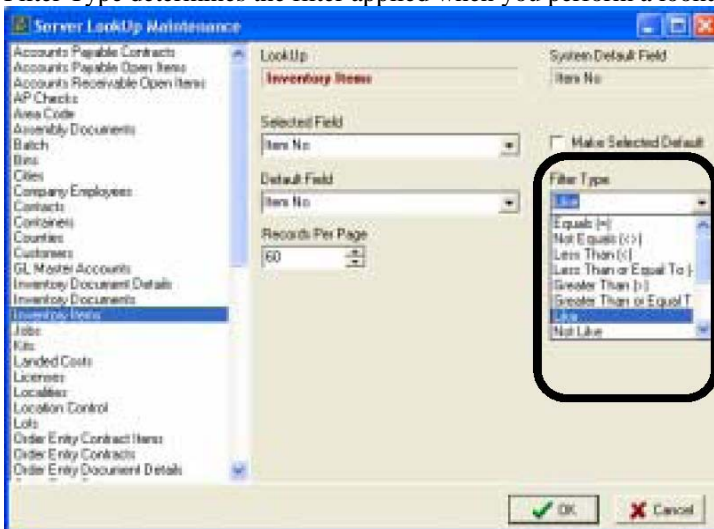
Default Field

Default Field allows you to override the System Default Field. The field you select here becomes the new default and remains in effect until you change it. The LookUp dialog determines the options that appear in this field. For example, the Vendor LookUp dialog contains different options than the System Default Field.



Filter Type

Filter Type determines the filter applied when you perform a lookup. The options are:



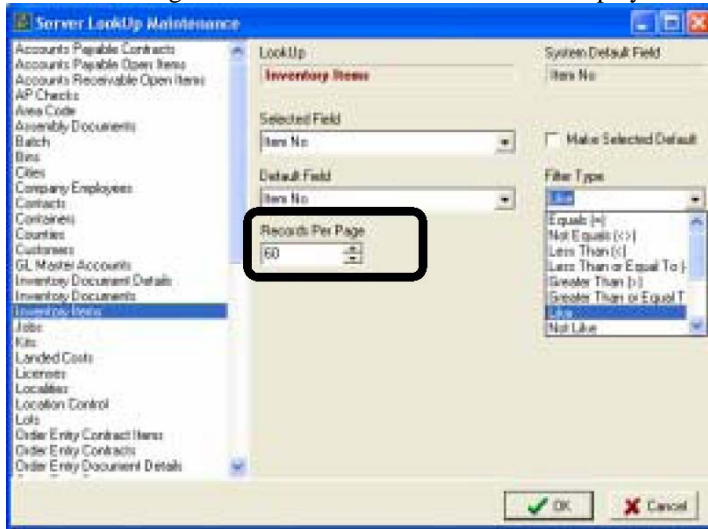
- Equals (=) - The data in a field must match exactly the value you type for the lookup. If an exact match occurs, the corresponding record passes this filter requirement. If an exact match does not occur, the corresponding record fails this filter requirement and is not included in the lookup results. If you want to include partial matches instead of exact matches in the lookup results, use the Like filter type.
- Not Equals (<>) - The data in a field must not match the exact value you type for the lookup. If a match does not occur, the corresponding record passes this filter requirement. If a match does occur, the corresponding record fails this filter requirement and is not included in the lookup results.
- Less Than (<) - The value of the data in a field must be less than the value you type for the lookup. If the value in a field is less, the corresponding record passes this filter requirement. If the value in a field is greater than or equal to the lookup value, the corresponding record fails this filter requirement and is not included in the lookup results.
- Less than or Equal to (<=) - The value of the data in a field must be less than or equal to the value you type for the lookup. If value in the field is less than or equal to the lookup value, the corresponding

record passes this filter requirement. If a value in the field is greater than the lookup value, the corresponding record fails this filter requirement and is not included in the lookup results.

- Greater Than (>) - The value of the data in a field must be greater than the value you type for the lookup. If the value in the field is greater, the corresponding record passes this filter requirement. If the value in the field is less than or equal to the lookup value, the corresponding record fails this filter requirement and is not included in the lookup results.
- Greater than or Equal to (>=) - The value of the data in a field must be greater than or equal to the value you type for the lookup. If value in a field is greater than or equal to the lookup value, the corresponding record passes this filter requirement. If the value in a field is less than the lookup value, the corresponding record fails this filter requirement and is not included in the lookup results.
- Like - The value of the data in a field must match, either exactly or partially, the value you type for the lookup. If a match occurs, the corresponding record passes this filter requirement. If a match does not occur, the corresponding record fails this filter requirement and is not included in the lookup results.
- Not Like - The value of the data in a field must not match, either exactly or partially, the value you type for the lookup. If a match does not occur, the corresponding record passes this filter requirement. If a match does occur, the corresponding record fails this filter requirement and is not included in the lookup results.
- Between - The value of the data in a field must fall between the values you type for the lookup. If the value is between the lookup values, the corresponding record passes this filter requirement. If the value is not between the lookup values, the corresponding record fails this filter requirement and is not included in the lookup results. Separate the lookup values with commas.
- Not Between - The value of the data in a field must not fall between the values you type for the lookup. If the value is not between the lookup values, the corresponding record passes this filter requirement. If the value is between the lookup values, the corresponding record fails this filter requirement and is not included in the lookup results. Separate the lookup values with commas.
- In List - The value of the data in a field must be included in the list of values you type for the lookup. If the value is included in the lookup values, the corresponding record passes this filter requirement. If the value is not included in the lookup values, the corresponding record fails this filter requirement and is not included in the lookup results. Separate the lookup values with commas.
- Not in List - The value of the data in a field must not be included in the list of values you type for the lookup. If the value is not included in the lookup values, the corresponding record passes this filter requirement. If the value is included in the lookup values, the corresponding record fails this filter requirement and is not included in the lookup results. Separate the lookup values with commas.
- Blank - The field must be empty. If a field is empty, the corresponding record passes this filter requirement. If a field is not empty, the corresponding record fails this filter requirement and is not included in the lookup results.
- Not Blank - The field must not be empty. If a field is not empty, corresponding record passes this filter requirement. If a field is empty, the corresponding record fails this filter requirement and is not included in the lookup results.

Records Per Page

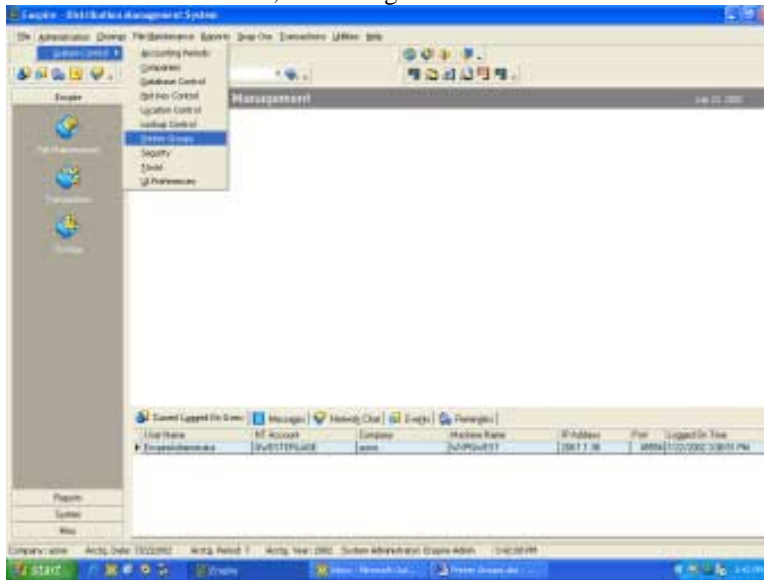
Records Per Page determines the number of records displayed.



Chapter 5

Printer Group Maintenance

The Printer Group Maintenance dialog allows you to add, modify, and delete printer groups. This dialog appears when you select Printer Groups within the System Control folder. In addition to the fields and sections discussed below, this dialog also includes the Standard toolbar and the Status bar.

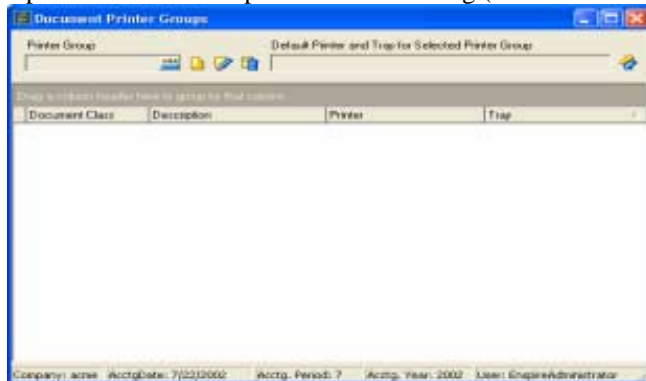


Key Words and Phrases

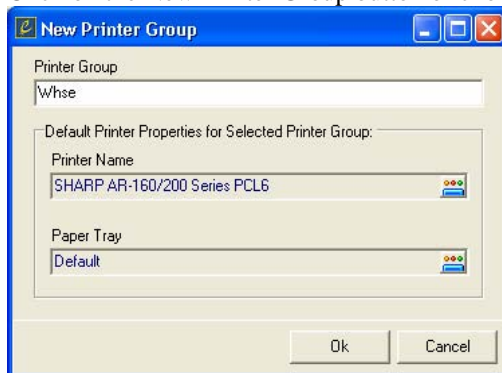
- Adding Printer Groups – Allows the user to add new printer groups.
- Changing the Name of a Printer Group – Allows the user to change the name of printer groups.
- Deleting Printer Groups – Allows the user to delete printer groups

Adding Printer Groups

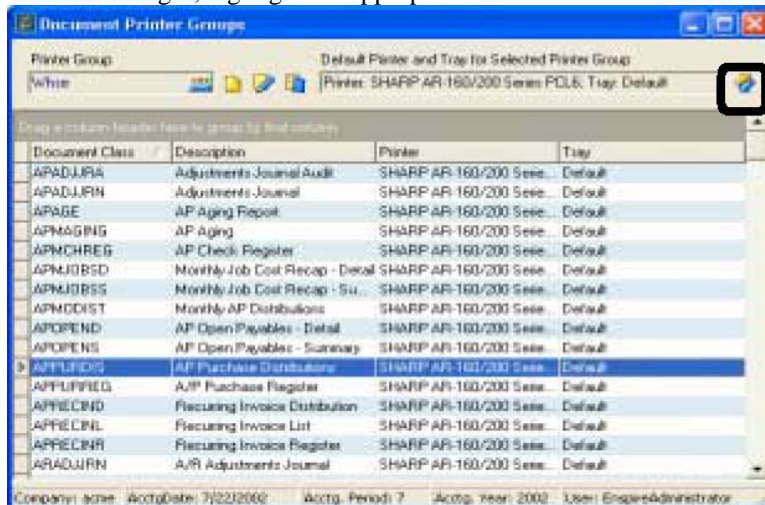
1. Open the Printer Group Maintenance dialog (Administration > System Control > Printer Groups).



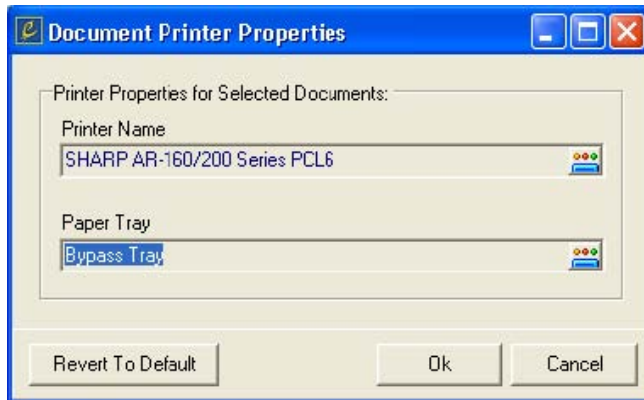
2. Click on the New Printer Group button or choose New (CTRL+N)



3. Type a Printer Group Name (Printer Group Name lists the printer groups defined in Enspre). This name is alphanumeric and can be up to 32 characters long.
4. Click OK.
5. Review Document Class and determine if any changes need to be made to the default printer
6. To make changes, highlight the appropriate document and select the Fetch button.



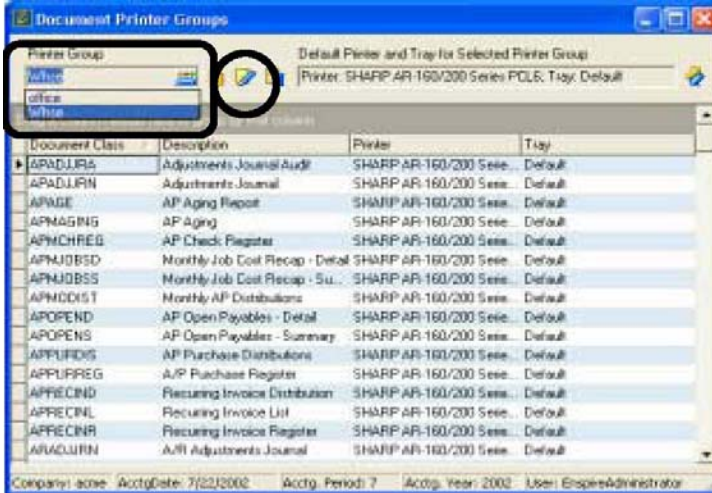
7. Make Printer and/or Paper Tray changes and click OK.



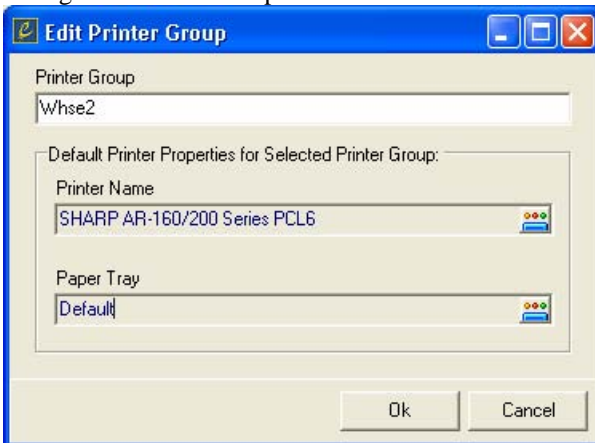
8. Repeat as necessary. Select SAVE from the file menu (CTRL+S) when complete.

Changing the Name of a Printer Group

1. Open the Printer Group Maintenance dialog (Administration > System Control > Printer Groups).
Select the printer group you want to edit and then hit the edit button.



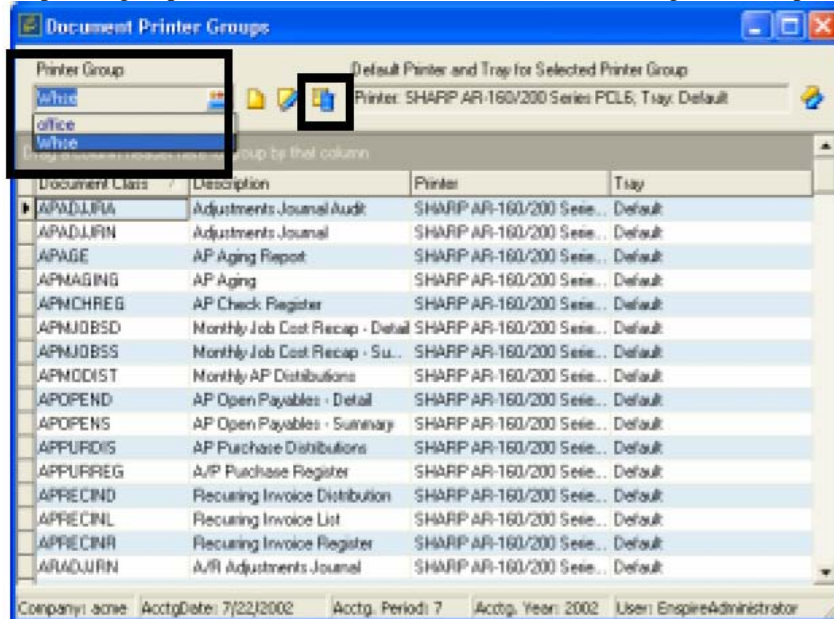
2. Change the Printer Group and click OK.



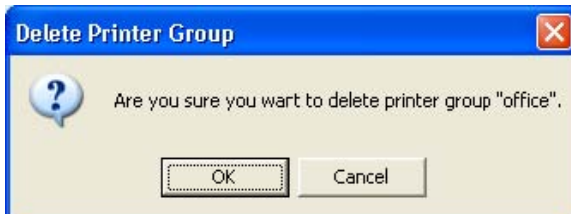
3. Choose Save (CTRL+S).

Deleting Printer Groups

1. Open the Printer Group Maintenance dialog (Administration > System Control > Printer Groups).
2. Select the Printer Group Name you want to delete (CAUTION – Deleting printer groups will “null out” the printer group and neither warehouses nor users will be assigned to the printer).



3. Select the Delete button.



4. Click OK and the Printer Group is deleted.

Chapter 6

Enspire Security

Enspire provides security features that enable system administrators to customize access parameters for each of Enspire's users. These security parameters include managing Enspire and Company Users, Enspire and Company Roles, Company Role Commands, Company Role Users and Company Role Events. In this section information is filtered and assigned from data in the tab preceding the one being worked in. For instance, Enspire Users are filtered from NT Users and Company Users are assigned from Enspire users, Company Roles are selected from Enspire roles, etc. Information flows from left to right in the tabs. Each of these parameters will be defined in the following sections.

WARNING! Changes made to Enspire Security parameters that are released as part of an Enspire Build Revision are the responsibility of each company's system administrator to manage. For instance, if an Enspire Build Revision added a security option for pricing, it would be the responsibility of each company's administrator to designate pricing access privileges for authorized company users. The Enspire Build Revision will default to no authorizations allowed upon release. Check the Maintenance Log for updates.

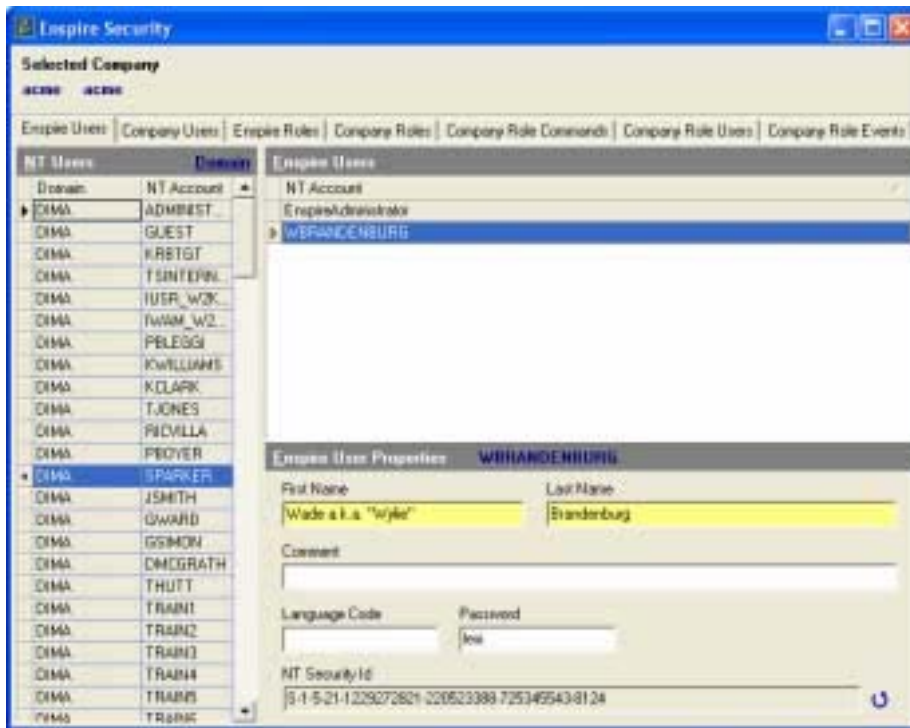
Key Terms and Phrases

- Enspire Users -Candidates from an NT user account assigned to Enspire
- Company Users - Enspire Users that are assigned to specific companies.
- Enspire Roles - Enspire Roles are user-defined terms intended to establish employee authority over a designated set of tasks.
- Company Roles -Company Role allows the administrator to assign the predefined Enspire Roles to companies.
- Company Role Commands - Company Role Commands authorizes system module access to designated roles. The Enspire Roles that were transferred to Company Roles are now integrated with the system modules
- Company Role Users - Company Role Users assigns employees to the roles established in Company Roles. A user can be assigned multiple roles.
- Company Role Events - Company Role Events notify employees with specific roles of special events as they occur. Special Events can be assigned to one or all of the roles.

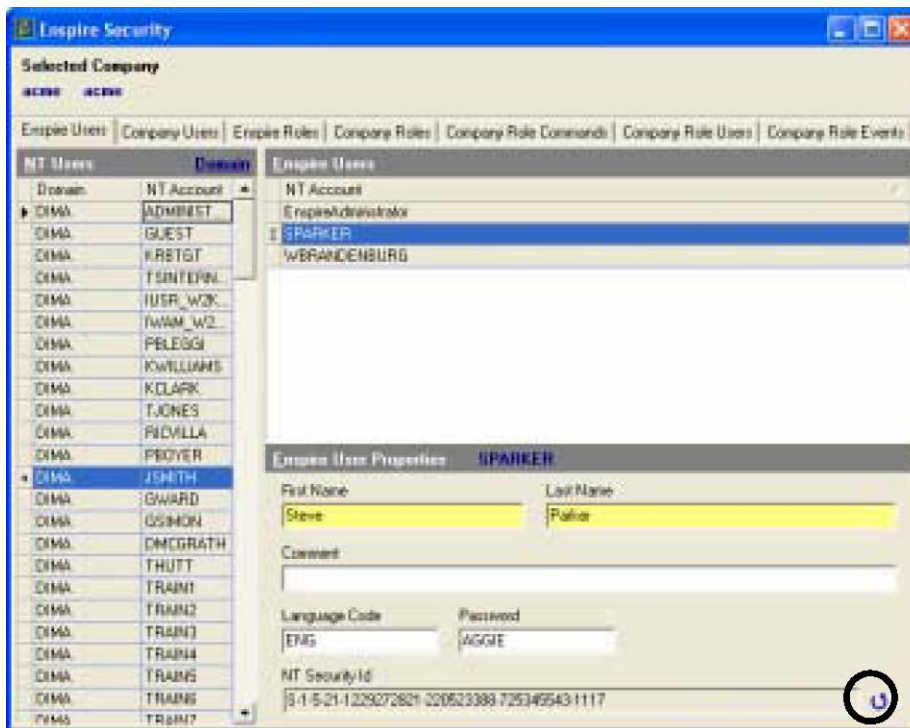
Enspire Users

The Enspire Users tab provides the administrator with the ability to assign NT Users to the Enspire database. A candidate Enspire user must be part of the NT user account before being assigned to Enspire. To perform this task, perform the following steps:

1. Left select and hold the desired NT Users name. This example selects SPARKER.



2. Drag and release the selected name in the Ensfire Users column.
3. Ensfire also provides the capability to customize the name, add comments, language code and a password. Simply input the desired information. Both first and last name are mandatory.



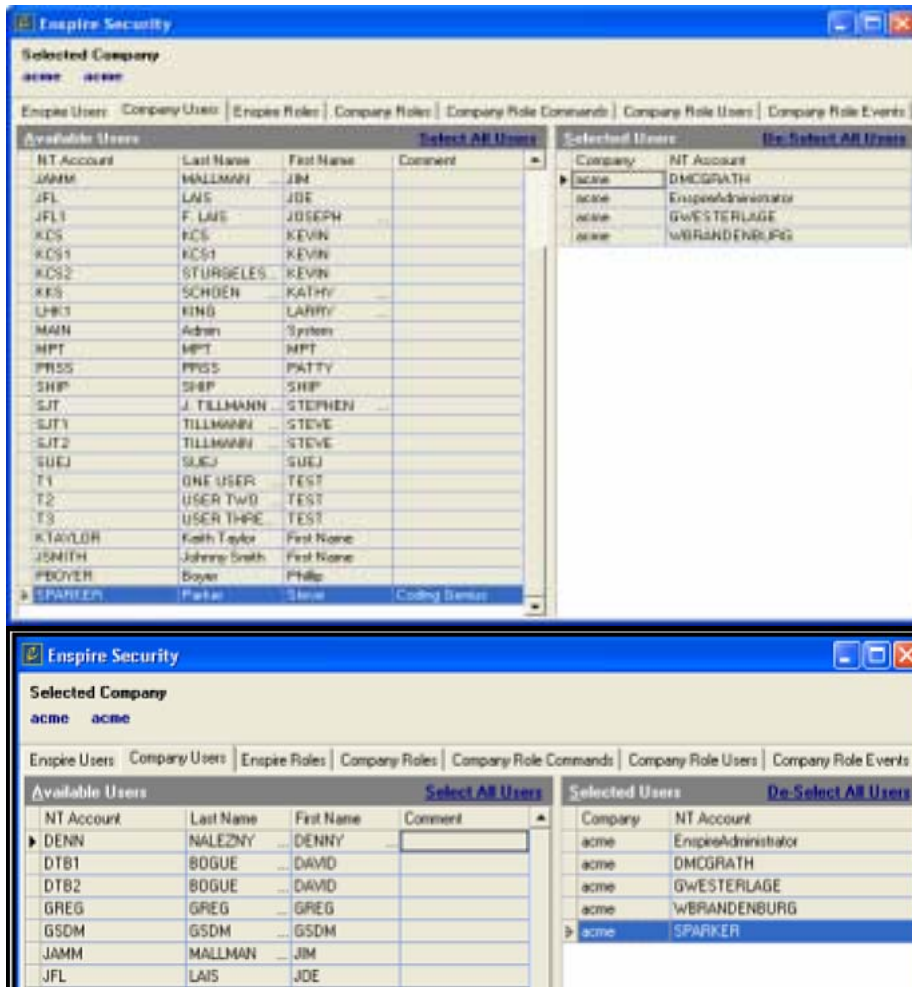
The NT Security ID capture utility, circled in the lower right corner above, is used to capture and connect a person's Security ID with the using computer's NT domain. This allows the user to begin using NT domain authentication rather than requiring the Ensfire user id and password for access. Simply select the icon after selecting the appropriate user to make this connection.

NOTE NT AUTHENTICATION WILL NOT WORK IF THE OPERATOR IS UTILIZING A ROAMING PROFILE. THE NT SECURITY I.D. WILL CHANGE WITH EACH COMPUTER'S USE. ALSO, A CHANGE OF COMPUTER, I.P. ADDRESS, ETC., WILL NULLIFY THE NT AUTHENTICATION. THIS WILL REQUIRE A RE-EXECUTION OF THE CAPTURE UTILITY.

Company Users

The Company Users tab provides the administrator with the ability to assign Ensfire Users to specific companies. To perform this task, perform the following steps:

1. Left select and hold the desired Available Users name. Again, The example continues with SPARKER.
2. Drag and release the highlighted name in the Selected Users column.
3. Repeat for all desired company users.

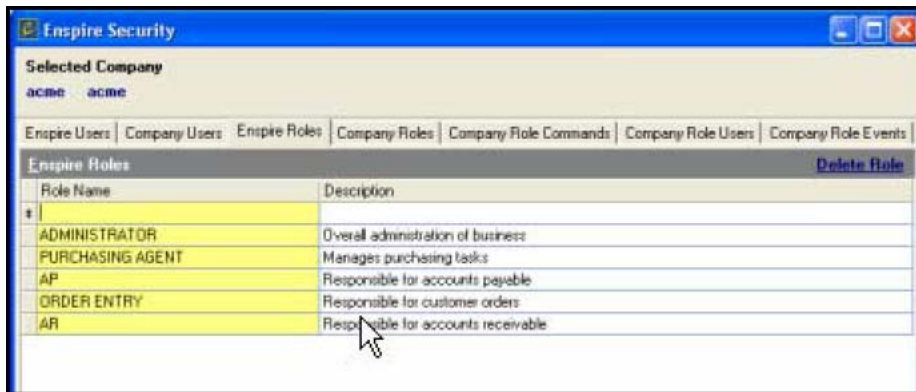


4. Choosing De-Select All Users removes all company users. To de-select individuals, simply drag the name back from Selected Users to Available Users.

Ensfire Roles

Ensfire Roles are user-defined terms intended to establish employee authority over a designated set of tasks. These generic role names are designed to provide consistent application of roles to companies under the same ownership.

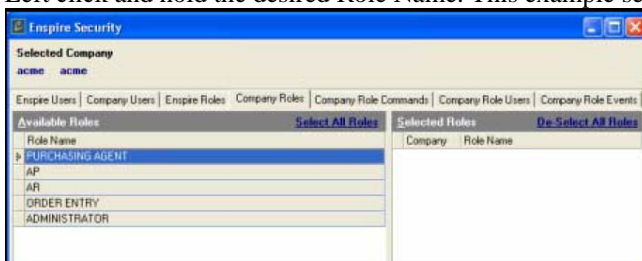
1. To input new roles; determine which roles you wish to establish.
2. Press INSERT on the keyboard.
3. Type in the Role Name and then the description.
4. To delete a Role Name, highlight the role and SELECT Delete Role.



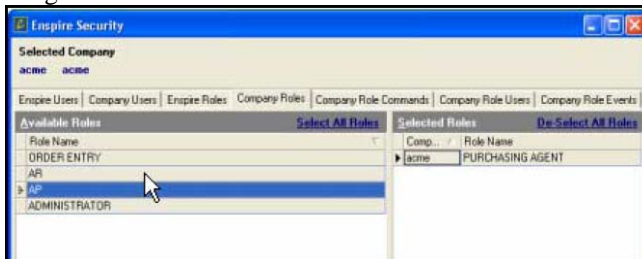
Company Roles

Company Role allows the administrator to assign the pre-defined Enspire Roles to companies.

1. Left click and hold the desired Role Name. This example selects PURCHASING AGENT.



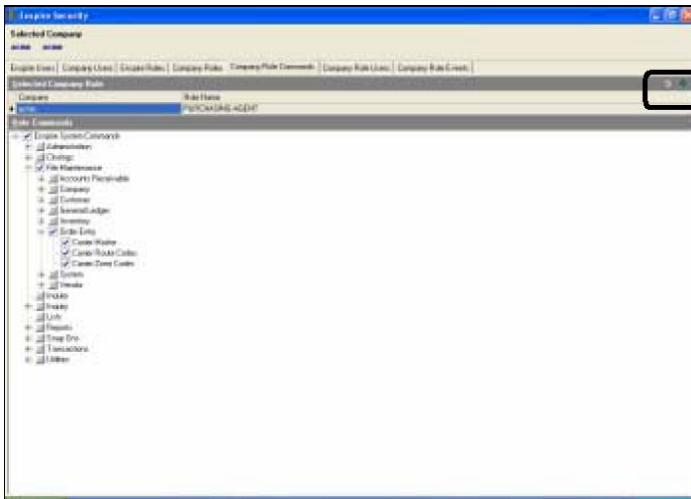
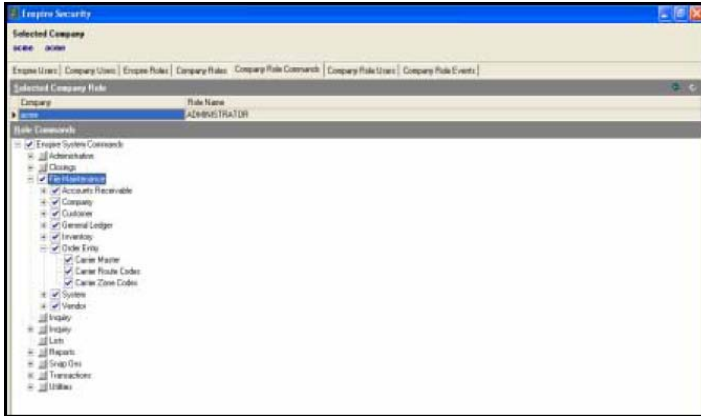
2. Drag and release the selected name under Role Name in the Selected Roles column.



3. To de-select a single role, select and drag the desired Selected Role back to the Available Roles Role Name box.
4. To select all Role Names, SELECT Select All Roles
5. This will move all Available Roles to Selected Roles.
6. To de-select all Selected Roles, SELECT De-Select All Roles.

Company Role Commands

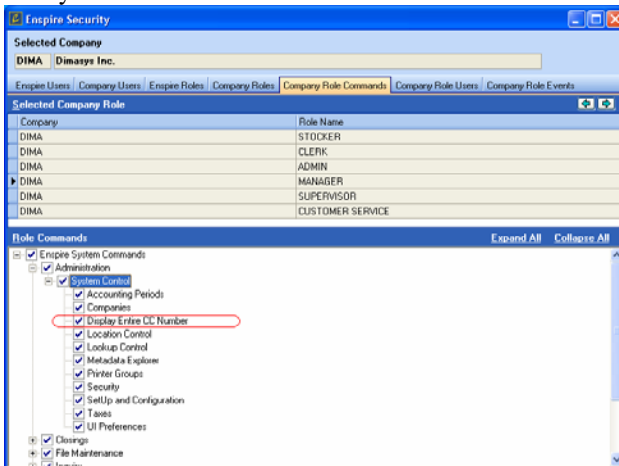
Company Role Commands authorizes system module access to designated roles. The Enspire Roles that were transferred to Company Roles are now integrated with the system modules. In the first example below, the Administrator's role is given authority to access all of File Maintenance. In the second example, the Purchasing Agent role receives more limited system access due to more restricted position responsibilities. Overall, the administrator has a higher security level and greater access rights. Analyzing the command tree and checking appropriate boxes establishes the role command and level of security.



NOTE THE ARROW KEYS IN THE BOX IN THE BOX OUTLINED ABOVE ARE FOR TOGGING BACK AND FORTH BETWEEN DIFFERENT COMPANY ROLES. IN SUCCEEDING TABS THEY ARE USED FOR THE SAME PURPOSE IN REGARD TO ROLE COMMANDS AND ROLE USERS.

Credit Card Field's Masked Display Within Enspire

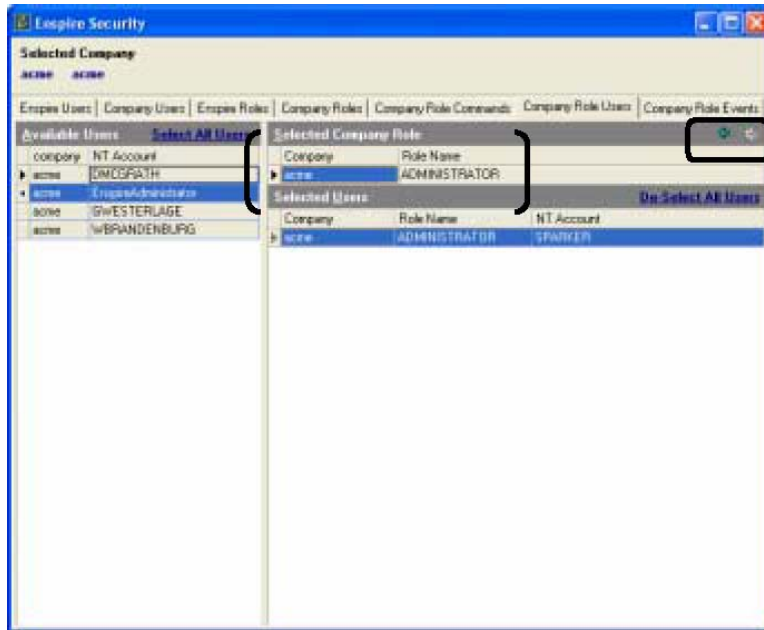
To maintain compliance with PCI regulations, all credit card fields within Enspire screens will be protected by the 4-digit masking format. The Display Entire CC Number flag in Enspire security grants user(s) the ability to see the full unmasked credit card field.



Company Role Users

Company Role Users assigns employees to the roles established in Company Roles. A user can be assigned multiple roles.

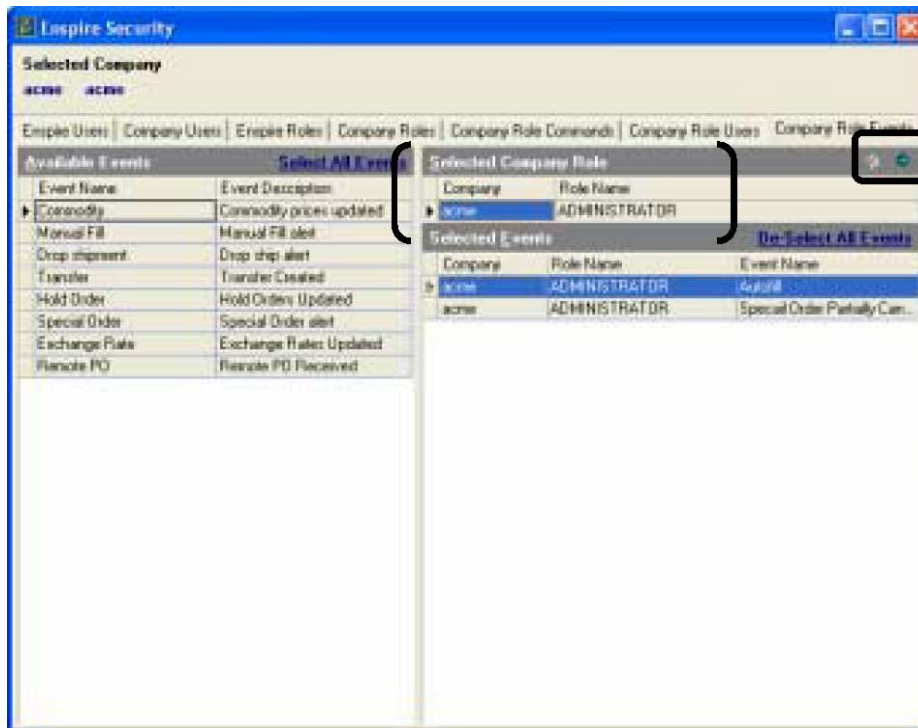
1. Select the role, displayed within the brackets, to assign personnel to by utilizing the arrows circled below.
2. Assign an employee by selecting one from Available Users and dragging the name under Selected Users.



Company Role Events

Company Role Events notify employees with specific roles of special events as they occur. Special Events can be assigned to one or all of the roles. To assign roles to selective events perform the following:

1. Select the Role Name, shown within the brackets, to assign the Event to by using the selection arrows circled below.
2. Select the event under Available Events and drag and drop under Selected Events.
3. Select All Events and De-Select All Events can be utilized by selecting on the bold underlined terms below.



The event names are defined as follows:

- Commodity (Commodity prices updated) – Informs the user that commodity prices must be updated. To update commodity prices, map to FILE MAINTENANCE>COMPANY>COMMODITIES (ALT + M, C, C).
- Manual Fill (Manual Fill alert) – Notifies when a back order condition exists in order to prompt decisions on product distribution. To execute Manual Fill, map to TRANSACTIONS>INVENTORY>MANUAL FILL (ALT + T, I, M).
- Drop shipment (Drop ship alert) – Lets the user know that a drop ship has been executed, thereby, informing of an unexpected drop in inventory. No action required.
- Transfer (Transfer Created) – Announces need to transfer goods from one warehouse to another. No action required.
- Hold Order (Hold Orders Updated) – Tells when invoices and PO's are placed on hold and whenever the hold status changes. To manage hold orders, map to TRANSACTIONS>ORDER ENTRY>HOLD ORDERS AND INVOICES (ALT + T, O, H).
- Special Order (Special Order alert) – Informs when orders are placed for items not stocked at all. To execute the order, map to TRANSACTIONS>PURCHASE ORDERS>SPECIAL ORDER BUY (ALT + T, P, S).
- Exchange Rate (Exchange Rates Updated) – Gives the user notice that currency exchange rates require updating. To update exchange rates, map to FILE MAINTENANCE>SYSTEM>CURRENCIES (ALT + M, S, C).
- Remote OE (Remote Order Entry Received) – Reports when a remote order, such as an E-client order, has been logged. To perform a remote order edit, map to TRANSACTIONS>ORDER ENTRY>REMOTE ORDER (No Hot Key Path). To release the order, map to TRANSACTIONS>ORDER ENTRY>DOCUMENT RELEASE (ALT + T, O, N).

Chapter 7

Taxes

The Taxes dialog determines how taxes are assessed within a given taxing authority. This dialog is available through the Administration menu (Administration > System Control > Taxes). It includes the following sections: Product Category Codes and Tax Jurisdictions.

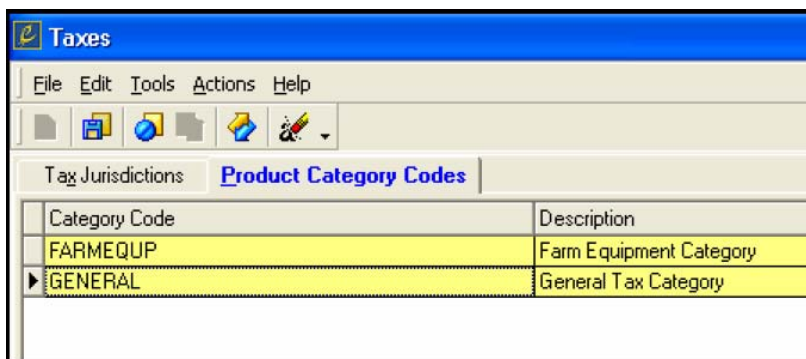
Key Terms and Phrases

- **Product Category Codes** - The Product Categories section of the Taxes dialog allows you to create the categories required for establishing taxing authorities in Enspire. Enspire contains a general category code and description as the system default.
- **Adding a Product Category** -Enspire provides the ability to add Product Category Codes. This is necessary for categories of products that are not taxed at general tax rates.
- **Tax Jurisdiction** - The Tax Jurisdiction section allows the user to set parameters for each of the four (4) taxing jurisdictions (State, County, City and Locality). It also provides Filters for selecting Product Category, State Code and Specific Location.
- **State Taxes** - The State section of the Taxes dialog sets the parameters for the taxing authorities at the state level based on the General Tax Category.
- **County Taxes** -The County section of the Taxes dialog sets the parameters for the taxing authorities at the county level.
- **City Taxes** - The City section of the Taxes dialog sets the parameters for the taxing authorities at the city level.
- **Locality Taxes** -The Locality section of the Taxes dialog sets the parameters for the taxing authorities at the local level.
- **Updating Taxes** – Updating, either automatically or manually, general tax information within Enspire.

Product Category Codes

The Product Categories section of the Taxes dialog allows you to create the categories required for establishing taxing authorities in Enspire. Enspire contains a general category code and description as the system default.

- **Category Code** - Category Code is the user-defined code that identifies the product category. This code is alphanumeric and can be up to eight characters long.
- **Description** - Description is the user-defined description of the corresponding code or ID. The description is alphanumeric and can be up to 25 characters long.



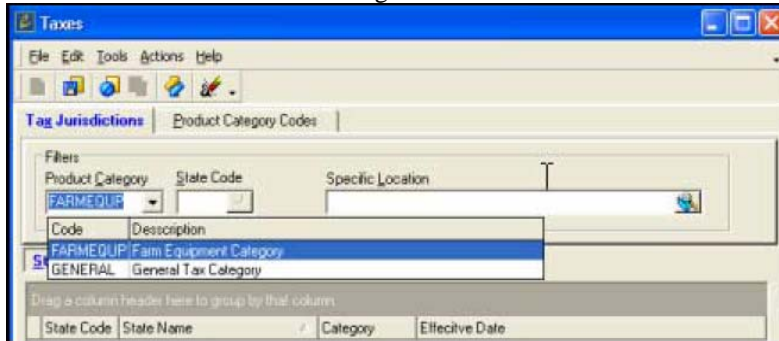
Category Code	Description
FARMEQUP	Farm Equipment Category
GENERAL	General Tax Category

Adding a Product Category

Enspire provides the ability to add Product Category Codes. This is necessary for categories of products that are not taxed at general tax rates.

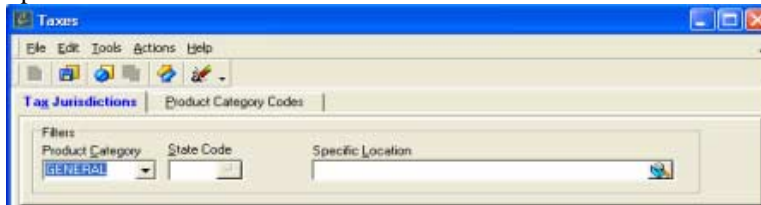
1. To add a category code and description, SELECT the Product Category Code tab, select in the box and hit insert.
2. Type in the category code (alphanumeric up to 8 characters) and the description (alphanumeric up to 25 characters). Click OK.

The new Product Category Code is complete and is ready for the addition of taxing information. The user must add this tax information manually since Enspire is only pre-populated with general taxing information. Instructions for adding tax information will be covered in the Tax Jurisdiction section.



Tax Jurisdiction

The Tax Jurisdiction section allows the user to set parameters for each of the four (4) taxing jurisdictions (State, County, City and Locality). It also provides Filters for selecting Product Category, State Code and Specific Location.



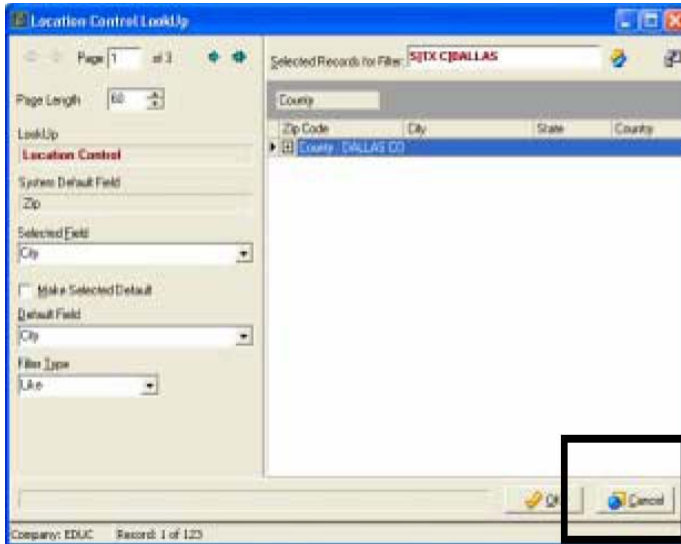
- Product Category - The Product Category box allows the user to select the category of products for which the tax is established. These product categories are defined within the Product Category Codes Tab. To choose, SELECT the Product Category arrow and then SELECT the desired category. General is the system default and will be the only category listed until others are created.
 - State Code - State Code simply displays the code of the state selected. It can be used to select a state without utilizing the grid. To do so, type in the state code and press enter or SELECT the LookUp button.
 - Specific Location - Specific Location gives the option of finding a particular area for defining a tax jurisdiction. You can type a certain location, or use the lookup to search for a specific location.
1. To conduct a specific location search, type in a question mark in the Specific Location box and press enter. This will lead the user to the Hot Key help box.



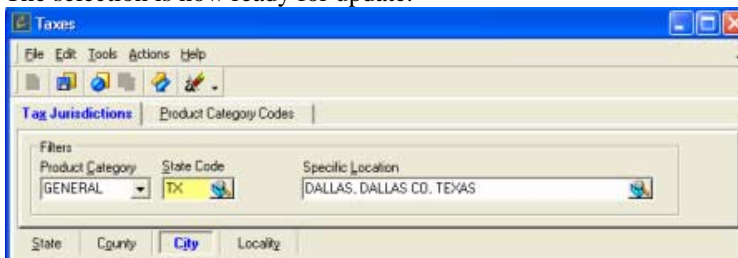
- To conduct a specific search, use the hot key and the desired location utilizing state and city hot key codes as demonstrated below.



- From the Location Control Lookup screen where the selection is displayed, the user will click OK to choose the selection for edit.



- The selection is now ready for update.



State-Taxes

The State section of the Taxes dialog sets the parameters for the taxing authorities at the state level based on the General Tax Category. To select the state, select the State tab, pick the appropriate state and set-up or modify State Taxes. The following terms describe the input requirements for State Taxes

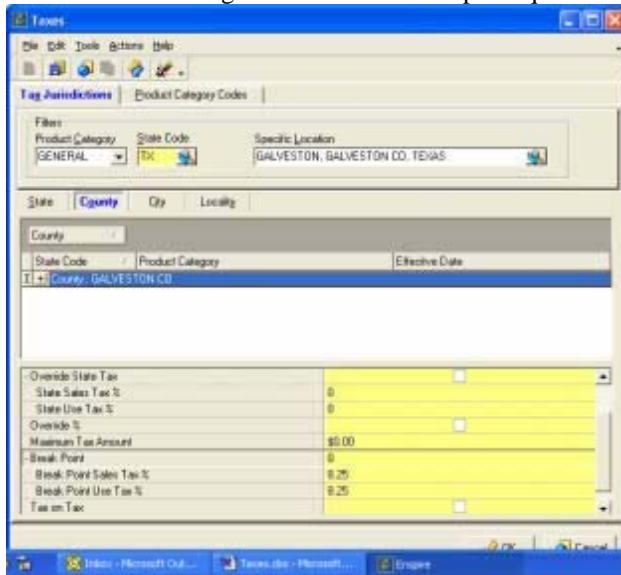
- **Sales Tax %** - Sales Tax % is the amount charged as a state sales tax. The field can be edited.
- **Use Tax %** - Use Tax % is pre-populated, but is reserved for future use.
- **% Subject to Tax** - % Subject to Tax is the percentage of a purchase that is taxable. For example, if only 50 percent of a purchase is subject to this tax, you type 50 here.
- **Minimum Taxable Sales Amount** - Minimum Taxable Sales Amount is the minimum amount on which you pay a sales tax.
- **Minimum Tax Amount** - Minimum Tax Amount is the least amount of tax you charge on any sale associated with this taxing authority.
- **Maximum Tax Amount** - Maximum Tax Amount is the greatest amount of tax you charge on any sale associated with this taxing authority.
- **Break Point** - Break Point establishes the amount at which the taxing authority begins charging a different tax rate. If this authority charges the same tax rate no matter what the sale amount is, set Break Point to 0 (zero). If you establish a sales tax break point, Enspire uses the percentage in Sales Tax % for all amounts below the break point. For amounts above the break point, Enspire uses the percentage in Break Point Sales Tax %.
For example: The Break Point is \$1,000. The Sales Tax Rate is 7.5 percent and the Break Point Sales Tax Rate is 6 percent. To calculate the sales tax on a \$2,000 purchase, Enspire takes 7.5 percent of the first \$1,000 (\$75) and adds it to 6 percent of the second \$1,000 (\$60) for a total tax of \$135.
Break Point Sales Tax Rate is the percentage charged as sales tax on the amount above the Break Point. Select the plus sign (+) next to Break Point to display Break Point Sales Tax Rate.
Break Point Use Tax Rate is reserved for future use.
- **Use Where City Tax** - Use Where City Tax determines whether you use the tax jurisdiction of the warehouse's city when the product is shipped to the customer. This is a yes or no answer. A check in the box indicates yes and an empty box indicates no.
- **Inside Outside Carrier** - Inside Outside Carrier determines whether you collect tax on freight charges for inside carriers, outside carriers, or both. The options are: B) both Inside and Outside, I) Inside Carrier, and O) Outside Carrier.
- **Tax on Tax** - Tax on Tax determines whether other taxes are included in the calculation of this tax. In other words, whether lower level jurisdictions' taxes are counted in the tax base at the state level. Select this option to include other taxes. Leave this option unselected if no other taxes are included in

the calculation of this tax. This is a yes or no answer. A check in the box indicates yes and an empty box indicates no.

- Tax on Freight - Tax on Freight determines whether freight is included in the calculation of this tax. Select this option to include freight charges. Leave this option unselected if the calculation for this tax does not include freight charges. You determine whether you tax ingoing freight, outgoing freight, or both when you create the tax category. This is a yes or no answer. A check in the box indicates yes and an empty box indicates no.
- Tax on Returns - Tax on Returns determines whether restocking fees for a customer return are taxable. Select this option if restocking fees are taxable. Leave this option unselected if restocking fees are not taxable. This is a yes or no answer. A check in the box indicates yes and an empty box indicates no.

County - Taxes

The County section of the Taxes dialog sets the parameters for the taxing authorities at the county level. Pick the appropriate county with either Specific Location or the Fetch Icon to set-up or modify County Taxes. The following terms describe the input requirements for County Taxes



- County - County is the county for which you are defining the tax.
- State - Displays the state to which the county belongs.
- Use Tax % - Use Tax % is reserved for future use.
- Effective Date - Effective Date is the date on which this taxing authority becomes effective. You can type the date or select the down arrow to display the Calendar dialog and select a date.
- % Subject to Tax - % Subject to Tax is the percentage of the purchase that is taxable by the county jurisdiction. For example, if only 50 percent of a purchase is subject to this tax, you type 50 here.
- Override State Tax - Determines whether the county tax is assessed in addition to or instead of some percentage of the state tax. Select this option if the county tax overrides the state tax. Leave this option unselected if you collect the state tax in addition to the county tax. Select the + to display the following fields:
 State Sales Tax % is the percentage of the state sales tax that the county tax overrides. For example, if the county tax overrides only 25 percent of the state sales tax, type 25 here.
 State Use Tax % is reserved for future use.
- Override % - Determines whether the county tax overrides the entire state tax, or only a percentage. Select this option if the county tax overrides a percentage of the state tax. Leave this option unselected if the county tax overrides the entire state tax.
- Maximum Tax Amount - Maximum Tax Amount is the greatest amount of tax you charge on any sale associated with this taxing authority.
- Break Point - Establishes the amount at which the taxing authority begins charging a different tax rate. If this authority charges the same tax rate no matter what the sale amount is, set Break Point to 0

(zero). If you establish a break point, Enspire uses the percentage in Sales Tax Rate for all amounts below the break point. For amounts above the break point, Enspire uses the Break Point Sales Tax %. For example: The Break Point is \$1,000. The Sales Tax % is 7.5 percent and the Break Point Sales Tax % is 6 percent. To calculate the sales tax on a \$2,000 purchase, Enspire takes 7.5 percent of the first \$1,000 (\$75) and adds it to 6 percent of the second \$1,000 (\$60) for a total tax of \$135.

Break Point Sales Tax % is the percentage charged as sales tax on the amount above the Break Point. Select the plus sign (+) next to Break Point to display Break Point Sales Tax %.

Break Point Use Tax % is reserved for future use.

- Tax on Tax - Determines whether city and locality taxes are included in the base for collection of this tax. Select this option to include other taxes. Leave this option unselected if no other taxes are included in the calculation of this tax.
- Tax on Returns - Determines whether restocking fees for customer returns are taxable. Select this option if restocking fees are taxable. Leave this option unselected if restocking fees are not taxable.

City-Taxes

The City section of the Taxes dialog sets the parameters for the taxing authorities at the city level. Pick the appropriate city with either Specific Location or the Fetch Icon to setup or modify City Taxes. The following terms describe the input requirements for City Taxes.

State	County	City	Locality
City			
County	State Code	Product Category	Effective Date
City: GALVESTON			

Sales Tax %	2	
Use Tax %	2	
% Subject to Tax	100	
Override County Tax		<input type="checkbox"/>
County Sales Tax %	0	
County Use Tax %	0	
County Break Point	\$0.00	
Override State Tax		<input type="checkbox"/>
Override %		<input type="checkbox"/>

- City - City is the city for which you are defining the tax.
- County - Displays the county to which the city belongs.
- State - Displays the state to which the city belongs.
- Product Category - Product Category is the category for which you are defining the tax.
- Sales Tax % - Sales Tax % is the percentage charged as a sales tax.
- Use Tax % - Use Tax % is reserved for future use.
- Effective Date - Effective Date is the date on which this taxing authority becomes effective. You can type the date or select the down arrow to display the Calendar dialog and select a date.
- Override County Tax - Determines whether this tax is assessed in addition to or instead of the county tax. Select this option if the city tax overrides the county tax. Leave this option unselected if you collect the county tax in addition to the city tax. Select the + to display the following fields:
- County Sales Tax % - County Sales Tax is the sales tax rate used if the city tax overrides the county tax and the amount of the sale exceeds the amount in County Break Point and you select Override %. If you do not select Override %, Enspire uses the rate in Sales Tax % when overriding the county sales tax.

County Use Tax % is reserved for future use.

County Break Point is the amount at which the county taxing begins charging a different tax rate.

- **Override State Tax** - Determines whether this tax is assessed in addition to or instead of the state tax. Select this option if the city tax overrides the state tax. Leave this option unselected if you collect the state tax in addition to the city tax. Select the + to display the following fields:
State Sales Tax % is the sales tax rate for the state to which the city belongs.
State Use Tax % is reserved for future use.
- **Override %** - Determines whether you use a sales tax rate different than the one in Sales Tax % when you select to override the county tax, the state tax, or both the county tax and the state tax. Override % is available if you selected Override County Tax, Override State Tax, or both. You type the overriding sales tax rate in County Sales Tax %, State Sales Tax %, or both.
- **Break Point** - Establishes the amount at which the taxing authority begins charging a different tax rate. If this authority charges the same tax rate no matter what the sale amount is, set Break Point to 0 (zero). If you establish a break point, Enspire uses the percentage in Sales Tax % for all amounts below the break point. For amounts above the break point, Enspire uses the Break Point Sales Tax %. For example: The Break Point is \$1,000. The Sales Tax % is 7.5 percent and the Break Point Sales Tax % is 6 percent. To calculate the sales tax on a \$2,000 purchase, Enspire takes 7.5 percent of the first \$1,000 (\$75) and adds it to 6 percent of the second \$1,000 (\$60) for a total tax of \$135.
Break Point Sales Tax % is the percentage charged as sales tax on the amount above the Break Point. Select the plus sign (+) next to Break Point to display Break Point Sales Tax %.
Break Point Use Tax % is reserved for future use.
- **Tax on Tax** - Determines whether locality taxes are included in the base for calculation of this tax. Select this option to include other taxes. Leave this option unselected if no other taxes are included in the calculation of this tax.
- **Tax on Returns** - Determines whether restocking fees for a customer return is taxable. Select this option if restocking fees are taxable. Leave this option unselected if restocking fees are not taxable.

Locality-Taxes

The Locality section of the Taxes dialog sets the parameters for the taxing authorities at the local level. Pick the appropriate locality with either Specific Location or the Fetch Icon to set-up or modify Locality Taxes. The following terms describe the input requirements for Locality Taxes

% Subject To Tax	Override State Tax	State Sales Tax %	State Use Tax %	Override County Tax	County Sales Tax %	County Use Tax %	Override %
100		0	0		0	0	0

- **Locality** - Locality is the locality for which you are defining the tax.
- **City** - Displays the city to which the locality belongs.
- **County** - Displays the county to which the locality belongs.
- **State** - Displays the state to which the locality belongs.
- **Sales Tax %** - Sales Tax % is the percentage charged as a sales tax.
- **Use Tax %** - Use Tax % is reserved for future use.
- **Effective Date** - Effective Date is the date on which this taxing authority becomes effective. You can type the date or select the down arrow to display the Calendar dialog and select a date.

- % Subject to Tax - % Subject to Tax is the percentage of a purchase that is taxable. For example, if only 50 percent of a purchase is subject to this tax, you type 50 here.
- Override State Tax - Determines whether this tax is assessed in addition to or instead of the state tax. Select this option if the locality tax overrides the state tax. Leave this option unselected if you collect the state tax in addition to the locality tax.
State Sales Tax Override Determines whether the locality sales tax overrides the state sales tax. Select this option to have the locality sales tax override the state sales tax. Leave this option unselected if you collect the state sales tax in addition to the locality sales tax. Select the plus sign (+) next to Override State Tax to display State Sales Tax Override.
State Use Tax Override is reserved for future use.
- Override County Tax - Determines whether this tax is assessed in addition to or instead of the county tax. Select this option if the locality tax overrides the county tax. Leave this option unselected if you collect the county tax in addition to the locality tax.
County Sales Tax Override Determines whether the locality sales tax overrides the county sales tax. Select this option to have the locality sales tax override the county sales tax. Leave this option unselected if you collect the county sales tax in addition to the locality sales tax. Select the plus sign (+) next to Override County Tax to display County Sales Tax Override.
County Use Tax Override is reserved for future use.
- Override % - Determines whether you use a sales tax rate different than the one in Sales Tax % when you select to override the county tax, the state tax, or both the county tax and the state tax. Override % is available if you selected Override County Tax, Override State Tax, or both. You type the overriding sales tax rate in County Sales Tax %, State Sales Tax %, or both.
- Inside/Outside City Limits - Determines whether taxes are assessed on businesses inside and/or outside the city limits. The options are: B) both Inside and Outside, I) Inside City Limits, and O) Outside City Limits.
- Tax on Tax - Determines whether other taxes are included in the calculation of this tax. Select this option to include other taxes. Leave this option unselected if no other taxes are included in the calculation of this tax. If you enable tax on tax, you determine the taxes included in the calculation of other taxes when you create the tax category.
- Tax on Returns - Determines whether restocking fees for a customer return are taxable. Select this option if restocking fees are taxable. Leave this option unselected if restocking fees are not taxable.

Updating Taxes

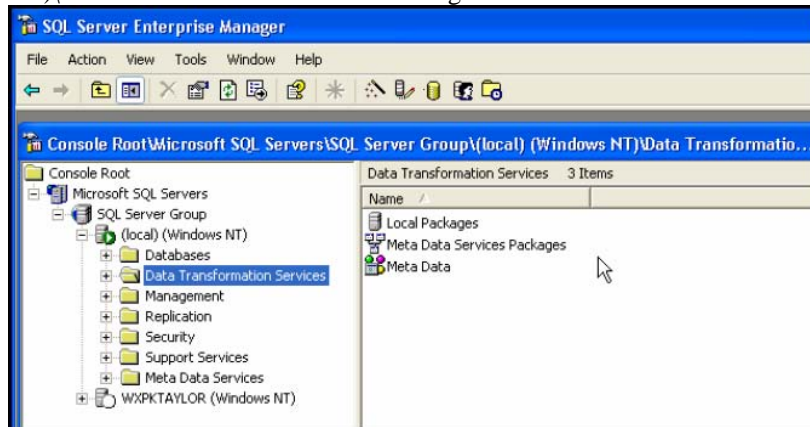
Tax information can be updated automatically. This section will focus on the tasks required to automatically update Taxes. In order to update automatically, the customer must purchase the information from Independent Systems. Independent Systems is the provider of the data utilized by Ensfire to populate Taxes and Location Control initially. Once the information has been received, perform the following tasks to execute an automatic update.

1. Save the information from Independent Systems to the desired location.
2. Download Tax and Zip Upload Package.zip from the Infor web-site (www.Infor.com). Select the Login in and select Software Updates>Tools and Utilities.

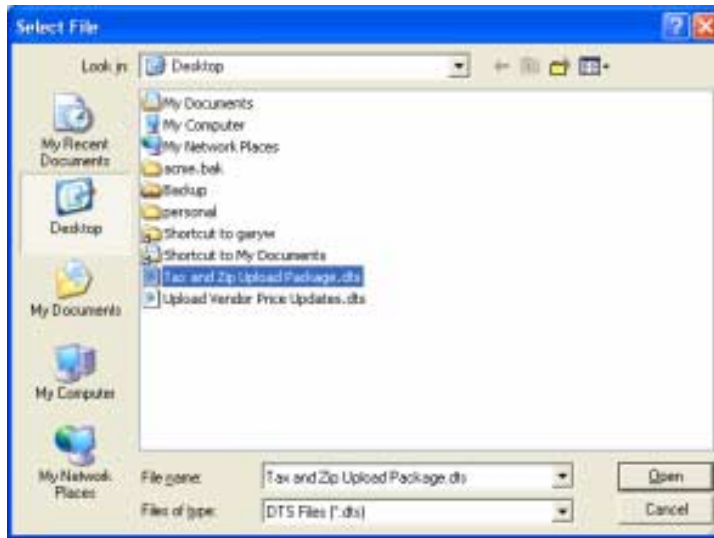
Then select Ensfire Tools and Utilities.



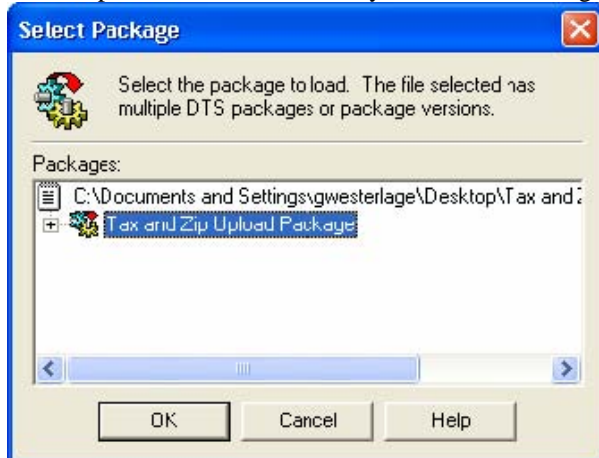
3. Open SQL Server Enterprise Manager to \Microsoft SQL Servers\SQL Server Group\local (Windows NT)\Data Transformation Services and right select Data Transformation Services.



4. Left select Open Packages and map directory to location that Tax and Zip Upload Package.dts was saved.



5. Select Open File, which will take you to Select Package.



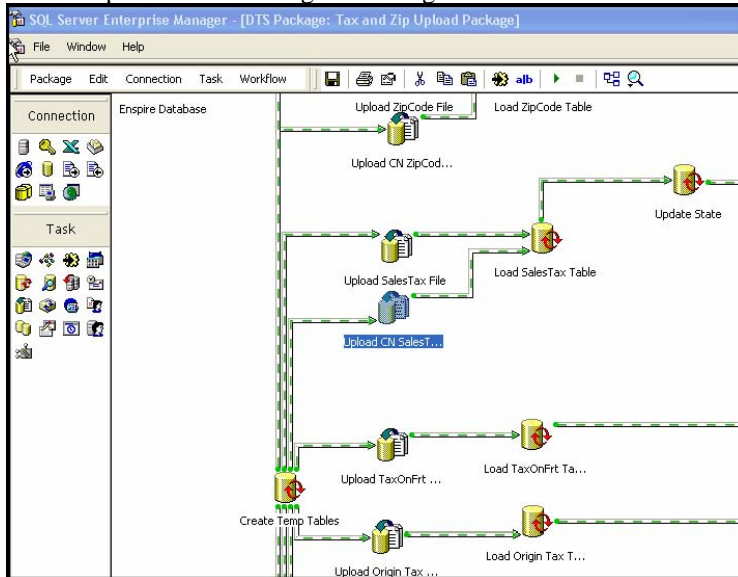
6. Select which package version to utilize and click OK.
7. In the DTS screen select Package and then Save As to convert from a Structured Storage File to an SQL Server File. To do this select the pop down window next to Structured Storage File, highlight SQL Server and click OK. This will permanently save the DTS package in your database.



Taxes

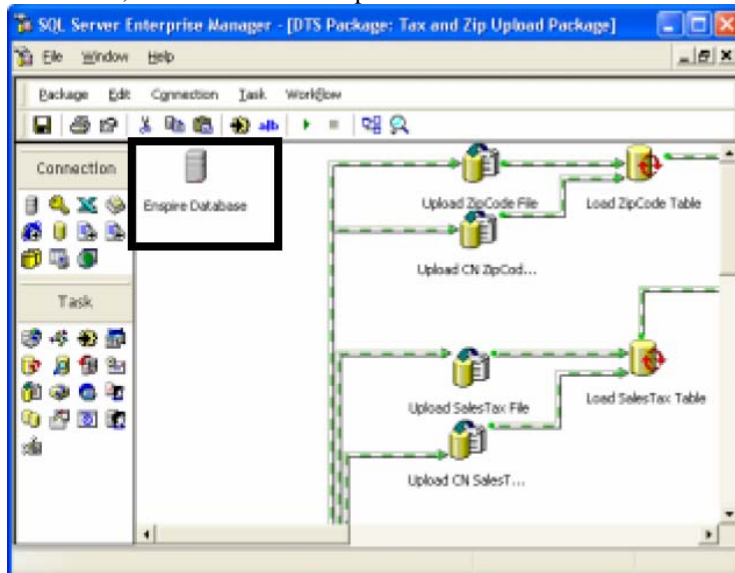
You are now in SQL server DTS Package: Tax and Zip Upload.

This completes downloading and saving Data Transformation Services.

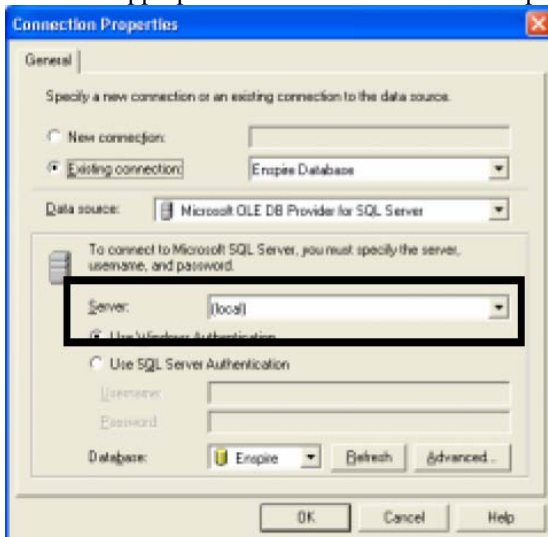


The next step in completing the update process is mapping the source files from Independent Systems to SQL servers DTS Package: Tax and Zip Upload.

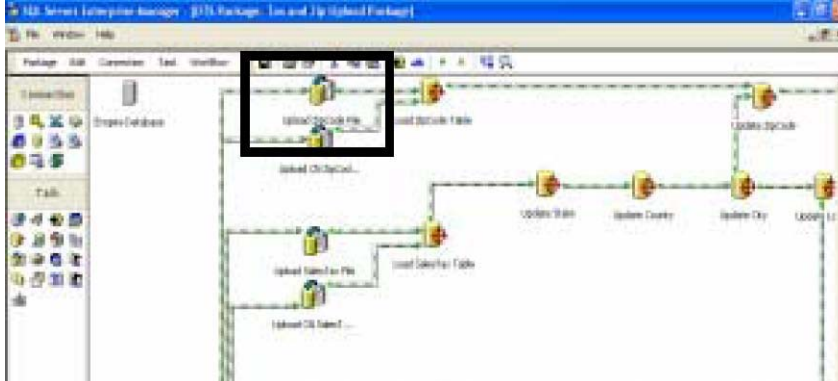
- 1 To do this, double-click the Ensfire Database button.



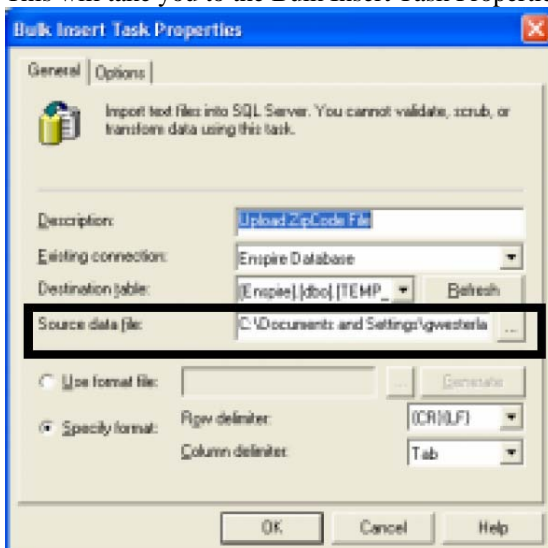
2. Select the appropriate server from the Server drop-down menu and click OK.



3. Double click on the upload cylinders in the DTS package. In this case, it is the upload zip code file.



This will take you to the Bulk Insert Task Properties screen.



4. Select in the Source data file box and scroll to the end to find the file name. Select the ellipse to map to the Source data file.
5. Map to the location of the desired file and double click or click once and select open. (Note: This must be repeated for each of the upload cylinders. There are a total of ten (10) files that must be uploaded.

This DTS package provides information for Location and Tax jurisdiction and must be executed entirely. The corresponding Upload and .TXT Files are listed below).

Upload Cylinders	.TXT Files
Upload ZipCode File	NEWXREF.TXT
Upload CN ZipCode File	NECXREF.TXT
Upload SalesTax File	NEWSALES.TXT
Upload CN SalesTax File	NECSALES.TXT
Upload TaxOnFrt File	NEWTABFR.TXT
Upload Origin Tax File	NEWTABOR.TXT
Upload Override File	NEWORIDE.TXT
Upload CN Override File	NECORIDE.TXT
Upload Locality File	NEWCOMP.TXT
Upload CN Locality File	NECCOMP.TXT

6. Click OK to return to the main DTS Screen
7. Select the next upload cylinder and repeat the file upload process. Continue to repeat the process until all ten (10) files are uploaded.
8. Once the ten (10) files are uploaded, all that remains is to execute. To do this, simply select the green arrow at the top of the DTS package.



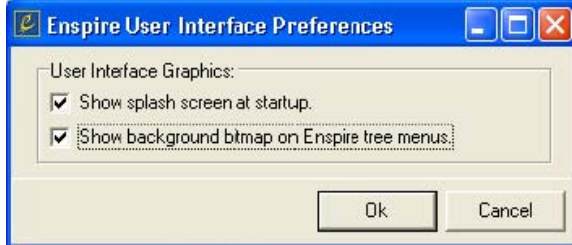
9. When the executing DTS Package is finished, select done and the update is complete.



Chapter 7

UI Preferences

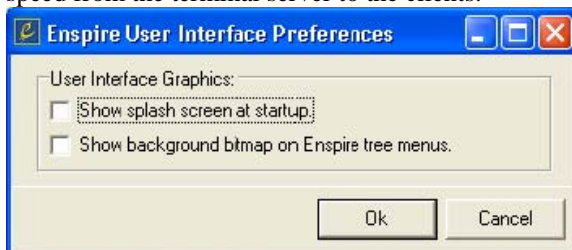
User Interface Preferences allow the user to switch Enspire graphics to either the on or off position.



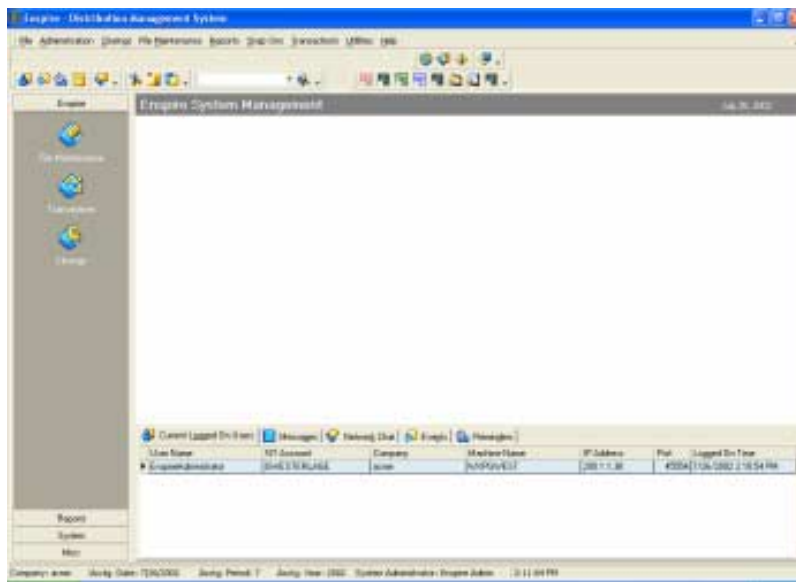
As checked above, the user interface preference shows the background bitmap (below) and the splash screen (brief Ensfire graphics display as the user logs on to Ensfire).



A user using terminal server may decide to de-select one or both of these options to increase processing speed from the terminal server to the clients.



To disengage the graphics, uncheck one or both boxes to eliminate the splash screen at logon or to “white-out” the Ensfire menus screen as shown below.



Chapter 8

Vendor Price Upload

Vendor price upload is Enspire's process to update vendor price information.

Key Terms and Phrases

- Vendor Price Upload - Vendor price upload is Enspire's process to update vendor price information. The five (5) key steps to this process include:
Download Vendor Price Updates and Setup Data Transformation Services
Create and Map a Vendor Price Source File
Identify a Targeted Company Database
Create Load Tables
Transform Data Task Properties
- Upload Vendor Price Updates Data Transformation Services - Data package standards loaded into SQL Server to execute vendor price updates.
- Vendor Price Source File - The vendor price source file is a spreadsheet, typically an Excel spreadsheet, which provides source data for vendor price updates.
- Target Company Database and Server - The targeted company database is the company database and server selected to receive pricing data contained in the vendor price source file.
- Load Table -A load table is a temporary data table that accepts and holds data from the vendor price source file. It is the table from which the targeted company database actually receives pricing information. The table requires a one-time set-up when the vendor price upload routine is installed. Subsequently, the table simply requires an execution command.
- Item Master - Item Master is where you assign items to warehouses and vendors, establish pricing, and designate substitutes and upgrades.
- Vendor Item Master - The Vendors section of the Item Master is where you assign vendors to the item and establish the vendor's costs, discounts, and units of measure that apply to the item.
- Warehouse Item Master - A Warehouse Item record is required for each warehouse that stocks the item. This record maintains information specific to a given item and warehouse combination. The information in the Warehouse Item record overrides the information in the Item Master record.
- Transform Data Task Properties - Transform Data Task Properties allows the user to review and execute the data transfer. Review options are defined as follows:
Source – Allows the user to review and edit a table name or results of a query as the original data source.
Destination – Allows the user to review destination data path and information.
Transformation – Allows the user to review transformations between the source and destination.
Execute - Execute is the final step for transferring data from the source file to the load table.

Setting Up

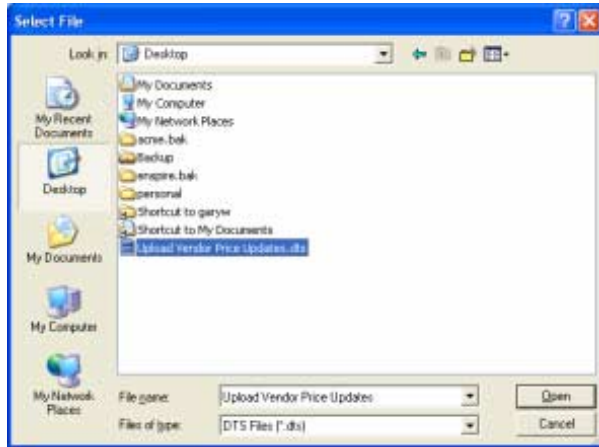
Setting up Vendor Price Upload requires five major processes

- Download Upload Vendor Price Upload and Setting up Data Transformation Services
- Create and map a Vendor Source Price File
- Identify a targeted Company Database and Server
- Create Load Tables
- Transform Data Task Properties

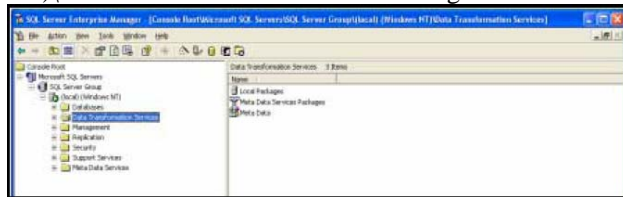
Downloading and Setting up Data Transformation Services

The first step in setting up is downloading Vendor Price Upload and setting up Data Transformation Services. The following steps complete this requirement:

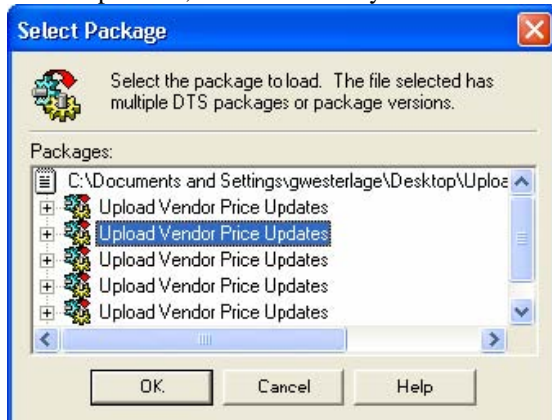
1. Download Upload Vendor Price Updates.dts from Infor ftp sight (<ftp://4.36.140.21>) Dealers Only Folder.



2. Open SQL Server Enterprise Manager to \Microsoft SQL Servers\SQL Server Group\local) (Windows NT)\Data Transformation Services and right click Data Transformation Services



3. Left click Open Packages and map directory to location that Upload Vendor Price Updates was saved.
4. Select Open File, which will take you to Select Package.



5. Select which package version to utilize and click OK. You are now in Vendor Price Upload.
6. In the DTS screen select Package and then Save As to convert from a Structured Storage File to an SQL Server File. To do this select the pop down window next to Structured Storage File, highlight SQL Server and click OK.



7. This completes Downloading and Setting up Data Transformation Services.

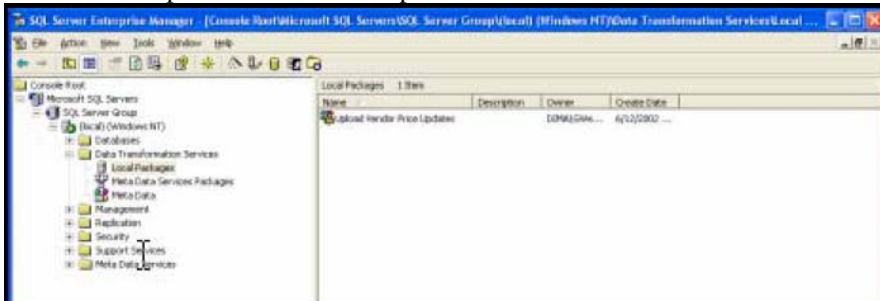
Create and Map a Vendor Price Source File

The next step is creating and mapping a Vendor Price Source File. The file must be a source that is SQL server ODBC compliant (remember, Excel is limited to 32,000 rows). The data source must contain the following column headings and parameters.

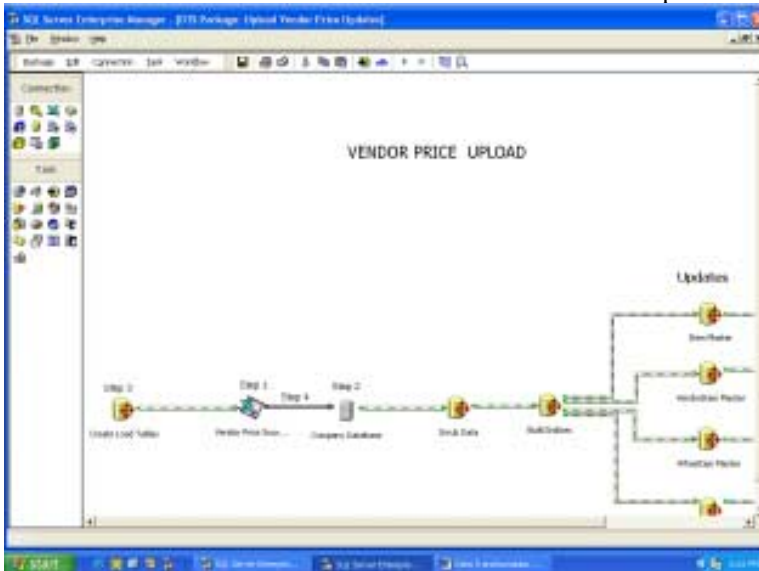
Column Name	Type	Starting	Ending	Size
VENDOR	VARCHAR	1	8	8
ITEM_NO	VARCHAR	9	40	32
BASE_DESCRIPTION	VARCHAR	41	90	50
GROUP_CODE	VARCHAR	91	98	8
MFGR	VARCHAR	99	106	8
UPC_NO	VARCHAR	107	131	25
PSR_NO	VARCHAR	132	163	32
CATALOG_NAME	VARCHAR	164	169	6
PAGE_NO	VARCHAR	170	174	5
SEQ_PREFIX	VARCHAR	175	182	8
SEQ_SUFFIX	VARCHAR	183	188	6
STATUS_ID	CHAR	189	189	1
SKU_UM	VARCHAR	190	191	2
QTY_UM	VARCHAR	192	193	2
QTY_CONV	NUMERIC	194	210	17
PRICE_UM	VARCHAR	211	212	2
PRICE_CONV_FACTOR	NUMERIC	213	229	17
NEXT_COST	MONEY	230	249	20
LIST_PRICE	MONEY	250	269	20
STD_COST	MONEY	270	289	20
UNIT_WEIGHT	NUMERIC	290	307	18
UNIT_VOLUME	NUMERIC	308	325	18
VENDOR_ITEM_DESC	VARCHAR	326	365	40

Vendor Price Source File Guidelines

The following sections demonstrate two types of source files, an Excel spreadsheet and an Ascii file. For both, the first step is to open SQL Server Enterprise Manager to \Microsoft SQL Servers\SQL Server Group\local (Windows NT)\Data Transformation Services\Local Packages. Double click Upload Vendor Price Updates.



Double click the Vendor Price Source File underneath the Step 1 label.

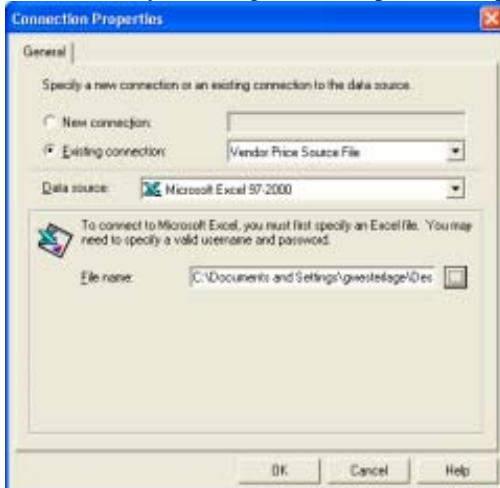


Subsequent steps for the two source files are unique and will be demonstrated separately.

Mapping an Excel Spreadsheet

The following steps demonstrate mapping an Excel spreadsheet.

1. Select existing connection in the window that appears. Select the directory path of the Vendor Price Source File by selecting on the ellipse and mapping to the location saved. Click OK



2. Click OK on the Task Reference window.

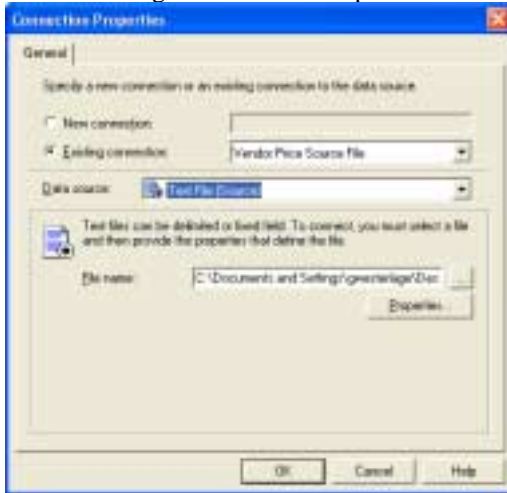


3. Mapping an Excel file is now complete

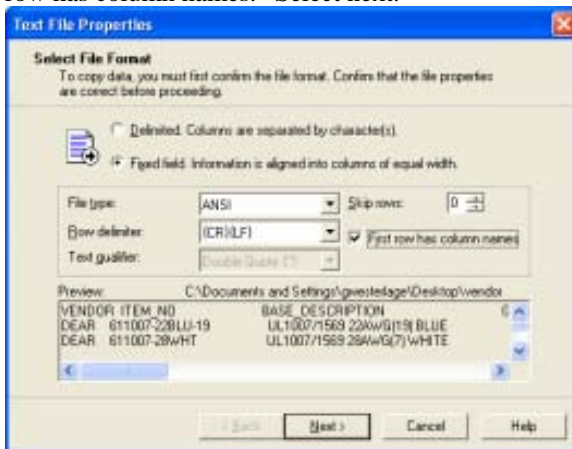
Creating and Mapping an Ascii File

The following steps demonstrate how to map an Ascii file.

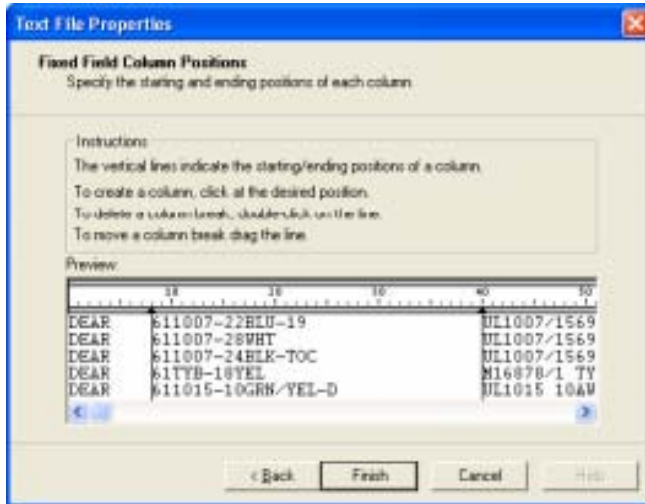
1. Select Existing connection and open the window to select Text File (Source)



2. Select existing connection in the window that appears. Select the File name of the Vendor Price Source File by selecting on the ellipse and mapping to the location saved. Click OK.
3. Select fixed field to enable editing of column size. Remember the column sizes are defined in Vendor Price Source File Guidelines at the beginning of this chapter. Make sure there is a check next to “First row has column names.” Select next.



4. Verify column spacing is correctly defined. Edit as necessary using the parameters establish in the Vendor Price Source File Guidelines. Select finish when complete.



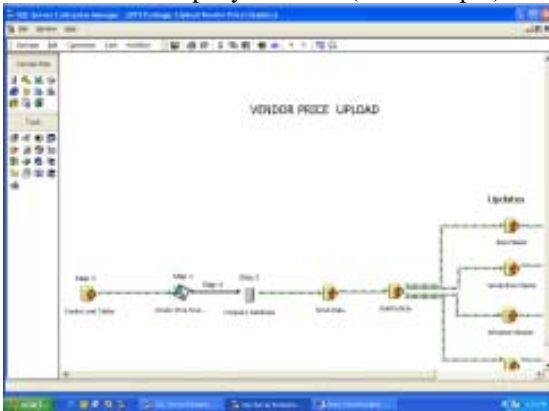
5. Select FINISH.
6. Click OK to complete creating and mapping an Ascii file.



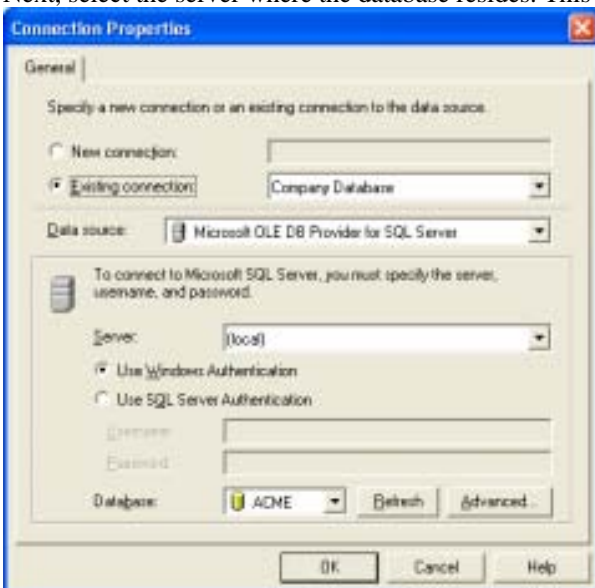
Identifying Targeted Company Database and Server

The Vendor Price Update requires a company database in which to load the new pricing data. The following steps outline the selection process for the database.

1. If you have exited Vendor Price Upload re-open SQL Server Enterprise Manager to \Microsoft SQL Servers\SQL Server Group\local (Windows NT)\Data Transformation Services\Local Packages. Double click Upload Vendor Price Updates.
2. Double click company database (below step 2).



3. Select database from drop-down menu at the bottom of the screen.
4. Next, select the server where the database resides. This can be found in the center of the screen.



5. Make selection and click OK



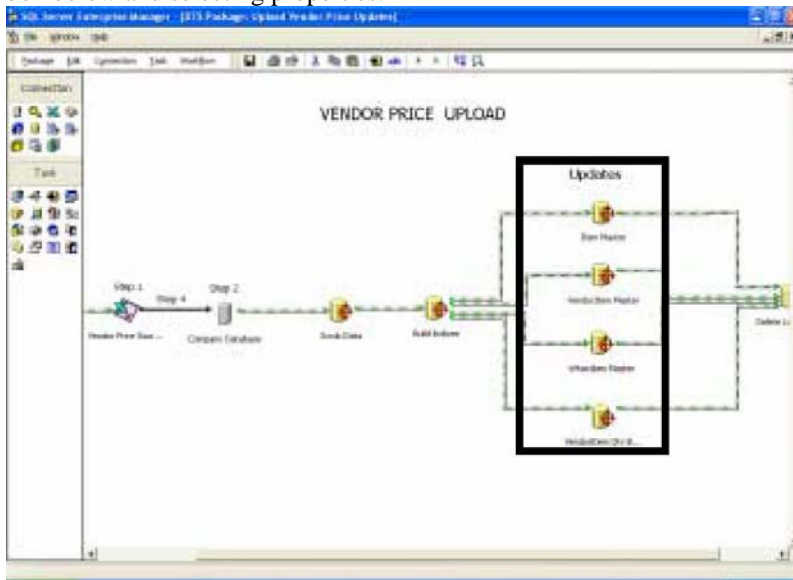
6. Click OK on Task references screen. This completes identification of the targeted database.

Updating Master SQL Statements

There are three Master SQL Statements that the user might consider modifying. These are:

- Item Master
- Vendor Item Master
- WhseItem Master

The statements can be accessed in the Vendor Price Upload screen by right selecting the icons within the box below and selecting properties.



The SQL statements are actually comprised of two statements, Update Statement and Insert Statement. The update statement controls existing item updates and the Insert Statement controls new items. Each can be modified. The user can eliminate or add columns to be updated in the Update Statement or change record defaults in the Insert Statement.

Update Statement

In the Update Section, modifications by the user are limited to the “set” of column description statements that activate or de-activate data transfer during the upload. This depends on the activation status of each individual line. If a “set” line has a double dash (--) prefix, it is commented out or inactive. Activate by deleting the double dash (--). A “set” line is said to be active if it does not have a double dash (--) prefix. It can be de-activated, or commented out, by adding the double dash (--) prefix.

The user must not edit any of the command statements (lines that start with update, from, inner, where). Examples of the three editable SQL statements for Vendor Price Upload are listed below. The bullets and arrows are added to the statements for this document only and are intended to depict which lines can be modified based on the following code:

- Command Statement – Should Not Be Edited.
- ⑩ “Set” Line – User can activate or de-activate (comment in or out).

Item Master SQL Update Statement

```

•      update in_item_master)
⑩      set --base_description = (case when u.base_description is null then 'Unknown' else
u.base_description end),
⑩      list_price = (case when u.list_price is null then 100000 else u.list_price end),
⑩      --next_cost = (case when u.next_cost is null then 0 else u.next_cost end),
⑩      std_cost = (case when u.std_cost is null then 0 else u.std_cost end),
⑩      --group_id = dbo.in_group_id(u.group_code),
⑩      --mfgr_id = dbo.mfgr_id(u.mfgr),
⑩      --date_last_priced = getdate(),
⑩      --catalog_name = u.catalog_name,
⑩      --page_no = u.page_no,

⑩      upc_no = u.upc_no,

⑩      unit_weight = (case when u.unit_weight is null then 0 else u.unit_weight end)

⑩      --unit_volume = (case when u.unit_volume is null then 0 else u.unit_volume end)
•      from in_item_master
•      inner join temp_vendor_price_upload u on (u.item_no = in_item_master.item_no)
•      where in_item_master.vendor_id = u.vendor_id
    
```

Vendor Item Master SQL Update Statement

```
•      update in_vndritem_master
10     set vendor_item_desc = u.base_description,
10     list_price = u.list_price,
10     last_cost = u.std_cost,
10     last_unit_cost = u.std_cost,
10     last_landed_cost = u.std_cost,
10     cost_chg_percentage = (dbo.rsafe_div((u.list_price - in_vndritem_master.list_price) ,
in_vndritem_master.list_price))*100,
10     cost_chg_date = getdate()
•      from in_vndritem_master
•      inner join in_item_master on (in_item_master.item_id = in_vndritem_master.item_id)
•      inner join temp_vendor_price_upload u on (u.item_no = in_item_master.item_no)
•      where in_vndritem_master.vendor_id = u.vendor_id
```

WhseItem Master SQL Update Statement

- update in_whseitem_master
- ⑩ set *list_price* = case
- ⑩ when *u.list_price* is null then *in_whseitem_master.list_price*
- ⑩ else *u.list_price*
- ⑩ end
- from in_whseitem_master
- inner join in_item_master on (in_item_master.item_id = in_whseitem_master.item_id)
- inner join temp_vendor_price_upload u on (u.item_no = in_item_master.item_no)

Insert Statement

In the Insert Statement, the user is limited to changing statement defaults. The user's first decision is to determine whether the Insert Statement should be active. Insert is defaulted to commented out or inactive status. The symbols /* at the beginning of the statement and */ at the end of the statement serve to comment out or inactivate the statement. Deletion of these symbols activates the Insert Statement. When activated, the user must decide whether to use the existing defaults or to default to another option. The following tables show the default options Item Master and Vendor Item Master. WhseMaster does not have an Insert Statement.

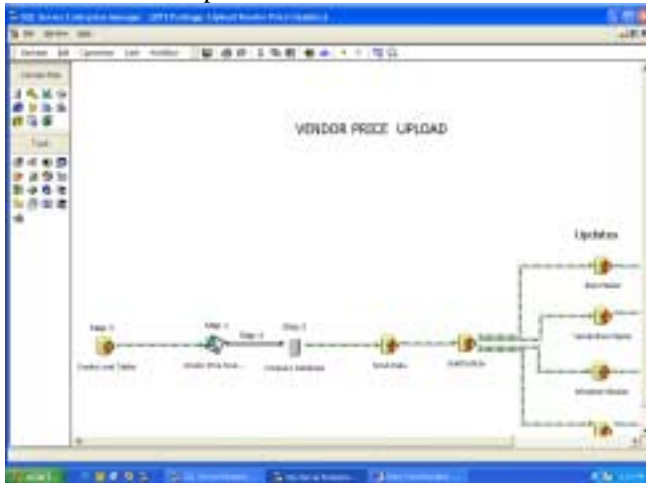
Item Master	
Default/Field	Options
'A' as status_id,	A-Active, C-Consign, D-Do Not Re-Order, F-Free Goods, M-Misc D/C, Y- Service, X-Sell Qty On-Hand
'N' as is_stocked,	Yes, No
'N' as sub_method_id,	A-Automatic, B-Blind, N-No Substitution, T-Traditional
'Y' as ok_to_discount,	Yes, No
'Y' as ok_to_bo,	Yes, No
'N' as kit_id,	B-BTO Assembly, K-BTO Kit, N-None, S-Stocked
'N' as unit_ctrl_method_id,	L-Lot, N-None, S-Serial, V-Volume, W-Weight
'O' as unit_ctrl_when_id,	C-Shipment Confirmation, E-Order Entry, O-Optional Either Confirmation or Order Entry
'Y' as ok_to_mix,	Yes, No
'Y' as tax_level_id,	Yes, No
'Y' as is_decimal,	Yes, No
'N' as container_used,	Yes, No
'O' as container_when_id,	O-Optional, C-Shipment Confirmation, E-Order Entry, Not Used
0 as min_margin_percentage,	>= 0 <= 100
1 as qty_conv,	>= .000001 <= 999999.999999
0 as break_percentage,	>= 0 <= 100
1 as price_conv_factor,	>= .000001 <= 999999.999999
'Y' as allow_fit_allowance,	Yes, No
'Y' as is_commission_paid,	Yes, No
'N' as is_spiff_paid,	Yes, No
'N' as is_commodity,	Yes, No
'Y' as is_taxable,	Yes, No

Vendor Item Master	
Default/Field	Options
'Y' as is_active,	Yes, No
1 as std_conv,	>= 0 ,= 999999.999999
1 as mstr_conv,	>= 0 ,= 999999.999999
2 as rounding,	2 or 4
'N' as freeze_last_unit_cost,	Yes, No
'Y' as is_multiples_only,	Yes, No
'Y' as use_load_factor,	Yes, No
'N' as freeze_avg_leadtime,	Yes, No
'N' as use_landed_cost	Yes, No

Creating a Load Table

The fourth step in setting up is preparing the load table. The following steps outline this process.

1. If you have exited Vendor Price Upload re-open SQL Server Enterprise Manager to \Microsoft SQL Servers\SQL Server Group\(\local) (Windows NT)\Data Transformation Services\Local Packages. Double click Upload Vendor Price Updates.
2. Right click Create Load Tables (under step 3 on Vendor Price Upload flow)
3. Select Execute Step

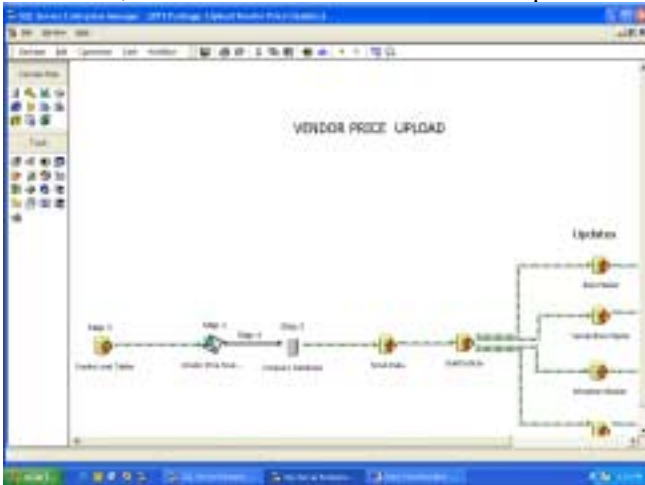


4. Click OK. Creating a load table is complete

Transform Data Task Properties

We have now downloaded and set up Data Transformation Services, created a Vendor Source Price File, identified a Targeted Company Database and created Load Tables. Transforming Data Task Properties is the next step. The following steps tell how to accomplish this requirement.

1. To execute, left double- click the arrow below step 4 below.



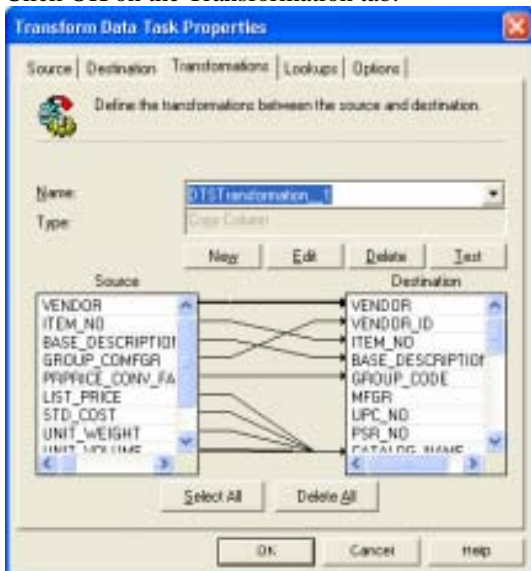
2. Select Table/View as the connection source in the Source tab.



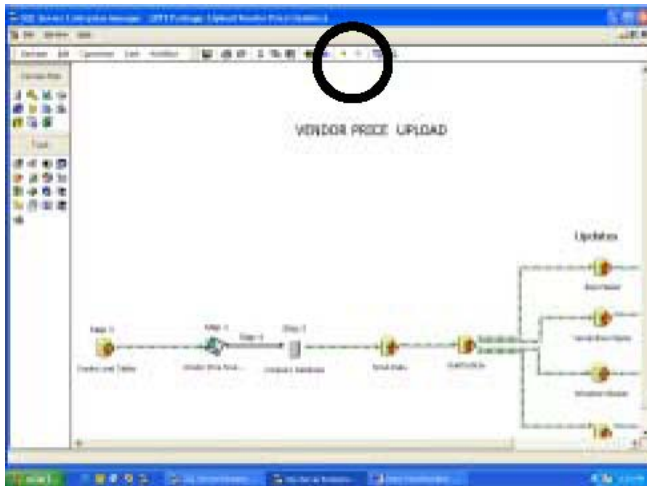
3. Select the file name from the window next to Table/View in the Source tab.
4. Verify the Table name is accurate in the Destination tab [database name][dbo][TEMP_VENDOR_PRICE_UPLOAD].



5. Click OK on the Transformation tab.



- The final step in Transforming Data Task Properties is the execute step
6. Simply left click the green arrow circled on the Vendor Price Upload screen.



7. Transform Data Task Properties is now complete

Updating Vendor Price Upload

Once setting up has been accomplished, updating Vendor Price Upload is a very easy process. The steps required are outlined below:

1. Update the spreadsheet or table created during set-up as the Vendor Price Source File.
2. Open SQL Server Enterprise Manager to \Microsoft SQL Servers\SQL Server Group\local (Windows NT)\Data Transformation Services\Local Packages. Right click Upload Vendor Price Updates.



3. Left click Execute Step. This completes the update process.

Chapter 9

ICVerify Interface

ICVerify is a third-party application that allows real time or batch processing of credit card authorizations. Infor, Inc. has designed an interface within Enspire to allow integration of ICVerify. ICVerify is available from IC Systems, Oakland, CA. Infor, Inc. has no ownership and makes no representation of the ICVerify software.

While ICVERIFY provides its own setup instructions, there are a few option settings within ICVERIFY itself that should be correctly set in order for the integration to work properly. To check these, run the ICVERIFY Setup program.

1. Under the “Merchant Information” tab, be sure the “Evaluated Response?” switch is set to “B”.
2. Under the “Options” tab, set the “Match 1st, 2nd Flds” switch to “S” and the “Amount Tax Inclusive” switch to “Y”.

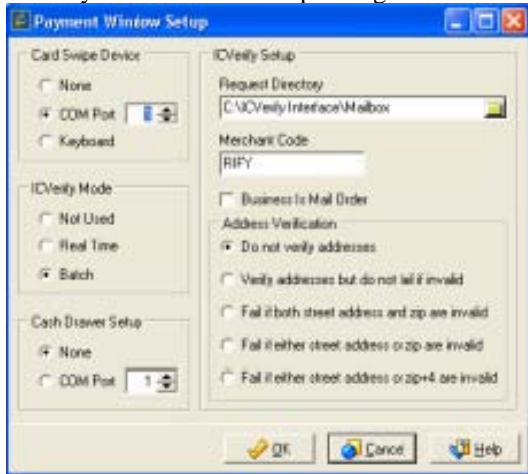
The other switch settings do not impact Enspire and may be set as desired.

Key Terms and Phrases

- Payment Window Setup -The Payment Window Setup dialog establishes the user parameters for Enspire's ICVerify Interface.
- Card Swipe Device - The Card Swipe Device dialogue identifies what type of credit card processing is available.
- ICVerify Mode -The ICVerify Mode selection allows the user to state whether ICVerify is being used or not and if it is, whether it is being used in batch or real time mode.
- Cash Drawer Setup - Cash Drawer Setup tells ICVerify Interface whether or not a Cash Drawer is connected to the computer system.
- Request Directory - Request Directory is the network path through which ICVerify Interface sends to and receives from ICVerify. The path is essentially a user-defined "mailbox."
- Merchant code - The Merchant Code is a four (4)-character code that tells ICVerify which set-up file to use.
- Business is Mail Order - ICVerify requires the user to state whether the Business is Mail Order.
- Address Verification - Address Verification provides the business with five (5) choices of identification verification.
- Payment Tab – The Payment Tab contains information such as payment method, amount card type, and etc. that must be filled out before processing ICVerify.
- Transaction Type – Identifies the type of sales process that ICVerify will confirm.
- Batch Processing – Method by which ICVerify collects multiple transactions in a queue and processes them at once, typically once a day.
- Real Time – Process by which ICVerify processes each credit confirmation as the request is made.

Payment Window Setup

The Payment Window Setup dialog establishes the user parameters for Enspire's ICVerify Interface.



Card Swipe Device

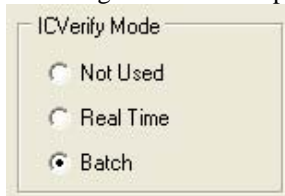
The Card Swipe Device is the first section that must be defined. The choices are listed below the diagram:



- None – Selection of this option tells ICVerify Interface that there is no Card Swipe Device.
- COM Port – Selection of this option tells ICVerify Interface that there is a Card Swipe Device installed on one (1) of the four (4) communication ports. The Interface must be told which of the four (4) COM Ports is being utilized.
- Keyboard – Selection of this option tells ICVerify Interface that there is a Card Swipe Device built into the keyboard.

ICVerify Mode

The ICVerify Mode selection allows the user to state whether ICVerify is being used and if it is, which way it is being utilized. The options follow the diagram:



- Not Used – Selection of this option tells ICVerify Interface that ICVerify is not being utilized.
- Real Time – Selection of this option tells ICVerify Interface that each transaction's verification is being conducted individually and immediately.
- Batch – Selection of this option tells ICVerify Interface verifications are being grouped and processed at a later time.

Cash Drawer Setup

Cash Drawer Setup tells ICVerify Interface whether or not a Cash Drawer is connected to the computer system.

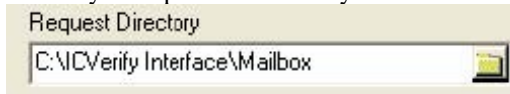


The options are as follows:

- None – Selection of this option tells ICVerify Interface that the system does not have a Cash Drawer interface.
- COM Port – Selection of this option tells ICVerify Interface that a Cash Drawer is electronically interfaced. The user must select the COM Port that the Cash Drawer is connected to by selecting the appropriate COM Port number.

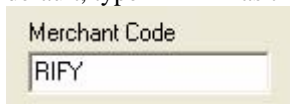
Request Directory

Request Directory is the network path through which ICVerify Interface sends to and receives from ICVerify. The path is essentially a user-defined “mailbox.”



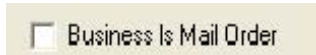
Merchant Code

The Merchant Code is a four (4)-character code that tells ICVerify which set-up file to use. ICVerify is defaulted to the last four (4) characters of the company’s setup file name, which is ICVerify.set. To use this default, type in RIFY as the Merchant Code



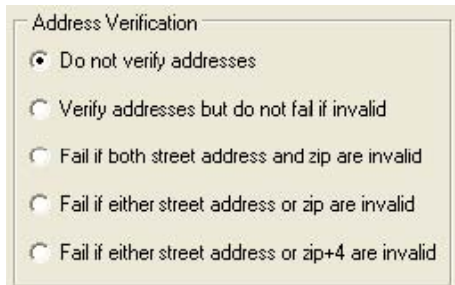
Business Is Mail Order

ICVerify requires the user to state whether the Business is Mail Order. If the business is Mail Order, check the box. If the business is not Mail Order, leave blank.



Address Verification

Address Verification provides the business with five (5) choices of identification verification. Simply select the desired Address Verification.



This completes Payment Window Setup. Press OK to accept the setup.


Using ICVerify Interface

The user will utilize ICVerify Interface when processing payment for an order. To do this, the user must map to TRANSACTION>ORDER ENTRY>SALES ORDER ENTRY>SALES ORDER TOTALS>PAYMENTS.

Payments Tab

Payment information must be filled out before processing ICVerify

Method	Amount	Card Type	Card#	Authorization#	Expiration Date	Check #	Direct License#	Paid By
Check	\$25.00	VISA	4511-3016-8119-0003	377000	07/2005			SWAGGER PETE

1. Select  Process, which will lead you to Transaction Type.
2. Select Transaction Type (defined below).

ICVerify Transactions

Transaction Type

☒ Authorize

☐ Book

☐ Mail - Ship

☐ Sale

☐ Convert To Sale

☐ Void

☐ Batch

OK Cancel Help

- Authorize – used to verify funds are available on an account and to return an approval code.
- Book – authorizes and places a hold on the transaction amount. A book transaction is the first part of a two-part transaction. It cannot be settled until it is completed by a ship transaction.
- Mail – Ship –used to complete a Book transaction. Once a book has been shipped, it is eligible for settlement.
- Sale – employed to charge a purchase to a customer’s credit account. It places a “Hold” on the customer’s available credit by the amount of the sale.
- Convert To Sale – Performs a settlement procedure that converts an authorized transaction to a sales transaction where funds are actually transferred into the selling business’s account.
- Void – used to remove a sale from an open batch before it has been settled.
- Batch – accumulates transactions and processes them all at one time as opposed to real-time where each entry is processed at once.

Batch Processing

Programming to be completed

Chapter 10

Electronic Data Interchange (EDI)

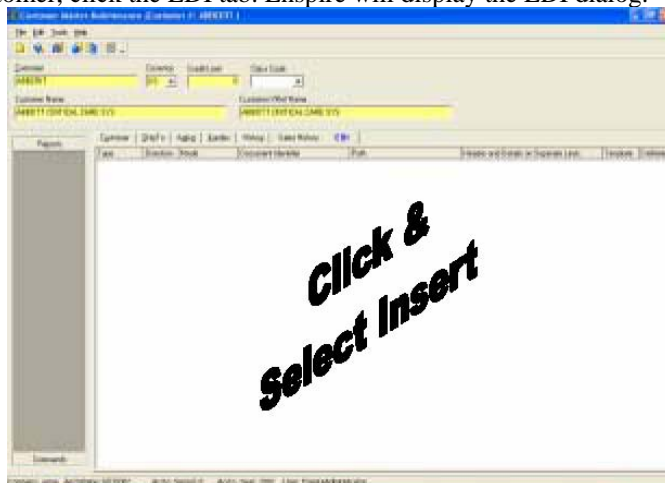
EDI provides E-commerce capability to the Enspire user.

Key Terms and Phrases

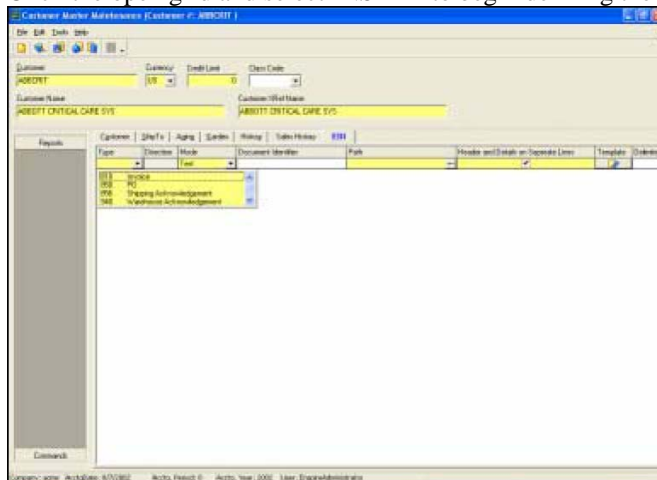
- Customer Invoice Template (810) – Template used to process an Invoice outbound to a customer.
- Purchase Order Template (850) -Template used to process Purchase Orders inbound from a customer.
- Shipping Acknowledgement (856) – Notifies the customer that an order has been shipped.
- Warehouse Acknowledgement (940) – Notifies the customer that an order has been received at the warehouse.
- Vendor Template – Template used to place EDI purchase orders to vendors. Processing EDI Files – Process to execute EDI transactions after completing templates

EDI

To utilize EDI, The user should map to Maintenance>Customer>Customer Master, and after selecting a customer, click the EDI tab. Ensfire will display the EDI dialog.



1. Click the open grid and select INSERT to begin defining the EDI transaction.



2. The EDI grid has four (4) mandatory fields that must be filled in. They are:
 - Type – Type determines the classification of the transaction being processed. In other words, it defines whether the transaction is an incoming PO, an outgoing invoice, or an acknowledgement communication. The four types are listed below:
 - 850 – Purchase Order incoming from a customer
 - 810 -Customer Invoice
 - 856 – Shipping Acknowledgement
 - 940 – Warehouse Acknowledgement
 - Mode – Mode determines whether the interface is being tested, or it is ready for production
 - Production – Selecting Production indicates that the interface is ready for use with customers or suppliers.
 - Test – Selecting test indicates that the user is setting up the interface, and is not ready for use with customers or suppliers.
 - Path – The path indicates where the “mailbox” for the transaction is mapped. It is strongly suggested that a separate path be established for each customer.
 - Header and Details on Separate Lines – Header and Details on separate lines requires a yes or no response to whether the user would like to have header and detail information on the same line. The

example below displays the condition in which the box is checked indicating that yes, the user would like to have header and footer information on separate lines.

- Template – The template icon takes the user to the EDI template, which is where the EDI header and detail settings are defined.

mes	Template	Delimiter

There are also two (2) optional fields that the user can fill out. They are:

- Document Identifier – Provides the ability to name the EDI file for each customer, which provides organization capability.
- Delimiter – The user can define what character will be utilized to delimit the data string (i.e. comma (,), semi-colon (;), etc.).

Purchase Order Template (Type 850)

When the user selects Type 850 (for PO incoming from a customer) and selects on the Template icon, Enspire displays the following dialog (A display of the entire template is included in Appendix 1).

The screenshot displays the TEE Template application interface. It features two data tables, 'Persons' and 'Persons2', each with columns for First, Source, PersonID, Photos, Length, Gender, and Hair. The 'Persons' table contains 10 rows of data, and the 'Persons2' table contains 10 rows of data. The application is running on a Windows operating system, as indicated by the taskbar and window title bar.

First	Source	PersonID	Photos	Length	Gender	Hair
John	John					
John2	John					
John3	John					
John4	John					
John5	John					
John6	John					
John7	John					
John8	John					
John9	John					
John10	John					

First	Source	PersonID	Photos	Length	Gender	Hair
John	John					
John2	John					
John3	John					
John4	John					
John5	John					
John6	John					
John7	John					
John8	John					
John9	John					
John10	John					

At the bottom of the application, there is a status bar showing the following information: Computer: John, Application: TEE Template, Application: TEE Template, User: JohnAdministrator.

The following describes the column headings and input requirements:

- **Field** – Field contains pre-defined titles that outline input requirements.
- **Source** – Source tells where, or in what form, the data is coming from. There is four (4) kinds of source data:
 - DATA** – Indicates the data is coming from an EDI file. **NONE** – Indicates data is not supplied in the file and a default source will be utilized (For example, the Customer, Ship To or Item Dialog).
 - MASTER** – **MASTER** behaves the same as **NONE**. Indicates data is not supplied in the file and a default source must be utilized. **CONSTANT** – Indicates that the data is the same on every file
- **Record ID** – Record ID identifies the fields within a document. Not mandatory except when using data source.
- **Position** – Tells what position in the data string that at which the field begins.
- **Length** – Defines the length of each of the fields.

NOTE: The sender of an EDI file must provide the receiver with definition of Record ID, Position and Length when the set-up is being made or when changes occur to these categories.

- **Constant** – Defines the value of Source constants.
- **Mask** – For numeric and date fields. Numeric fields use #. Date fields use some form of MM/DD/YYYY.

NOTE: Implied decimal must be noted with an exclamation mark (!), not a decimal (.).

XML support for Inbound 850 Purchase Order EDI Document

Enspire can also process an inbound 850 in an XML format, such as those from the Atlas partners: Yahoo, Home Depot, Lowes, and so on. Each partner provides their own specific format of the XML file. Enspire's XML support is configurable so that a new XML 850 file for each customer profile can be processed without additional code changes.

Complete the following in Enspire to implement XML support for an inbound 850 Purchase Order EDI document:

1. The EDI tab screen under Customer Maintenance includes an XML checkbox for each template row that is defined by the user. This setting is used to specify XML formatting for the Inbound

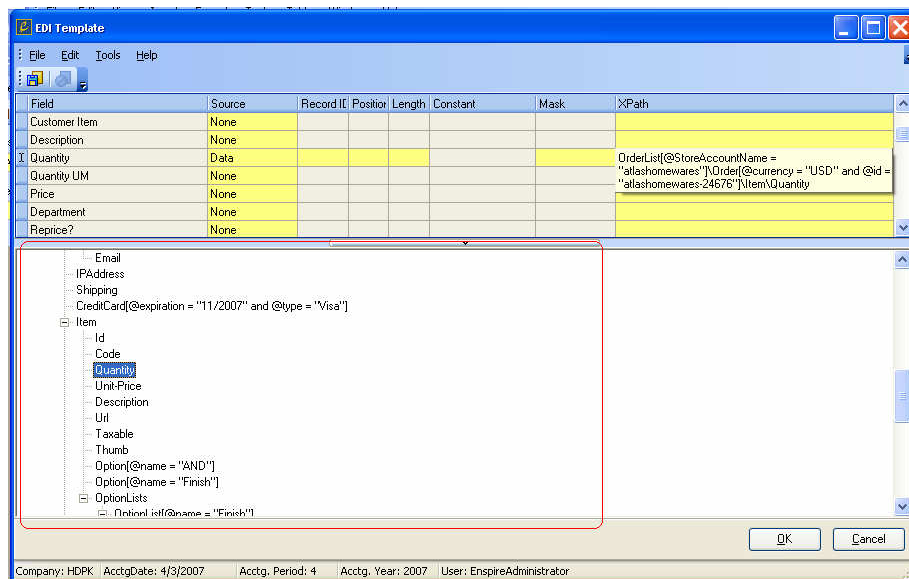
850. Note that this setting is only available when an 850 Type is defined and when the Header and Details on Separate Lines checkbox is unchecked.

Customer ShipTo Aging Kardex History DocStat EDI Collections									
Type	Direction	Mode	Document Identifier	Path	Header and Details on Separate Lines	Delimiter	Template	XML	
850	In	Production	EDI-TEST-850	EDI	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
I 810	Out	Production	EDI-TEST-810	EDI	<input type="checkbox"/>	<input type="checkbox"/>	

2. Access the Load sample XML Files feature. The Load XML Sample File feature provides the ability for users to load a sample file into the EDI template (single line mode) screen. This feature is located under the Tools menu on the EDI Template window.

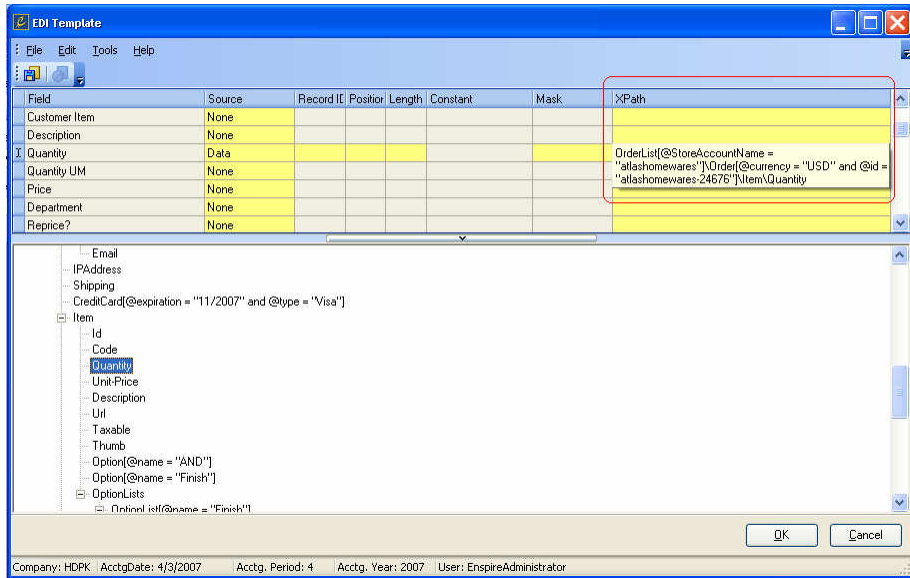


3. Once the Load 850 XML Sample File option is selected from the Tools menu, a Find File dialog box prompts you to select the appropriate XML file.
4. Select the sample 850 XML file, and the Template screen will display a TreeView at the bottom of the page that shows each node in the sample XML file and their relationship to each other. This allows you to quickly obtain XPaths from the sample XML file.



5. To obtain the XPath for a given node in the XML tree, simply locate the node in the TreeView section of the screen and click on the node. The system automatically generates the XPath and populates the XPath field column with the information. This field is used during the EDI 850 Process to pull the corresponding data from the XML tree.

IMPORTANT: The detail node in the XML must be "Item". If not, you must specify the correct note label under the Customer Master's Codes & Controls tab (i.e., EDI XML Detail).

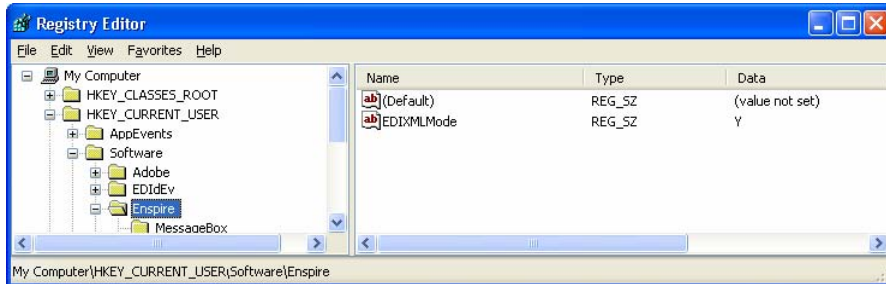


- During the EDI 850 processing, Ensphere goes through the defined template and using the xpath for each field, extracts the data from the XML file. Ensphere will recognize the 850 XML file and process the file appropriately. If an XML file is corrupt or not valid, an error will be displayed and the process will be aborted. The Data extracted from the XML file is processed the same way data is processed from the existing CSV file.

Making 850 XML Support Available for the End User

To make the 850 XML support available for the end user, a registry setting must be created and set. Upon execution of the Ensphere client, the system reads the setting and makes the the appropriate menus items and screens visible.

Under HKEY_CURRENT_USER>Software>Ensphere key, create a String Value called EDIXMLMode and set to 'Y'. Note if this setting is not set properly, the application will default to 'N' or disable.



Customer Invoice, Shipping and Warehouse Acknowledgement Template (Types 810, 856 and 940)

When the user selects Type 810, 856 or 940 (Customer Invoice, Shipping Acknowledgement, Warehouse Acknowledgement respectively) and selects on the Template icon, Enspire displays the following dialog (A display of the entire template is included in Appendix 1).

Table	Index	Parent ID	Parent Position	First Position	Length	Parent
Table Header						
Barcode			5	43	17	
Order Source			5	42	9	
Ordered By			5	47	20	
Paid By			5	41	17	
Paid To			5	40	17	
Document Type			5	1	1	
Shipping Area			5	11	40	
Invoice Type			5	10	13	
Cancel Date			5	50	14	
RTT Date			5	11	14	
Latest Ship Date			5	50	14	
Latest Ship Date			5	50	14	
Order Date			5	14	14	
Order Date			5	13	9	
Status			5	12	9	
Status			5	20	1	
Cancel Today			5	50	1	
Customer Name			5	5	1	
Customer			5	9	9	
Sub Type			5	11	1	
OrderSource Name			5	42	20	
OrderSource			5	50	1	
ShipToName			5	4	20	
Ship To			5	2	9	
EndUserOrder			5	22	13	
CardNo			5	50	1	
Card			5	40	13	
Card			5	40	2	
Customer Rating			5	21	13	
Equipment			5	50	13	
Parent ID			5	50	17	

- **Field** – Field contains pre-defined titles that outline input requirements.
- **Include** – Allows the user to determine if the field will be included in the EDI transaction. System defaults to yes by having a check in the box. Uncheck the box to deselect the field.
- **Record ID** -Record ID identifies the fields within a document. Not mandatory except when using data source.
- **Record Position** – Allows the user to create a hierarchy of data in the EDI file.
- **Length** - Defines the length of each of the fields.
- **Format** - For numeric and date fields. Numeric fields use #. Date fields use some form of MM/DD/YYYY.

NOTE: Implied decimal must be noted with an exclamation mark (!), not a decimal (.).

To utilize EDI to place orders with a vendor, map to File Maintenance>Vendor> Vendor Master, and after selecting a Vendor #, select the EDI tab.



- The template is the same as the Type 810, 856 or 940 template. The following information must be completed to utilize EDI:

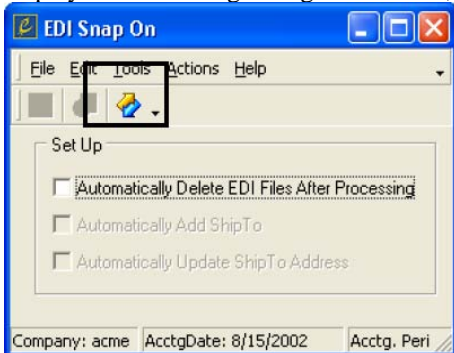
- 99

- Format – For numeric and date fields. Numeric fields use #. Date fields use some form of MM/DD/YYYY.

NOTE: Implied decimal must be noted with an exclamation mark (!), not a decimal (.).

Processing EDI Files

To execute EDI transactions after completing templates, simply map to Snap Ons>EDI where Enspire displays the following dialog. To execute, select the double arrow button.



Enspire provides the user with the ability to save EDI files for future reference. This is the default selection. Should the user not want to save EDI files, check the box to automatically delete files after processing.

Appendices

Types 810, 856 and 940 Template

Header

Table : Header						
Surcharge	Y		1	44	17	
Order Source	Y		1	43	4	
Ordered By	Y		1	42	255	
Freight Out	Y		1	41	17	
Freight In	Y		1	40	17	
Document Type	Y		1	1	1	
Staging Area	Y		1	11	40	
Invoice Date	Y		1	19	10	
Cancel Date	Y		1	18	10	
RTP Date	Y		1	17	10	
Latest Ship Date	Y		1	16	10	
Earliest Ship Date	Y		1	15	10	
Order Date	Y		1	14	10	
Route Stop	Y		1	13	6	
Route	Y		1	12	4	
Status	Y		1	20	1	
Commit Today	Y		1	10	1	
Customer Name	Y		1	9	1	
Customer	Y		1	8	8	
Sub Type	Y		1	7	1	
Warehouse Name	Y		1	6	25	
Warehouse	Y		1	5	8	
ShipTo Name	Y		1	4	25	
ShipTo	Y		1	3	8	
Document Number	Y		1	2	10	
Taxable	Y		1	39	1	
Carrier	Y		1	30	10	
Zone	Y		1	38	3	
Customer Release	Y		1	37	10	
Department	Y		1	36	12	
Freight Allowance	Y		1	35	17	
Customer PO	Y		1	34	20	
Exchange Rate	Y		1	33	10	
Date Printed	Y		1	32	10	
Box Count	Y		1	31	10	
Original Quote	Y		1	21	10	
Date Shipped	Y		1	29	10	
Minimum Order Upcharge	Y		1	28	17	
Terms	Y		1	27	4	
Summary Bill Date	Y		1	26	10	
Use Summary Billing	Y		1	25	1	
Is Backorder	Y		1	24	1	
Revision	Y		1	23	10	
Original Order	Y		1	22	10	


Details

Table : Detail					
Item Description	Y		2	1	50
Quantity UM	Y		2	15	2
Taxable	Y		2	14	1
Price Source	Y		2	13	2
Invoice Date	Y		2	12	10
Date Shipped	Y		2	11	10
Latest Ship Date	Y		2	10	10
Earliest Ship Date	Y		2	9	10
RTP Date	Y		2	8	10
Price UM	Y		2	16	2
Customer Item	Y		2	6	32
Item	Y		2	5	32
Disposition	Y		2	4	1
Line Type	Y		2	3	1
Line Number	Y		2	2	10
Reference Price	Y		2	26	17
Department	Y		2	29	12
Customer Release	Y		2	28	10
Customer PO	Y		2	27	20
Quantity Ordered	Y		2	17	17
Extended Amount	Y		2	25	17
Price	Y		2	24	17
List Price	Y		2	23	17
Quantity Cancelled	Y		2	22	10
Quantity Committed	Y		2	21	17
Quantity Backordered	Y		2	20	17
Quantity Invoiced	Y		2	19	17
Quantity Shipped	Y		2	18	17
Table : Extended Description					
Extended Description	Y		3	1	255
Table : Unit Control					
Weight / Volume	Y		4	5	17
Quantity	Y		4	4	17
Control Number	Y		4	3	20
Unit Control Method	Y		4	2	1

Header

Field	Source	Record ID	Position	Length	Constant	Mask
Zip Code	Data		0	0		
Address2	Data		0	0		
City	Data		0	0		
State	Data		0	0		
Country	Data		0	0		
Address1	Data		0	0		
Telephone	Data		0	0		
Fax	Data		0	0		
Carrier	Data		0	0		
Department	Data		0	0		
Customer	Data		0	0		
Customer PO	Data		0	0		
ShipTo Name	Data		0	0		
ShipTo	Data		0	0		
Miscellaneous Text	Data		0	0		
Miscellaneous Text	Data		0	0		
Terms	Data		0	0		
Buyer	Data		0	0		
Cancel Date	Data		0	0		
Ship Date	Data		0	0		
PO Date	Data		0	0		
Release Number	Data		0	0		

Details

Field	Source	Record ID	Position	Length	Constant	Mask
XDesc1	Date		0	0		
XDesc2	Date		0	0		
XDesc3	Date		0	0		
XDesc4	Date		0	0		
Earliest Ship Date	Date		0	0		
Latest Ship Date	Date		0	0		

Vendor Template

Field	Include	Record ID	Record Position	Field Position	Length	Format
Table : Header						
Exchange Rate	Y			1	23	17
Taxable	Y			1	22	1
FOB Destination	Y			1	21	1
Backorder OK	Y			1	20	1
Instructions	Y			1	19	255
Service Code	Y			1	18	4
Carrier	Y			1	17	10
Ship By Date	Y			1	16	10
Cancel Date	Y			1	15	10
Date Required	Y			1	14	10
Date Released	Y			1	13	10
PO Date	Y			1	12	10
Consignee	Y			1	11	12
Release	Y			1	10	12
Department	Y			1	9	12
Terms	Y			1	8	4
Buyer	Y			1	7	4
Vendor Name	Y			1	6	25
Vendor	Y			1	5	8
Warehouse Name	Y			1	4	25
Warehouse	Y			1	3	8
Document Number	Y			1	2	10
Document Type	Y			1	1	1
Table : Detail						
Taxable	Y			2	13	1
Unit Cost	Y			2	12	17
Quantity	Y			2	11	17
Cost UM	Y			2	10	2
Quantity UM	Y			2	9	2
Vendor Item Description	Y			2	8	50
Item Description	Y			2	7	50
Vendor Item	Y			2	6	32
Item	Y			2	5	32
Warehouse Name	Y			2	4	25
Warehouse	Y			2	3	8
Line Type	Y			2	2	1
Line Number	Y			2	1	10

Chapter 11

Price File Maintenance Service (PFMS)

Enspire includes utilities that update item file price and cost fields using Price File Maintenance Services (PFMS) data. PFMS is a third-party provider of database update subscription services. A cross-reference file is established in Enspire to specify how the PFMS data is used for item file updates. The update step uses the PFMS data and the cross-reference file to update item master and vendor item records for selected items. The update utility can create a new item master and/or vendor item record when the PFMS data includes an item identifier that does not exist in the system.

Key Terms and Phrases

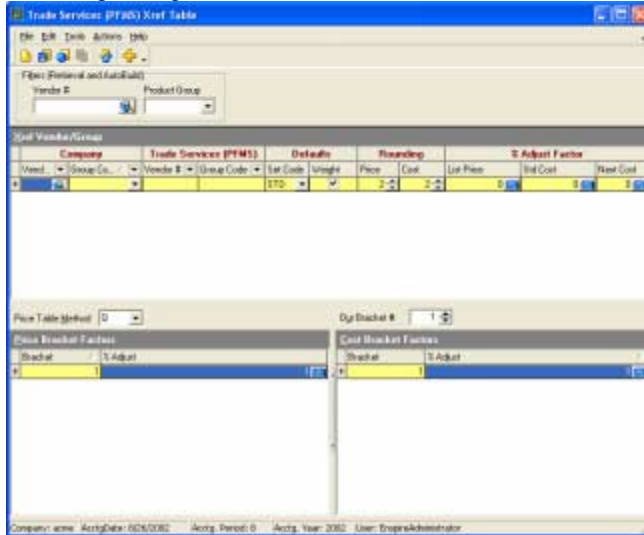
- XRef File Maintenance – Presents the dialogue in which you set up the interface between your company and PFMS. Also establishes the parameters used to execute PFMS.
- Company/Vendor # - Your company's list of vendors and their corresponding vendor numbers.
- Company/Group Code – A group code is an identifier for categorizing products. The using company's product group code cross-references with Trade Service's Group Code to update the item master record with the PFMS price and cost data in item master and item/vendor records (an eight character field).
- Trade Services/Vendor # - PFMS's list of suppliers and their corresponding vendor numbers.
- Trade Services/Group Code – PFMS's group commodity code will be matched with the company's item master record to update the PFMS price and cost data (a four character field).
- Defaults/Set Code – Specifies the default for the general ledger account set that will be defined in the item master record when adding item master and item/vendor records. Record addition may occur when the PFMS data includes an item identifier that does not exist in the system.
- Defaults/Weight – Allows you to determine whether the weight field will be updated.
- Rounding/Price – Specifies the level of rounding accuracy for price field data.
- Rounding/Cost – Specifies the level of rounding accuracy for cost field data.
- % Adjust Factor/List Price – Specifies the percentage increase or decrease in the PFMS list price before storing in the item/vendor list price field.
- % Adjust Factor/Std Cost – Specifies the percentage increase or decrease in the PFMS cost field before storing in the Standard Cost field of the item master record.
- % Adjust Factor/Next Cost – Specifies the percentage increase or decrease in the PFMS cost field before storing in the Next Cost field of the item master record.
- Price Table Method – Determines if the target item file record defines a quantity bracket price (Q) table or a customer-bracket price table (P). A quantity bracket table has minimum purchase quantity brackets each with unique unit price and quantity. A customer-bracket table has unit price levels that are assigned in a customer master record without regard to purchase quantity.
- Bracket – A subset that allows the user to group information into different categories.
- % Adjust – Specifies the percentage increase or decrease in the associated PFMS field.
- Our Bracket # - Specifies the minimum cost quantity bracket that will be used for a purchase quantity of one. This level is typically set to "1" unless special arrangements exist with the vendor to use a different cost bracket.
- Price Bracket Factors – The Price Bracket Factors grid is where you set brackets and adjustment percentages for price.
- Cost Bracket Factors – The Cost Bracket Factors grid is where you set brackets and adjustment percentages for cost.
- Update Item Files – Dialogue where PFMS upload parameters are set and where PFMS is executed.
- Network File Path – Location of PFMS file (Usually supplied on CD).
- Vendor Filter/Sel – Yes or no decision determines if selected vendor information will be uploaded.
- Vendor Filter/PFMS Vendor # -Pre-populated PFMS vendor identification number.
- Vendor Filter/Vendor # -Pre-populated customer vendor identification number.
- Vendor Filter/Name – Pre-populated vendor name.
- Processing Defaults/Master Item # - Field in which you determine whether to use the Mfg. Stock # (M) or UPC # (U).
- Processing Defaults/Description Field Format – Field in which you determine whether to use the Description (D) Mfg. Stock # and Description (M).
- Processing Defaults/Is Description Updated – Yes or No field determines whether to update descriptions on existing items.
- Processing Defaults/% List [Cost=0] – Field in which the user defines a value to calculate cost if the list price comes in as 0.
- Processing Defaults/Use EA as SKU (PFMS = C or M) – Yes or No field in which the user decides whether or not to have PFMS convert price from units of Hundreds (C) or Thousands (M) to a price or cost for each.

PFMS

The first step in utilizing PFMS is setting up. To set up, you must map to Snap Ons>PFMS>XRef File Maintenance. This will take you to the XRef File Maintenance dialogue.

PFMS XRef File Maintenance

Presents the dialogue in which you set up the interface between your company and PFMS. Also establishes the parameters used to execute PFMS. Map to Snap Ons>PFMS>XRef File Maintenance to access the following dialogue.



To utilize PFMS, you must build a cross-reference interface between your company's vendors/product codes and Trade Services' vendors/product codes. With the exception of Company Vendor #, the input of this data is manual. The requirements are defined below.

Company		Trade Services (PFMS)	
Vendor #	Group Code	Vendor #	Group Code
Alw	10	662381	6440

- Company/Vendor # - The using company's supplier vendor # (an eight (8) character field).
- Company/Group Code - A group code is an identifier for categorizing products. The using company's product group code cross-references with Trade Services Group Code to update the item master record with the PFMS price and cost data in item master and item/vendor records (an eight (8) character field).
- Trade Services/Vendor # - PFMS's supplier vendor # (a six (6) character field).
- Trade Services/Group Code - PFMS's group commodity code will be matched up with the company's item master record to update the PFMS price and cost data (a four (4) character field).

The following fields establish data parameters and are defined as follows:

Defaults		Rounding		% Adjust Factor		
Set Code	Weight	Price	Cost	List Price	Std Cost	Next Cost
STD	<input checked="" type="checkbox"/>	2	2	0	0.1	-0.05

- Defaults/Set Code - Specifies the default for the general ledger account set that will be defined in the item master record when adding item master and item/vendor records. STD stands for Inventory "Stock" in this example. Record addition may occur when the PFMS data includes an item identifier that does not exist in the system.
- Defaults/Weight - Allows you to determine whether the weight field will be updated for existing records.
- Rounding/Price - Specifies the level of rounding accuracy for price field data.
- Rounding/Cost - Specifies the level of rounding accuracy for cost field data.
- % Adjust Factor/List Price - Specifies the percentage increase or decrease in the PFMS list price before storing in the item/vendor list price field.

- % Adjust Factor/Std Cost – Specifies the percentage increase or decrease in the PFMS cost field before storing in the Standard Cost field of the item master record.
- % Adjust Factor/Next Cost – Specifies the percentage increase or decrease in the PFMS cost field before storing in the Next Cost field of the item master record.

Price Table Method – Determines if the target item file record defines a quantity bracket price (Q) table or a customer-bracket price table (P). A Quantity Bracket Table has minimum purchase quantity brackets, each with unique unit price and quantity. A Price Bracket Table has unit price levels that are assigned in a customer master record without regard to purchase quantity.

Price Table Method	P
Price Bracket Factor	Code Description
	P Price Bracket Levels
Bracket	Q Quantity Brackets

Our Bracket # - Specifies the minimum cost quantity bracket that will be used for a purchase quantity of one. This level is typically set to “1” unless special arrangements exist with the vendor to use a different cost bracket.

Our Bracket #	1
---------------	---

Price Bracket Factors – The Price Bracket Factors grid is where you set brackets and adjustment percentages for price. Simply click on the grid and press INSERT key on your keyboard to add a new bracket. You are limited to three (3) brackets in this category when Quantity Brackets is selected.

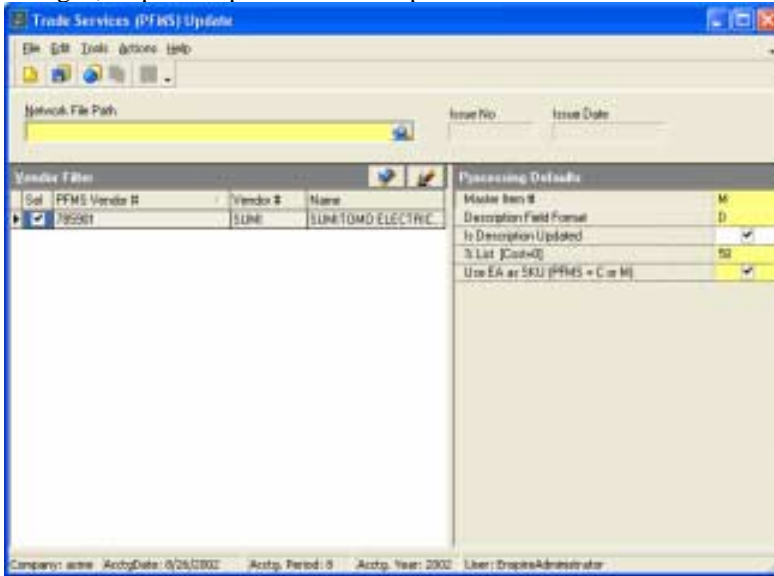
Price Bracket Factors		
Bracket		% Adjust
1		0
2		3
3		5

Cost Bracket Factors – The Cost Bracket Factors grid is where you set brackets and adjustment percentages for cost.

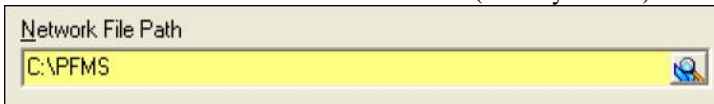
Cost Bracket Factors		
Bracket	% Adjust	
1	0	
2	1	
3	2	
4	3	
5	4	
6	5	
7	6	
8	7	

PFMS Update Item Files

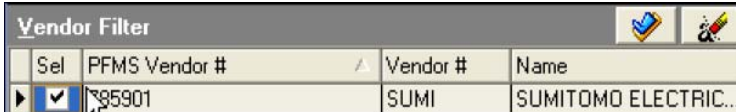
This dialog box is where PFMS upload parameters are set and where PFMS is executed. To access this dialogue, map to Snap Ons>PFMS>Update Item Files



Network File Path – Location of PFMS file (Usually on CD).



Vendor Filter/Sel – Yes or no decision determines if selected vendor information will be uploaded.



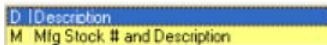
Processing Defaults fields define data processing parameters. They are defined as follows:

Processing Defaults	
Master Item #	M
Description Field Format	D
Is Description Updated	<input checked="" type="checkbox"/>
% List [Cost=0]	50
Use EA as SKU (PFMS = C or M)	<input checked="" type="checkbox"/>

Processing Defaults/Master Item # - Field in which you determine whether to use the Mfg. Stock # (M) or UPC # (U).



Processing Defaults/Description Field Format – Field in which you determine whether to use the Description (D) or the Mfg. Stock # and Description (M).



Processing Defaults/Is Description Updated – Yes or No field determines whether to update descriptions on existing items.



Processing Defaults/% List [Cost=0] – Field in which the user defines a value to calculate cost if the list price comes in as 0. The following example tells PFMS to use 50 if it encounters a list cost of 0.

% List (Cost=0) 50 

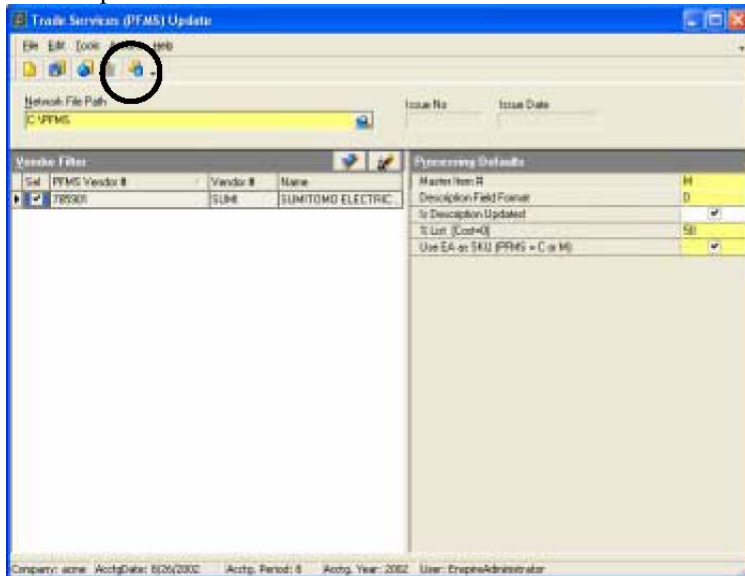
The calculator below appears when you select the calculator button. Use this calculator to input the value; again, in the preceding example the value is 50.



Processing Defaults/Use EA as SKU (PFMS = C or M) – Yes or No field in which the user decides whether or not to have PFMS convert price from units of Hundreds (C) or Thousands (M) to a price or cost for each.

Use EA as SKU (PFMS = C or M) ☒

When the parameters are established and the file path is defined, click the Execute Upload button to run PFMS Update.



Sel	PFMS Vendor #	Vendor #	Name
<input checked="" type="checkbox"/>	78990	5186	SUMITOMO ELECTRIC

Chapter 12

Report Customization

The Enspire report engine eliminates the expense and headaches of third-party reporting tools. You can use the dozens of reports provided with Enspire as they are, or customize them to fit your specific business practices. You can also create an unlimited number of your own custom reports.

Standard Reports and Forms

Within Report Explorer, the Infor Report Objects node contains over three hundred (300) reports, forms, labels and lists. These report objects provide the user with a full array of management tools from which to analyze all of the basic business functions including but not limited to accounts payable, accounts receivable, inventory and closing. The greatest advantage associated with utilizing Enspire's standard reports is the fact that Infor personnel manage maintenance of these reports. Many of the reports are extremely complex with a high degree of integration involving calculations from the Enspire application. With no additional cost to the customer, Infor personnel continually upgrade the report tools to assure optimal processing speed and presentation enhancements.

Custom Reports and Forms

While Infor strongly recommends that you utilize standard reports and forms, Enspire users may choose to use custom reports. Custom reports can be created from scratch or you can modify Infor report objects to create them. If you plan to modify or design reports, knowledge of SQL (Structured Query Language) is strongly recommended.

Chapter 13

File Upload Utility

Enspire's File Upload Utility has been created to allow technology partners, as well as wholesale distributor's using the Enspire software system, the ability to import data directly into Enspire's powerful SQL Server database. The File Upload Utility provides a mechanism to load new records, as well as update existing records that are in the Enspire system and company database(s), by mapping and importing data that is presently stored in fixed length ASCII files and delimited ASCII files.

This utility is very powerful and flexible. Numerous maps can be created for every eligible target table and the utility will also provide the user with the ability to change data on-the-fly in preparation for loading the data into production.

Summary Steps to the File Upload Load Process

1. Prepare ASCII data for load. Excel spreadsheets can be saved as CSV (comma separated value) for easy loading with the File Upload Utility. (HINT: Label column headers with short names with no spaces or unusual characters.)
2. Access the File Upload Utility in Enspire by going to Utilities > System > File Upload Utility (Alt U > S > F).
3. Select your TARGET table. This is the table that you are going to be adding new records to, or optionally you may be updating records that are already in your database.
4. Create a MAP in the first main white area by insert a new line with your INSERT key.
 - a. Name the MAP carefully. Make descriptions short and do not use spaces or other non-standard characters. Use only numbers and letters in the alphabet.
 - b. (Optional) Provide a description for your MAP.
 - c. Specify the location on your local computer, or on the network, of your SOURCE ascii data file.
 - d. Indicate whether your MAP is being built for ADDing new records or UPDATEing existing records. (HINT: Remember the two modes are mutually exclusive of one another. When in ADD mode the system will only add new records not already found in the database. When in UPDATE mode the system will only update the information you have specified on item's that match between your loaded WORK table and the company PRODUCTION database table.
 - e. (Optional) Add reference notes as desired to perhaps help you remember unique information regarding the SOURCE data being used, the TARGET table, your map, etc.
 - f. Identify the type of, or delimiter used, for the SOURCE ASCII file you are loading.
 - g. Identify how your SOURCE file handles text fields. (HINT: Fields like customer name or item descriptions often have comma's or other characters in them. Generally when these types of fields are created, the process that creates the file will surround, beginning and end, of the entire text field with quote marks ("), so that the delimiters can clearly delineate where a field begins and where a field ends.)
 - h. (Optional) Indicated whether or not there are column headers in your first row, or first several rows. (HINT: Notice when this number is incremented the first number in the ROW filters area with increase correspondingly by one increment.)
 - i. Identify the delimiter used to indicate the END of the row/record. The default of Carriage Return/Line Feed (CR/LF) is the most common delimiter used to indicate a row is ended.
 - j. In the FILTERS section you can indicate which row you would like to being with, or you can use the SQL Source File area to add your own WHERE clause in order to only import select records from your SOURCE file.
5. Create/Update Enspire Target Fields. This is the first ACTION item on the ACTION ring menu drop down.
6. If your SOURCE data has column headers then select the ACTION of Create SOURCE fields from SOURCE table. Otherwise you can add them manually by clicking in the source fields area and hitting the INSERT key. Repeat as needed. You may also use the Create SOURCE fields from Target Table to create your column labels quicker and easier.
7. Map your SOURCE data field to your TARGET data fields. Several options exist for mapping sources. Please see Technical/Field definitions shown in the Enspire Target Fields section of this document. (optional) If your SOURCE column names match the TARGET column names you can have the system Auto-Map your SOURCE to your TARGET.
8. Once mapping is complete select the VALIDATE mapping Action to ensure all required values are correctly mapped from SOURCE to TARGET.
9. If no MAPPING violations are found then proceed with the UPLOAD SOURCE File to WORK (TARGET) Table.
10. Validate your WORK Table to ensure all values are acceptable and modify work table information as needed. Repeat VALIDATE WORK TABLE Action until data is clean and prepared to load into your Production database.
11. Proceed to Enspire Update Steps. Change the Production Bulk Load step TYPE to "P". This will ensure that each record is either loaded successfully and/or records that fail to load are clearly identified.

File Upload Utility (technical and field definitions)

Upload Map

The Upload Map section contains the definition of the Upload Map and specifies the source file formatting. Unlimited maps can exist for each Enspire production target table.

Fields

Code: Identification Code for the Upload Map.

Description: Map Description

Source File Path: File Path location of the ASCII source upload file.

Mode: Update existing records with same key or Add new records.

Notes: Special instruction notes associated with this map.

Column Format Type: Identifies if columns are fixed or delimited.

Column Format Delimiter: Identifies the delimiter character. (Fixed Column Format Only).

Column Format Text Qualifier: Identifies whether single or double quotes are used.

Row Format FieldName: Row which contains the source field names, if any.

Row Format Length: Characters contained in each row. (Fixed Column Format Only).

Row Format Delimiter: Identifies the row delimiter character.

Filter First Row: The first 'data' row to include in upload process.

Filter Last Row: The last 'data' row to include in upload process.

Filter Source File: Filter referencing Source Fields, using SQL formatting.

Actions

Show Hierarchy: Shows precedence for the Enspire production target table.

Duplicate Map: Allows for creation of new maps based on existing map data.

Source Fields

This section lists all of the Source File fields which will be mapped to the Enspire table target fields.

Fields

Seq: Column Sequence. (Columns can be moved using the arrows in the upper left grid).

Field Name: Unique field names assigned to the source file.

(Double-Click on Field Name to Locate any linked Target fields)

Start: Column number for the first character in the source field.

(See Source File Layout).

Length: Character length of source field. (See Source File Layout).

Field No: Identifies the field number. (Delimited Columns Only)

Type: Field data-type.

Mask: Mask used for Dates and Decimal fields.

Actions

Create Source Fields From Enspire Target: Auto builds source fields from target fields.

Create Source Fields From Source File: Auto builds source fields if names in source file

(See Row Format FieldName).

Enspire Target Fields

This section contains all of the fields in the Enspire target table (Excluding Identity and Computed Columns). These fields will be used to create a Work Table in the target database for user manipulation. The user uses this screen to identify the mapping between source and target, or identify a calculated value for the target field. The user may drag and drop source fields onto the appropriate target field to map the columns. Note: The user can add additional fields if desired.

Fields

Seq: Column Sequence in database.

Source: Identifies data source for this field. (S-Source, C-Calculated, O-Constant, D-Default, N-Null, E-Source EnumCaseDefault, L-Lookup Guid, A-AutoNumber)

Source Field Name: Displays source field name if source type 'E' or 'S' is used. (Double Click on Source Field Name to Locate any linked Source fields. Right-Click on Source Field Name to Unlink Source.)

Ensfire Field Name: Target table field name.

Update: (Only exposed when Map in Update Mode). Columns to be updated.

Nullable: Identifies if target column is nullable.

Source Conversion SQL: Allows use of custom SQL statements (Case, Select, Calc) if Source is calculated 'C'. Used for entry of constant if Source is constant 'O'.

Source Field Filter: Filter to be applied to source field for S, E and C source types. If the filter begins with the operator SUB(, the filter is not formatted, otherwise the field name is inserted in front of the standard SQL. (i.e. [x] = 'VALUE').

Suppress Uniqueidentifier: Hides fields which are uniqueidentifier data-type.

Field Attributes: Displayed in inspector grid at bottom of section.

Enumerations: Lists enumeration constraints and descriptions.

Actions

Create/Update Ensfire Target Fields: Builds target fields from meta-data.

Set Default Field Update Type: Sets Source column update type based on meta-data.

Auto-Map Source To Target: Maps source to target fields if name and data-type match.

Validate Mapping: Validates mapping requirements.

Upload Source File To Work Table: Executes the parsing process to move the source file up to the work table on the SQL Server database.

Source File Layout

This section is used to view the source file layout and select the field location parameters. The user can retrieve the desired number of records from the source file for analysis. The user may select the desired field in the Source Field section, then highlight the data in the Source File layout view, right-click and select 'Apply Position'. This will update the selected source fields start position and length. The Field No indicates the current location of the cursor.

Source File Parser SQL

This section displays and validates the dynamic Parsing SQL created based on the mapping definitions. The values for the source fields in the dynamic view are set to null and included for validation only. If an error is encountered with an associated Line number the user can double-click in the SQL Syntax error box and the cursor will move to that line.

Work Table

This primary section provides the user with the ability to view and update the source file values after the parsing process is complete, prior to loading into the target production table. The work table displays the Parse Warnings, Data Validation and DataBase errors. This is where the majority of the user's time will be spent prior to updating the production target table.

Fields

Bands: Increases or decreases the heading column bands for readability.

Suppress Nullable Columns: Hides nullable target field columns.

Suppress Uniqueidentifiers: Hides target fields which are uniqueidentifier data-types.

Rec: (WorkTable) Record number.

Sel: (WorkTable) Used to select/deselect records to be validated and/or loaded. The check controls in the upper left section of the grid can be used to update this field.

Status Code: (WorkTable) Current status of record:

- 0 - Record has been validated and can be uploaded to Production.
- 1 - Work Table validation errors exist.
- 2 - Production Upload encountered Database Error.
- 3 - Production Upload Insert Failed: Existing record found in production table.
- 4 - Production Upload Update Failed: No matching record
- 5 - Pending Work Table validation process.

9 - Production Upload Completely Successfully.

Error Qty: Number of errors encountered.

Parse Warnings: Potential problems identified during the Parse process.

WorkTable Validation Errors: Datatype and constraint errors identified. (Status Code 1) (Double-Click on Field Name in error display to locate field in work table)

Database Errors: Errors encountered during the Production Upload step.

Actions

SQL Query Analyzer: Starts Query Analyzer session.

Execute Guid Lookup: Updates worktable fields which are guid lookups.

Validate WorkTable: Validates data-types, field constraints and key constraints in work table.

Refresh WorkTable: Reloads the work table on the client.

Drop WorkTable: Allows the user to delete the work table when the upload is completed.

Auto-Number: Auto-Numbers Vendor and Customer No based on Description.

Enspire Update Steps

This section contains the query which will move the work table to the Enspire production target table. In addition, custom SQL steps can be added to perform additional tasks. There will always be at least one step listed, which is the Production Upload Step, which builds SQL dynamically based on the map settings and work table values. The steps can be ordered in a preferred sequence.

Fields

Seq: Step sequence.

Execute: Executes the selected step.

Name: Description/Name of step.

Type: Type of step (P – RecUpload, R – RecUpload w/Truncate, X – Exec CustomSQL, B – BulkUpload, T – BulkUpload w/Truncate)

Step Instructions: Special instructions for that step.

Statistics: Statistics log for selected step.

SQL: SQL scripts associated with that step.


Actions

Clear Statistics Log: Deletes all statistical history for the selected step.

Chapter 14

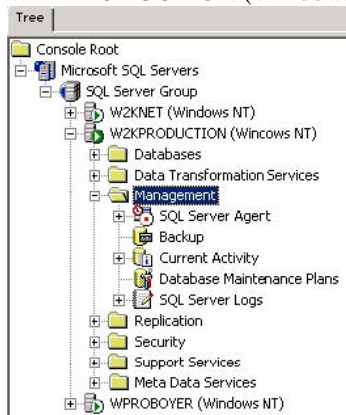
Rebuilding Database Indexes

If you do not rebuild your database indexes regularly, they become fragmented and affect the performance of the software. These instructions describe the steps for creating and scheduling a maintenance plan to rebuild your Ensfire database indexes. The indexes should be rebuilt once a week, after you have completed your backups.

NOTE In order for your maintenance plan to run at the scheduled time, the SQL Server icon  in your Windows system tray. Select the **Server**, then in **Services**, select **SQL Server Agent** and click **Start/Continue**. To start the SQL Server Agent automatically, select **Auto-start service when OS starts**. Close the SQL Server Agent.

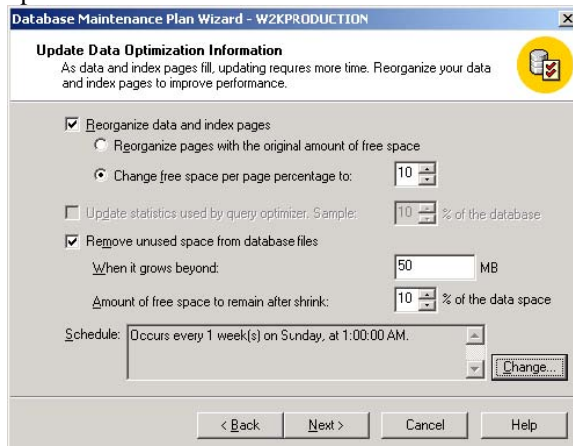
To schedule a maintenance plan for rebuilding indexes:

1. On your Ensfire database server, open the Microsoft SQL Server Enterprise Manager. To open the Enterprise Manager, click the **Start** button on the Windows taskbar. Select Programs>Microsoft SQL Server>Enterprise Manager.
2. Double click the server you want to create the maintenance plan for. In the example below, W2KPRODUCTION (Windows NT) is the selected server.

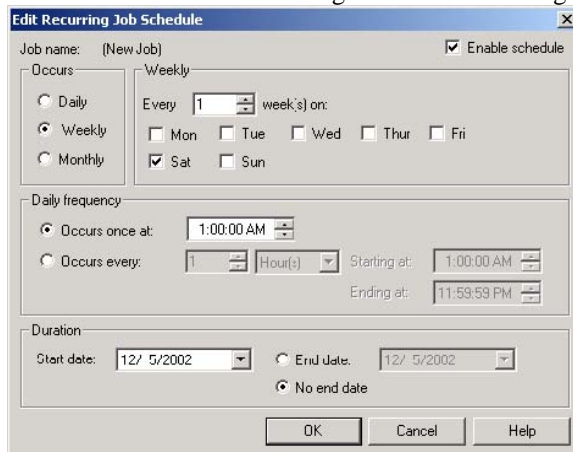


3. Under the selected server, open the Management folder.
4. Right click **Database Maintenance Plans**. From the menu that appears, select **New Maintenance Plan**. The Database Maintenance Plan Wizard appears.
5. Click **Next**.
6. If you want to rebuild the indexes for all of your databases, select **All databases**. If you want to select individual databases, select **These databases** then select each database you want to include. **It is recommended that you select All databases**.
7. Click **Next**.
8. Select the following options: **Reorganize data and index pages**, **Change free space per page percentage to**, then set this option to 10, **Remove unused space from database files**, then set this

option to 50 mb. Your wizard should resemble the one shown below.



9. Click **Change**. The Edit Recurring Job Schedule dialog appears.
10. Complete the Edit Recurring Job Schedule dialog as follows: In the Occurs group box, select **Weekly**. In the Weekly group box, set the option to **Every 1 Week**, then select the day of the week you want to rebuild the index. Set the **Start date** to the current date.
11. Click **OK**. Your Edit Recurring Job Schedule dialog should resemble the one shown below.



12. Click **Next**.
13. Unselect **Check database integrity**.
14. Click **Next**.
15. Unselect **Backup the database as part of the maintenance plan**.
16. Click **Next**.
17. Select **Write report to a text file in directory**, then select a directory.
18. Select **Delete text report files older than**, then set this option to 4 weeks.
19. Click **Next**.
20. Unselect the following options: **Write history to the msdb.dbo.sysdbmaintplan_history table on this server** and **Write history to the server**.
21. Click **Next**.
22. Click **Finish**. If you receive the message below, see the note at the beginning of this document.



Chapter 15

eClient B2B Order Templates

Mapping Customer Orders Into Enspire

eClient is the Business to Business module for Enspire that allows remote users to perform different tasks through an efficient and productive web interface that can be run on different Internet browsers. Besides being able to obtain information about products, account receivables and other documents, users can also place orders in different ways: manually entering the information via an intuitive web form, adding products to a shopping basket, sending an HTTP request to the eClient server, or by directly uploading a text file in one of three specific formats (comma delimited, fixed length and XML). However, even when these four methods proved to be an excellent solution in most cases, some remote customers found difficulties in the process of transforming their current purchase orders into a format that could be recognized by eClient. In order to solve this problem, an Enspire module to handle the mapping of these custom orders has been created. The following white paper explains how to use it and integrate with eClient.

Using the Mapping Tool in Enspire

The first step to allow remote users to upload custom orders is to create an order template. This can be achieved by accessing the module *Snap Ons – Eclient – Eclient Order Templates (SLO)* from the Enspire main window (Figure 1)



Figure 1

The following windows will be displayed (Figure 2)

Figure 2

By default, Enspire includes two templates, Enspire Comma Delimited and Enspire Fixed Length. These two formats adhere to the current specifications supported by non-custom eClient templates. It is not recommended to delete these templates, since some customers could still make use of them and it is always possible to assign to only specific customer (which is explained later on this document).

The screen is divided in two areas: The one on the top is used to specify general properties of the order template; the one on the bottom is used to provide mapping information for each field in the order. Columns in both areas are explained in the following sections.

Header Fields

In order to create a new order template, click on the upper grid of the Order Templates window and press the *Insert* key on the keyboard. A new row will be added, allowing entering information in the different columns. Possible values and how they affect the document mapping are described in the following lines:

Order Templates							
General		Header		Detail			
Template Name	Start String	Delimiter	Start String	Starts in Line	Lines per Item	New Line Identifier	Delimiter
		,					,

Template Name: This is the name that identifies the order template and that will be presented to the remote customer as an option during the order upload process. Try to make it as descriptive as possible.

Header – Start String: The mapping algorithm uses this field to identify the start of an order. Make sure that the text provided will never change, regardless of the order status. If this field is left blank, the system will assume that every line in the file represents a complete order, where the header and detail fields are included in the same line. If header information is repeated in different lines, the system will automatically merge them into a single order.

Header – Delimiter: The value in this field determines the delimiter character between fields in the order header. It is only necessary to populate this field when one or more of the header fields are located by this method.

Detail – Start String: This field determines the string that identifies the start of the detail lines section. If no value is provided, the system will use the value in the *Starts in Line* column instead.

Detail – Starts in Line: The line number (using the first line of the header as a reference) where the detail lines section starts. **The value in this column will be ignored if the *Detail – Start String* column is populated.**

Detail – Lines per Item: The value in this field determines the number of text lines that can be found in one single order line. If this value is not the same for all the order lines, then it is probably better to use the next column *New Line Identifier*, and set a value of 1 to this column.

Detail – New Line Identifier: This is the string that identifies the start of a new order line. Make sure to set the value of *Detail – Lines per Item* to 1 if you are using this column.

Detail – Delimiter: The value in this field determines the delimiter character between fields in the order detail section. It is only necessary to populate this field when one or more of the detail line fields are located by this method.

Detail – End String: This field determines the string that identifies the end of the detail section.

Detail line Fields

When the new order template is saved, the system automatically populates the grid in the lower area of the window. Fields that can be mapped to Ensfire fields are automatically added as rows that can be customized with different values. The available fields are:

Header Section:

Section : H	
ONE_TIME	One Time
CUST_NAME	Customer Name
SHIP_CITY	ShipTo City
SHIP_IS_RESIDENCE	ShipTo Is Residence Flag
SHIP2_ATTENTION	ShipTo Attention
SHIP2_NAME	ShipTo Name
SHIP_PHONE_NO	ShipTo Phone Number
SHIP_NO	ShipTo Number
SHIP_ZIP	ShipTo ZipCode
CUST_NO	Customer Number
SHIP_ADDR2	ShipTo Address2
CUST_REL_NO	Customer Release No
SHIP_COUNTRY	ShipTo Country
SHIP_STATE	ShipTo State
SHIP_ADDR	ShipTo Address
DEPT	Department
CARRIER_NO	Carrier Number
CUST_PO	Customer PO
INSTRUCTIONS	Order Instructions
SERVICE_CODE	Service Code

Detail Section:

Section : D	
PRICE_UOM	Price Unit of Measure
DESCRIPTION	Item Extended Description
PRICE	Item Price
UOM	Unit of Measure
ITEM_NO	Item Number
QTY_ORDERED	Quantity Ordered

Different values can be assigned to each one of these fields. The way they affect the mapping of the order is describe in the following paragraphs:

Name	Description	Source	Line	Locate Mthd	Position	Length	Seq #	Start	End	Constant
------	-------------	--------	------	-------------	----------	--------	-------	-------	-----	----------

Name: This is the name of the field, it cannot be changed.

Description: Description for this field, it cannot be changed.

Source: This field can take three different values

(N) None: this field will be ignored by the mapping process.

(D) Data: the field will be mapped using the information in the rest of the columns.

(C) Constant: this field will take the value entered in the *Constant* column.

Line: The text line inside the order line where this field is located. This number cannot be greater than the one entered in the *Header – Lines per Item* field.

Locate Method: This field can take three different values:

(D) Delimited: The field is located using a delimiter approach. Associated columns:

Sequence: Using the line number, the corresponding delimiter and this value, the field is located.

(F) Fixed: Using a fixed length method, the field will be located. Associated columns:

Position: The character position where this field starts, in the text line specified.

Length: The number of characters that will be read after the value in the *Position* column.

(S) String char: The text located between the start and end string is used as the value to be mapped.

Start: The string right before the field starts.

End: The string after the field ends.

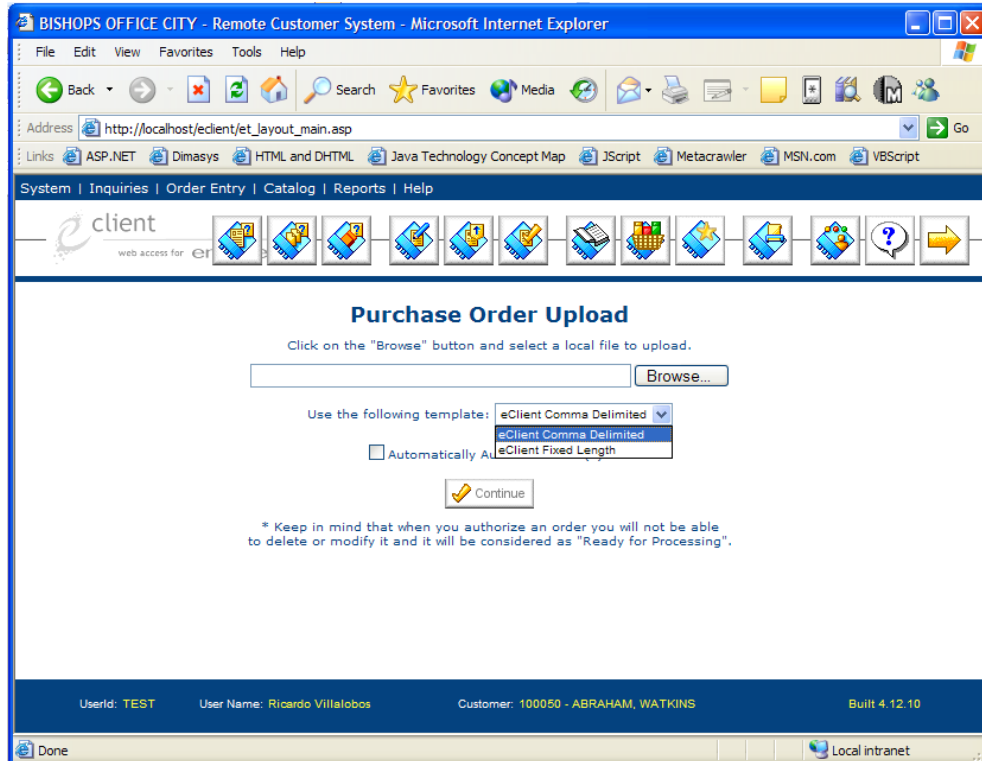
Constant: The value that this field will take in case the *Source* is set to (C) Constant. It is ignored otherwise.

Assigning Order Templates to eClient customers

Once all the fields have been mapped, it is possible to assign order templates to Enspire customers by clicking on the *Customers using template* tab. The following screen will be presented:

In order to add new customers, press the *Insert* key. A new row will be added to the customers' grid. Using the regular Ensfire search option, find customers and add them to the grid. Any eClient users associated to these customers will be able to start using the corresponding template.

It is important to mention that if the eClient customer does not have any order templates assigned, the regular eClient interface (with the three specific eClient formats) will be presented to the user. Otherwise, only the selected templates will be included as options.



Chapter 16

PCCharge

Enspire offers an interface to third-party applications that provide real time or batch processing of credit card authorizations. Enspire's interface enables PCCharge Payment Server, which is available from GO Software Inc., Savannah, GA.

Infor recommends PCCharge to Enspire users who do not currently have a credit authorization Snap On because Infor ultimately plans to make PCCharge Enspire's single credit authorization source.

Toward that end, Infor provides the following contact and product information for PCCharge Payment Server.

PCCharge Payment Server offered by GO Software

Telephone #	800.725.9264
E-Mail Address	mailto:sales@pccharge.com
Web Site	http://www.gosoftware.com/

PCCharge Payment Server	Price
Single-Merchant Number License with Single-User License	\$545.00
Additional Merchant Number	\$125.00
Additional User License	\$125.00
Upgrade to Unlimited User License	\$795.00
Mag Card Reader (Keyboard Wedge)	\$115.00
Mag Card Reader (Serial Port)	\$115.00

Prices subject to change

Setting Up PCCharge

PCCharge is integrated into Enspire and requires no special setup. Simply install per the PCCharge Payment Server installation instructions.

Payment Window Setup

The Payment Window Setup dialog establishes the user parameters for Enspire's Credit Authorization Interface. You may access the Payment Window Setup for PCCharge via the Snap Ons selection on the Enspire main menu. You complete the setup before using PCCharge.

1. On the Credit Card Verification Setup tab complete the following.
2. Enter the **Request Directory**. This directory is where PC Charge or ICVerify transactions are spooled until you are ready to process them. It is the network location through which Enspire sends and receives information to/from your credit card processing company. The path is essentially a user-defined "mailbox."

For ICVerify, this directory must be on a local drive or on a network drive that is shared. It also must match the directory selected when you set up ICVerify.

For PC Charge, this directory must be the same location where the PC Charge software is installed.

3. Enter your **Merchant Code**.

For ICVerify, this code is the last four characters of the name of your ICVerify setup file. In most cases, those four characters are RIFY.

For PC Charge, this code is the merchant account as registered with PCCharge. If you are using PC Charge, enter a **Processor** value. This field identifies the credit card processing company. The following is a list of current Credit Card Processing Companies and Processor Values as provided with PCCharge:

Credit Card Processing Company	Platform	Former Name	Processor Value
Alliance Data Systems, Inc.	ADSI		ADSI
BancTech Payment Systems, Inc.	BPS		BPS
Bank of Montreal	BMON		BMON
BuyPass	BPAS		BPAS

Credit Card Processing Company	Platform	Former Name	Processor Value
Concord/EFS	CCRD		CCRD
Electronic Clearing House	ECHO		ECHO
First Data Corporation	Omaha	First Data Resources	FDC
	Nashville	Envoy	FDCN
	NaBanco		NB
	CardNet	Card Establishment Services	CES
	Telemoney (terminal-based)		TELM
	Telemoney (host-based)		TMH
First Hawaiian	FHAW		FHAW
First Tennessee Merchant Systems	FTMS		FTMS
Global Payment Systems	Atlanta	National Data Corporation	NDC
	St. Louis	Mastercard	MAPP
	Los Angeles	Modular Data	MDI
Lynk	LYNK		LYNK
Midwest Payment Systems	MPS		MPS
Maverick	MVRK		MVRK
National Processing Company	NPC	National City Bank	NPC
Nova	NOVA		NOVA
NOVUS	NOVUS		NVUS
Paymentech	Florida	Gensar, Transnet	GSAR
Royal Bank of Canada	RBOC		RBOC
VisaUSA	IPGS		IPGS
VITAL	VisaNet		VISA

Processing Company Abbreviations

- If you restrict payment processing by **User**, enter the Enspire user codes for the users that can use payment processing.

OR

Selected **Unlimited Users** if you do not restrict processing by user code.

- If your company is a mail order business, select **Business Is Mail Order**. If it is not a mail order business, leave this option unselected.

6. In **Timeout (Secs)**, type the number of seconds to determine how long Enspire waits to process a credit card transaction. For example, if **Timeout** is set to 30 seconds, Enspire will take 30 seconds to attempt to make contact and verify the credit card. If no contact is made, you will receive a timeout message and Enspire will stop trying to make contact. If you find that you receive frequent timeout messages, increasing the **Timeout** seconds may solve the problem.
7. In the Address Verification group box select whether you verify the addresses of the credit card users and also whether the transaction fails if the address is invalid.

Do not verify addresses - This option does not verify the address.

Verify address but do not fail if invalid - This option verifies the address but does not cause the transaction to fail if the address is invalid.

Fail if both street address and zip are invalid - This option verifies the address and causes the transaction to fail if the address and zip code are invalid. If one is valid and the other is not, the transaction does not fail.

Fail if either street address and zip are invalid - This option verifies the address and causes the transaction to fail if either the address or the zip code are invalid.

Fail if either street address and zip+4 are invalid - This option verifies the address and causes the transaction to fail if either the address or the zip+4 zip code are invalid.

8. In the Card Verification Mode group box, select the mode in which you use PC Charge or ICVerify.

Select **Not Used** if you do not use PC Charge or ICVerify.

Select **Real Time** if you process credit card transactions through PC Charge or ICVerify as they occur.

Select **Batch** if you process multiple credit card transactions through PC Charge or ICVerify at once. For example, if your company is a mail order business and you process credit card orders once at the end of the day, select **Batch**.

9. On the Device and Transport Setup tab complete the following.

The screenshot shows the 'Payment Window Setup' dialog box with the 'Device And Transport Setup' tab selected. The dialog is divided into two main sections: 'Card Swipe Device' and 'Cash Drawer Setup'.

Card Swipe Device:

- ☒ None
- ☐ CDM Port: 1
- ☐ Keyboard

PCCharge Version:

- ☐ Version 5.6 And Below
- ☒ Version 5.7 And Above

Cash Drawer Setup:

- ☒ None
- ☐ CDM Port: 1
- Drawer #: 0

PCCharge Transport:

- ☐ File Method
- ☒ TCP/IP Method

Host Name or IP Address: US-IRV-FS01

Port: 31420

At the bottom of the dialog are three buttons: OK, Cancel, and Help.

10. In the Card Swipe Device group box, select the method used to connect your credit card swipe device, if any, to your computer.

You can select:

None – Selection of this option tells the credit authorization interface that there is no Card Swipe Device.

COM Port – Selection of this option tells the credit authorization interface that there is a Card Swipe Device installed on one (1) of the four (4) communication ports. The interface must be told which of the four (4) COM Ports is being utilized.

Keyboard – Selection of this option tells the interface that there is a Card Swipe Device built into the keyboard. If you select **Keyboard**, then select the port number if the card swipe device is attached to your computer through the keyboard.

NOTE: Infor recommends the MAGTEK Item No. 21080057 card swipe device, which works seamlessly with Enspire. MAGTEK reduces set-up by integrating its communication software and drivers within the swipe device.

Features & Benefits

- Available models include IBM AT, PS/2 and compatibles in single and dual track configurations
- Bi-directional read capability
- Can be attached to any PC keyboard or flat surface
- LED Feedback: green indicates ready to read, red indicates error
- No external power requirements
- No programming or special software required
- Sends data to the PC as if it were entered from the keyboard

11. In the Cash Drawer Setup group box, select the method used to connect your cash drawer, if any, to your computer.

Select **None** if no cash drawer is attached to your computer.

Select **COM Port**, then select the port number if the cash drawer is attached to your computer through a COM port.

Enter the **Drawer #** that this information refers to.

12. For PCCharge Version, select Version 5.6 And Below or Version 5.7 And Above to indicate to Enspire which version of PCC is installed and being used at your location.
13. For the PCCharge Transport option indicate whether your system uses the **File Method** (only method previously available) for transporting “input” and “output” files to PCCharge or if the **TCP/IP Method** for sending and receiving the “input” and “output” files to and from PCCharge.
14. In the **Host Name or IP Address** field, enter the PC-Charge Server name or IP Address to communicate through TCP/IP connectivity. Note that Host Name can only be used if the PC Charge server is domain authenticated. Otherwise, use the IP Address.
15. If you selected the **TCP/IP Method** enter the **Port** number on which all communication is conducted.
- Note: When using the TCP/IP method for processing credit card payments, the determination as to which port to use, is a decision that should be made by the user and/or their network administrator. The main thing to keep in mind is that the default port of 31419 should be changed to maximize security when processing transactions in a live environment. Additionally, the default port of 31419 may be changed if a device is already using that port on the computer that is running PCCharge. Refer to the PCCharge documentation for more details.
16. Select OK to save your entries.

The Payment Window Setup can also be selected in POS Payments and A/R Check Entry by clicking on the double check icon labeled settings.

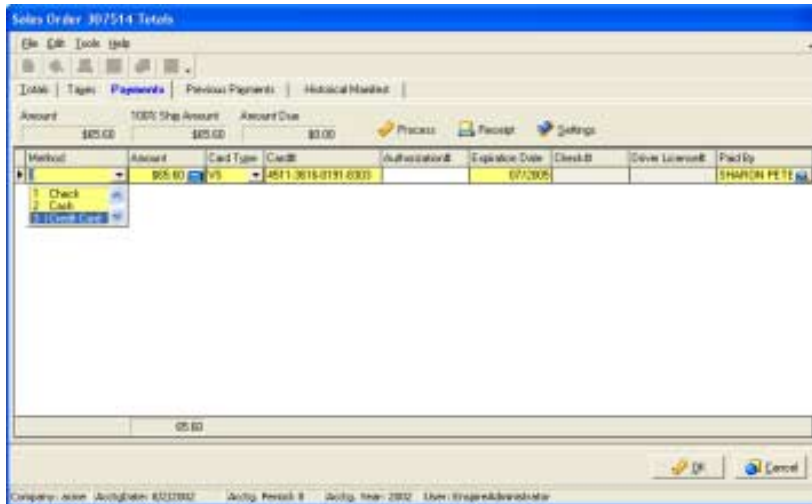


Using PCCharge

PCCharge is accessed through the sales order payment screen. To do this, the user must map to TRANSACTIONS>ORDER ENTRY. From the actions menu, choose totals. In the totals dialog, click the payment tab.

Payments

Payment information must be filled out before processing PCCharge.



Select Process, which will lead you to Transaction Type.



Transaction Type

Select Transaction Type (defined below) and then select OK.



- Authorize – used to verify funds are available on an account and to return an approval code.
- Book – authorizes and places a hold on the transaction amount. A book transaction is the first part of a two-part transaction. It cannot be settled until it is completed by a ship transaction.
- Mail – Ship –used to complete a Book transaction. Once a book has been shipped, it is eligible for settlement.

- Sale – employed to charge a purchase to a customer’s credit account. It places a “Hold” on the customer’s available credit by the amount of the sale.
- Convert To Sale – performs a settlement procedure that converts an authorized transaction to a sales transaction where funds are actually transferred into the selling business’s account.
- Void – used to remove a sale from an open batch before it has been settled.
- Batch – accumulates transactions and processes them all at one time as opposed to real-time where each entry is processed at once.

Type in the authorization number when approved and select OK.



Batch Processing

If you selected the batch transaction type within the Payment Window or the Transaction Type dialog, you must complete the batch processing.

The dialog is found within Snap Ons>ICVerify (Although the window is called ICVerify Batch, it also processes PCCharge batches).



Perform the following steps to utilize batch processing:

1. Select the warehouse for which you want to process credit.
2. Select authorize or sale to determine whether you are authorizing a sale or actually processing a sale.
3. From the actions menu, choose fetch to pull in all available records.
4. Post the records and select OK.

Technical Support

The following are ICVERIFY_TRANS_CODE and their corresponding transactions. ICVERIFY_TRANS_CODE are found in the dbo.OE_POS_PMTS table. The column is a one character field, which allows null values (char(1), Null). Within the application, the user selects the desired transaction and Enspire records the appropriate code to OE_POS_PMTS.

- 1 - sale
- 2 - void
- 3 - credit
- 4 - booked
- 5 - converted to sale from authorize
- 6 - authorized
- O - shipped (this is the letter not the number)
- B - batch
- H - declined / on hold

Troubleshooting

Problem – PCCharge has been taking a second or two to process when it suddenly starts taking longer than 30 seconds resulting in a time-out.

Solution Possibility – Check your virus scan to see if you have included the request directory folder in the scan. If so, de-select the request directory folder from the virus scan.

Chapter 17

eClient Channel Specifications

Overview

This chapter provides the specification for the HTTP Channel into Enspire eClient. This specification can be used by technical staff to determine how to connect to Enspire eClient using the HTTP protocol. It considers the use of HTTP to send and receive business document as asynchronous messages.

Basic Authentication

Basic Authentication follows RFC2617¹. Enspire eClient follows the following rules for basic authentication.

1. Messages sent with a Authentication HTTP header field should be authenticated by the Receiving Message Agent. If the userid/password is validated, the message should then go through normal processing . For messages that fail authentication a 401 message should be sent back as a response to the Sending Message Agent
2. Messages that are sent without a Authentication HTTP Header field should receive a 401 (Unauthorised) Response. Sending Message Agents that receive the 401 response should send the same message again with the Authorization HTTP Header.

HTTP Message under Basic Authentication

As a client it will pass the Authentication information in the HTTP Header as follows:

HTTP 1.1

Authentication: Basic <base64-user-pass>

<message>

Where

base64-user-pass = userid:password // base 64 encoded

HTTP Authorization Example²

The following is an example of an Authorization Header being sent to a Message Agent. As can be seen the userid and password are base64 encoded. The userid and password are actually “Aladdin” and the password is “open sesame”.

Authorization: Basic QWxhZGRpbjpvcGVuIHNlc2FtZQ==

HTTP Message – Unauthorized

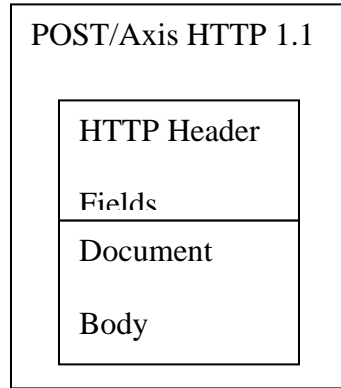
HTTP/1.1 401 Access Denied

WWW-Authenticate: Basic

¹ RFC 2617 can be found at <http://www.ietf.org/rfc/rfc2617.txt?number=2617>

HTTP Requests

All HTTP Requests are sent as HTTP V1.1 POSTs. They have the following format:



HTTP Requests Header Fields

The following table describes the HTTP Header fields used by Enspire eClient.

HTTP Header Field	Description	Possible Values	Mandatory/Optional
ECLIENT_FILE_FORMAT	Specifies the file format for the order	FIXED COMMA XML	Mandatory
ECLIENT_AUTO_AUTHORIZE	Specifies if the order should be automatically authorized when received or not	Y N	Mandatory

HTTP Requests Document Body

The document body for the request should meet the following criteria:

XML purchase orders must be based on the [OAGI 7.2.1](#) specifications.

Document number is S3_003_process_po_007 (Process PO).

You can only include one order per XML file (based on the specification).

Partner types SHIPTO and CARRIER must be included (CARRIER information can be empty)

In addition to the required fields specified by the OAGI documentation, your order must include:

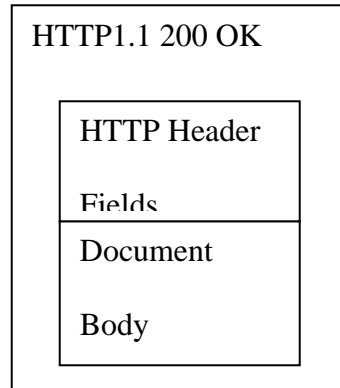
Field	Description
/POORDERHDR/PORELEASE	Purchase Order Release

Field	Description
/POORDERHDR/NOTES	Purchase Order Instructions
/POORDERHDR/DATETIME	Purchase Order Date and Time
/POORDERHDR/PORELEASE	Purchase Order Release
/POORDERHDR/PARTNER	Include a Partner type "SHIPTO" and address
/POORDERLIN/ITEM	For each POORDERLIN, include the Item number

A typical HTTP request recognized by Enspire eClient can be found in Appendix A.

HTTP Responses

All responses are standard HTTP 1.1 Responses as indicated in the following diagram.



HTTP Response Codes and Header Fields

Message Agents should use the 'standard' HTTP response codes. For example a 200 OK should be sent if the message was successfully received. The following table shows the values used and their meaning:

Code	Meaning
200	Ok. This indicates that the Message Agent received the message and placed it into a Reliable message store
500	Internal Error. This indicates that the Message Agent received the message, but an error occurred. This could be because of a validation error, an incorrectly formatted HTTP message etc.
Other Codes 4xx and 5xx	These messages will be returned according to the implementation. Ie. A Web Server may return 400 if it is a bad request.

HTTP Response Document Body

HTTP Return Codes are used to indicate success or failure.

In case of success, a HTTP return code of 200 is returned, with the XML message of the form Acknowledge PO (OAGIS 7.2.1 standard). A typical response can be found in appendix B.

If an error occurs an Internal Server Error is return, with the XML Message of the form:

```
<Enspire_Enspire eClient_Response>
  <Enspire_Enspire eClient_Status>
    <Enspire_Status> </Enspire_Status>
  </Enspire_Enspire eClient_Status>
</Enspire_Enspire eClient_Response>
```

The following table provides details on the message in the response:

Field	Description	Optional
-------	-------------	----------

Field	Description	Optional
Enspire_Enspire eClient_Response	This is the response for a particular message. This should always be in the response.	No
Enspire_Enspire eClient_Status	Axis_Status. This indicates the status of the message	No
Enspire_Status	Error Status Code with description.	No

Chapter 18

Enspire to FulFillAnalytics/Correlation(E2FC) Export Utility

Overview

The Enspire FulFillAnalytics/Correlation(E2FC) Export Utility is stand-alone utility used to replace the SQL2000 DTS utility, EnspiretoDataWhse.dts. FulFillAnalytics/Correlation(E2FC) Export Utility is a client-server program written in Delphi 2007 that is simple to deploy and use. In an effort to keep it simple to maintain, it uses only native components which are included in the Delphi package.

The E2FC utility program uses the EnspireReadOnly user that should already be defined on the SQL Server for querying information from the Enspire databases.

Note that this utility is available on either the Nexus or the Infor365 Web site for download.

The E2FC Zip file that you download from website will contain three files.

1. E2FC.INI
2. E2FC.EXE
3. README.TXT

Infor recommends that you extract these files into a new folder in the Dimasys folder (e.g., C:\Program Files\Dimasys**E2FC**).

E2FC Configuration File

The E2FC Configuration File (i.e., E2FC.INI file) contains the following settings:

- **AutoMode:** This setting is a flag that tells the program to automatically run the export upon execution of the program. This is important when setting up a Windows Scheduler to automatically run the exports in a recurring cycle. However, if you simply want to run it manually, turn off the flag. This will allow you to make changes to the settings once the program has been executed. The valid value for this setting is either 1 (True/On) or 0 (False/Off).
- **DBServer:** This is the target Database Server that hosts the Enspire application. The valid value for this setting should be the computer name (not IP address).
- **CODB:** This is the target company database within the Enspire Database Server. This should not be the “Enspire” database.
- **ExportLocation:** This setting should have the common folder that will contain the exported database from the E2FC program. This folder is also the location where FulFillAnalytics DTS will be pulling the information from. Note that the user running the E2FC program should have Read/Write privileges to this location.
- **LastRunDate:** This setting contains the last time the E2FC was successfully executed. The program uses this date as the starting date in its query to pull the information from Enspire. If you are running this program for the first time, you should manually set the date. If not, the program will assume yesterday’s date. Note that after a successful export, this date will automatically be set to the execution date.

Execution of E2FC

The E2FC Configuration File can be executed manually or automatically.

Manual Execution of E2FC

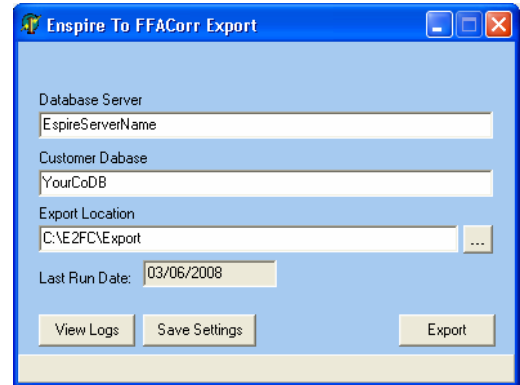
Ensure that the INI file's AutoMode setting is set to "0" prior to executing the E2FC program. Once activated, you will see the Ensfire to FFACorr Export screen.

This screen allows you to modify and save the following fields:

- Database Server
- Customer Database
- Export Location

Simply click on the **Save Settings** button to save the current settings. To run the export process, click on the **Export** button.

The **View Logs** button allows you to view the current activity of the program. Note that a new log file is created on the daily basis. The filename convention that it uses is mmddyy.log. This is a regular text file that you may open using a text editor like NotePad.



Automatic Execution of E2FC

Ensure that the INI file's AutoMode is set to "1". You may use the Window's scheduler to automate the E2FC's daily (or weekly, and so on.) execution.

Under Window's XP, you may open the Schedule Task program under the Control Panel. Once opened, click on **Add Scheduled Task**. Complete the Wizard steps and select the E2FC.exe using the **Browse** button. Select the schedule down to the time of day. Enter the Windows User and Password of the user for whom the program will be running under.

Appendix A

Typical Ensfire eClient Request

POST http://www.domainname.com/eClient/et_order_http.asp HTTP/1.0

Authentication: Basic QWxhZGRpbjpvGVuIHNlc2FtZQ==

Content-Type: text/xml

Referer: URL

Content-Length: *(modify according to content)*

User-Agent: Mozilla/4.0 (compatible; MSIE 5.5; Windows.NT.5.0)

Pragma: no-cache

ECLIENT_FILE_FORMAT: XML

ECLIENT_AUTO_AUTHORIZE: N

<PROCESS_PO_007>

<CNTROLAREA>

<BSR>

<VERB>PROCESS</VERB>

<NOUN>PO</NOUN>

<REVISION>007</REVISION>

</BSR>

<SENDER>

<LOGICALID />

<COMPONENT />

<TASK />

<REFERENCEID />

<CONFIRMATION />

<LANGUAGE />

<CODEPAGE />

<AUTHID />

</SENDER>

<DATETIME qualifier="CREATION">

<YEAR>2003</YEAR>

<MONTH>5</MONTH>

<DAY>5</DAY>

<HOUR>2</HOUR>

<MINUTE>0</MINUTE>

<SECOND>27</SECOND>

<SUBSECOND>0000</SUBSECOND>

<TIMEZONE>1</TIMEZONE>

</DATETIME>

</CNTROLAREA>

<DATAAREA>

<PROCESS_PO>

<POORDERHDR>

<DATETIME qualifier="DOCUMENT">

<YEAR>2003</YEAR>

<MONTH>5</MONTH>

<DAY>5</DAY>

<HOUR>2</HOUR>

<MINUTE>0</MINUTE>

<SECOND>27</SECOND>

<SUBSECOND>0000</SUBSECOND>

<TIMEZONE>1</TIMEZONE>

</DATETIME>

<POID>WEBSKAN</POID>

```

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Appendix B

Typical Acknowledge Response

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