entrée

Software for the Food Distribution Industry

V4 SQL

NEW FEATURES

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Contact NECS

1 Contact NECS

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SOFTWARE FOR FOOD DISTRIBUTORS

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Chapter 2

New Features in entrée V4 SQL

2 New Features in entrée V4 SQL

The new **entrée version 4 SQL** software takes the most popular software for food distributors, **entrée version 3**, and sky rockets it to the next level of power, speed and ease of use.

The new dashboards, enhanced search screens, ribbon menus, Update Utility and more help you do your job faster while providing new visual insights of your complex data. This chapter will provide an overview of these new features to bring you up to speed.

We now use the “Task Execution Application” (TEA) application see the **Client Monitor & Task Execution Services** section of this chapter for more information.

- **Update Utility**
- **Schedule Regular Backups**
- **Using the Task Scheduler**
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- **Using Dashboards**
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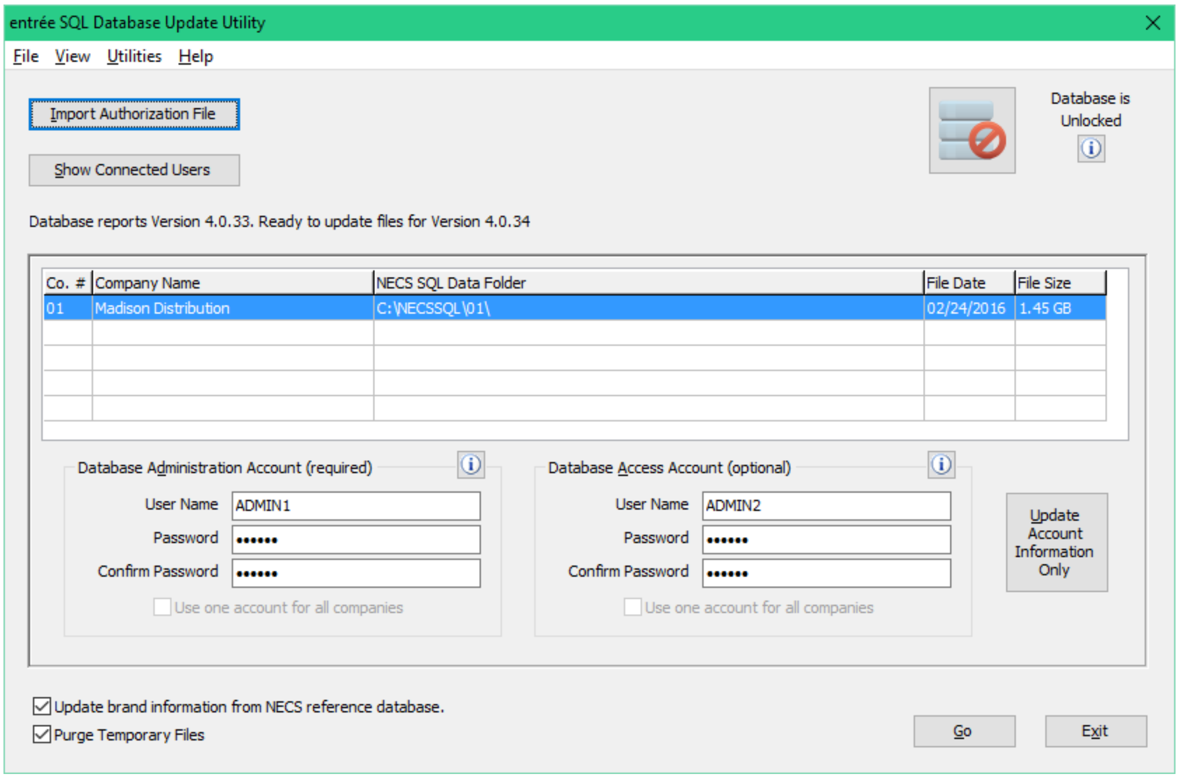
Chapter 3

Using the Update Utility

3 Using the Update Utility

You will first encounter with the **Update Utility** during the V4 SQL update process which will transition your software from **entrée version 3** to **entrée V4 SQL**. During the V4 SQL update process you will setup the required folders, database accounts and connections to the shared folder and the new **entrée version 4** databases. After the update process has been completed you will run both versions of **entrée** parallel for a period until your business is ready to only use version 4.

Once your business is fully running only on version 4 you will be using the **Update Utility** to perform common file and database maintenance functions. The features of the **Update Utility** will be discussed in this chapter.

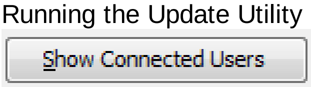


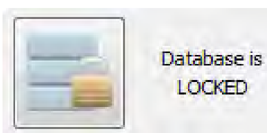
Update Utility Main Features

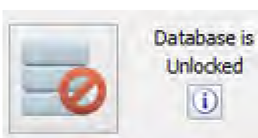
- **Updates SQL databases & files to the latest entrée version:** Allows you to see which of your users are still logged in before you proceed with the utility.
- **Update Advantage Database Server (ADS) License:** Use this process to update your server without needing to reinstall it. Use the option to change the number of ADS licenses your business has and more.
- **Backs up SQL files:** Copies your SQL files from their protected directory, into another location where your backup software can access. Create an editable "Windows Task Scheduler" event to automate the copying of the files to local or Internet based off site storage.
- **Checks Backup Space:** Use this option in the Utilities menu to check potential locations for your backup to be sure there is enough space before you proceed.
- **Restores SQL files:** Can take a file or your entire file set to restore and replace **entrée** SQL file(s).
- **Re-indexes SQL files:** For those rare occasions when you need to Re-index a specific file or group of files, you will only be able to perform that function here. The old "Re-index Files" feature is no longer available or needed from within the main **entrée** software**.**

- **Edit NECS Shared Data Folder:** Edit the location of the shared data folder in the event that it must be moved to a new network location.
- **Repair Data:**
  - **Purge Duplicates:** Removes duplicate records from SQL databases.
  - **Validate Character Dates:** Reviews and Validates “Character”- style date values.
  - **Fix Zero Dates**
  - **Fix Contact Manager Sequence values**
  - **Re-link DOC image data**
- **Check Databases:** Checks your SQL databases to see if an update or re-index is required.
- **Review Database Constraints:** This process will review both the constraints as well as the data in **entrée** to be sure all existing data complies with the defined constraints. If not **entrée** errors could occur.

Rules for Using the Update Utility

1. Only ***System Administrator*** level users should ever have access to the Update Utility.
2. ***You MUST run the Update Utility on your server*** which is required when using **Sybase Advantage SQL** software.
3. Running the Update Utility requires that ***ALL* users exit entrée**. Use the **Show Connected Users** button 

in the update utility screen to see who is in **entrée**.
4. 

The V4 SQL databases must be **"*locked*" before an update**. Once all users are out of the system click the **Database Lock / Unlock** button in the update utility screen to lock the databases before you perform an update.
5. 

Then click the **Database Lock / Unlock** button again to unlock the **entrée** databases after the update utility work is done.

Note If the Update Utility detects connections from the **Task Scheduler** the “**Click Me**!” icon will now post a message to indicate that one or more Task Scheduler applications are running and will remind you that you need to lock the databases to shut down those connections.

- When you issue the “**lock**” command there will also be a flashing message in red while the Task Scheduler system processes the shutdown notification.
- When the shutdown process is complete then the message will no longer be displayed and you should be able to launch the version update.

Import Authorization File Button

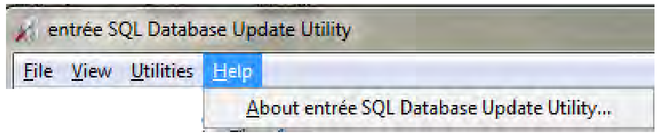
Used to import or update the authorization file from NECS. This file will tell the system what add-on modules and custom modifications you have purchased. The **Import Authorization File** dialog box will open. Browse to find and select the **NECS.DAT** file on your server and click **Open**. The **NECS.DAT** file will be processed by the Update Utility. The **Install Part 2** chapter of the system guide covers the use of this feature when you first install V4 SQL.

Informational Tools

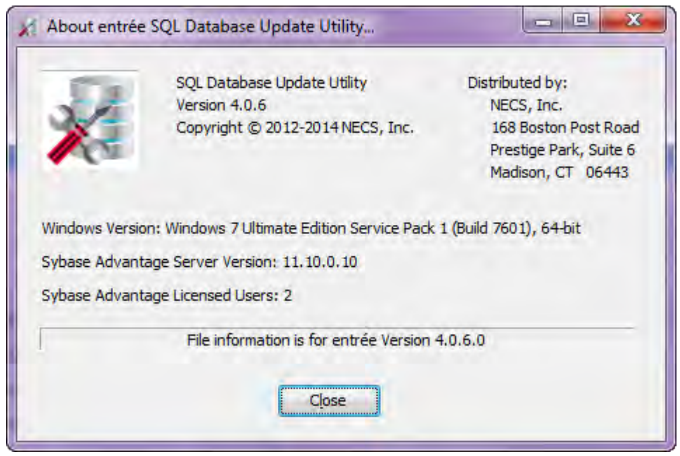
In the Update Utility there are a few informational tools to help you understand features in the screen and what is required for input during the update process. You can easily find software version information menu.

- **Help Menu**

  Click **Help** in the menu bar provides you with version information for **entrée,** Windows, and Sybase Advantage software.



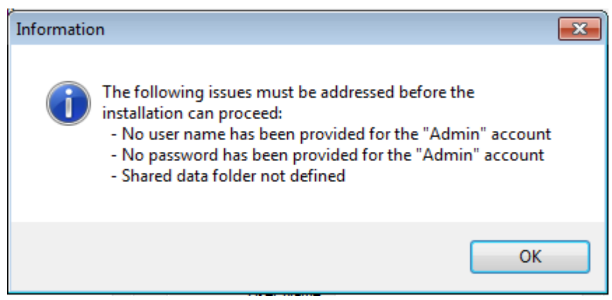
In the **Help About** example shown here the **entrée** version is 4.0.6



Click Me! Button

Provides information about what other fields are required before the utility can be run the first time you update.

The Information message opens to list the tasks that must be complete before proceeding.

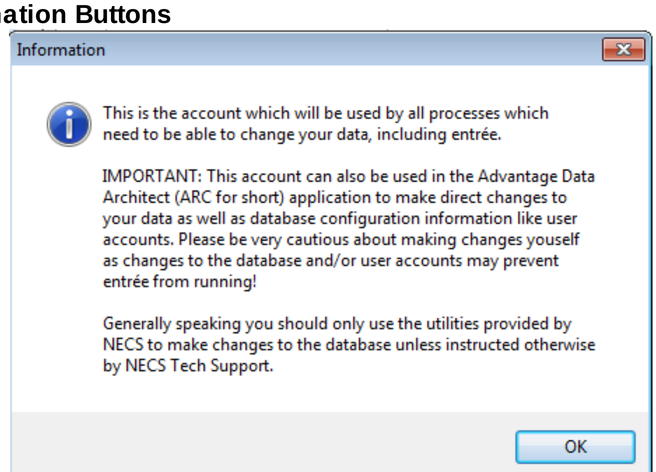


Important / Information Buttons

- These buttons will provide you with information about the specific field it is near on the screen.

- The Database Administration Account, Database Access Account, NECS Shared data folder and the Database Lock / Unlock button for the SQL databases all have an **Information** button.

  On the right is the Information displayed for the Database Administration Account section.



Database Account Updates

When you first ran the Update Utility you created the required **Database Administration Account** and optionally created a **Database Access Account**. To maintain these accounts and their passwords you will use the Update Utility.

Update Account Information Only Button - When you change either the **User Name** or **Password** information for either of the Database Accounts in the update utility you must click the **Update Account Information Only** button to update the accounts in the **entrée system**.

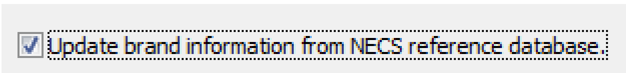
Hot Tip! **Database Account Security Tips**

- Please be sure to save this login information in a secure place.
- Only share this information with a limited number of people who *require* System Administrator access to your databases.
- Users with this login information have update access and can modify your **entrée** databases which can potentially cause a loss of critical data for your business.
- Use the Update Utility to change the password on this account if you think it has been compromised.

Note **Multi-Company Note:** For businesses with the multi-company add-on module you can check the **Use one account for all companies** option to use the accounts set up here for all the companies in **entrée**.

Update Brand Information

If you check the "**Update brand information from NECS reference database**" option box the utility will update your **entrée** system brand information from the NECS brand database.



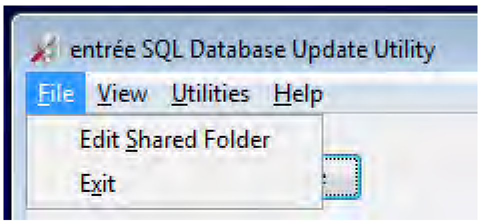
Keeping this option checked will ensure that you always have the latest brand information for new items you need to add to **entrée**. When you include a new brand in **entrée**, the system will automatically have the brand logo and website address/URL ready to load if it finds a match. If an existing brand has information missing, and there is a match in our 600+ brand database, the system will automatically insert the logo and website address/URL.

Purge Temporary Files

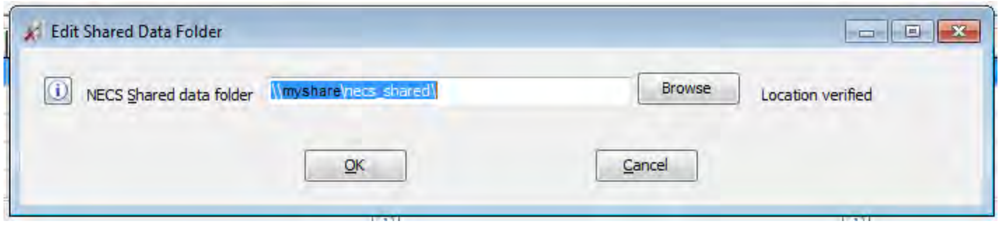
If you check the "Purge Temporary Files" option box then during the database updating performed by the utility any leftover temporary files will be purged from the system. This will help to control space usage and system resources because temporary files can become quite large.

File Menu Options

- **Edit Shared Folder -** There may come a time when due to space limitations or some other reason you need to designate a different location for your NECS Shared data folder. This is when you would use the **Edit Shared Folder** option in the File menu.

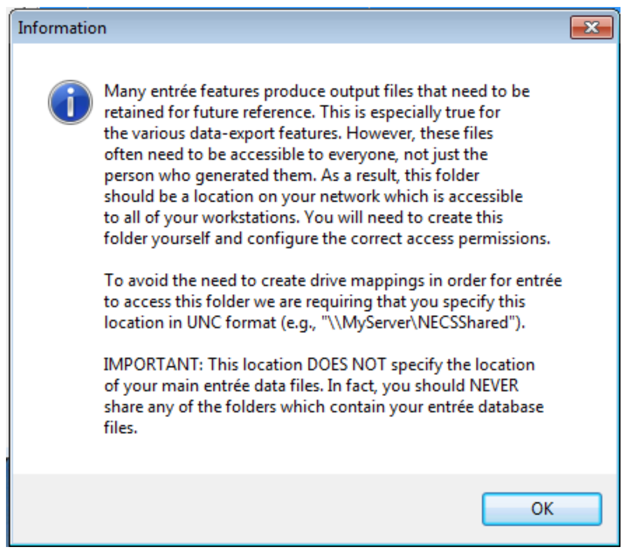


When the **Edit Shared Data Folder** dialog opens click in the folder name text box and enter the new location or use the **Browse** button to find and select the new folder you have setup. You must get the **Location verified** message displayed in the image below to proceed.



If your location can not be verified here your location may not be shared with Read/Write permissions on your network. Click **Cancel** and check the folder settings on your network.

Information message displayed for Shared Folder in the Update Utility will provide useful details.



About the NECS Shared Data Folder

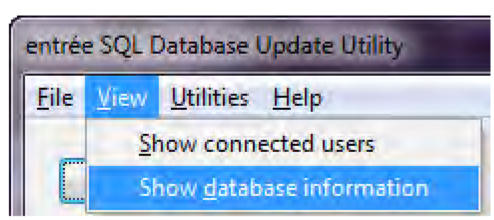
For version 4 you will need to have a location set up for the required **NECS Shared data folder** on your network. You need to specify this location in UNC format.

Example For example: **\\MyServer\NECSShared**, where "MyServer" is the name of your local server.

- All entrée users must have Read / Write permission for this folder.
- The NECS Shared data folder stores the entrée Help files, imported and exported files and output files.

- **Exit -** Use this option to exit the **entrée SQL Database Update Utility**.

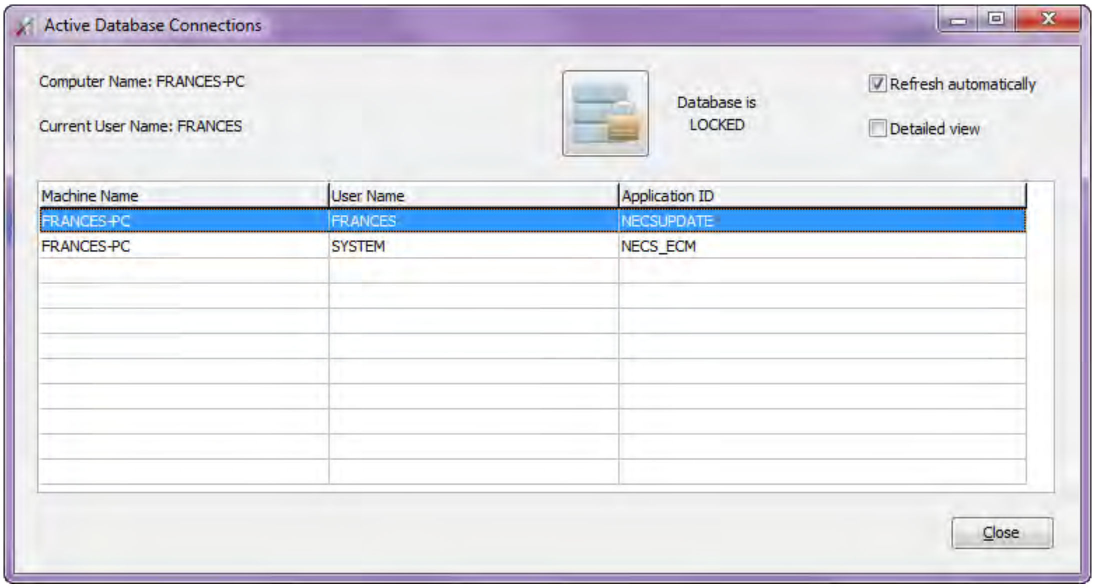
View Menu Options



- **Show Connected Users -** Use this option to see what users are logged in the **entrée system** in the **Active Database Connections screen**.
- Before you perform an update with the **entrée SQL Database Update Utility** *ALL users* must be out of the system and the databases must be *locked*.

Application ID Values in Show Connected Users

- Application ID beginning with "**ECM**" are part of the entrée Client Monitor system and *do not* affect the operation of the Update Utility.
- Application ID value of "**ENTREE_V4**" are connections opened by a regular copy of entrée. These IDs are actual users in the entrée system. We recommended that you have those users exit entrée ***before*** you issue the "lock" command. This will prevent the loss of documents or data that the user was working on.
- Application ID value of "**NECS.exe**" will normally be secondary connections to the database which were opened by one of the other applications in the list.



1. A list of users in the system is displayed. You can contact them to log out.
2. Once all users are out of the system, click the **Database is Unlocked** button. The databases will now lock and the button text will change to the **Database is LOCKED**.
3. When your update is complete click the **Database is LOCKED** button to unlock the **entrée** databases again. Now your users can login to work.
4. Send out a message system-wide to notify users.

- **Show Connected Users - Refresh Automatically Option -** When this option is checked the list of user in the **entrée system** will update automatically when users login or exit the system.

- **Show Connected Users - Detailed View Option -** When this option is checked more detailed information about the users and their computer logged into the **entrée system** is displayed.

Active Database Connections screen columns:

- **Machine Name:** The name assigned to the user's computer.
- **User Name:** The user's name in **entrée**.
- **Application ID:** The application in **entrée** that the user is currently working in.

When the Detailed View option is enabled these additional columns are displayed:

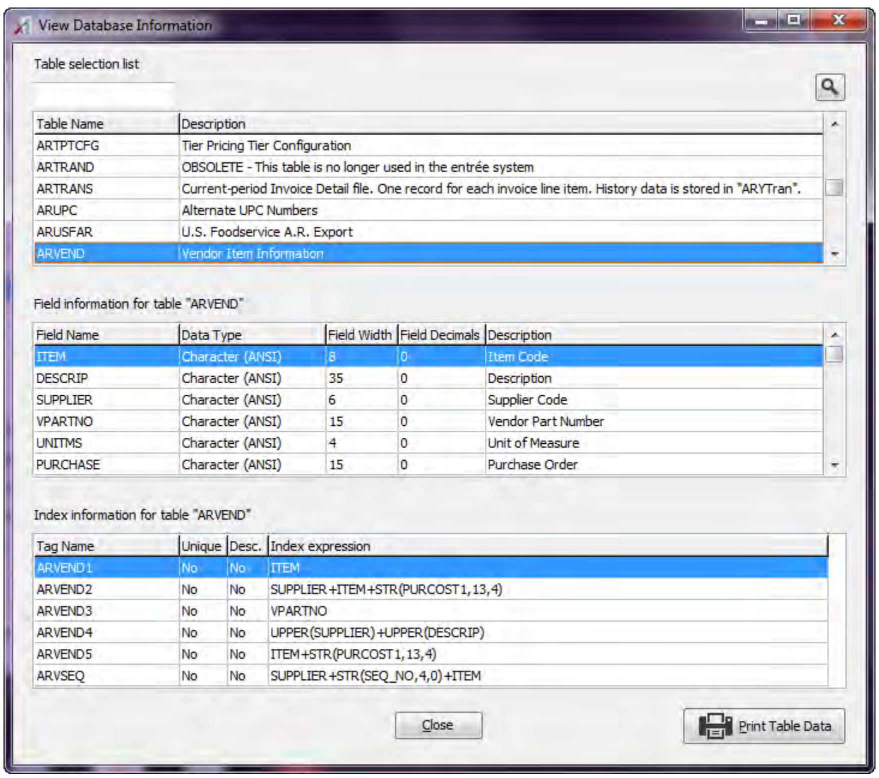
- **Comp #:** The number of the Company in **entrée** where the user is working.

- **Database User:** The Advantage user account that is being used to access the database for the connected users information. It can be one of the accounts you created in the Update Utility or the “AdsSys” master account as seen in the image above.
- **Network Address:** IPC connection number of the Terminal Services host machine.
- **Term Client Address:** The client address of a user connected through Terminal Services, which for a normal direct client connection is "0.0.0.0".

- **Show Database Information -** Allows you to view and print detailed information about the various data tables which comprise an **entrée** database. The main use for such information would be if you were using an external program like Crystal Reports to access your **entrée** data since you need to know the internal structure of a table in order to correctly access the information it contains.

1. To find a database enter the table name if know in the **Table selection list** text box or use the scroll bar on the right to scroll through the database list and make your selection.

2. Once you select the database the **Field** and **Index** information for the table will be displayed in the sections below. Here we have the Vendor Item Information database.



3. **Printing Database Information** - Click the **Print Table Data** button when you have the desired table displayed.

- You can currently only print table data ***one file at a time***.
- The print process is ***not “dot-matrix friendly”*** so if you choose to print data you must use an ink jet or laser printer.

4. Click **Close** when done.

Example Here is the printed Table Description for ARVEND.

entrée Data Dictionary

Data valid for entrée Version 4.0.3
Data generated Thursday, May 22, 2014 at 9:38 AM

Table Name: **ARVEND** Table Description: Vendor Item Information

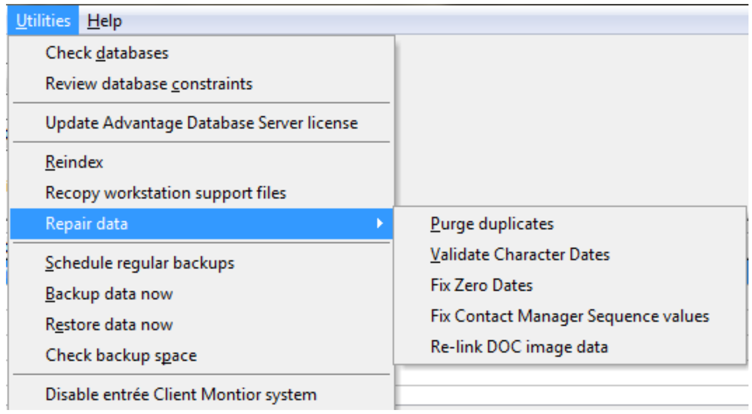
Index tag definitions

Tag Name	*Unique*	*Descending*	*Index Expression*
ARVEND1	No	No	ITEM
ARVEND2	No	No	SUPPLIER+ITEM+STR(PURCOST1,13,4)
ARVEND3	No	No	VPARTNO
ARVEND4	No	No	UPPER(SUPPLIER)+UPPER(DESCRIP)
ARVEND5	No	No	ITEM+STR(PURCOST1,13,4)
ARVSEQ	No	No	SUPPLIER+STR(SEQ_NO,4,0)+ITEM
DEL_RECS	No	No	DELETED()

Field definitions

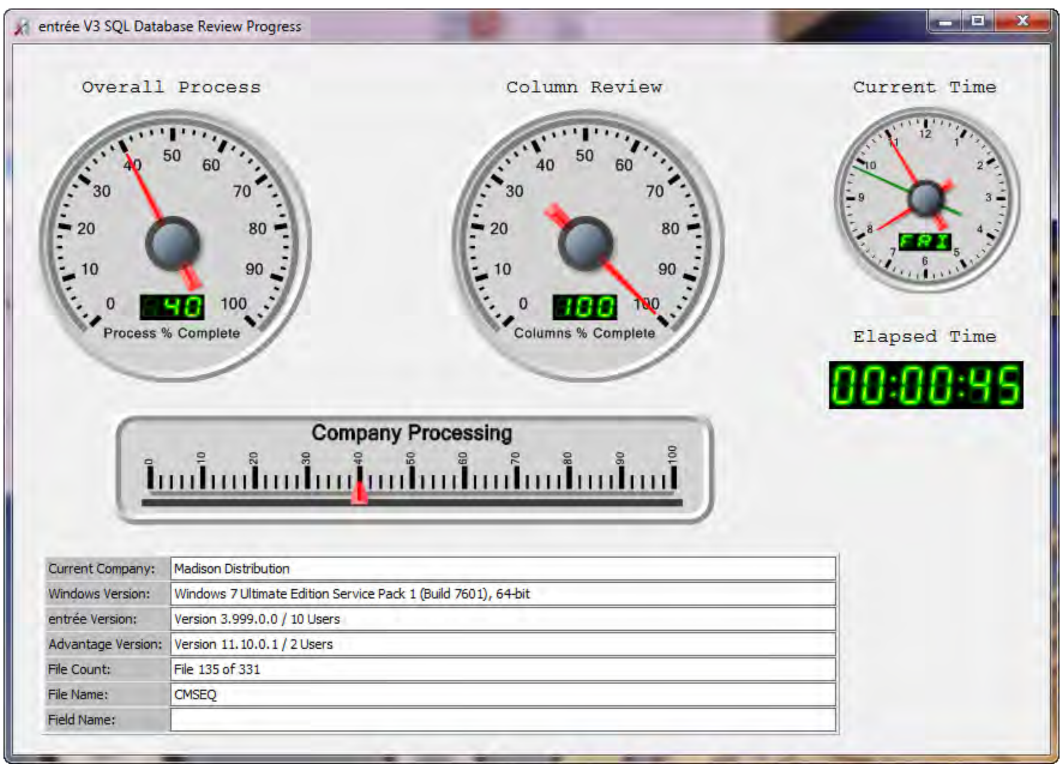
Field Name	*Data Type*	*Width*	*Decimals*	*Description*
ITEM	Character (ANSI)	8	0	Item Code
DESCRIP	Character (ANSI)	35	0	Description
SUPPLIER	Character (ANSI)	6	0	Supplier Code
VPARTNO	Character (ANSI)	15	0	Vendor Part Number
UNITMS	Character (ANSI)	4	0	Unit of Measure
PURCHASE	Character (ANSI)	15	0	Purchase Order
PURCOST1	Numeric	11	4	Purchase Cost 1
PURDATE1	Character (ANSI)	8	0	Purchase Date 1
PACKSIZE	Character (ANSI)	5	0	Pack Size
RORDERQTY	Numeric	6	0	
PALLETQTY	Numeric	5	0	
CSPALQTY	Numeric	5	0	Cases per Pallet
CLAYERQTY	Numeric	4	0	Cases per Layer
NOHIGH	Numeric	4	0	Layers per Pallet
DISLB1	Numeric	6	0	
DISCOUNT1	Numeric	6	2	
REBATE	Numeric	8	4	
FLAG	Character (ANSI)	1	0	
WEEK1	Numeric	11	2	
WEEK2	Numeric	11	2	
WEEK3	Numeric	11	2	
WEEK4	Numeric	11	2	
WEEK5	Numeric	11	2	
WEEK6	Numeric	11	2	
WEEK7	Numeric	11	2	
WEEK8	Numeric	11	2	
WEEK9	Numeric	11	2	
WEEK10	Numeric	11	2	
WEEK11	Numeric	11	2	
WEEK12	Numeric	11	2	
WDATE	Date	8	0	
CWEEK	Numeric	11	2	
NOTED_PR	Numeric	8	4	
NET_PR	Numeric	8	4	
TERMS1	Character (ANSI)	20	0	
TERMS2	Character (ANSI)	20	0	
SEQ_NO	Numeric	4	0	
REBDOL	Numeric	9	4	
REBSDTE	Character (ANSI)	8	0	
REBEDTE	Character (ANSI)	8	0	
VEND_PR	Numeric	8	4	
REB_BASED	Character (ANSI)	1	0	
CUST_MISC	Character (ANSI)	2	0	
CUST_INDUS	Character (ANSI)	4	0	
PO_DATE	Character (ANSI)	8	0	
PO_OHQTY	Numeric	13	2	
PO_ORDQTY	Numeric	13	2	
ACCRUAL	Numeric	13	4	
ADALLOW	Numeric	13	4	
ADEXPIRE	Date	8	0	

Utilities Menu Options



A. Check Databases
B. Review Database Constraints
C. Update Advantage Database Server Licenses
D. Reindex
E. Recopy Workstation support files
F. Repair Data
  1. Purge Duplicates
  2. Validate Character Dates
  3. Fix Zero Dates
  4. Fix Contact Manager Sequence Values
  5. Re-link DOC image data
G. Schedule Regular Backups
H. Backup Data Now
I. Restore Data Now
J. Check Backup Space
K. Disable entrée Client Monitor system

A. Check Databases - When you click the **Check databases** option in the utilities menu the Database Review screen below will open. It will immediately begin running a check of all the **entrée** databases.

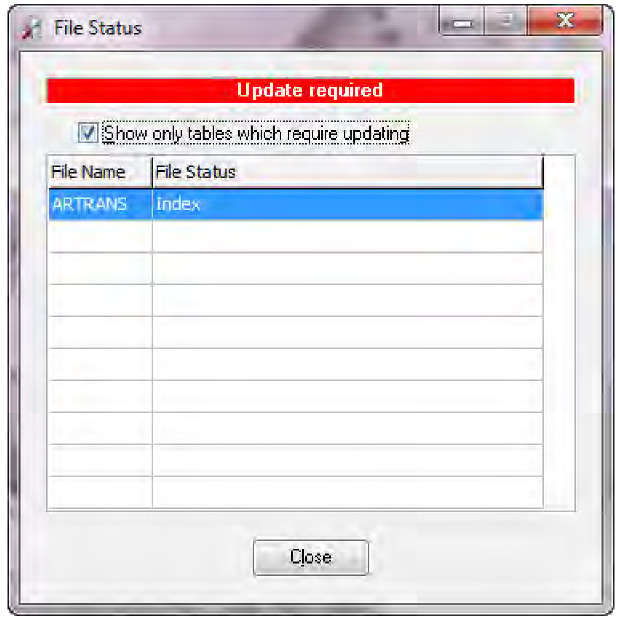


This check is similar to the one that you ran for **entrée version 3** that was part of the "FPUdate Utility". The dials will show the progress as the File Count below increments until the process has completed.

- **File Status Report -** Once the Check Databases process has completed the **File Status** screen will display and report on all the databases.

  - If an update is needed a red bar with “Update required” will be displayed at the top of the screen.
  - The File Name column lists each database.
  - The File Status column tells you the current status of the database, either OK or Index.

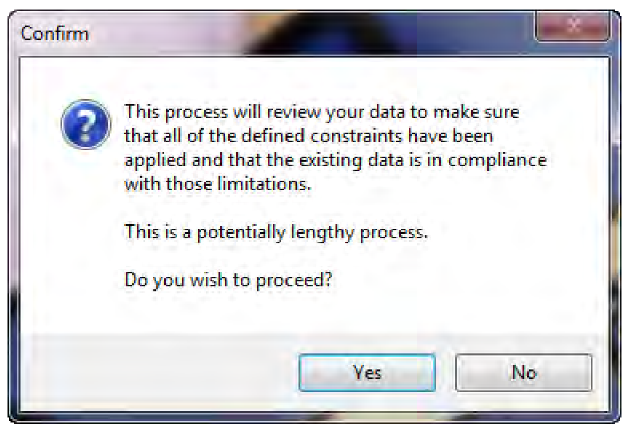
- **Show only tables which require updating option -** Check this option to display only the list of databases that require updating



B. Review Database Constraints

- This process will review both the constraints as well as the data in **entrée** to be sure all existing data complies with the defined constraints. If not **entrée** errors could occur.

It may take hours to run this process depending on database size.



- When you click the **Review Database Constraints** option in the utilities menu the first screen that is displayed is the **Confirm** dialog.
- If you would like to proceed click **Yes**.

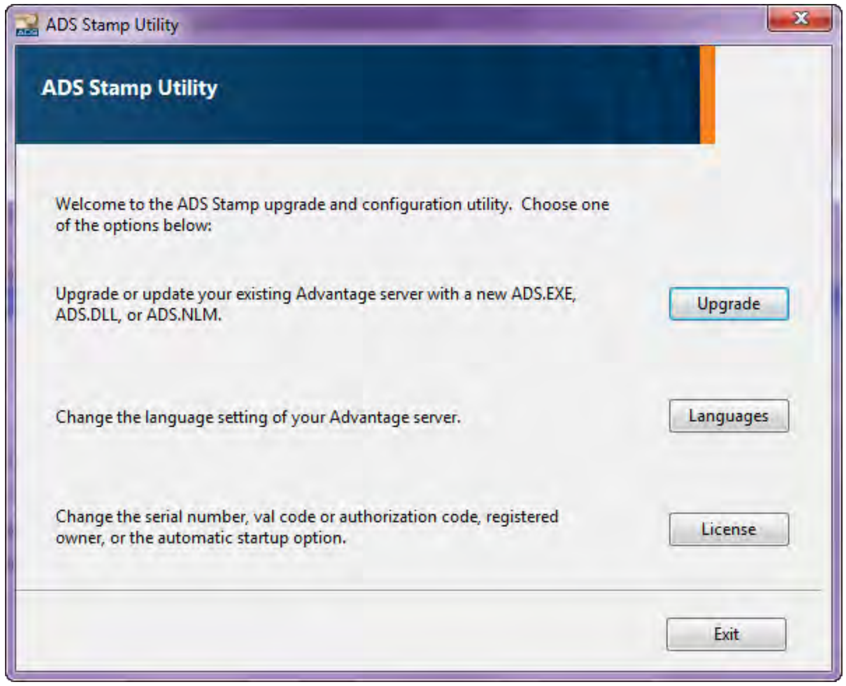
<u>What are database constraints</u>?

Constraints are rules applied to certain fields in a database. These rules help to keep the data compatible with applications that use the data. The dials will show the progress as the File Count and Company Processing readings increment until the process has completed. For our small testing database it took around 30 minutes to run. An Information box will display the message **Database review process is complete** when the processing is done. For "Numeric" fields the "not NULL" constraint and the "Default" constraint that sets uninitialized fields to zero has been applied.

C. Update Advantage Database Server Licenses - Update your Advantage Database Server license so you can add more users.

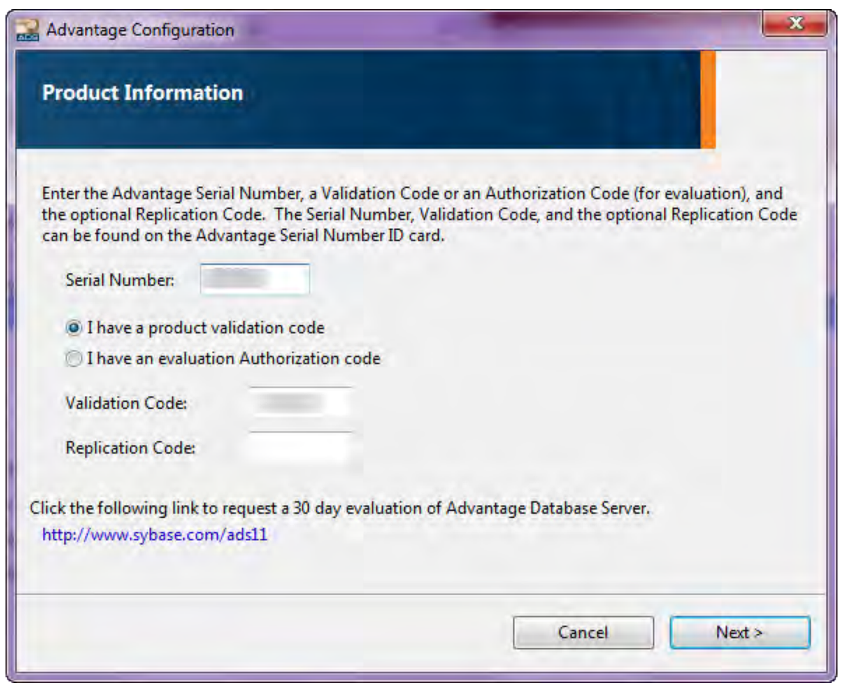
1. Select **Update Advantage Database Server Licenses** from the Utilities menu.

2. Click the **License** button.



3. Your current license Serial Number will be displayed (we blurred our info).

   Enter the **Validation Code** provided.



Entering a new **Validation Code** with the existing serial number allows for expansion of the Advantage Database Server to a higher number of users, such as from a 10-user version of the Advantage Database Server to a 25-user version.

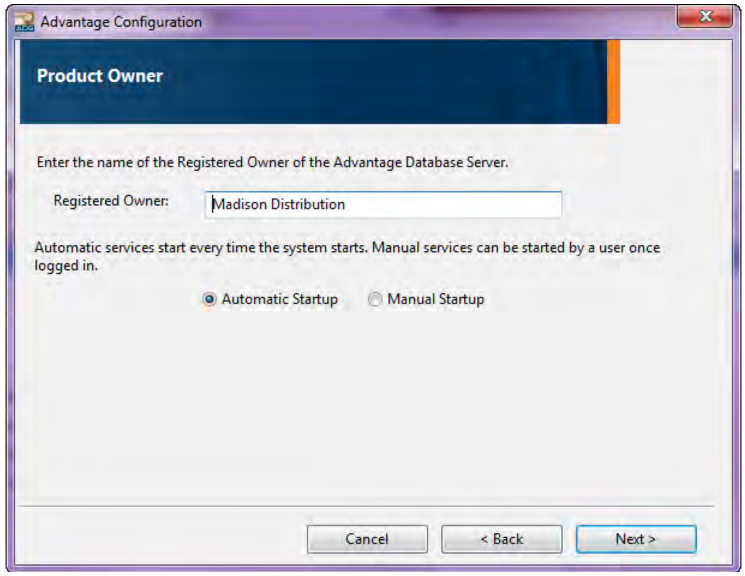
The registered owner information and startup type (if on Windows) can be updated from this dialog as well. That ANSI Character Set and OEM/Localized Character Set dialogs may follow. Different character sets may be selected from these dialogs.

4. Click **Next**.

5. Verify the **Registered Owner** information.

6. Keep **Automatic Startup** checked and click **Next.**

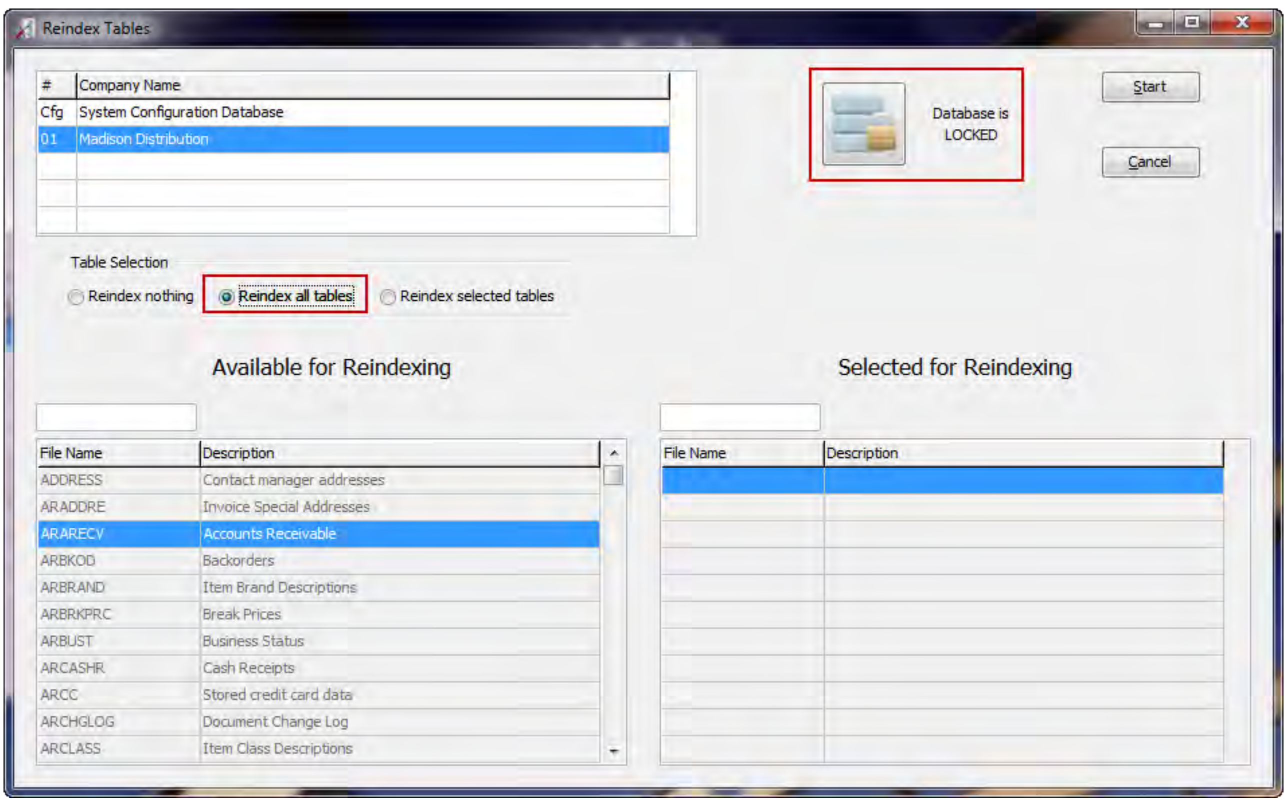
   You are back at the **ADS Stamp Utility** main dialog screen.



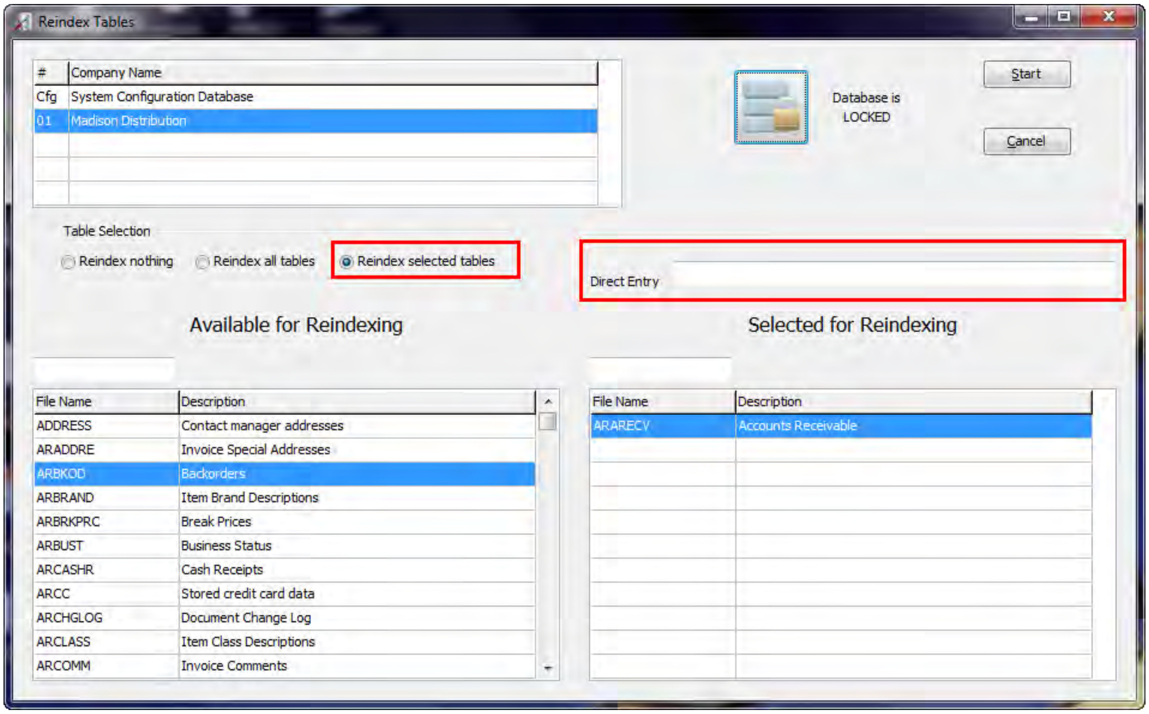
D. Reindex Databases - Select the **Company Name** and the list of databases will be populated in the **Available for Reindexing** list.

For Table Selection choose from:

- **Reindex all tables:** When this option is checked all tables are automatically selected.



- **Reindex selected tables:** Once you check this option, drag and drop the desired tables from the **Available for Reindexing** list to the **Selected for Reindexing** list.



- **Direct Entry:** In this text box you can enter the comma separated names of databases you would like to run reindex.

Caution **Before you run a Reindex you should go to the View menu and use the Show Connected Users feature to see what users are in the system.**

Running a Reindex

1. Send a message to request users log out of the system prior to the Reindex.
2. Now use the **Database Lock** button and lock the databases before you run the Reindex utility.
3. Once you have made your **Table Selection** and made sure all your users are logged out of the system click the **Start** button to begin the reindex process.
4. When the reindex process has completed a **Reindexing completed** Information message box will display.
5. Send a second message to notify users it is done.

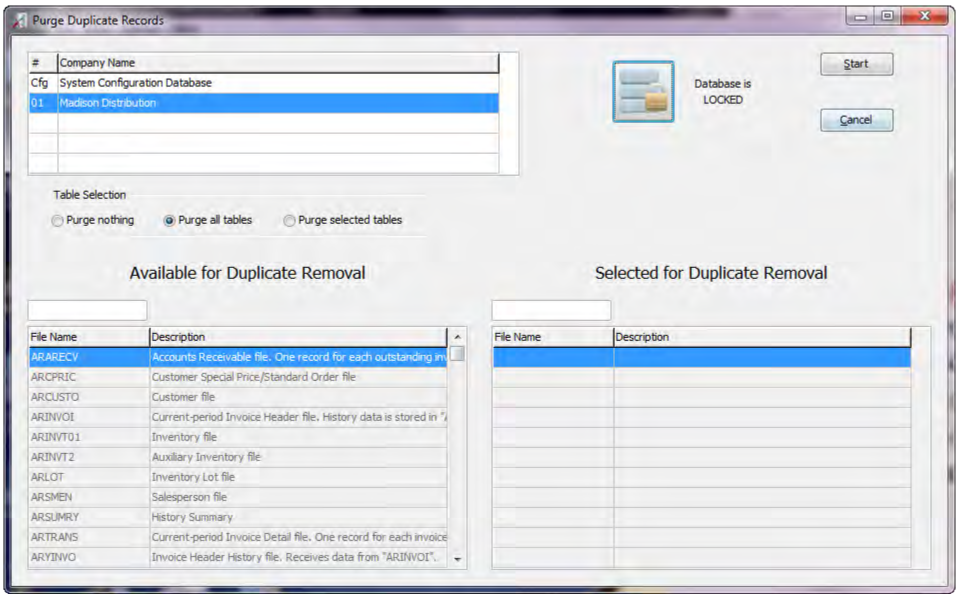
E. Recopy Workstation support files - When a new version of the Update Utility is installed on your server matching installers for the workstations are also provided. These workstation installers are placed in a "WS" folder underneath the Update Utility's folder which is *not accessible to you*. This utility copies the workstation update files from the private "WS" folder into the shared "WSUpdate" folder so you can access the files update your workstations. The folder is created by the installation process and should always be present. If the folder is missing then you have no way of publishing your workstation updates. Contact NECS Tech Support for assistance with creating the missing folder.

F. Repair Data menu options: Purge Duplicates, Validate Character Dates, Fix Contact Manager Sequence Values and Re-link DOC image data.

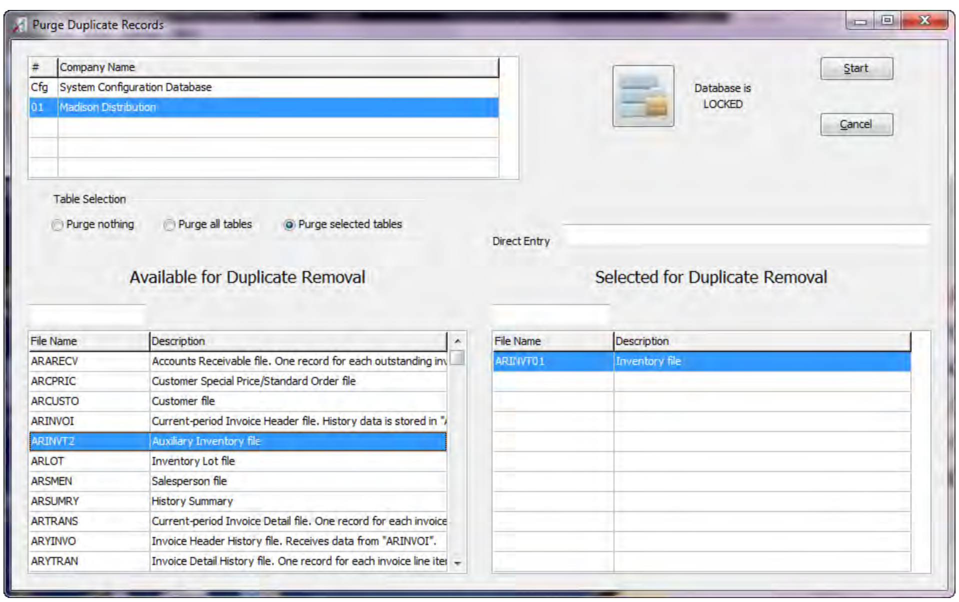
1. **Purge Duplicates -** The Purge Duplicates feature will remove duplicate records in key files like the Inventory file where you commonly have this situation. Select the correct Company Name and the list of databases will be populated in the Available for Duplicate Removal list.

Purge Table Selection options:

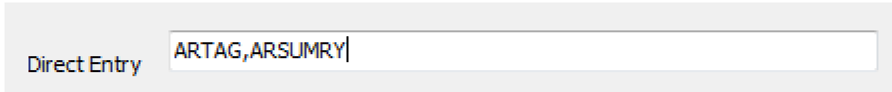
- **Purge all tables:** When this option is checked all tables are automatically selected.



- **Purge selected tables:** Once you check this option, drag and drop the desired tables from the **Available for Duplicate Removal** list to the **Selected for Duplicate Removal** list.



- **Direct Entry:** In this text box you can enter the comma separated names of databases you would like to run the duplicate removal process against.



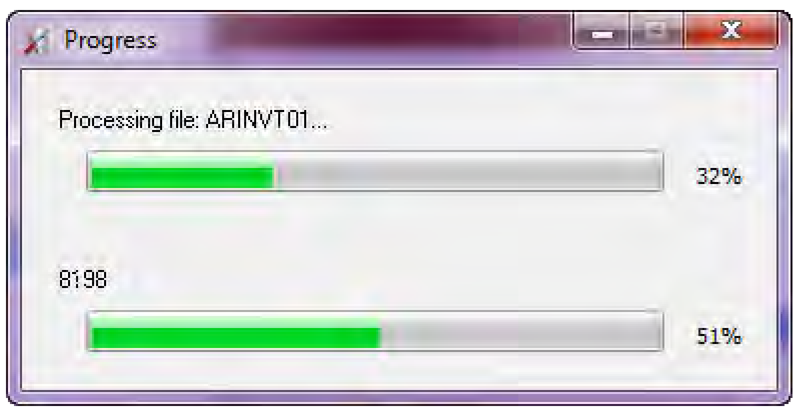
Caution **Before you run the purge duplicate process you should go to the View menu and use the Show Connected Users feature to see what users are in the system.**

Running Purge Duplicates

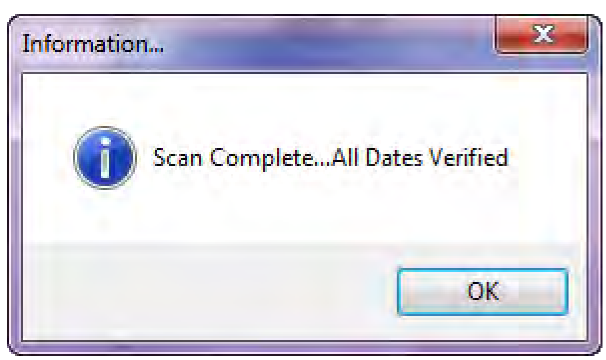
1. Send a message to request users log out of the system prior to the purge.
2. Now use the **Database Lock** button and lock the databases before you run the purge duplicates.
3. Once you have made your **Table Selection** and made sure all your users are logged out of the system click the **Start** button to begin the purge duplicates process.
4. Once the purge has completed a **Duplicate removal completed** Information message box will display.
5. Send a message to notify users the purge is done.

2. Validate Character Dates - The utility will review the “Character”- style date values and assure that they are all valid. It will also removes any date values that do not represent valid dates in Advantage so they will not produce errors and end the database operation that was in progress.

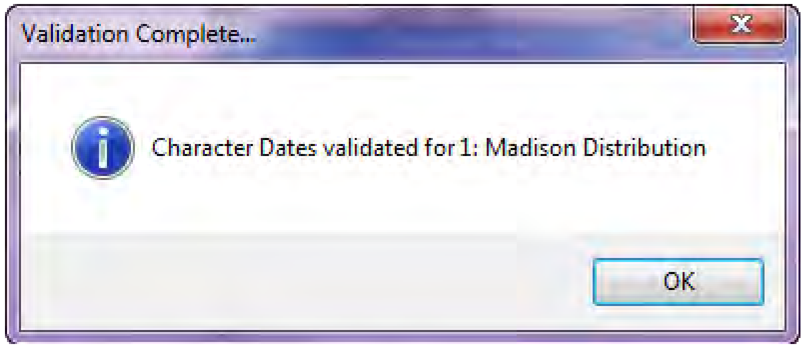
a. When you click the **Validate Character Dates** option in the menu the validation will automatically run and a progress dialog will display.



b. Once the validation is done for your 01 Company in **entrée** and Information dialog box will display "Scan Complete... All Dates verified". Click **OK**.

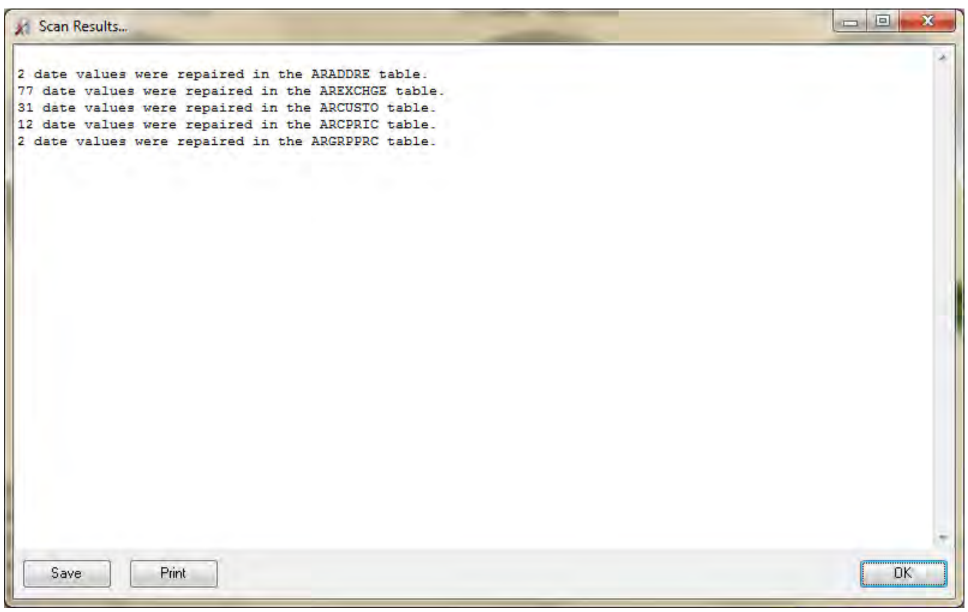


c. The **Validation Complete** message will display with the company name and number whose dates were validated. Click **OK**.

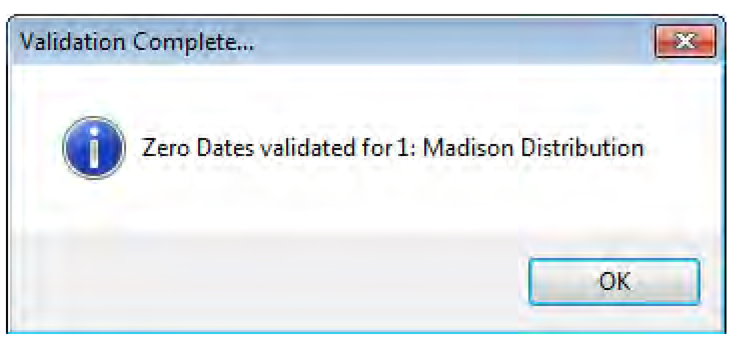


3. Fix Zero Dates - In the system "unknown" dates were being recorded in the database as "12/31/1899" but not being converted properly when added to some databases. When entrée sees one of these 1899 dates being written to the database it is supposed to save it as a "null" value. We found in a few places this was not being properly enforced and there are now entries in the database which have the 1899 date. Areas of the system causing the date problem have been updated so this date problems will no longer occur.

The **Fix Zero Dates** utility automatically runs as a part of the 14.0.18 release update. This run will find and fix all those 1899 dates and produces the Scan Results dialog (below) which you can **Save** or **Print** using the buttons. Click **OK** to close.



- When click **Fix Zero Dates** it will immediately begin to run and a progress dialog will display.
- After the run in the 4.0.18 update the **Validation Complete** message box will display at the end. Click **OK** to close.

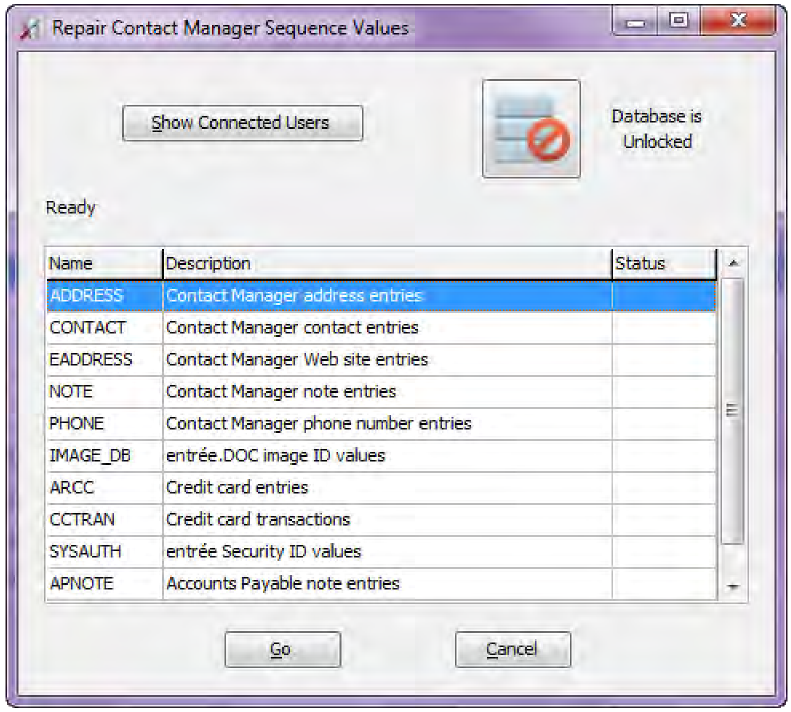


4. Fix Contact Manager Sequence Values - This resolves data issues created by the resetting counters stored in the “CMSeq” table in the “4.0.2” release. The utility will run automatically when it detects that it is updating a database from the “4.0.2” release or older.

a. In the **Repair Data** drop down menu click the **Fix Contact Manager Sequence Values** option.

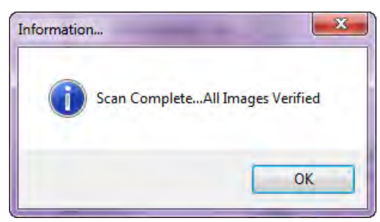
b. Click the **unlock/lock** button to lock the databases.

c. Click the **Go** button.

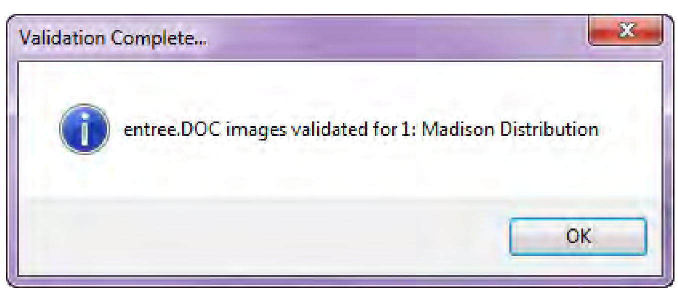


5. Re-link DOC image data - This repair utility will scan the **entrée.DOC** image database and correct data errors produced by earlier versions of the .DOC image import process which could prevent you from retrieving your document images. There is nothing wrong with the image data itself, there is just a problem in the extra data which is used to connect the entrée document with its scanned image.

- Click the option and the scan will begin automatically and display the results.



- Click **OK** and the Validation Complete message will display and you are done.

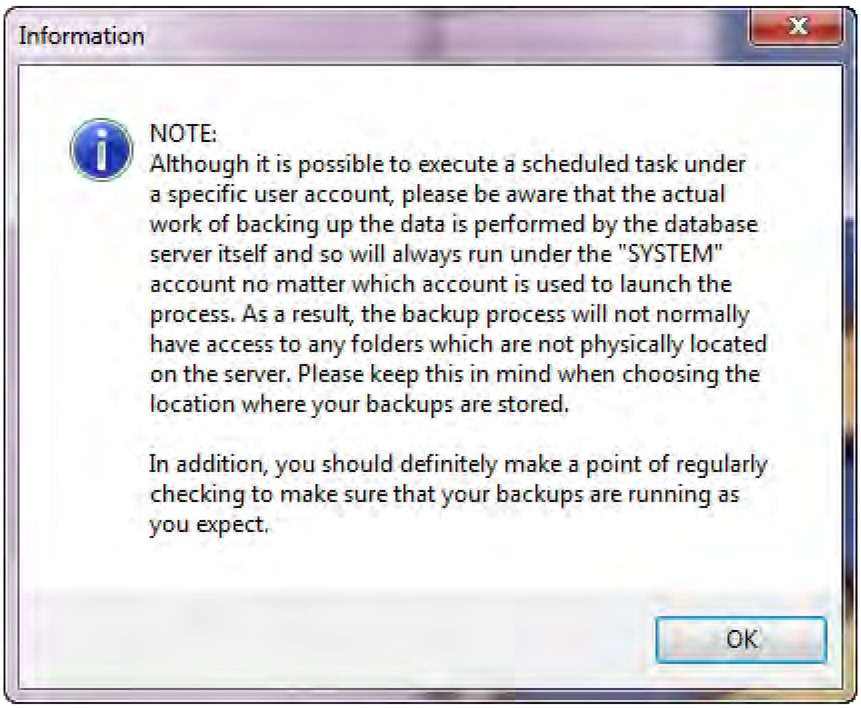


G. Schedule Regular Backups - You have already run the **Check Backup Space** utility and analyzed various storage devices on your network so you will know if your selected device will be able to store your SQL databases.

Once you find the best place for your database backups, taking into consideration that they will grow larger over time, you can proceed to the **Schedule Regular Backups** utility.

Caution **You must be sure there is enough space on the selected device to store your database backups. Be sure to run the Check Databases utility before you make a new folder on a storage device to be sure that you have enough space.**

When you click the **Important** button the informational note here is displayed.

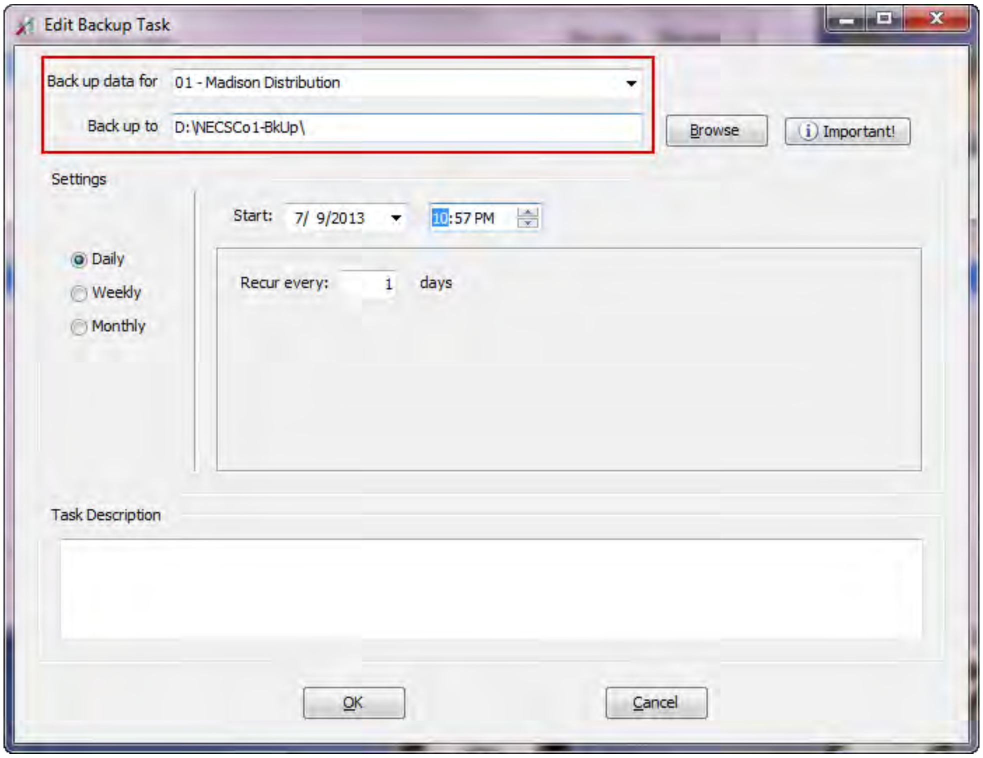


Add Task: To schedule regular backups use the **Add task** button to create your schedule.

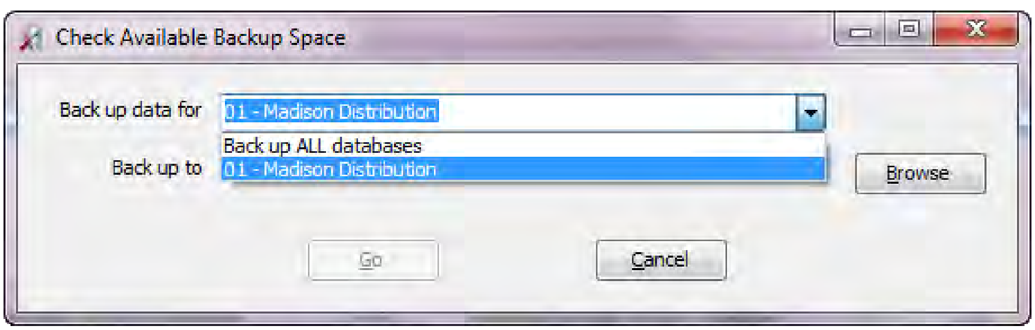
- You will need to decide how often you need to backup your system based on the volume of your business.
- It is strongly suggested that backup jobs be run after business hours when there is no activity in **entrée**.
- Then you can proceed to build your schedule of backup jobs using the **Add Task** button.

How to Add a Backup Task to the Scheduler

1. Once you click the **Add Task** button the **Edit Backup Task** screen will open. Here you will build the backup jobs that will be run by the Scheduler.
2. The **Important** button message previously shown can be used here for more information.
3. Set your **Edit Backup Task** screen options which are discussed next.



4. Make selections for the **Edit Backup Task** screen fields:



Back up data for:

- **Back up ALL databases:** Select this to back up all your databases.
- For customers with multiple companies your 01, 02… companies will be listed here. Use this drop down menu to select the desired **Company Name** from the list.

Back up to:

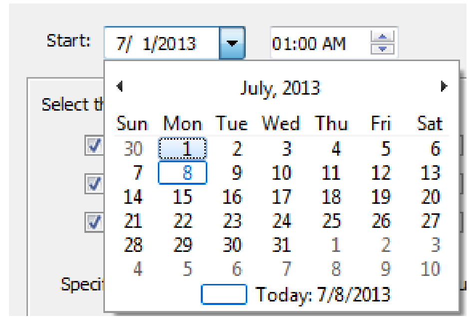
- Use the **Browse** button to locate the device and select a folder to store your database backups.
- Or use the **Make New Folder** button in the **Browse** dialog to create a folder for your backups.

Settings Section:

a. First select the frequency of your scheduled database backups**:**

- **Daily**
- **Weekly**
- **Monthly**

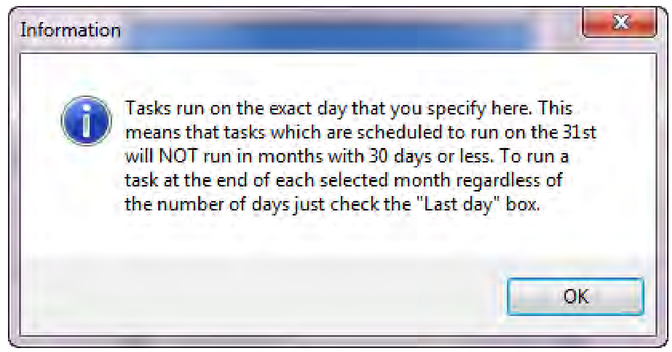
b. Enter the desired date and time in the **Start** section**.**



Date settings:

- Click the arrow to reveal the calendar and select a start date for your task.
- Or use your keyboard to enter the desired date.

Date Information: The Information box here is part of the explanation for setting dates and how they work in the system.



Time settings:

- Click the **Hour** area and use the arrows to set the desired hour for the backup run.
- Click the **Minutes** area and use the arrows to set the desired minutes value.
- Click the **AM / PM** area to make a selection for the backup task.

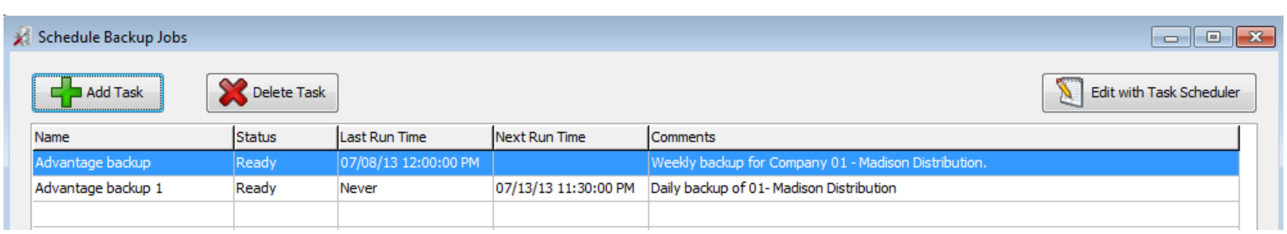
Options:

- The options information in the area below the Date and Time settings will change with your choice of backup frequency, Daily, Weekly or Monthly.
- In the screen above you see the "**Recur every**" option for daily backup tasks. Click the number to change the daily recurrence frequency.

Task Description:

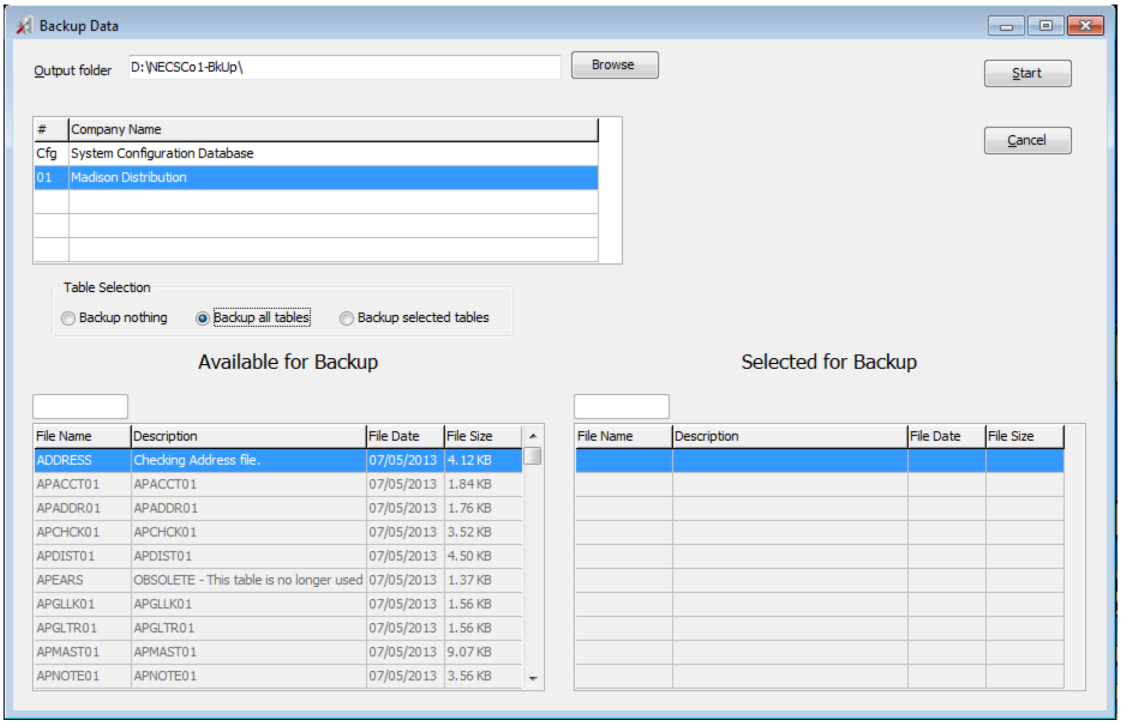
- Enter a simple description for the backup task you are creating. As an example your can write "Daily backup of company 01 databases."

5. After you save your new database backup task it will be added to the list in the **Schedule Backup Jobs** screen.



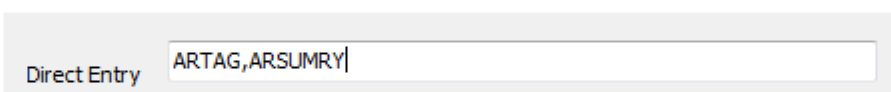
H. Backup Data Now

- **Output folder:** Similar to the previously mentioned database utility screens the **Browse** button is used to locate the storage device and select or make a folder to store your database backups.
- **Company Name:** Select the company and the list of databases will display in the **Available for Backup** list.
- Either **Backup all tables** or **Backup selected tables** and use drag and drop to the **Selected for Backup** list.



In the example above we have selected **Backup all tables**. If you would like to backup specific tables use the **Backup selected tables** or **Direct Entry** options.

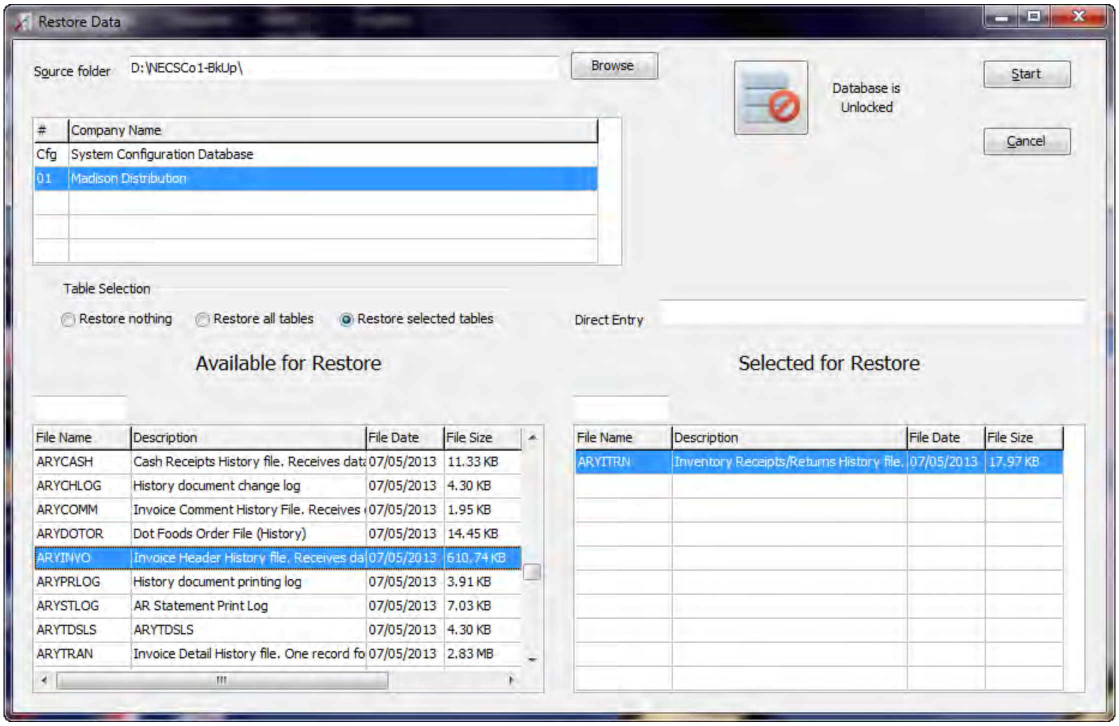
- The **Direct Entry** option is available with **Backup selected tables** so you can enter comma separated database names for backup.



Hot Tip! **If the network can see a device you can select it and backup your databases there.**

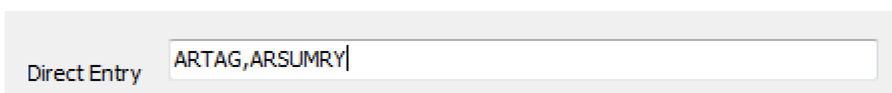
I. Restore Data Now

- **Source folder:** The opposite of the **Backup Data Now** utility, the **Restore Data Now** uses a similar screen to **Browse** and locate the device and folder where your backup of the SQL databases are stored.
- Select the **Company Name** and the list of databases will display in the **Available for Restore** list.
- Either **Backup all tables** or **Backup selected tables** and use drag and drop to move databases to the **Selected for Restore** list.



Example In the example above we have selected the **Restore selected tables** option because only one database needs to be restored. The database was dragged from the **Available for Restore** column to the **Select for Restore** column.

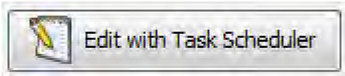
- **Direct Entry:** In this text box you can enter the comma separated names of the specific databases you would like to restore.



Caution **Before you restore databases you should go to the View menu and use the Show Connected Users feature to see what users are in the system. Then ask the users to sign out before you begin.**

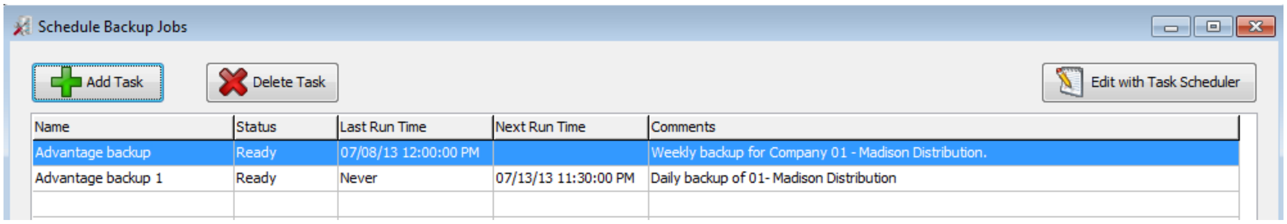
Running a Restore

1. Send a message to request users log out of the system.
2. You must click the **Database is Unlocked** button to lock your databases before the restore job can run.
3. When your restore is complete click the **Database is LOCKED** button to unlock the **entrée** databases again.
4. Send a message to notify users when the restore is done.



Edit with Task Scheduler

On the Schedule Backup Jobs screen you will see the **Edit with Task Scheduler** button. Use this button to access the more advanced features of the Windows Task Scheduler. The next topic covered will be **Using the Task Scheduler**.



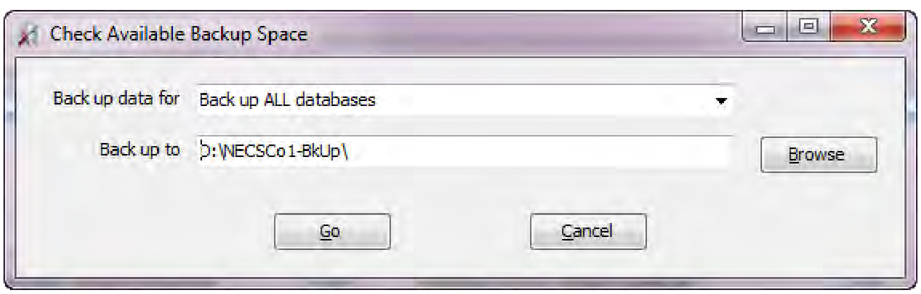
J. Check Backup Space - Before you designate a device and folder to store your company database backups you should use the **Check Backup Space** feature to analyze the space available in potential locations.

- Browse to select a folder for your backups. Then click **GO** to run the backup space check. This process should run very quickly since it is just analyzing space availability.

Back up data for:

- **Back up ALL databases:** Select this to back up all your databases.
  For customers with multiple companies your 01, 02… companies will be listed here.

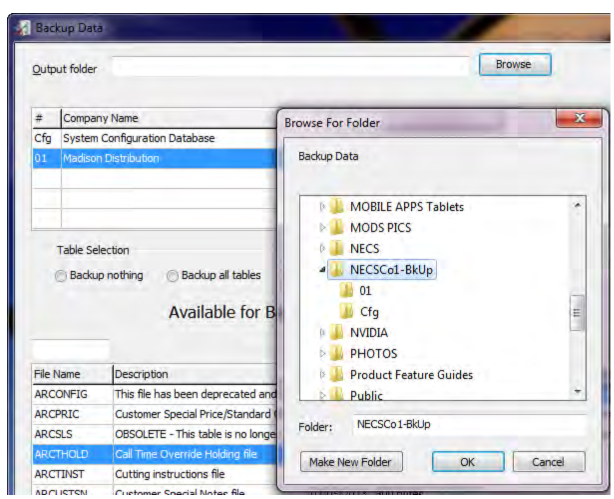
- Use the drop down menu to select the desired **Company Name** from the list.



Browse: Use the **Browse** button to locate the device.

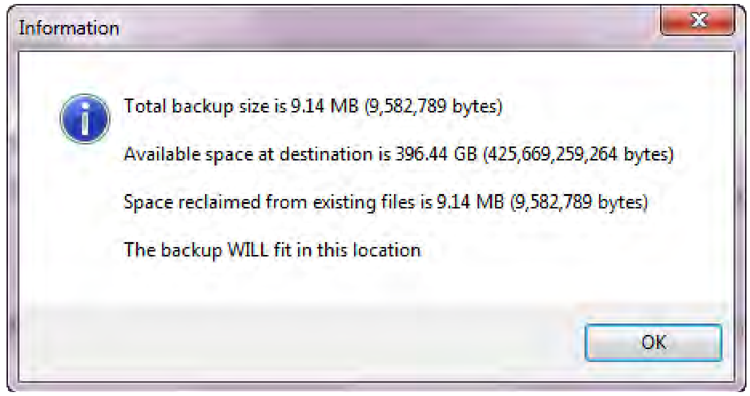
- Select an existing folder.

- Or use the **Make New Folder** button to create a folder for your backups.



- Here we created a folder with using NECS, the company number and letters representing the back up function called "NECS01-BkUp".

- When the space on the device has been analyzed an **Information** message box will display with the statistics and tell you whether you databases will fit in the location.



K. Disable entrée Client Monitor system

This is a switch to disable the **entrée Client Monitor System** and bypass it to let **entrée** run. Once the option is checked any running copies of **entrée** will disconnect from the monitor. Instances of **entrée** linked to the Task Execution Service (TES) will finish the currently started job if applicable then disconnect and terminate.

Once the monitor feature is unchecked, any running copies of **entrée** will plug back in without any notification to the user. The Task Execution Service will also restart its copy of **entrée** when it sees the client monitor is running again and without any interaction with the users other than turning the monitor back on.

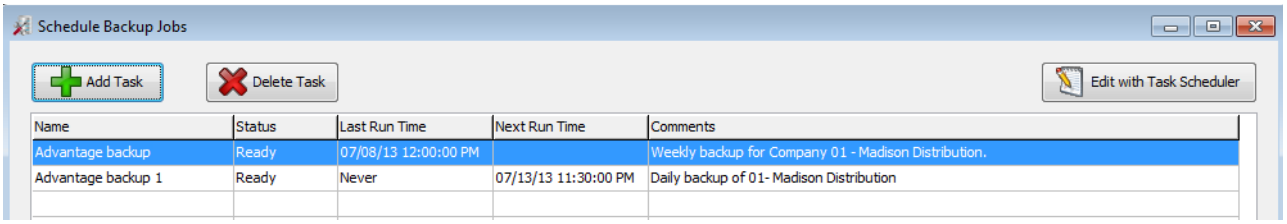
This option should only be used if NECS Tech Support advices you to disable the Client Monitor.

- With the Client Monitor disabled, the Task Execution Application (TEA) shuts down completely because without the Client Monitor there is no way to control the execution of tasks on remote machines (Mainly an issue during updates to the database).

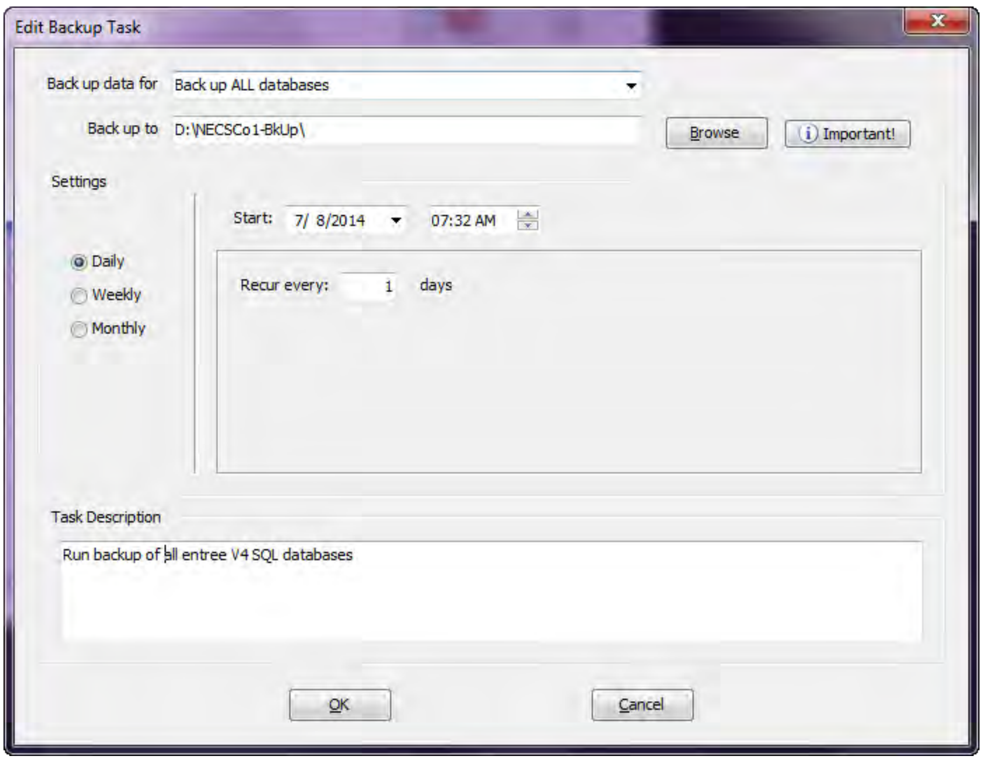
- With the Client Monitor shut down the Update Utility can no longer remotely notify running instances of **entrée** that they need to shut down for an update, so the distributor is back to running around the building telling people to close **entrée**.

3.1 Schedule Regular Backups

It is easier and quicker to create and delete your backup jobs using the **Update Utility** > **Utilities** menu > **Schedule Regular Backups** option.



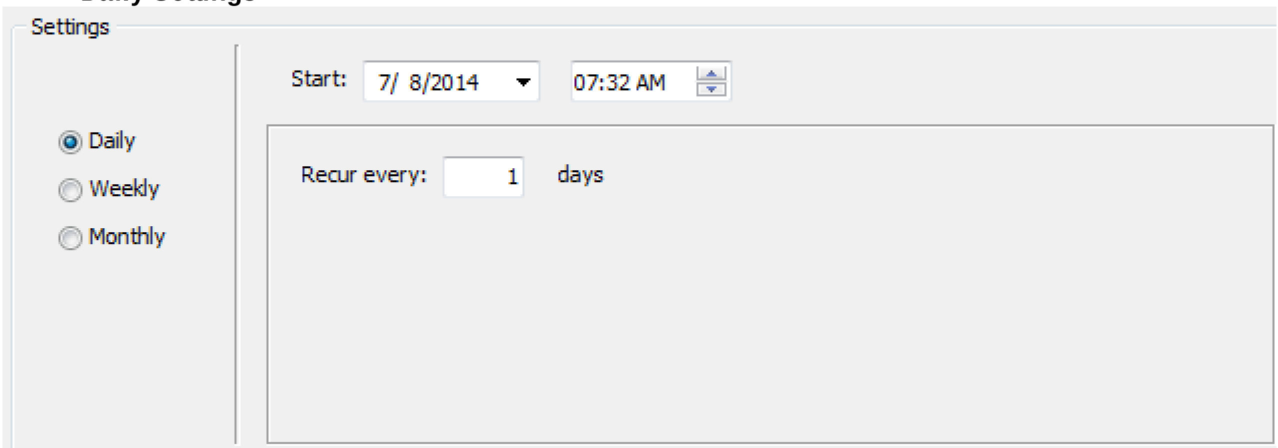
Use the **Add Task** button in the Schedule Backup Jobs screen to create and schedule regular backups of your version 4 SQL databases.



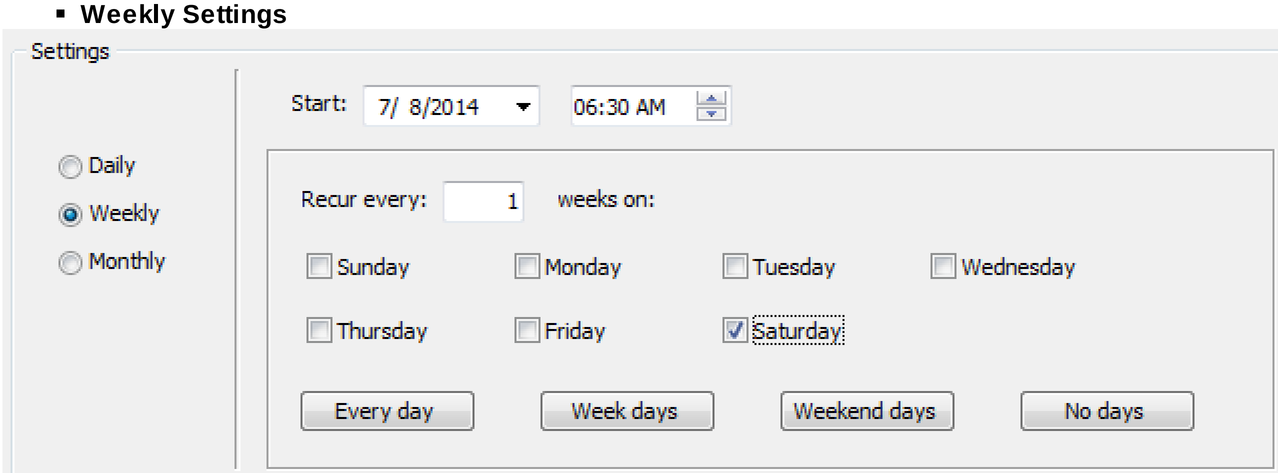
- **Back up data for:** If you only have one company select **Back up ALL databases** from the drop down menu.
  - If your system is set up with as a multi-company you will select the desired company's database files from the companies listed in the drop down menu.

- **Back up data to:** Use the **Browse** button to locate the destination drive and folder for your backups to be written to. You can create an empty folder in the selected location prior to performing this step.

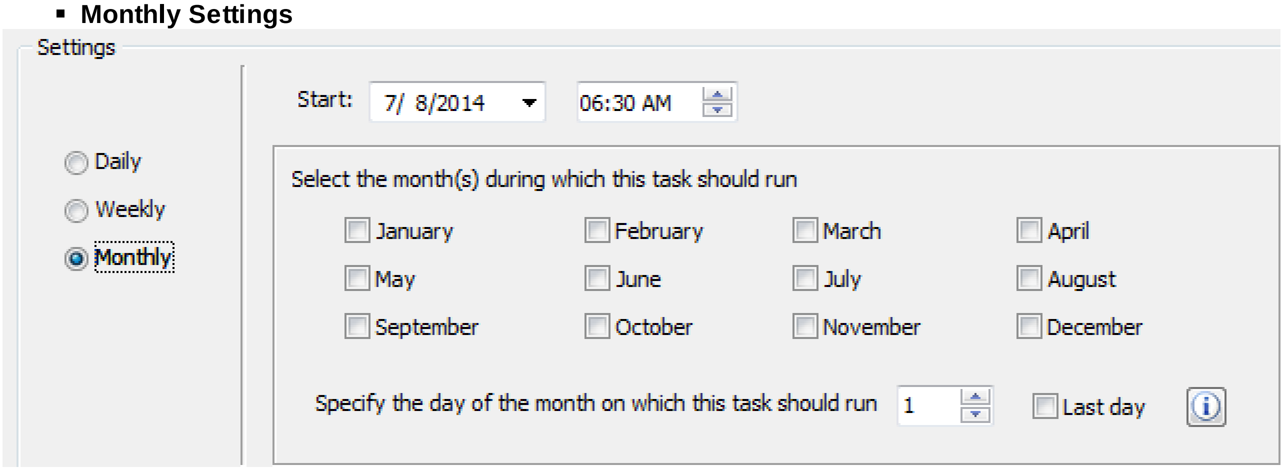
- **Settings:**
  - **Daily Settings**



  - **Weekly Settings**

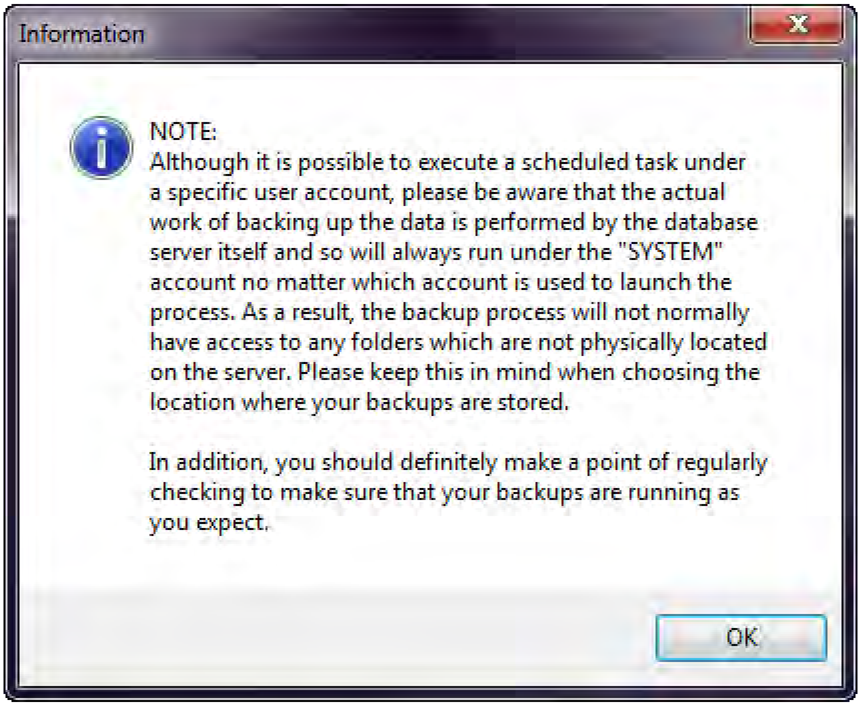


  - **Monthly Settings**



- **Task Description:** Enter a description of the task to be run.

- The note seen when you click the **Important** button. 



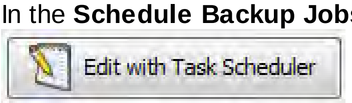
Select a task and click the **Delete Task** button in the Schedule Backup Jobs screen to delete a backup job.

Resetting Failed Tasks

You have the ability to reset the status of a task that started to execute but for whatever reason failed to complete either with or without errors. The task failure could be due to a service restart or some other system failure. If a task is executed and completes with errors it will automatically be placed into a suspended state.

Go to the **Scheduling Utility** chapter of this guide to learn about how the **Restore Task** option is used to reset the status of a suspended task. The **Restore Task** option will only be displayed if the selected task is either running or in a suspended state.

Edit with Task Scheduler

- To maintain scheduled backup jobs access the **Task Scheduler** via the **Update Utility** > **Schedule Regular Backups** window.
- In the **Schedule Backup Jobs** window click and select the job you would like to edit. Then click the 

Edit with Task Scheduler button.

- The next section of this guide will cover the **Task Scheduler**.

3.2 Using the Task Scheduler

The Task Scheduler is used to maintain the backup jobs scheduled **Using the Update Utility**. The Task Scheduler, which is a more advanced tool in Windows, will schedule and run many jobs including Microsoft software updates and updates to other software packages installed on your computer.

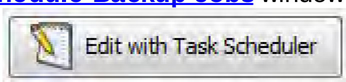
You can use the Task Scheduler to create and manage common tasks that your computer will carry out automatically at the times you specify.

Tasks are stored in folders in the Task Scheduler Library. To view or perform an operation on an individual task, select the task in the library and click on a command in the **Action** menu.

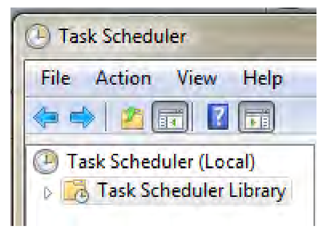
Be sure to go to the **Scheduling Utility** chapter of this guide to learn about scheduling tasks using this option in the **entrée System** ribbon menu.

1. To access the **Task Scheduler** run the **Update Utility** > select **Schedule Regular Backups** window.

2. In the **Schedule Backup Jobs** window click and select the job you would like to edit.

3. Click the 

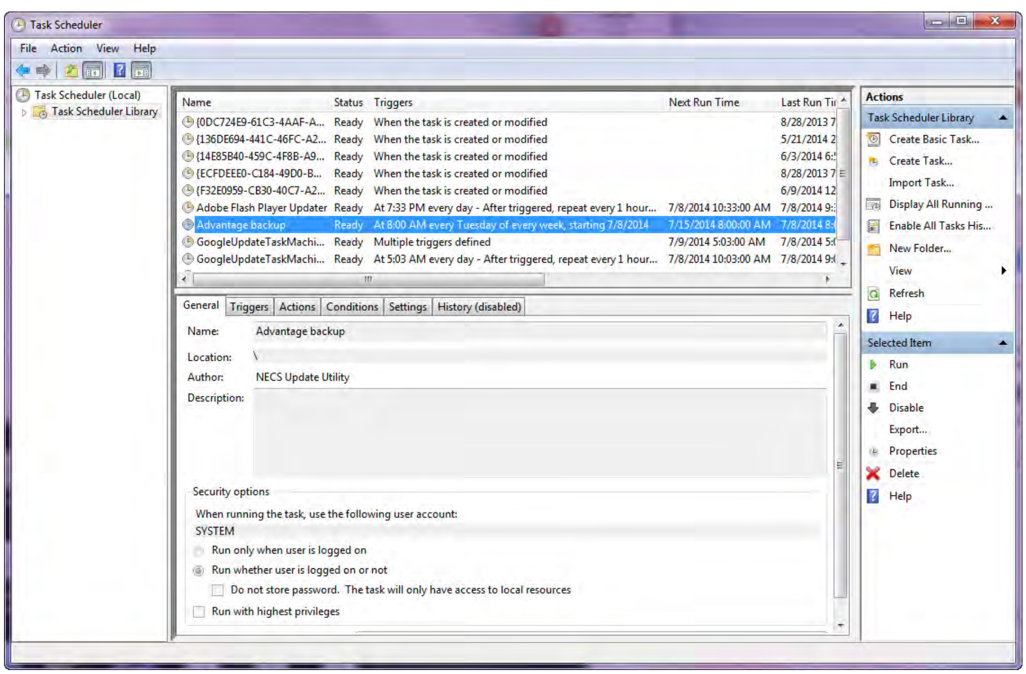
Edit with Task Scheduler button.



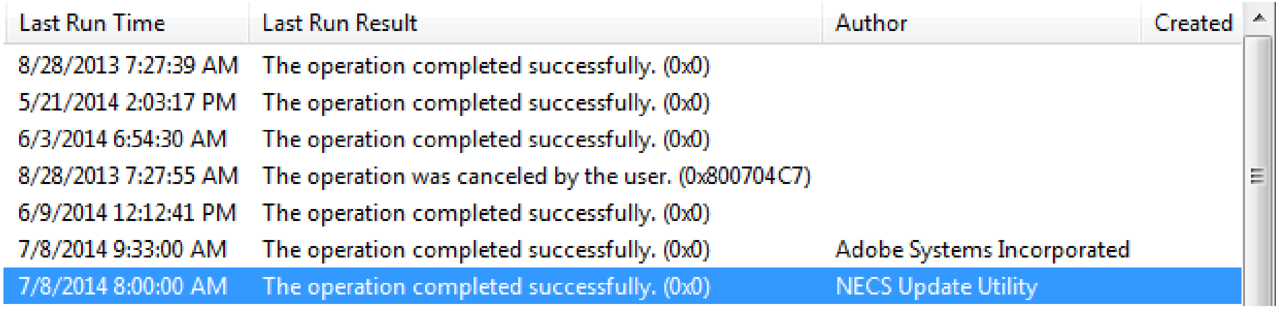
- **Task Scheduler Main Menu**
  File, Action, View, Help

- **Tool Bar** (from left to right)
  Back arrow, Forward arrow, Up One Level, Show/Hide Console Tree, Help, Show/Hide Actions Pane.

- **Task Scheduler Library:** Click it to see all scheduled tasks and the menus. The Advantage backup that is highlighted is the task that will back up your **entrée** databases.

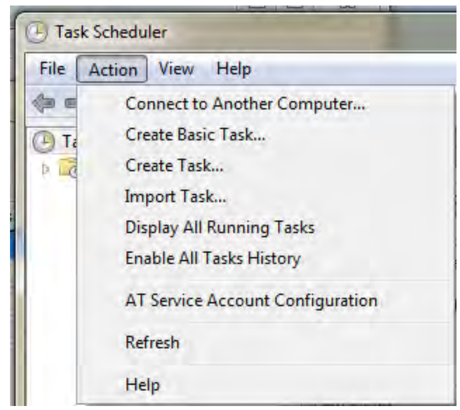


- Scroll to the right to see the rest of the columns for the tasks (below).



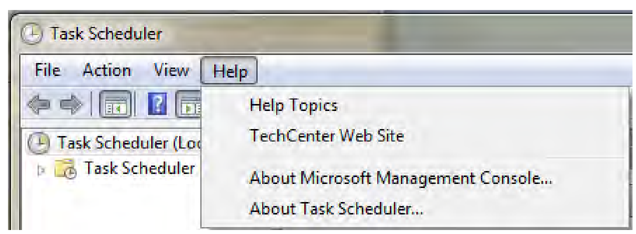
Last Run Time	Last Run Result	Author	Created
8/28/2013 7:27:39 AM	The operation completed successfully. (0x0)		
5/21/2014 2:03:17 PM	The operation completed successfully. (0x0)		
6/3/2014 6:54:30 AM	The operation completed successfully. (0x0)		
8/28/2013 7:27:55 AM	The operation was canceled by the user. (0x800704C7)		
6/9/2014 12:12:41 PM	The operation completed successfully. (0x0)		
7/8/2014 9:33:00 AM	The operation completed successfully. (0x0)	Adobe Systems Incorporated	
7/8/2014 8:00:00 AM	The operation completed successfully. (0x0)	NECS Update Utility	

- **Task Scheduler Action Menu**



- **Task Scheduler Help Menu:**

  For more information about using the Task Scheduler use the **Help** menu > **Help Topics** option.

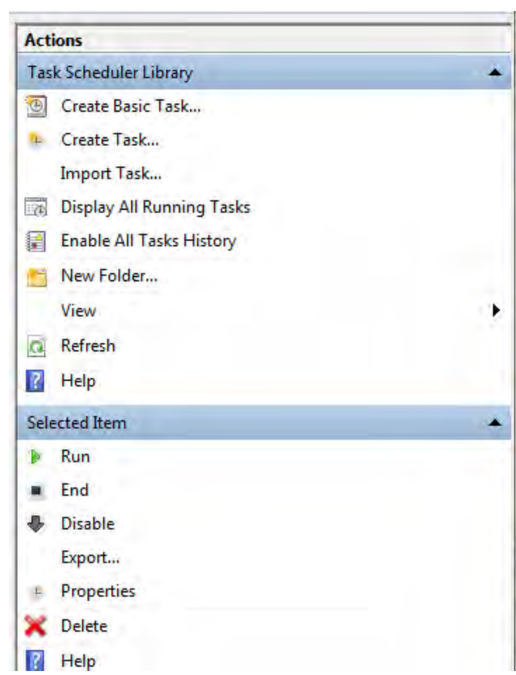


- **Create a basic task using the wizard**

  1. In the Actions pane, click **Create Basic Task**.

  2. Follow the instructions in the Create Basic Task Wizard.

- **Actions Pane -** When you click on a task the options in the pane will expand to include what is seen on the right.



- **Create a Task**

1. Find and click the task folder in the console tree that you want to create the task in. If you want to create the task in a new task folder, see Create a New Task Folder to create the folder.
2. In the Actions Pane, click **Create Task**.
3. On the **General** tab of the **Create Task** dialog box, enter a name for the task. Fill in or change any of the other properties on the **General** tab. For more information about these properties, see General Task Properties.
4. On the **Triggers** tab of the **Create Task** dialog box, click the **New…** button to create a trigger for the task, and supply information about the trigger in the **New Trigger** dialog box. For more information about triggers, see Triggers.
5. On the **Actions** tab of the **Create Task** dialog box, click the **New…** button to create an action for the task, and supply information about the action in the **New Action** dialog box. For more information about actions, see Actions.
6. (Optional) On the **Conditions** tab of the **Create Task** dialog box, supply conditions for the task. For more information about the conditions, see Task Conditions.
7. (Optional) On the **Settings** tab of the **Create Task** dialog box, change the settings for the task. For more information about the settings, see Task Settings.
8. Click the **OK** button on the **Create Task** dialog box.

- **View a Task's Properties**

1. Find and click the task folder in the console tree that contains the task you want to view.
2. In the console window, click the task that you want to view.
3. Click **Properties** in the **Action** pane. The **Task Properties** dialog box will appear.
4. In the **Task Properties** dialog box, the task's properties are located on the **General**, **Triggers**, **Actions**, **Conditions**, and **Settings** tabs. Click a tab to view the properties.
5. Click the **History** tab to view the task's history.
    - Task history can be enabled or disabled. In the **Action** pane, click **Disable All Tasks History** or **Enable All Tasks History** to change the Task History display.
    - Click an event in the list of events on the **History** tab to view the description of the event.

- **Display All Running Tasks**

1. In the **Actions** pane, click **Display All Running Tasks…**. The **Running Task** dialog box will appear.

- **Disable a Task from Running**

1. Find and click the task folder in the console tree that contains the task you want to disable.
2. In the console window, click the task that you want to disable.
3. In the **Actions** pane, click **Disable**. The **Disable** command will only be available in the **Actions** pane if the task is enabled.

- **Enable a Task to Run**

1. Find and click the task folder in the console tree that contains the task you want to enable.
2. In the console window, click the task that you want to enable.
3. In the **Actions** pane, click **Enable**. The **Enable** command will only be available in the **Actions** pane if the task is disabled.

- **Delete a Task**

1. Find and click the task folder in the console tree that contains the task to delete.
2. In the console window, click the task to delete.
3. In the **Actions** pane, click **Delete**.
4. In the **Confirm delete** dialog box, click **Yes**.

- **Delete a Task Folder**

1. Find and click the task folder in the console tree that you want to delete.
2. In the **Actions** pane, click **Delete Folder**.
3. In the **Confirm delete** dialog box, click **Yes.**

Chapter 4

Client Monitor & Task Execution Application

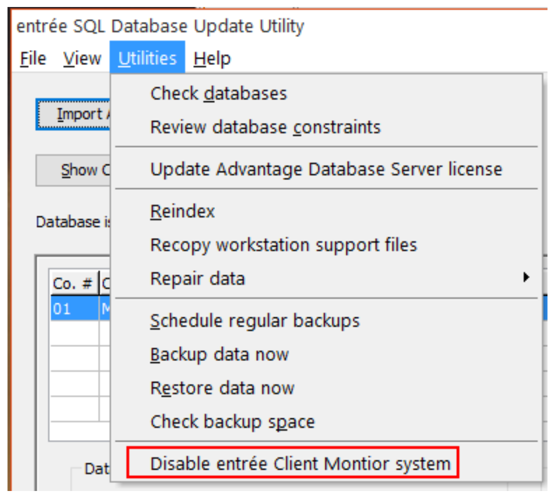
4 Client Monitor & Task Execution Application

Viewing Services Running Using the Windows Task Manager

1. Hit the **CTRL + ALT + Delete** keys simultaneously and you will open a Windows menu.
2. Select **Start Task Manager** and the **Windows Task Manager** will open.
3. Click the **Services** tab.
4. Then click the **Services** button in the lower right corner to view the **Services** dialog.
5. Scroll down the list to locate these **NECS** services:
   a. **NECS entrée Client Monitor Service**
   b. **FaxMan Fax Engine**
   c. **NECS Task Execution Application**

6. In the Windows Services dialog window you can Stop, Pause and Restart the **NECS entrée Client Monitor** and other services.

- You can also turn off the **NECS entrée Client Monitor** in the Update Utility > **Utilities** menu.



Caution **This disable option should only be used if NECS Tech Support advices you to disable the Client Monitor.**

Note **About the Disable entrée Client Monitor option**

- Once the disable option is checked in the Update Utility any running copies of **entrée** will disconnect from the Client Monitor.
- All instances of **entrée** linked to the Task Execution Service will finish the currently started job, if any, and then disconnect and terminate the Task Execution Service.
- Once the Client Monitor feature is re-enabled by removing the check in the Update Utility **Utilities** menu, any running copies of **entrée** will plug back in without any notification to the user.
- The Task Execution Service will restart its copy of **entrée** when it sees that the Client Monitor is running again without any interaction with users other than turning the monitor back on.

NECS entrée Client Monitor (ECM)

- The **entrée Client Monitor** service manages and tracks all the **entrée** client connections (workstation computer connections) for the network.
- The **entrée Client Monitor** will create a new log file when the system date changes for each day.
- Client Monitor works with the Update Utility to remotely notify running instances of **entrée** when they need to shut down for an update.

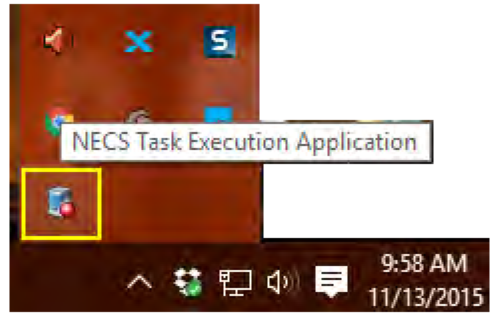
NECS Task Execution Application (TEA)

- The Task Execution Application works through the **entrée Client Monitor** (ECM) to control the execution of scheduled tasks on remote computers, like running reports.
- See the [Using the Task Scheduler] topic in the [Using the Update Utility] section for more information about the Scheduler.

Welcome toTEA

We have replaced the "Task Execution Service" (TES) application with the **Task Execution Application**, or "**TEA**" (pronounced "tee") for short.

TEA is designed to run in the system tray as shown on the right.

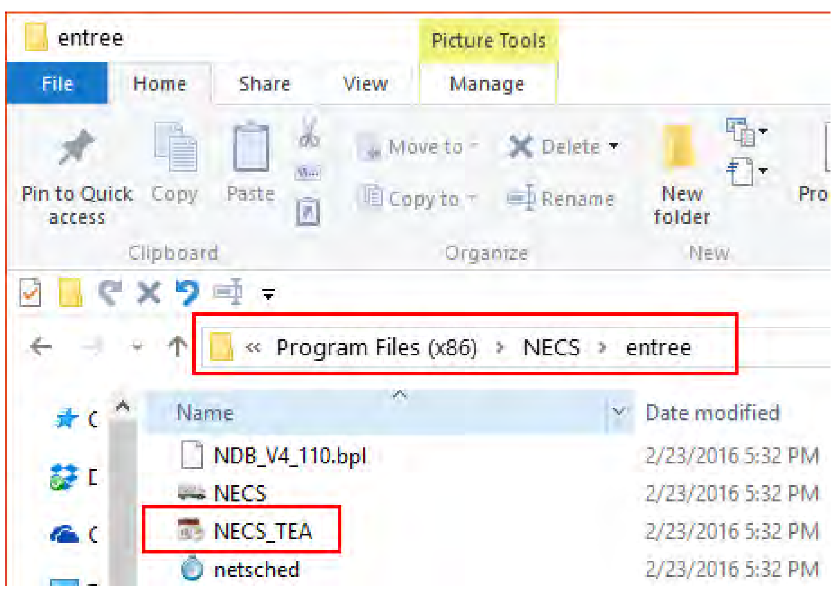


We have transitioned to TEA to assist with diagnosing any intermittent problems with scheduled tasks. TEA will also show any prompts or messages from scheduled tasks that require you to respond to them so they can continue running.

TEA interacts with the main **entrée** application to perform tasks for some scheduled processes like the display of prompts, warning messages and dialog boxes requiring user responses for tasks. During the work day when **entrée** is running these messages pop up, you respond to them and the tasks continue to run and complete.

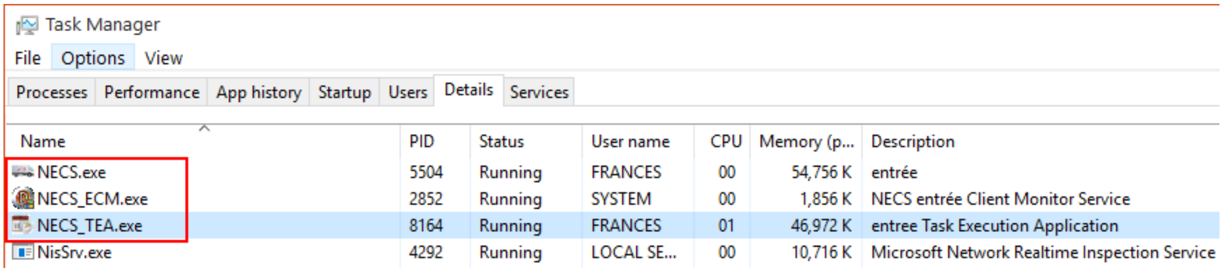
Running TEA

1. Go to the server where your **entrée system** software is installed.
2. Open your designated Program Files folder.
3. Find the **NECS** folder then > open the **entree** folder.
4. Double-click the **NECS_TEA.exe** executable module and it will run, but you will not see it.

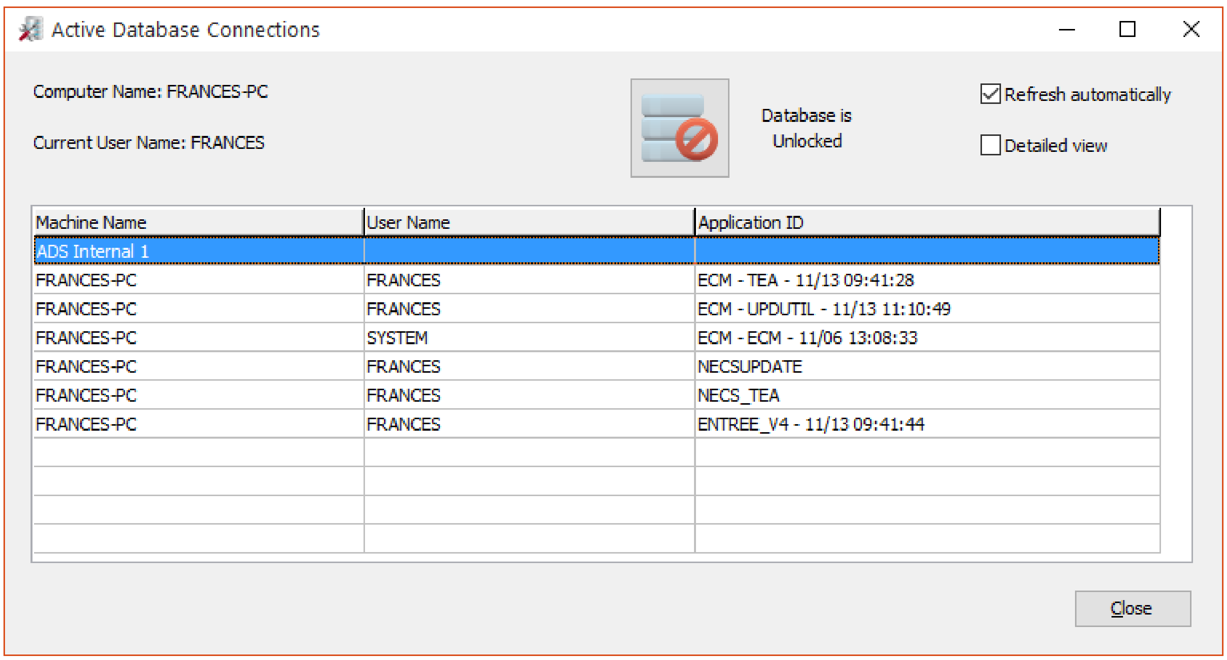


5. To see if **TEA** is running you have two options; the Windows Task Manager or the Update Utility.

5a. Open the Windows Task Manager by hitting the **Ctrl + Alt + Delete** buttons at the same time. Select the **Task Manager** option. When the Windows Task Manager opens and you will see NECS_TEA.exe along with NECS_ECM.exe and if the **entrée system** is running you will see NECS.exe (image below).



5b. Or in the [Update Utility] click the **Show Connected Users** button. Here you will see all the users and services running on the database server including **NECS_TEA**.



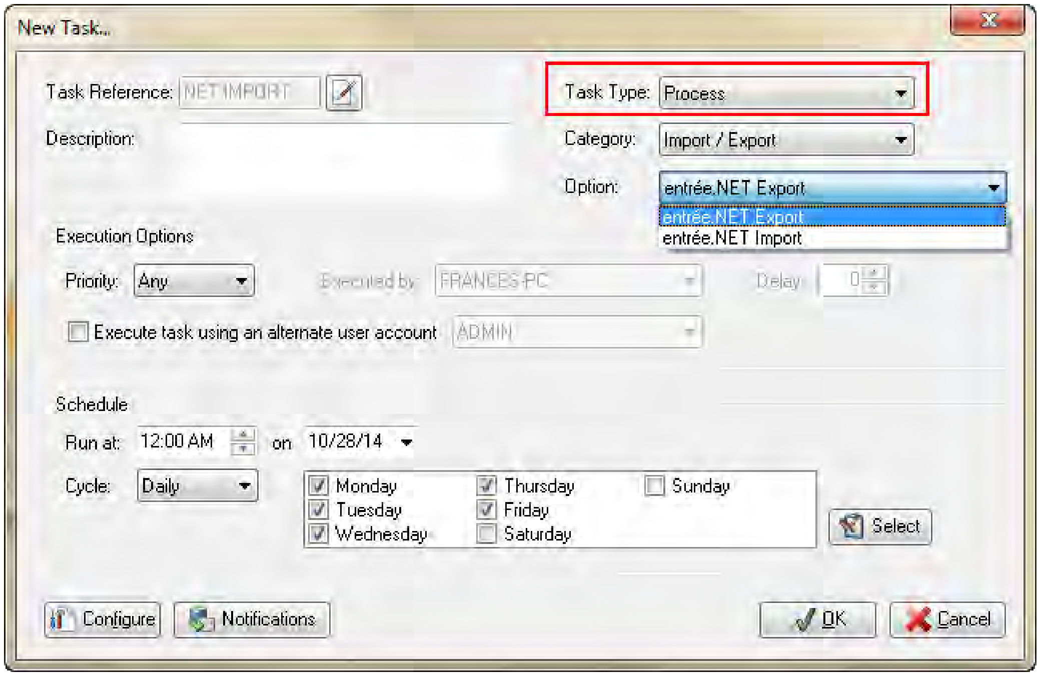
6. **This step is only for customers who have the entrée.NET add-on module.**

You will need to add your **entrée.NET** import and export tasks back into the scheduler so they will run.

a. Go to the **System** ribbon menu **System Utilities** section and run the**Scheduling Utility**.

b. Select a Task Type of **Process** and select a Category of **Import / Export.**

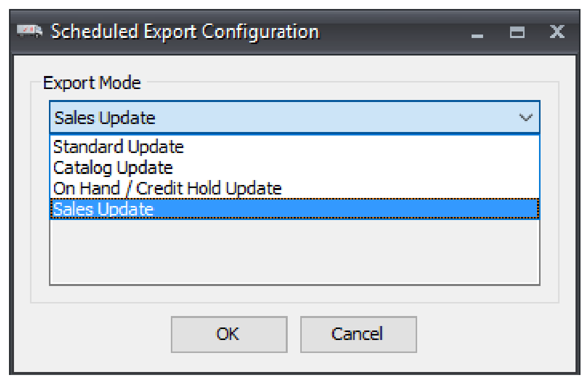
c. In the **Option** drop down menu select from the **entrée.NET Export** and **entrée.NET Import** to schedule these processes.



d. Click the **Configure** button (we have selected the **entrée.NET Export** option) and the Scheduled Export Configuration dialog opens.

e. Select the desired **Export Mode** from the drop down menu and click **OK**.

f. Continue with setting up the rest of the process schedule as you would for any other task. For more information you can consult the **Scheduling Utility** chapter in this guide.



Chapter 5

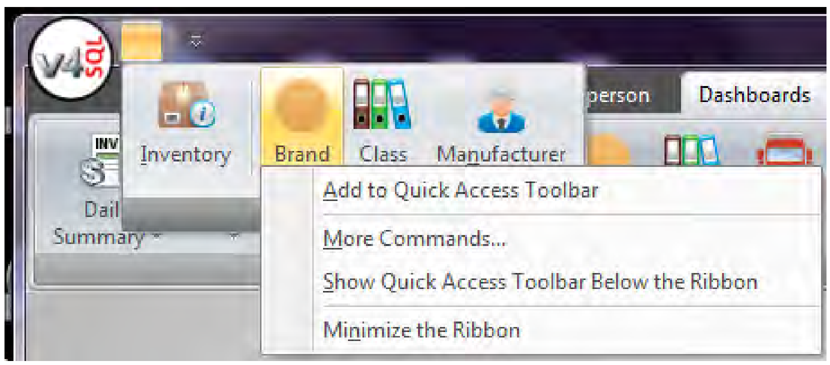
Using the Ribbon Menus

5 Using the Ribbon Menus

The purpose of this chapter is to provide you with a detailed overview of the features of the version 4 Ribbon Menu feature, the new method of navigating within your **entrée** application. This new feature will provide you with faster more intuitive menus. All the menu options have a graphical icon which visually represents what that menu choice accomplishes. Once the user is used to the visual icon, they can identify the menu option much faster than reading a menu title.

Menu options related to each ribbon category are grouped together. This makes it easier for the user to find what they is looking for. As an example, on the "Inventory" ribbon, all options related to inventory, including file maintenance, transactions, reports and utilities are grouped together. The same is true for the other ribbon elements of "Customer", "Vendor", "Salesperson", etc.

Frequently used menu options can be set by the user and added to the "Quick Access Toolbar", which can appear directly above the ribbon menus or below them. Previous versions of **entrée** had a similar concept called "My Menu".



Clicking on the "**V4 SQL**" in the circle at the top left of the ribbon menu, as well as the small down arrow button to the right of it, will bring up additional options, such as "**Show Login Screen**" and other commands.

As option for a new V4 SQL installations, below the ribbon menu will appear the older "**Legacy**" menu structure. This was included so that users familiar with the old style menu of **entrée** could feel comfortable while they adapted to the newer ribbon style. The Legacy menu format can be turned off in the **System** ribbon menu **System Preferences** area in the **System Options** section. Previous hot keys used by **entrée** for menu selections are fully supported.

☑ **Hot Tip!** Previous hot keys used by **entrée** for menu selections will continue to be fully supported in the **entrée V4 SQL** version.

Ribbon Menu Overview

The V4 SQL release of **entrée** includes a new Ribbon menu that organizes menu options into a tabbed interface. This new menu uses distinctive visual icons for each menu option providing you with a quick and intuitive way to interface with **entrée**.

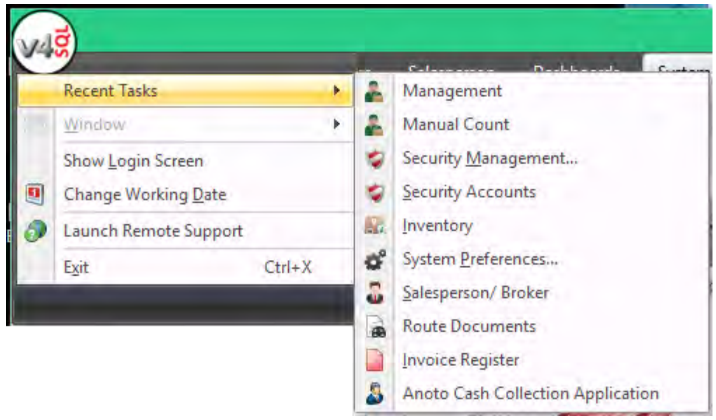
- **V4 SQL Menu**

The "**V4 SQL**" icon in the top left of the ribbon menu or the drop down arrow, will reveal general options like "Show Login Screen" and the Exit command to close **entrée**. The menu is accessed by clicking on the **V4 SQL** circle icon (outlined in red in the image) in the upper left corner.

Options are:

- **Recent Tasks**
- **Window**
- **Show Login Screen**
- **Change Working Date** - Use this tool to enter invoices using a different default date for the invoice and order dates.

  Changing the default date works for all parts of the system that use the current date, such as cash receipts and receiving inventory.



- **Exit**

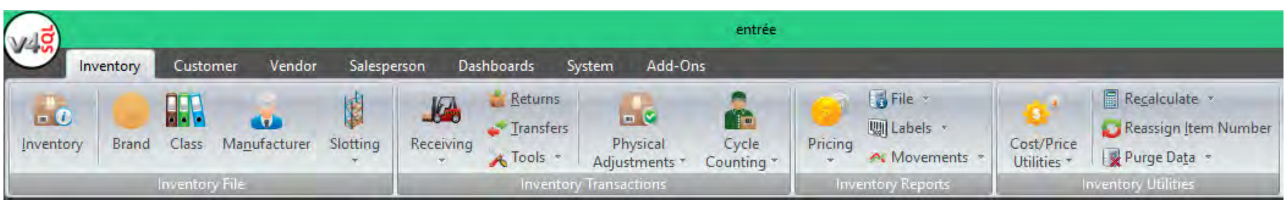
View your **Recent Tasks** in the list on the far right.

The Ribbon Menu allows you to access the **entrée** application main data files; Inventory, Customer, Vendor, Salesperson, Dashboards, System and Add-Ons. Menu options related to each ribbon category are grouped together. This coupled with the icon images make it easier for **entrée** users to find what they are looking for.

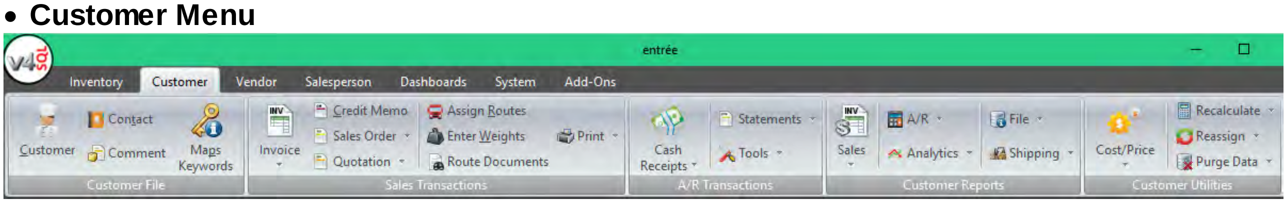
• Inventory Menu

On the "Inventory" ribbon menu above, all options related to inventory, including file maintenance, transactions, reports and utilities are grouped together with the group caption below it like “Inventory File”. Menu options with a down arrow to the right have a drop down menu of options.

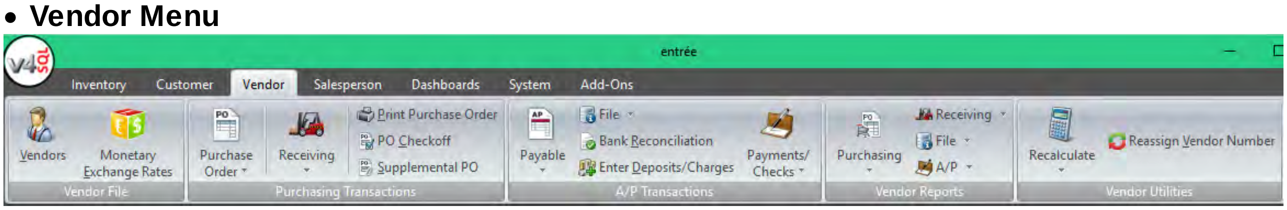
In the Inventory ribbon menu you will find these sub-menus: Brand, Class, Manufacturer, and sections for Inventory Transactions, Reports and Utilities.



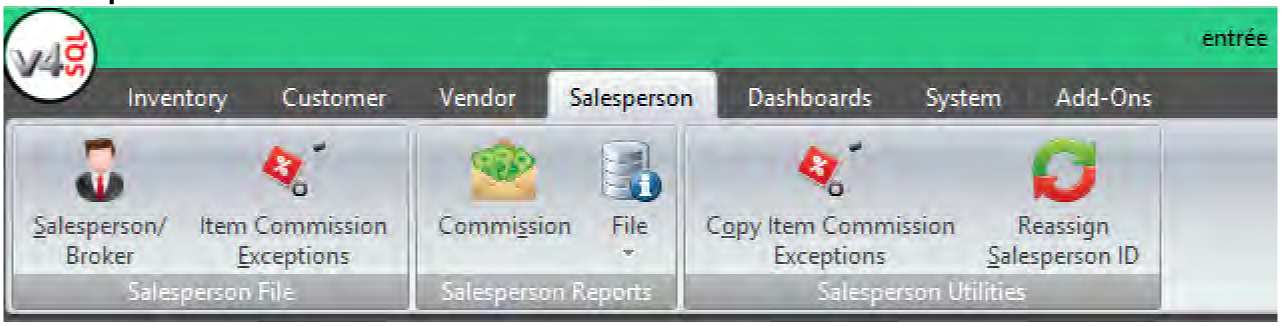
• Customer Menu



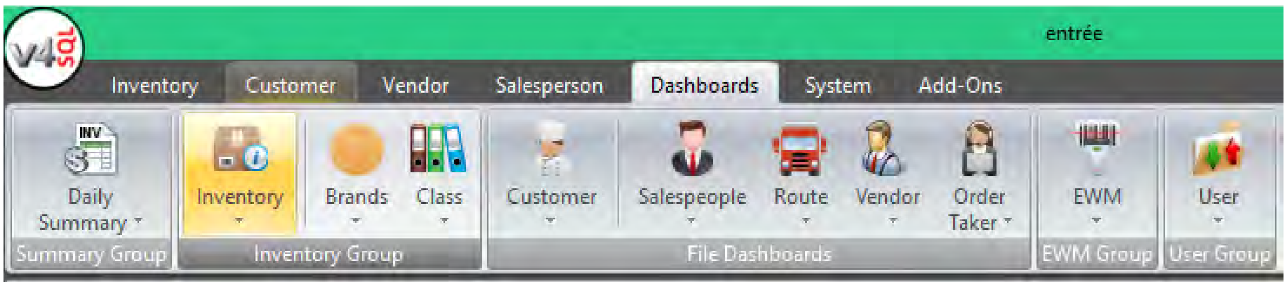
• Vendor Menu



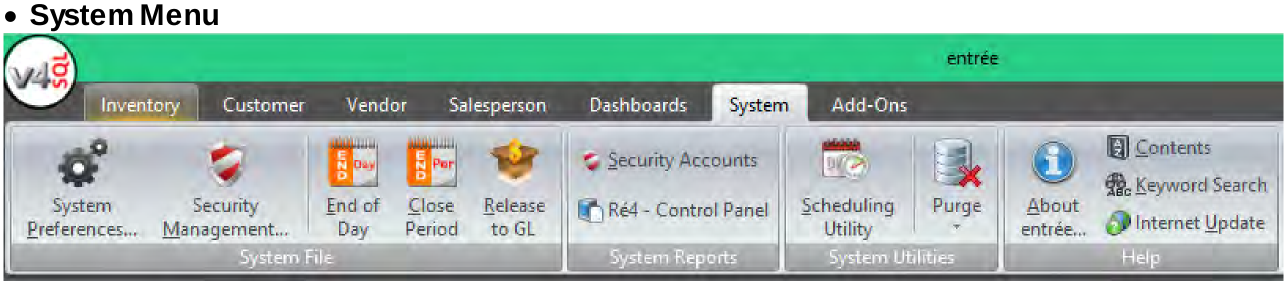
- **Salesperson Menu**



- **Dashboards Menu**

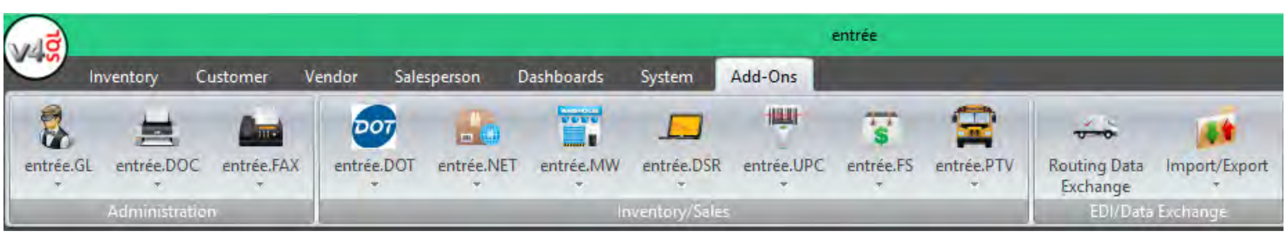


- **System Menu**



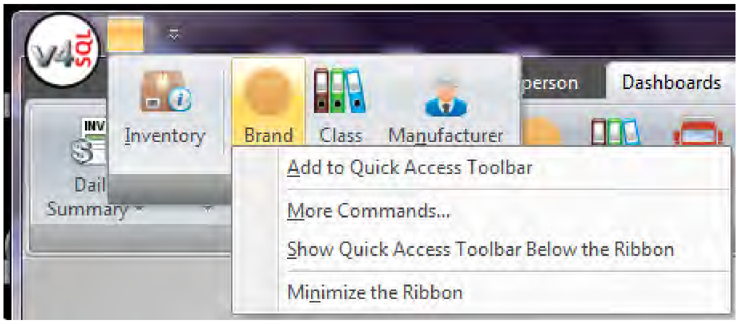
- **Add-Ons Menu**

The Add-Ons ribbon will provide access to the options related to any of our add-on products you may have purchased to enhance and expand the performance of the **entrée** system. In the ribbon menu below **entrée.DOC,** used for document scanning and **entrée.DOT,** the DOT Foods interface, **entrée.NET** for Internet based e-commerce are some of the add-on modules a customer can purchase to enhance **entrée**. Please visit our website at necs.com to learn about our other add-on modules, products and services.

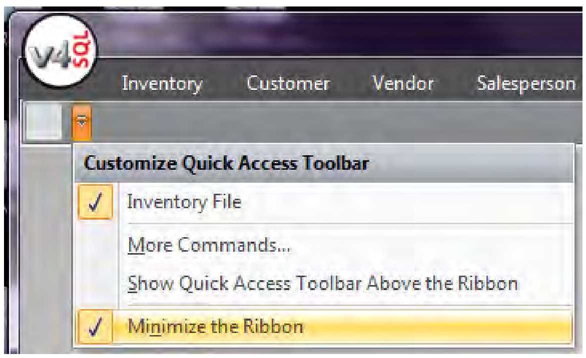


- **Minimizing the Ribbon Menu**

You have the option to minimize and restore the Ribbon menu whenever you like. Click the down arrow in the upper left corner of the screen near the V4 SQL icon and Quick Access Toolbar area to reveal the Ribbon menu options.



Or you can right-click any ribbon command and check the **Minimize the Ribbon** option. This is an example of the minimized menu.

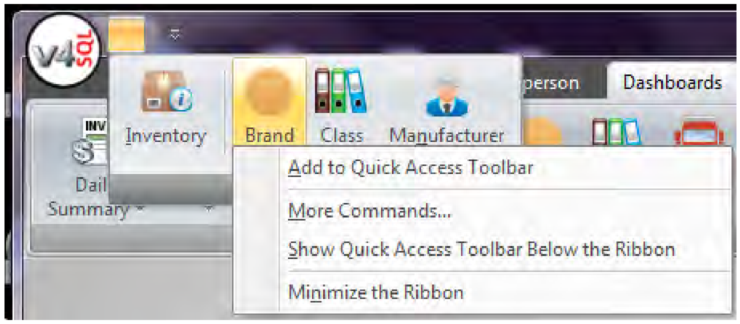


To restore the Ribbon menu, right-click any command or page and uncheck the **Minimize the Ribbon** option.

You can also minimize or restore the Ribbon menu by double-clicking any tab page header.

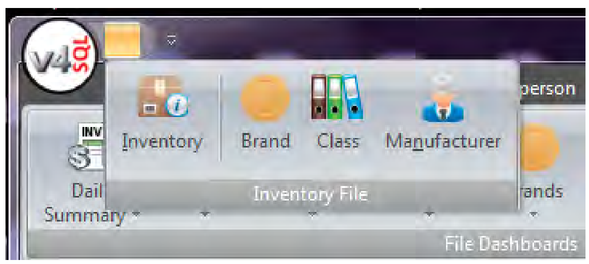
5.1 Quick Access Toolbars

The Quick Access Toolbar can easily be customized to store your most frequently used **entrée** commands. The Quick Access Toolbar has replaced the "My Menu" feature you have seen in previous versions of **entrée**.



At the top of the ribbon near the V4SQL is a square icon you right-click to view the saved commands in the Quick Access Toolbar. These commands are also listed in the menu drop down list. One way to remove a command from the Quick Access Toolbar is to uncheck it here.

Click the down arrow in the upper left corner to reveal the saved commands.

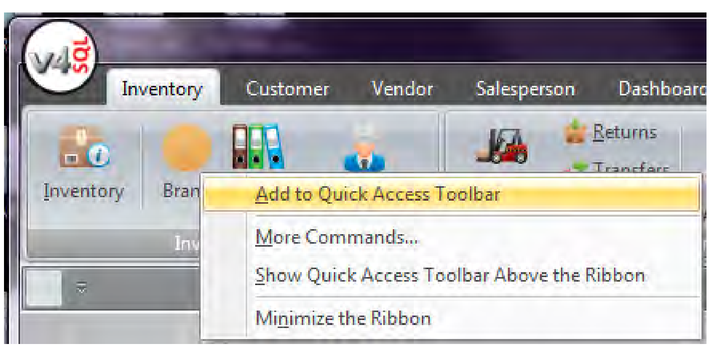


From this drop down menu you can control your saved commands and the position of the Quick Access Toolbar in the Ribbon menu.

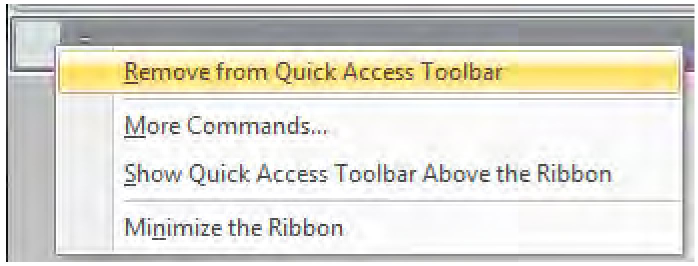
- **Customize the Quick Access Toolbar**

To add a group of commands to the Quick Access Toolbar, right-click the group's caption and select **Add to Quick Access Toolbar**.

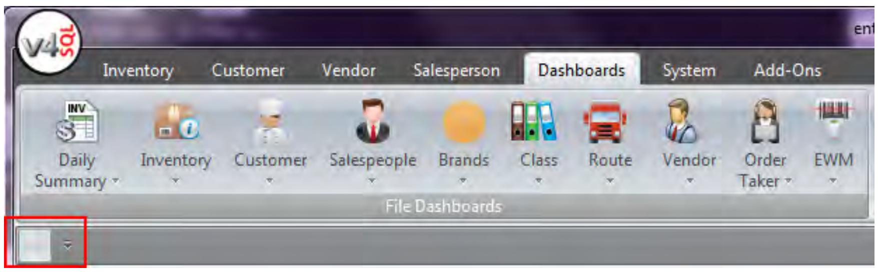
To add any command to the Quick Access Toolbar, right-click the icon in the ribbon menu and click **Add to Quick Access Toolbar**. Notice that in this image no command icons have been added to the **Quick Access Toolbar**.



To remove any command from the Quick Access Toolbar, right-click the icon image and click **Remove from Quick Access Toolbar**.

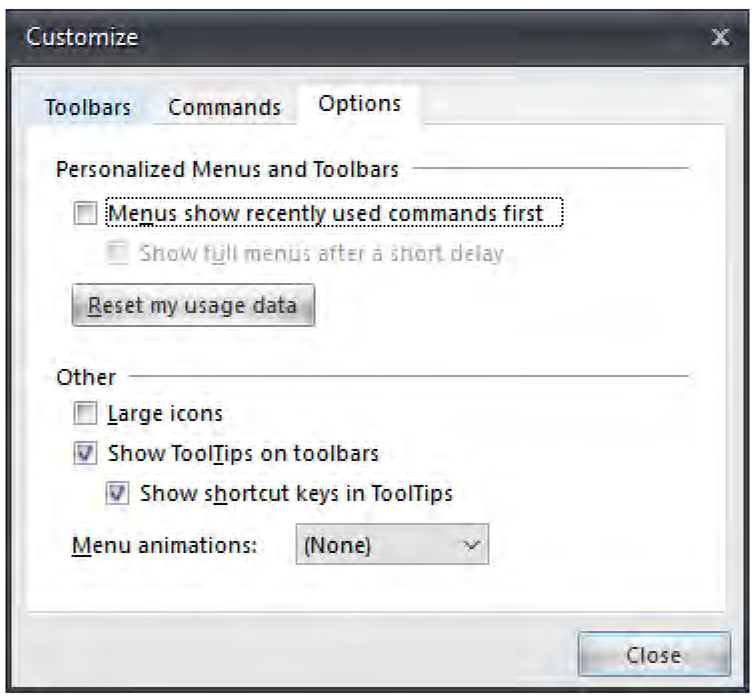


To position the Quick Access Toolbar and select either **Show Quick Access Toolbar Above the Ribbon** or **Show Quick Access Toolbar Below the Ribbon**. In the image below it is positioned below the ribbon menu.



- **Customize Toolbar Options**

1. Right-click on the main ribbon menu toolbar and select **More Commands....**
2. Click the **Options Tab**.
3. Select from options and click **Close**.



Personalized Menus and Toolbars

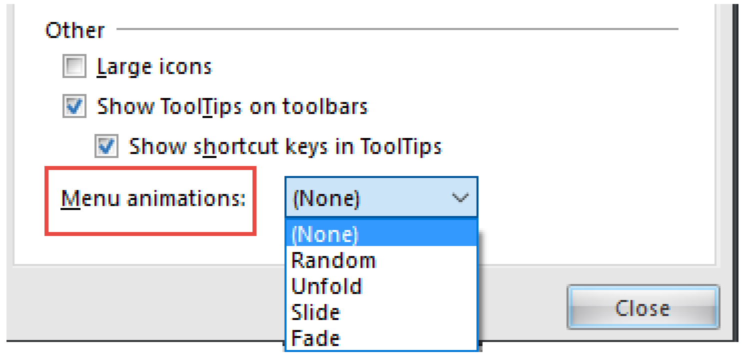
- Menus show recently used commands first.
- Show full menus after short delay.

Reset my usage data - Click to clear out the recently used commands that were saved when the Menus show recently used commands first option is enabled

Other

- Large Icons
- Show ToolTips on toolbars.
- Show shortcut keys in ToolTips.
- Menu Animation options

The animation you select will be applied to menus that use a drop down arrow to access the menu options.

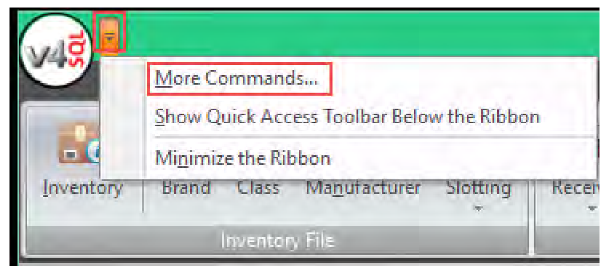


5.2 Creating Custom Toolbars

Adding a custom toolbar will allow your tasks to move more quickly by eliminating the need to find the menu for your task. Follow this simple process and save time every day.

- **Add a Custom Toolbar**

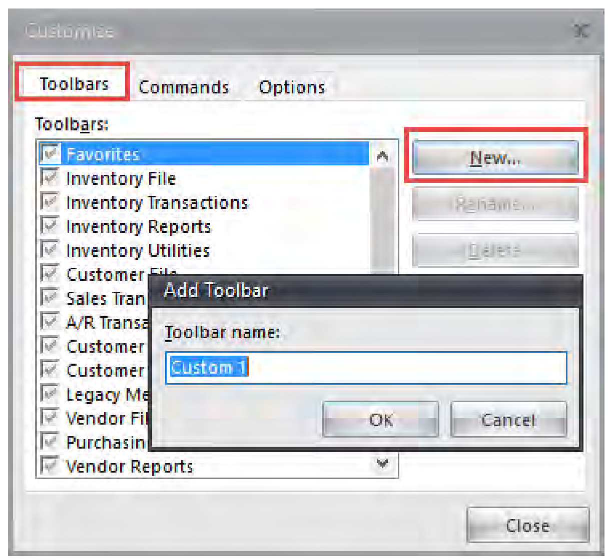
1. To create a custom toolbar tailored to your work click the Quick Access bar menu down arrow and select the **More Commands....** option.



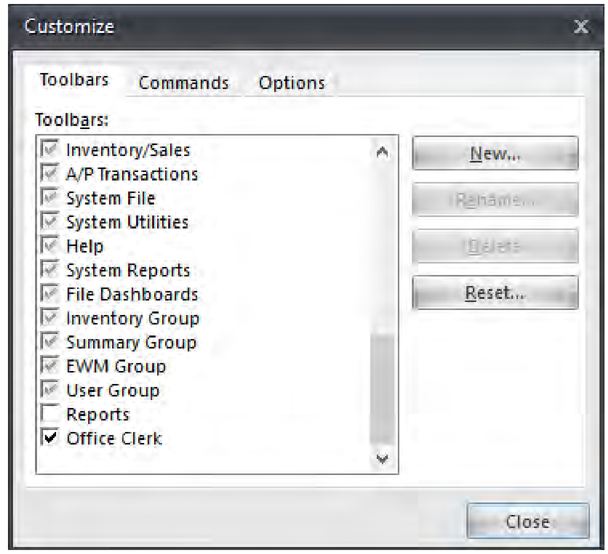
2. In the **Toolbars** tab click the **New** button to create a new customizable toolbar.

3. The **Add Toolbar** dialog will open. Enter a name for the new toolbar.

4. Click **OK**.



In our example we created the Office Clerk toolbar which can now be found in the list on the Toolbars Tab.

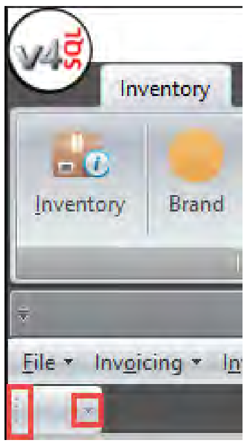


Your New Custom Toolbar

When the Office Clerk toolbar is first created it is empty and will look like a little box with dots and an arrow (image below).

The vertical row of dots on the left are the handle for positioning it. The custom toolbar will stay where it is docked unless you move it.

Click the handle and drag the toolbar to any location you like on the screen or even on your computer desktop.



You can also dock it on the right or left side as a vertical toolbar.

- **Now you get to make your command selections for the new custom toolbar.**

5. Click the **Commands** tab to add commands, menus and reports to this new custom toolbar.

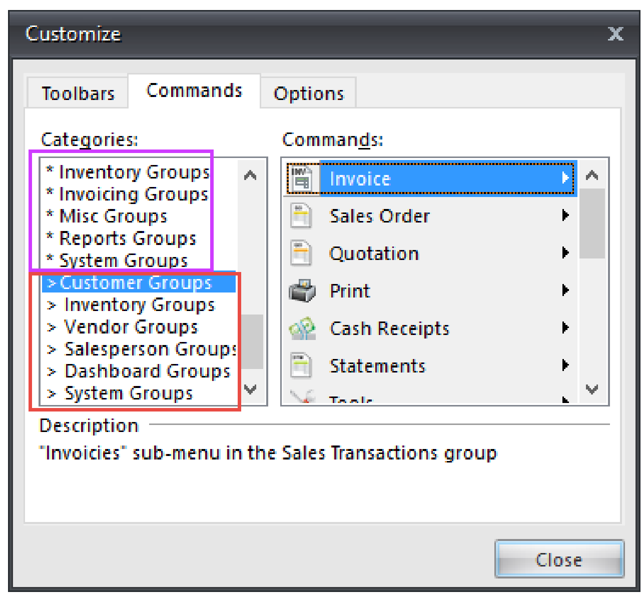
The Legacy menu groups have an ***** asterisk preceding their names.

The V4 ribbon menu groups have the **>** right arrow preceding their names.

6. Scroll through the Categories list to find the desired commands, listed on the right, to add to your toolbar.

Here the **Customer Groups** category was selected.

Groups are a collection of menu options from an option in the ribbon menu in **entrée**.

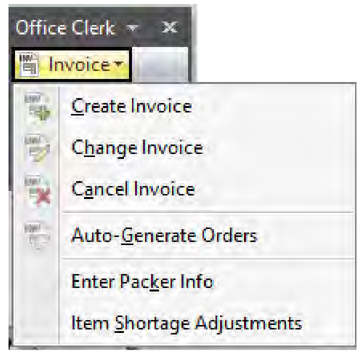


In **Commands** the **Customer Groups** menu options are listed. Scroll through the list and drag your selections to the Office Clerk toolbar on the screen.

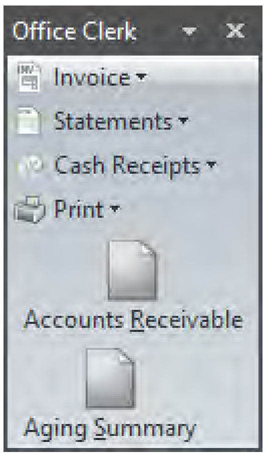
Once the first command is added it will expand the toolbar area.

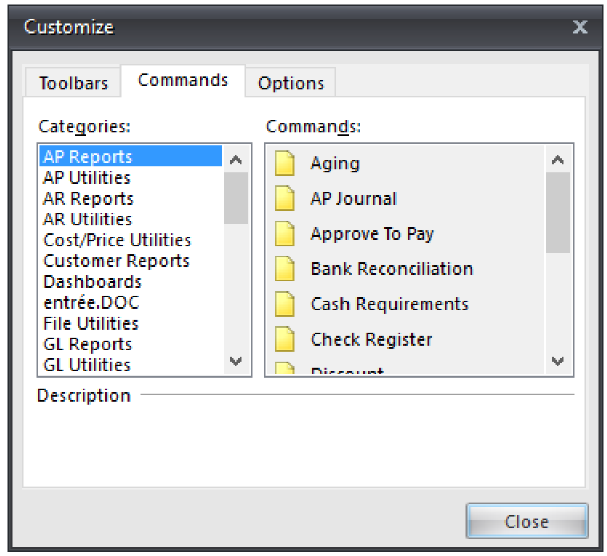
In our Office Clerk customized toolbar we dragged in the Invoice, Statements, Print and Cash Receipts from the Customer category commands.

When you click on the down arrow of Invoice in the Office Clerk custom toolbar you have access to the entire Invoice menu.



When you drag reports from the Commands list into your toolbar the report name will be listed and easy to find.

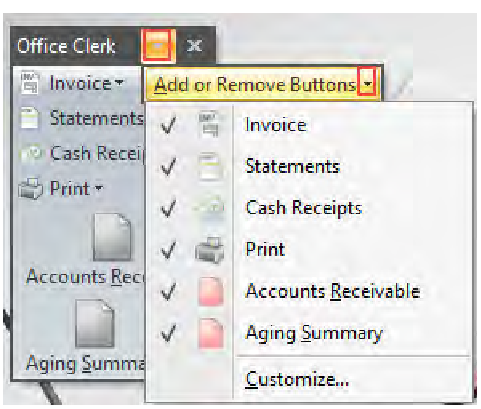




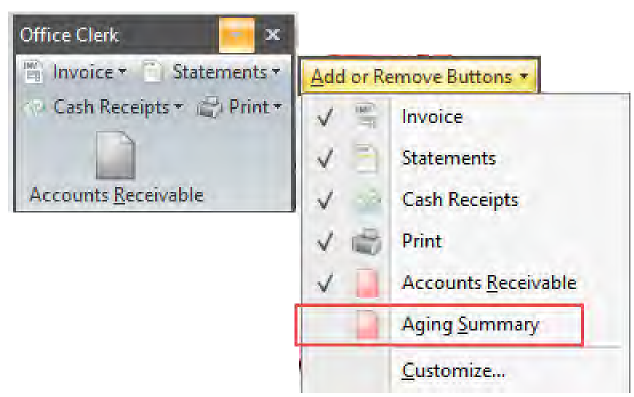
7. Click **Close** when you are done creating your customized toolbar.

• Editing a Custom Toolbar

1. In the Office Clerk toolbar click the drop down menu arrow and select **Add or Remove Buttons**.



2. Remove the check from the button in the list and it no longer displays in the toolbar.



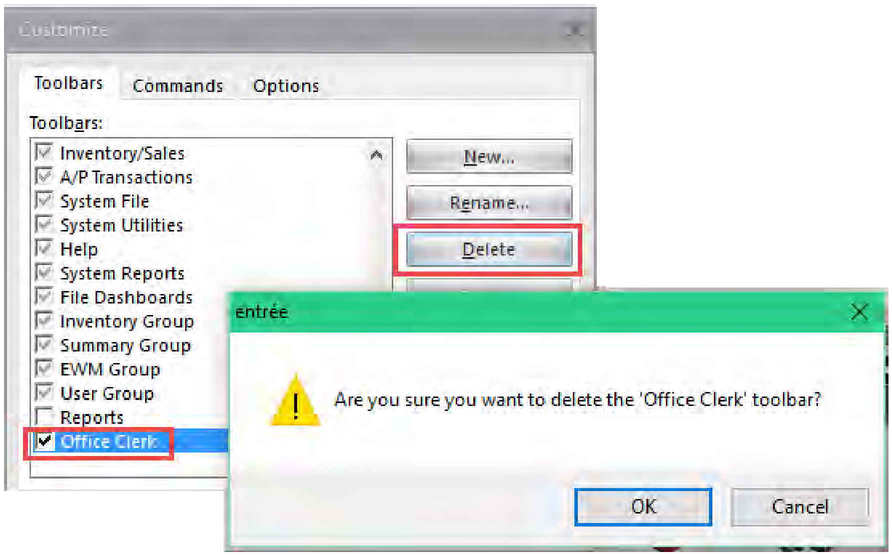
- **Delete a Custom Toolbar**

You have two options for the removal of custom toolbars.

1. To keep the custom toolbar but no longer display it go to the Toolbars tab and remove the check from the box.

OR

2. To delete the custom toolbar from the system select it then click the Delete button. Then click **OK** on the delete confirmation dialog message



Chapter 6

Using the Auto-Complete Feature

6 Using the Auto-Complete Feature

Auto-Complete, the latest feature to be integrated into **entrée V4 SQL**, was first showcased in the Vendor File Maintenance redesign. Now the Auto-Complete feature has been integrated into many other areas of the system such as the “Customer Number” field in Create Invoice, the “Invoice Number” field in Change Invoice and the “Item Number” field when adding items to an invoice just to name a few.

The Auto-Complete feature will provide a speedier search and selection method for all users. This new feature will increase productivity in order entry, sales, purchasing and in every department that uses **entrée V4 SQL**.

Satisfaction with your customer service will increase as your order takers easily find and change orders on the fly for customers while they are on the phone.

Based upon our customer feedback for this feature, we will begin to add this feature throughout the **entrée V4** software.

The Auto-Complete feature can easily be turned off by removing the check from option #112, Use Auto-Complete feature in Create/Change Invoice, for each **entrée** user through the Security Management Miscellaneous system options. If you have a large number of user and would like a SQL command to perform the update please contact your NECS Tech Support team member.

How Auto-Complete Works

You can use as many as three words with a maximum of 20 characters to search within an auto-complete field. As you enter each character or word into the field the Auto-Complete feature will try to figure out what you are entering as you type. It updates the drop down list of auto-fill values with values that are already used for the field in the database.

Auto-Complete performs the look-up by searching multiple fields (such as Item Number, Brand Name and Description when looking up an item) and returns the first 500 matching results found. This means that even in the “Item Number” field you can start typing in the item's description and locate the desired item that way.

You have the ability to easily add new entries on the fly while using the auto-complete feature. Type the new identifier for a new Item or Customer in the field and click the "**Create New**" button. **entrée** will open the proper dialog to initiate the creation of the new entry in the database.

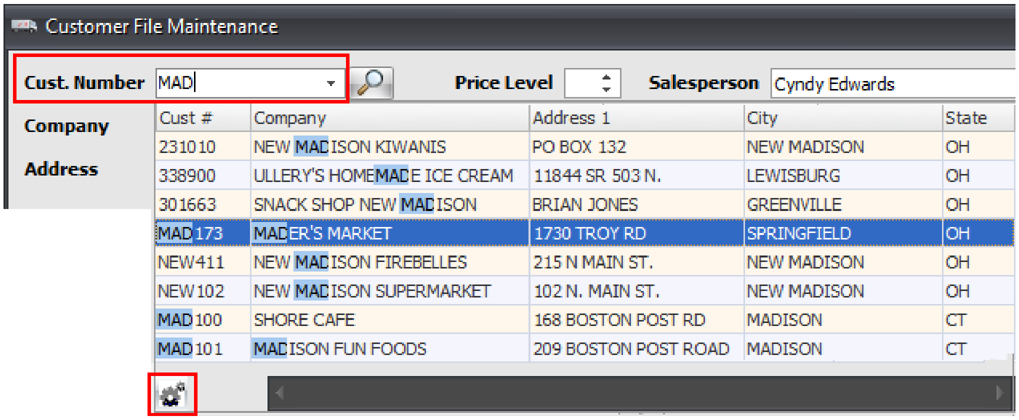
When you type a new identifier and a list of matches are found in the database. If you hit the **<Enter>** key the first match will be loaded. If the look-up process matches an existing item it will load that item instead of starting a new entry. Or just click and make a selection from the look-up match results.

If no values have been saved for the field in the database a blank value and **<No data to display>** will be seen in the auto-complete look-up match results.

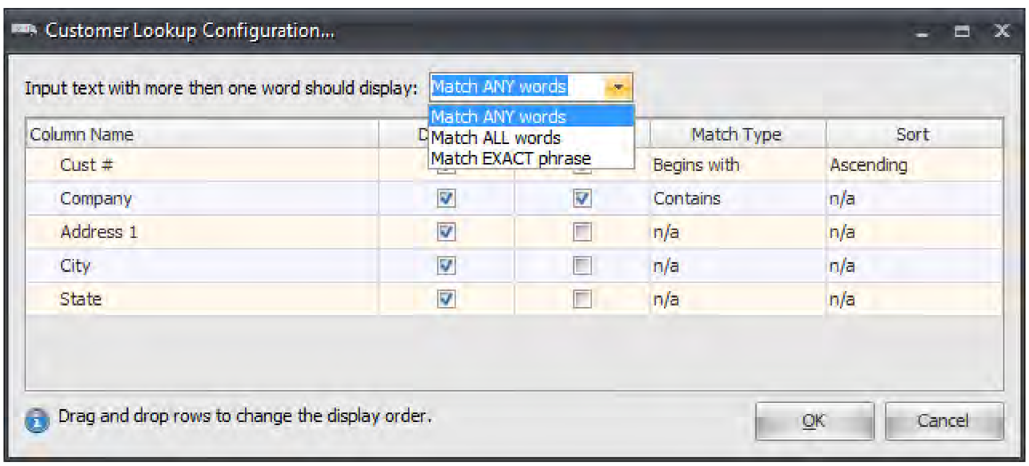
Of course the regular **entrée** search system is still available by clicking the magnifying glass or by hitting **<F5>** on your keyboard.

Configuring Auto-Complete Lookup Settings

Here you see the auto-complete feature in the Customer File for the customer number. Each **entrée** user can now configure they own settings for each field using the auto-complete feature. We will use the Cust. Number in the Customer File for our configuration example.



1. In the Auto-Complete window click the **Configure** icon in the bottom left corner of any auto-complete window to open the **Lookup Configuration…** dialog.
2. For the **Input text with more than one word should display** option select how you want to handle the search terms containing two or more words. The available options are: “Any word”, “All words” and “Exact phrase”. The default is “Any word”.



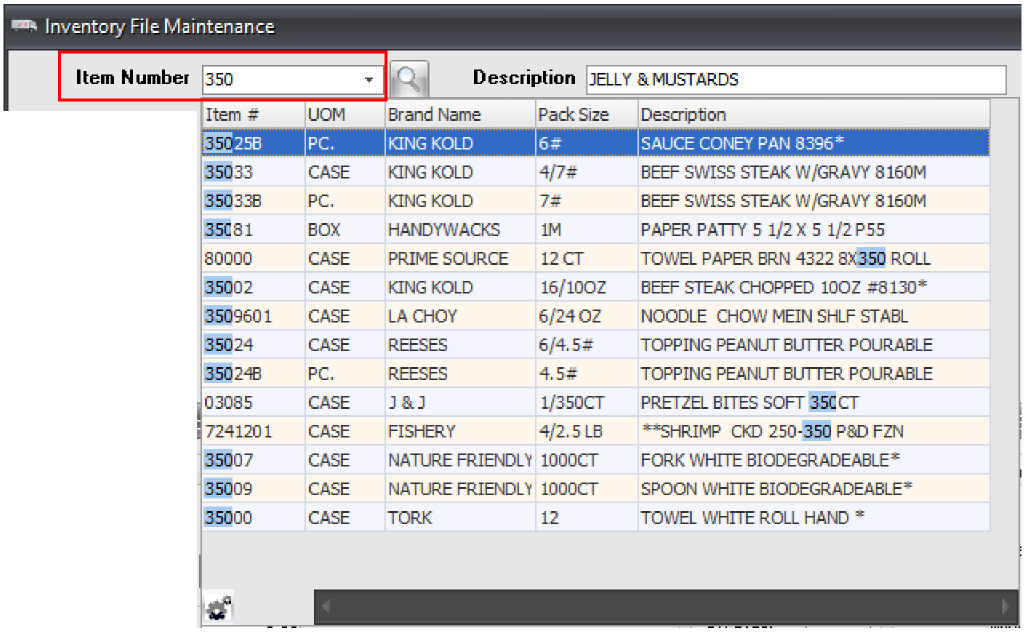
3. Check the **Display** option for the fields you want to see in the auto-complete window.
4. Check the **Search** option for columns you want the auto-complete to use in the search.
5. Double-click in the **Match Type** option to access the menu to make a selection for each search field that you checked.

6. Double-click in the **Sort** option to access the menu to make a selection for each search field that you checked. Selection of the sort option is limited to only one field all other fields will be set to n/a by the feature.

Column Name	Display	Search	Match Type	Sort
Cust #	☑	☑	Begins with	Ascending
Company	☑	☑	Contains	n/a / Ascending / Descending
Address 1	☑	☐	n/a	
City	☑	☐	n/a	n/a
State	☑	☐	n/a	n/a

7. Drag and drop your rows to change their display order in the auto-complete window.
8. Click **OK** to save your changes.

Auto-Complete in Inventory File Item Number

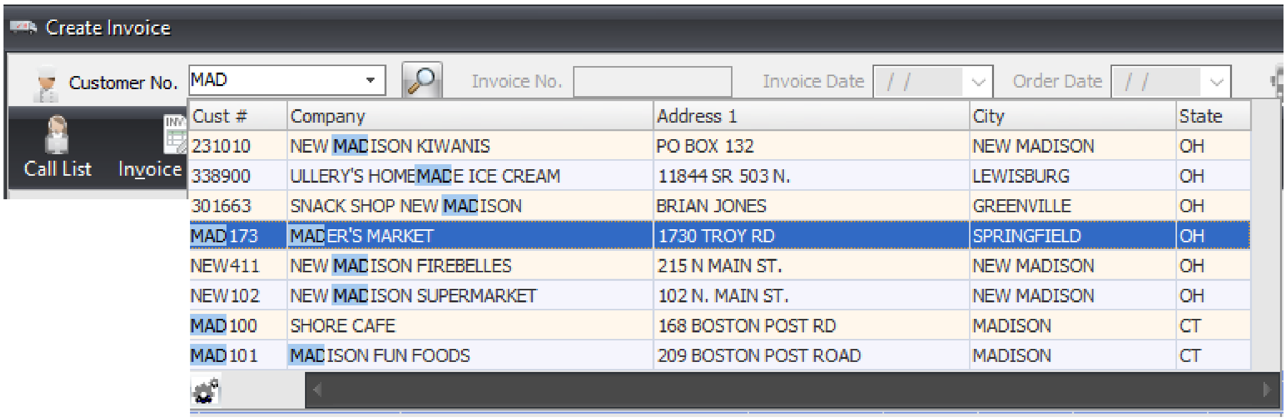


Item #	UOM	Brand Name	Pack Size	Description
35025B	PC.	KING KOLD	6#	SAUCE CONEY PAN 8396*
35033	CASE	KING KOLD	4/7#	BEEF SWISS STEAK W/GRAVY 8160M
35033B	PC.	KING KOLD	7#	BEEF SWISS STEAK W/GRAVY 8160M
35081	BOX	HANDYWACKS	1M	PAPER PATTY 5 1/2 X 5 1/2 P55
80000	CASE	PRIME SOURCE	12 CT	TOWEL PAPER BRN 4322 8X350 ROLL
35002	CASE	KING KOLD	16/10OZ	BEEF STEAK CHOPPED 10OZ #8130*
3509601	CASE	LA CHOY	6/24 OZ	NOODLE CHOW MEIN SHLF STABL
35024	CASE	REESES	6/4.5#	TOPPING PEANUT BUTTER POURABLE
35024B	PC.	REESES	4.5#	TOPPING PEANUT BUTTER POURABLE
03085	CASE	J & J	1/350CT	PRETZEL BITES SOFT 350CT
7241201	CASE	FISHERY	4/2.5 LB	**SHRIMP CKD 250-350 P&D FZN
35007	CASE	NATURE FRIENDLY	1000CT	FORK WHITE BIODEGRADEABLE*
35009	CASE	NATURE FRIENDLY	1000CT	SPOON WHITE BIODEGRADEABLE*
35000	CASE	TORK	12	TOWEL WHITE ROLL HAND *

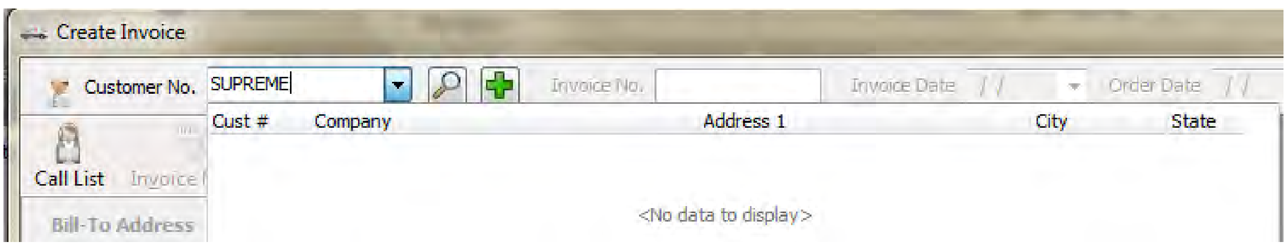
Auto-Complete In Create Invoice for Customer Number

The Auto-Complete feature works for any combination of letters and numbers. The auto-complete search look-up will check the customer number field in addition to the Company, Address1 and City fields for a possible match to the text entered in the identifier field or whatever fields you have set in the Lookup configuration.

- If a new customer needs to be created on the fly just click the **Create New** button.
- In the example below we enter part of a company name in the Customer No. field to find our customer. It finds matches in the Cust # and Company fields.



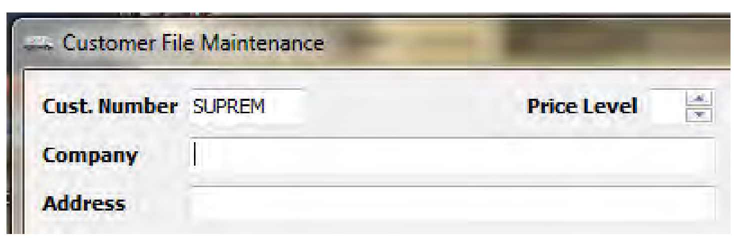
Example In this example the text is entered and the look-up process does not find a match in the database. The search results area displays **<No data to display>**.



Hit the **<Enter>** key and the Invalid Customer Number message displays giving you the option to create a new customer.

Click **Yes** on the Invalid Customer Number message and the Customer File Maintenance screen will open.

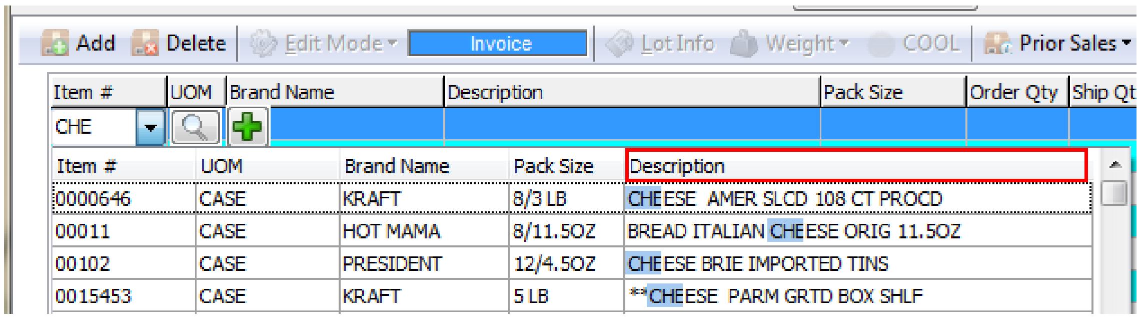
The customer number field is populated so you can quickly add the new customer.



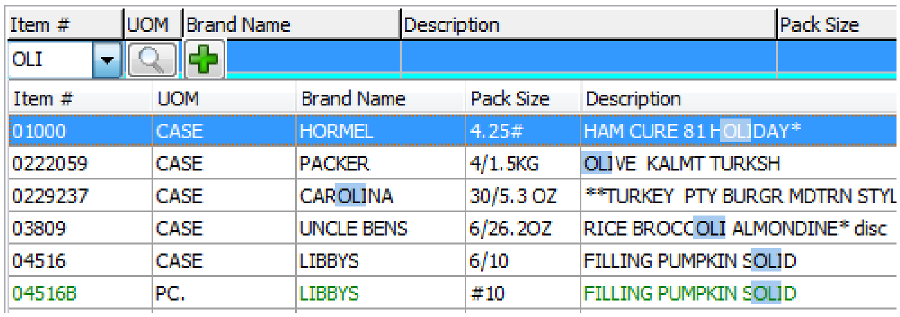
- This same add process is used in Create Invoice to add new items and in Vendor File Maintenance to add new vendors.

Auto-Complete In Create Invoice for Item Number

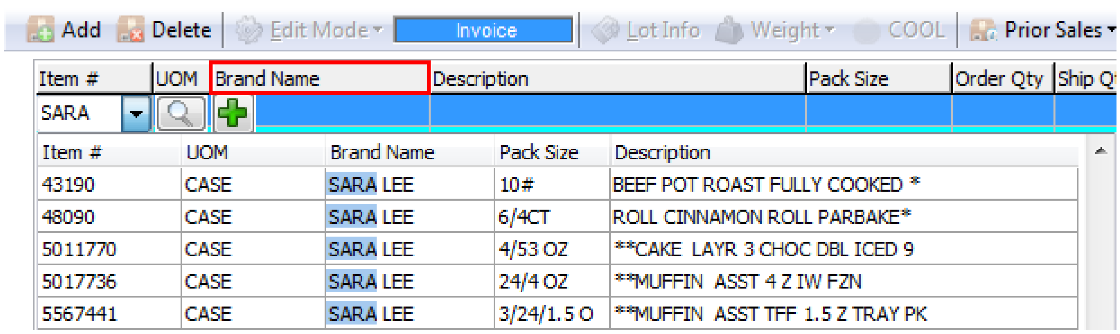
- When you need to quickly add a new item to the Inventory file on the fly just click the **Create New** button.
- The Auto-Complete search will check the Item Number, Brand Name and Description field for matches. Here we began to enter Description letters in the item number field to find our item.



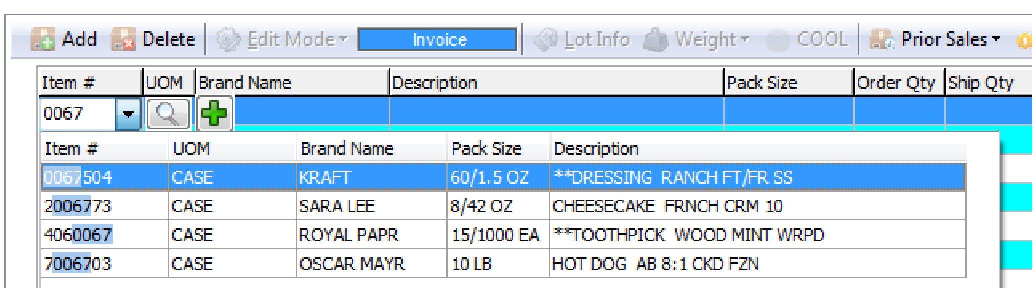
- **PC.** items will be shown in green text to help you differentiate them from other item units of measure, like CASE.



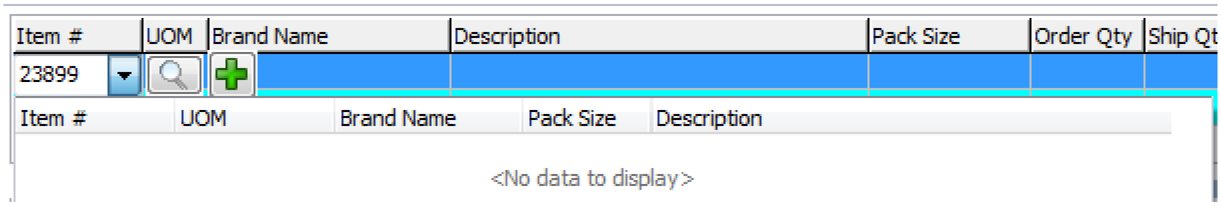
- Here we entered part of the Brand Name in the item number field to find items from that brand.



- If you know your item numbers you can begin entering the numbers and quickly click and select the item.



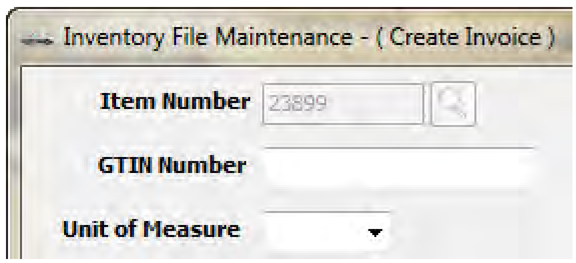
Example In Create Invoice part of the item number was entered into the Item # field and the item number was not found.



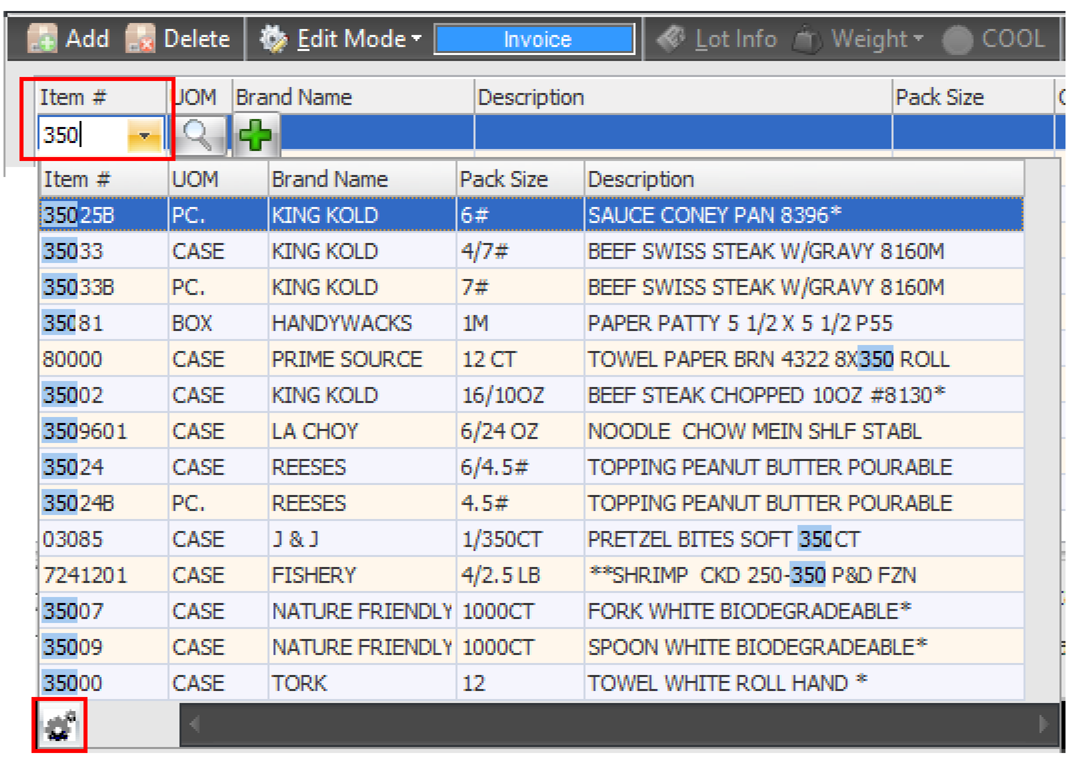
When you hit the **<Enter>** key you will get the Invalid Item Number message. Click **Yes** to the message and the Inventory File Maintenance screen will open so you can add the new item.

The item number you entered will already be loaded in the Item Number field and is not editable.

"(**Create Invoice**)" will appear in the top left corner indicating what system feature opened the screen.



Auto-Complete In Create Invoice for Item Number



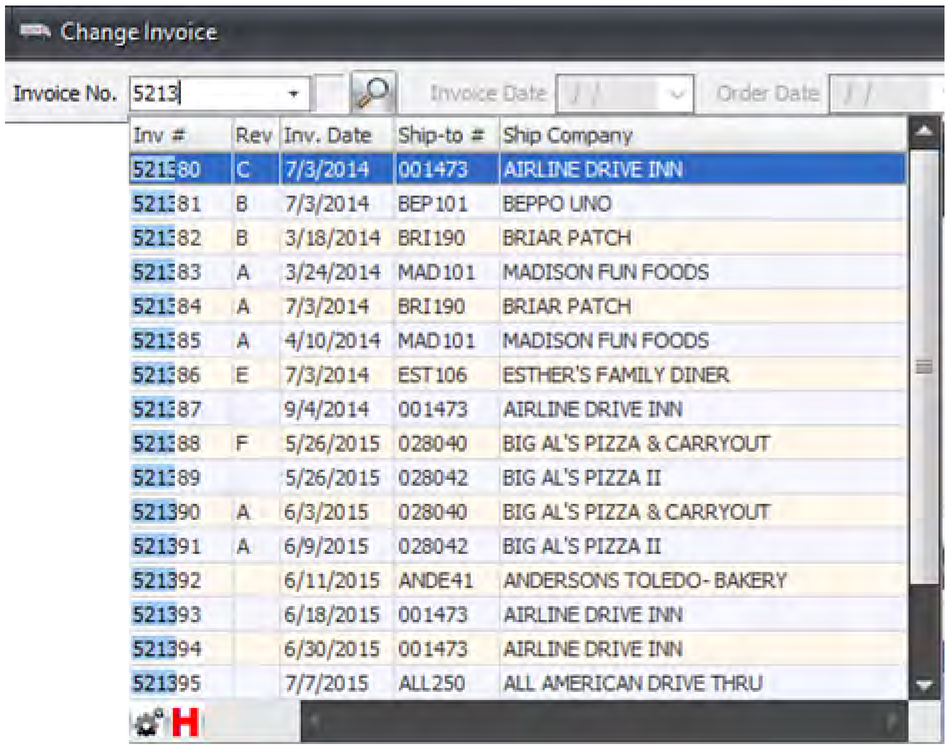
Auto-Complete In Change Invoice for Invoice Number

Need to make that quick change to an invoice for your customer?

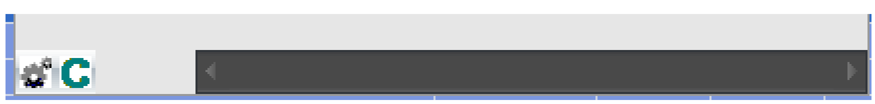
- Just start typing the Ship-to Company name in the Invoice No. field and you got your customer's invoices. A quick convenient way to provide the best service to your valued customers.

- If you know the range of your recent invoice numbers you can begin typing the first few numbers and you have your list of recent invoices.

- Only in Change Invoice the search for the Invoice Number gives you the choice of either the "**C**" for Current file or "**H**" for History file.



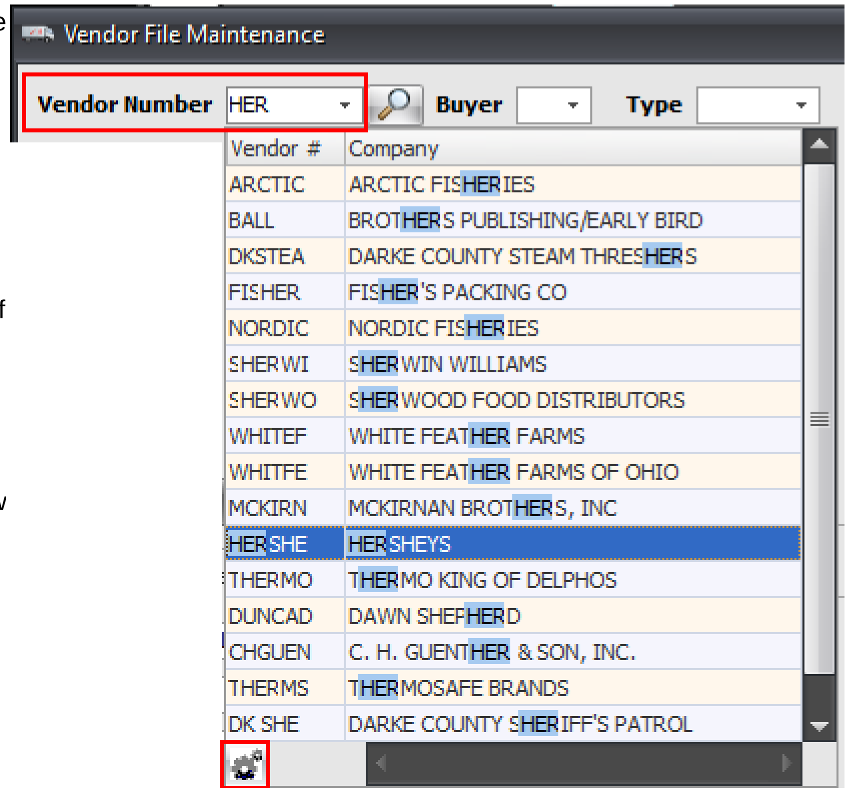
- You will click the letter next to the **Configure** icon in the bottom left corner of the auto complete window to swap to the other file.



Auto-Complete in Vendor File Maintenance for Vendor Number

Quickly find the vendors you need to complete that PO.

Here we typed the letters "**HER**" in the Vendor Number field.



The auto-complete look-up results list possible vendor number values, a quicker selection method.

If you do not find a match in the auto-complete look-up results the Confirm message will display asking if you would like to add the new vendor number.

Click **Yes** in response to the **Confirm** message and the Vendor File Maintenance screen opens with a new screen ready to add your new vendor to the database.

Chapter 7

Using Dashboards

7 Using Dashboards

entrée Version 4 introduces the **Dashboards** feature that we built from the ground-up and was made possible by our move to the SQL database platform. Dashboards are the ultimate tool for organizing and analyzing your business data.

The actual term for our dashboards is called a "Pivot Grid" or "Pivot Table", which is commonly used in business intelligence software. This tool helps the user recognize data patterns that help to build advanced data models quickly. With pivot tables, users can define and store sets of categories, then change views by dragging category names with the mouse. This core functionality provides the model for pivot tables which we have embraced in the **entrée V4 SQL Dashboards**. It provides a highly flexible means for a food distributor to analyze and grasp trends from the mountains of complex data which is normally lost by simply printing reports.

You will find a **Dashboards** 

or **Sales** 

button integrated into the Inventory, Customer, Vendor, Salesperson, Brand and Class File Maintenance screens. The main function is to summarize large amounts of information and represent it in a cross-tabulated form.

For instance, you can analyze sales during specific periods (years, quarterly intervals, months, weeks) for each customer, item, vendor, salesperson, brand or class, many of the dashboards include "drill down" features which allow you to see specific information, such as all the line items of a selected invoice.

The dashboards allow you to visualize your data by summarizing into different charting diagram styles including: pie charts, line charts, bar charts and area charts.

Dashboards have an interactive control, permitting you to easily reorganize and modify the layout using drag-and-drop. As a result, your business data will be re-summarized according to the new layout of the column and row fields, so an end-user can easily alter a report to display the information they need in the way they need it. Your dashboard configurations can be saved and loaded for sharing with other users in your company.

The **Dashboards** feature includes full reporting capabilities, so you can easily print to paper or export to Excel or HTML. Advanced data filtering is also provided for more sophisticated users.

The following topics are covered in the rest of this chapter to fully demonstrate the use of dashboards within the system.

- **Dashboard Features**
- **Inventory Dashboards**
- **Brand Sales Dashboard**
- **Class Sales Dashboard**
- **Customer Dashboards**
- **Vendor Dashboards**
- **Salesperson Dashboards**
- **Summary Dashboards**

7.1 Dashboard Features

- **Dashboard Menus**

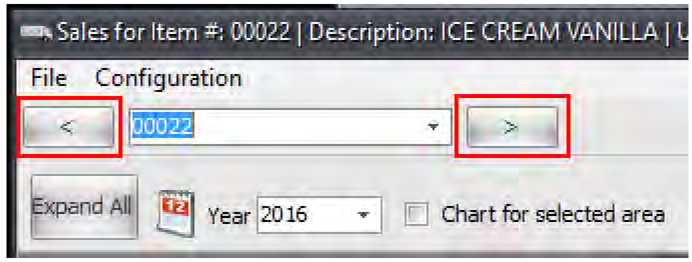
Many dashboards in **entrée version 4** have a drop down menu arrow on the **Dashboards** button to access the dashboards specifically designed for the Inventory, Customer, Vendor, Salesperson, Brand and Class Files. These custom menus will be discussed later in this document.

- **Unique Data Icons**

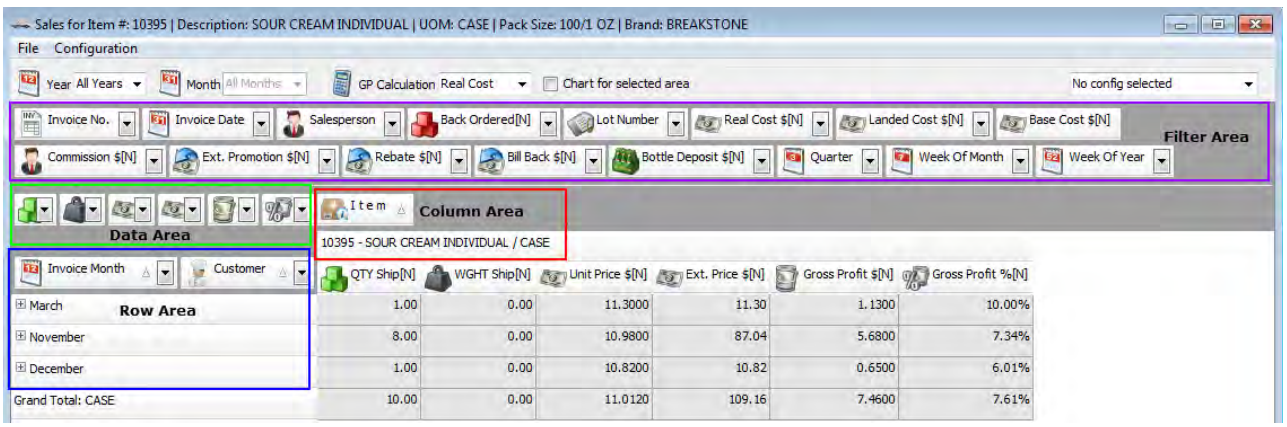
Our dashboard design includes unique icons for each type of data so they can easily be recognized.

- **Navigation**

Using left and right arrows provide the ability to move between different entries in the dashboard without having to close the current dashboard.



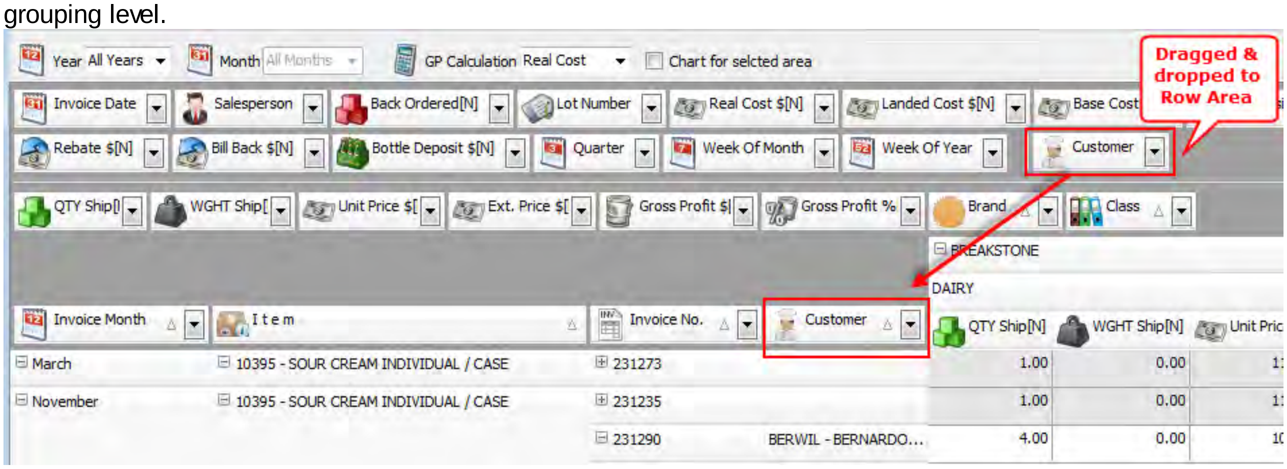
- **Dashboard Pivot Grid Areas**
  - **Filter Area** - Stores the data available for use in the grid.
  - **Column Area** - Data here will be in the columns of your chart.
  - **Row Area** - Data here will populated the rows of your chart.
  - **Data Area** - This is the data you selected to analyze and run in your chart.



- **Drag, Drop, Sort & Group Data**

Easily drag and drop data from the **Filter Area** at the top of the screen into the **Row Area** to sort by those fields. Or drag a field into the **Column Area** or **Data Area** to analyze those numeric fields to see different data patterns.

Example In the example below the **Row Area** contained Invoice Month, Item, Invoice Number. Then we clicked the "Customer" in the **Filter Area** and dragged it to the **Row Area** to add "Customer" as the fourth grouping level.

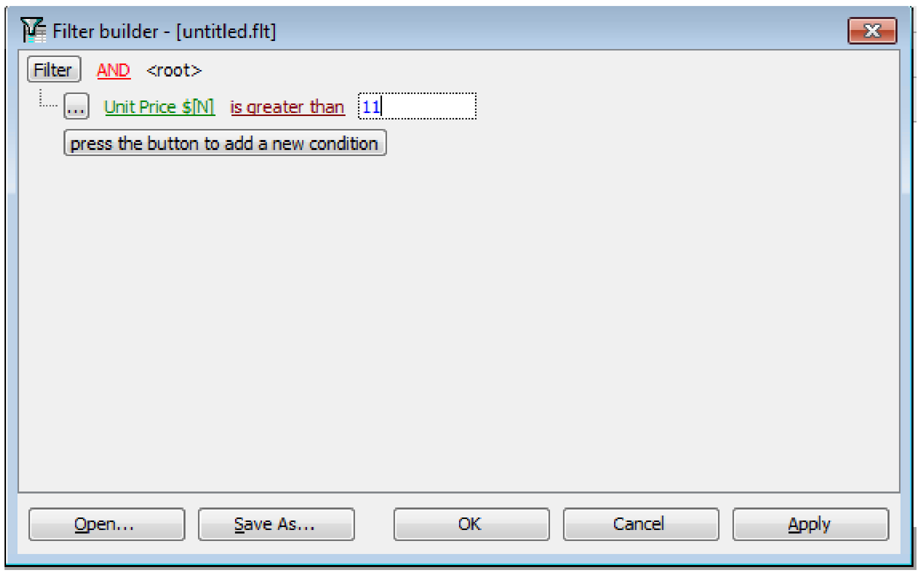


- **PivotGrid Data Pre-filter Feature**

Click the **Pre-filter** button, on the right side of the Prefilter bar area, to access the **Filter builder** dialog (see the following Data Prefilter section). The **Filter builder** dialog is where you can select a Group (data) to be pre-filtered with conditions to further restrict the data you analyze in the dashboard.

Right click on the **Group**, **Condition** or **Value** text box to make a selections from the list. The **Group** list for inventory is on the right.

In this **Filter builder** example the pre-filter of Unit Price is greater than 11 has been created. Click Save As to save for reuse. You can see the results of this filter on the Inventory Sales dashboard in the following Data Prefilter section.



Click to access the Add Condition, Add Group and Remove Row options.

- **Apply:** Pre-filters can be applied to a dashboard and not saved but will only be available while you are in the current dashboard session.

- **Save As:** Pre-filters can be saved with a name for future use. You must create a folder on your computer to store your saved Prefilter during the saving process.

- **Open:** Used to locate and open saved filters for the current dashboard.

- **Prefilter Controls:** On the left side of the Prefilter bar area is where you can select from the applied prefilters or click the red X box to remove the pre-filters completely from the data in the dashboard (see the following Data Prefilter section).

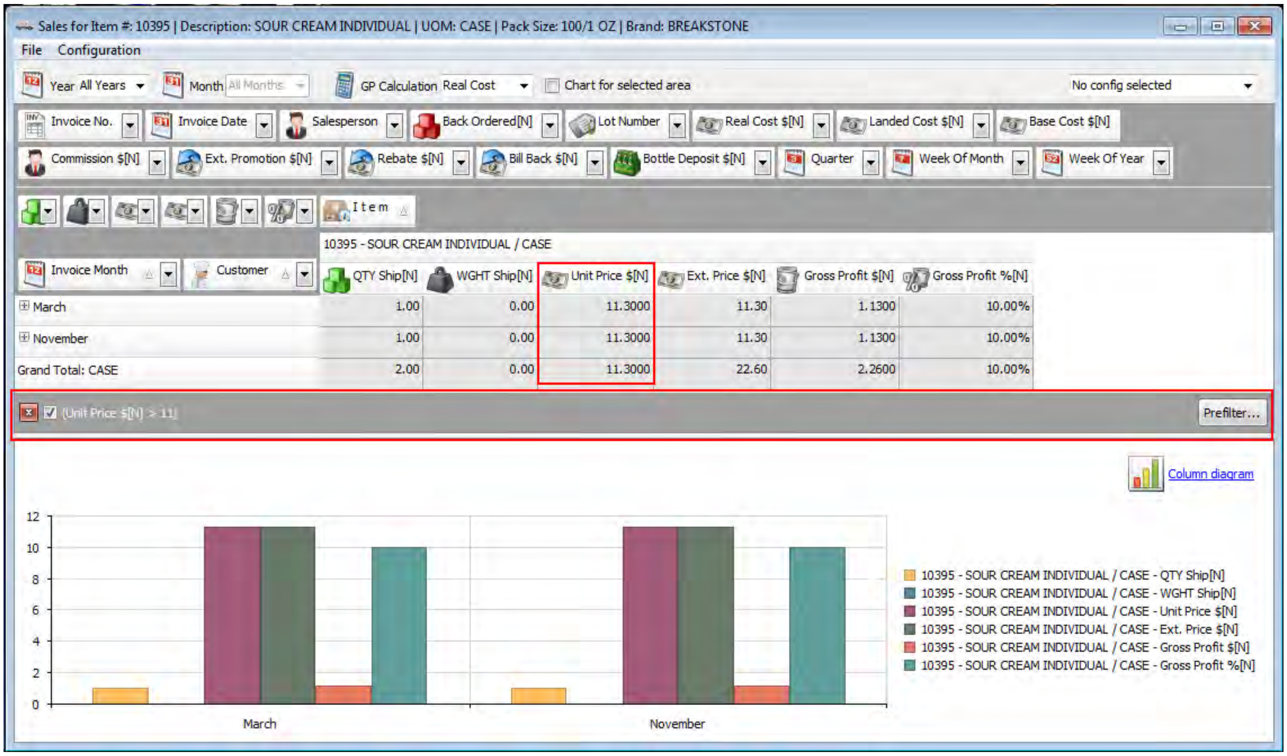
- **PivotGrid Data Prefilter Feature**

The Prefilter bar area, outlined in red, is where you create, save and control your prefilters.

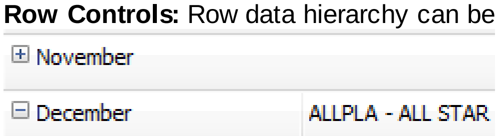
Clicking the **Prefilter** button on the right side of the Prefilter bar opens the **Filter builder** dialog as described on the previous page.

Example Inventory Sales

The prefilter of "Unit Price greater than 11", (shown in the previous section), has been applied to the item. The Data Area **Unit Price** column and the Column diagram chart below reflect the prefiltered conditions.



- **Row Controls:** Row data hierarchy can be expanded or collapsed using the plus or minus button.

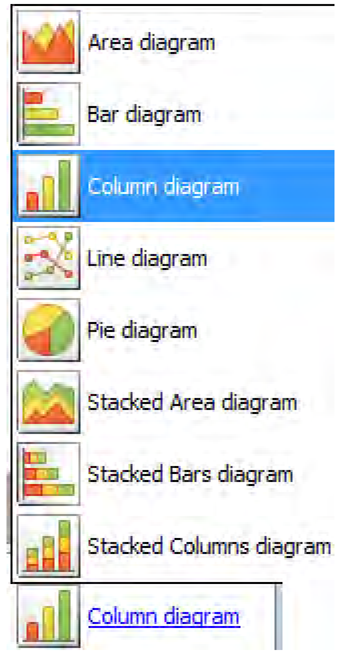


- **Sort Controls:** The Sort arrow button on the right side of the Filter data and Row data controls sort in ascending or descending order as desired. 

- **Numeric Data:** If a data group has an "**[N]**" following the data name this means it is numeric and follows those constraints in the **entrée** system. Sort results will reflect the same constraints.

- ## Multiple Charting Style Options

Generates a diagram to visualize your data using any one of eight different chart styles for the Summary Chart including:



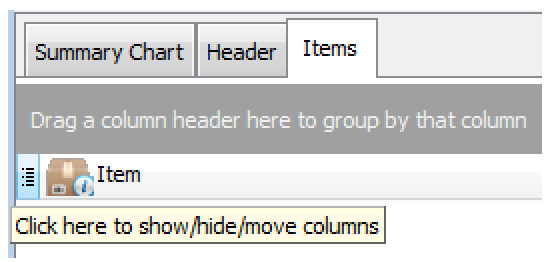
  - **Area**
  - **Bar**
  - **Column**
  - **Line**
  - **Pie**
  - **Stacked Area**
  - **Stacked Bar**
  - **Stacked Columns**

- ## Diagram Area Options

The Diagram area not only generates the **Summary Chart** but for some customer and salesperson dashboards there are additional menu and grouping options.

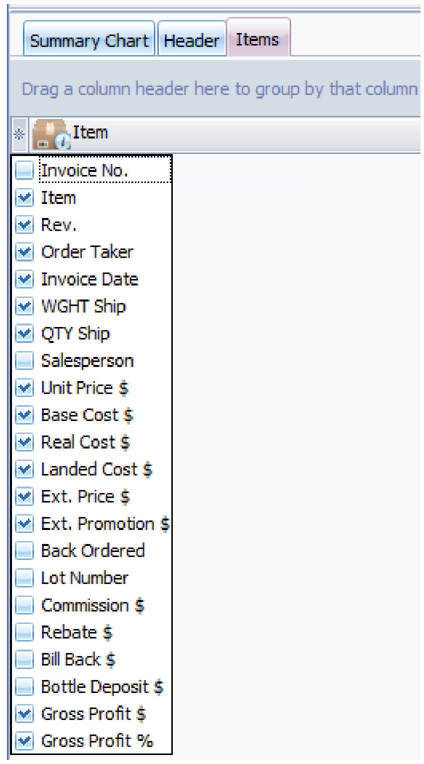
Header: Shows the header details for the selected. See the Customer Sales Dashboard in the Customer Dashboard section of this chapter for an example.

Items: Shows item details for selected customer, salesperson or invoice number. See the Customer Payments Dashboard in the Customer Dashboard section of this chapter for an example.



Drag a column header here to group by that column: Drag any field from the columns listed in the diagram area to the gray drag to bar to group data by that column.

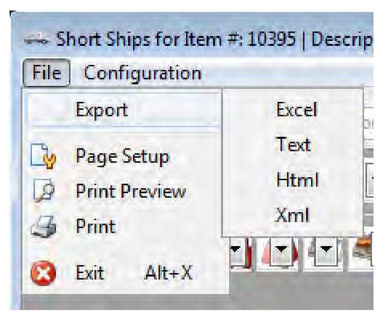
Click here to show/hide/move columns:



- Click the icon to open the drop down list of columns in the diagram area.
- Check columns to add them to the column list.
- Uncheck columns to remove the column from display.
- Drag columns to new positions in the column list to rearrange them for your needs.

- **Export / Print Dashboard Reports**

From the **File** menu you can Export or Print a hard copy of your dashboard analysis.



Export: Once you have done your analysis in a dashboard you can export the data to Excel, Text, HTML or XML using the **File** menu. > **Export** menu path.

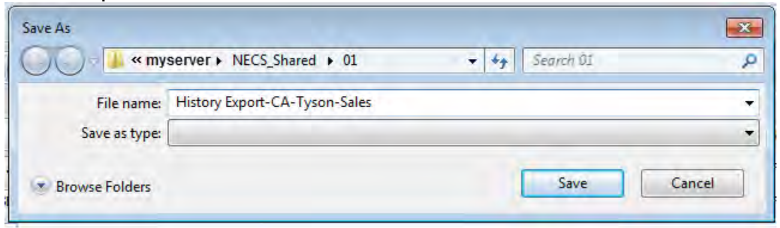
Exporting Reports to Excel

1. Use menu path: **File** >**Export** > **Excel**.

2. The **Save As** dialog box will open. It will be pointing to your **NECS_Shared** folder for the 01 company.

☑ Hot Tip! On the **Save As** screen is a **Hide Folders** button when enabled the dialog screen below is what you will see. You will normally see the **Browse Folders** screen with all the drives and folders listed on the left as you have seen many times before.

3. **File Name**: Enter a meaningful file name for your report. The system automatically wrote "History Export" in the file name field when it opened.



To make the file name more meaningful we added "**CA**", our Salesperson's initials, "**Tyson**", the brand selected in the Brand dashboard and Sales.

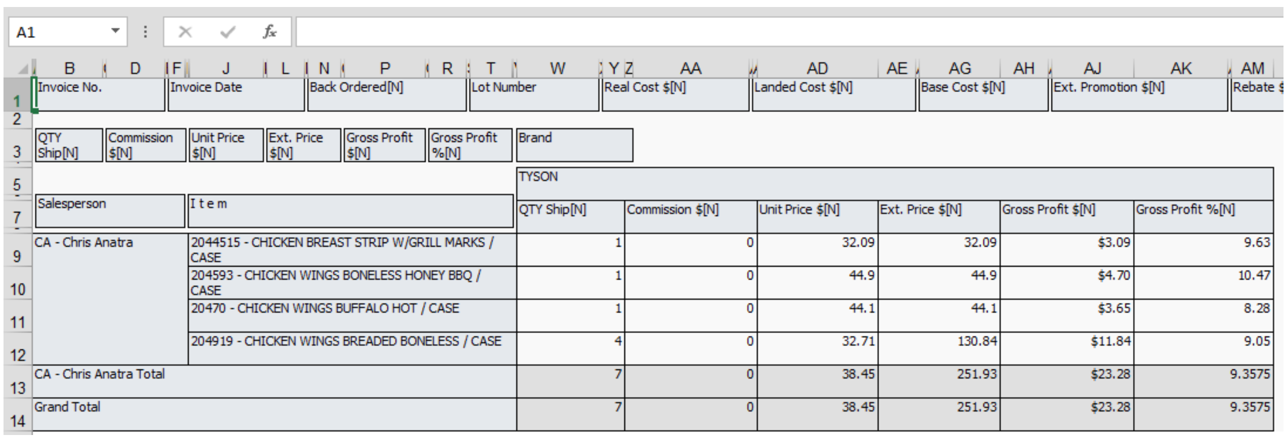
4. **Save as type**: You do not have to make any selection it knows your selection from the main menu.

5. Click **Save** and in the background the report is exported as an Excel file to the designated folder.

6. Now use Excel to access the report data.

Example Brand Sales Report

The report example below was created in the Brand dashboard to show sales figures for "Tyson" brand items for our salesperson Chris.



Salesperson	Item	QTY Ship[N]	Commission $[N]	Unit Price $[N]	Ext. Price $[N]	Gross Profit $[N]	Gross Profit %[N]
		TYSON					
CA - Chris Anatra	2044515 - CHICKEN BREAST STRIP W/GRILL MARKS / CASE	1	0	32.09	32.09	$3.09	9.63
	204593 - CHICKEN WINGS BONELESS HONEY BBQ / CASE	1	0	44.9	44.9	$4.70	10.47
	20470 - CHICKEN WINGS BUFFALO HOT / CASE	1	0	44.1	44.1	$3.65	8.28
	204919 - CHICKEN WINGS BREADED BONELESS / CASE	4	0	32.71	130.84	$11.84	9.05
CA - Chris Anatra Total		7	0	38.45	251.93	$23.28	9.3575
Grand Total		7	0	38.45	251.93	$23.28	9.3575

- ## Custom Dashboard Configurations

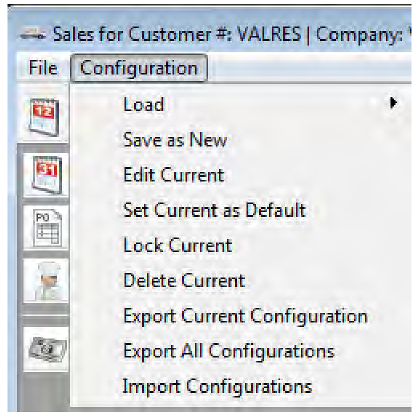
entrée provides default configurations for all dashboards. You are encouraged to customize dashboard analysis and save those custom configurations to fit your business needs.

Saving dashboard configurations you have customized will allow you to more quickly access the vital information to keep on top of activity in your business.

Each dashboard screen has the **Configuration** option in the menu in the top left side of the screen.

Managing Dashboard Configurations

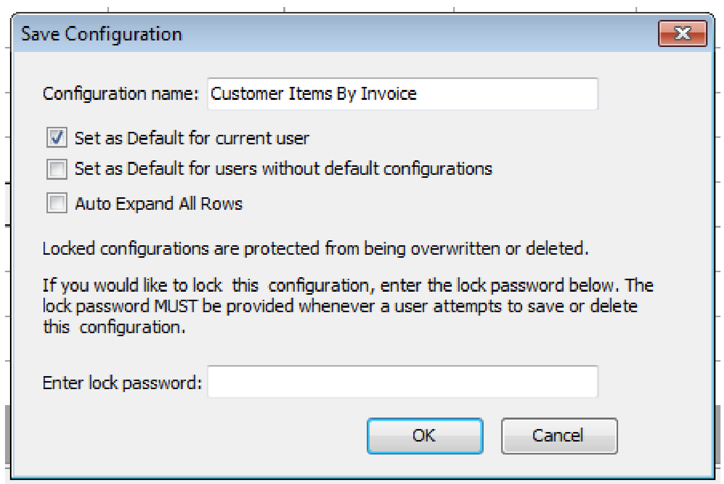
Once you have spent the time to customize a dashboard and want to save that custom configuration for reuse click the **Save as New** option in the Configuration menu.



In the **Save Configuration** dialog you will enter a unique and descriptive Configuration Name.

Check the box to enable these options:

- **Set as Default for current user.**
- **Set as Default for users without default configurations.**
- **Auto Expand All Rows.**



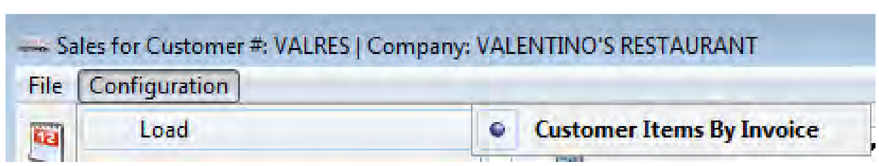
You have the option to lock the saved configuration so only you will be able to save or delete it.

- Type a password in the text box for **Enter lock password**.

Once the first configuration is saved the remainder of the **Configuration** menu options will display including:

- **Load**
- **Edit Current**
- **Set Current as Default**
- **Lock Current**
- **Delete Current**
- **Export Current Configuration**
- **Export All Configurations**
- **Import Configurations**

Here the "Customer Items By Invoice" configuration was selected from the **Load** option in the **Configuration** menu.



To see what this saved configuration does see the Customer Sales By Item configuration example in the Customer Dashboards section.

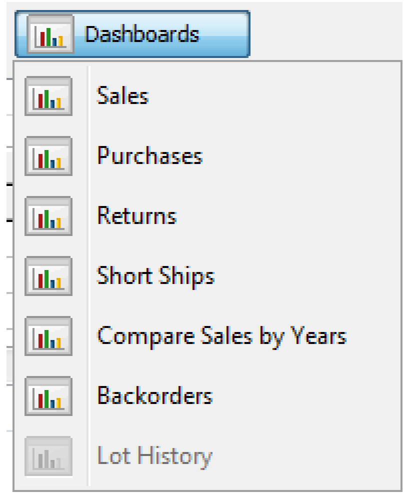
7.2 Inventory Dashboards

To access the Inventory File dashboard first locate the item the **Dashboard** button (outlined in red below) will have a drop down menu where you can select the dashboard you would like to open.

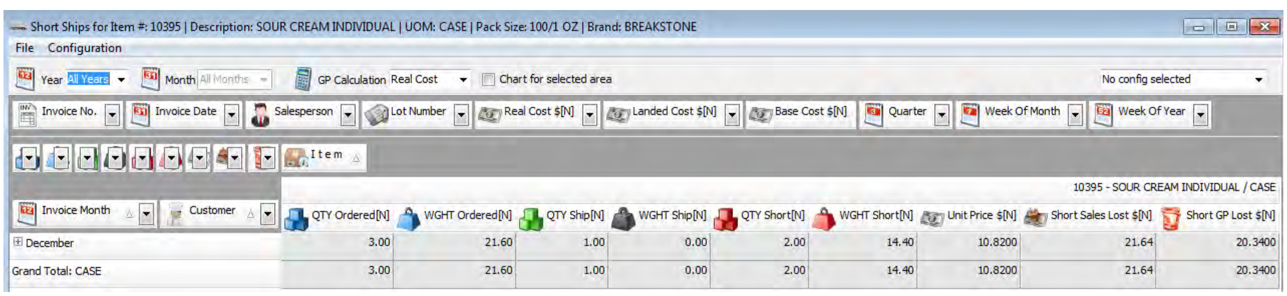
entrée version 4 has built into it a database of over 600 brands with their logos and URLs which can be used to provide further details about items in your inventory via the Brand drop down menu shown here.

The Inventory Maintenance dashboards menu has six different dashboards.

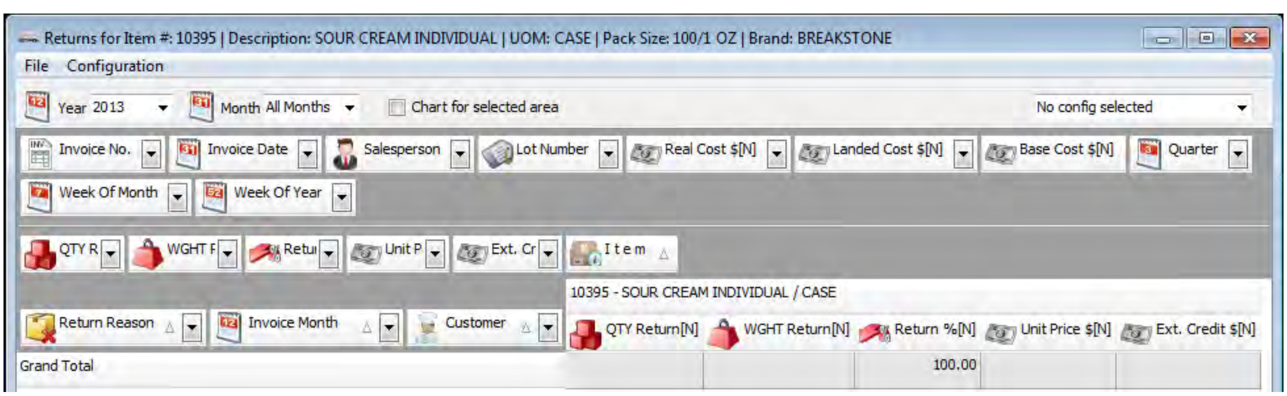
- **Sales**
- **Purchases**
- **Returns**
- **Short Ships**
- **Compare Sales by Years**
- **Backorders**
- **Lot History**



Example Item Short Ships

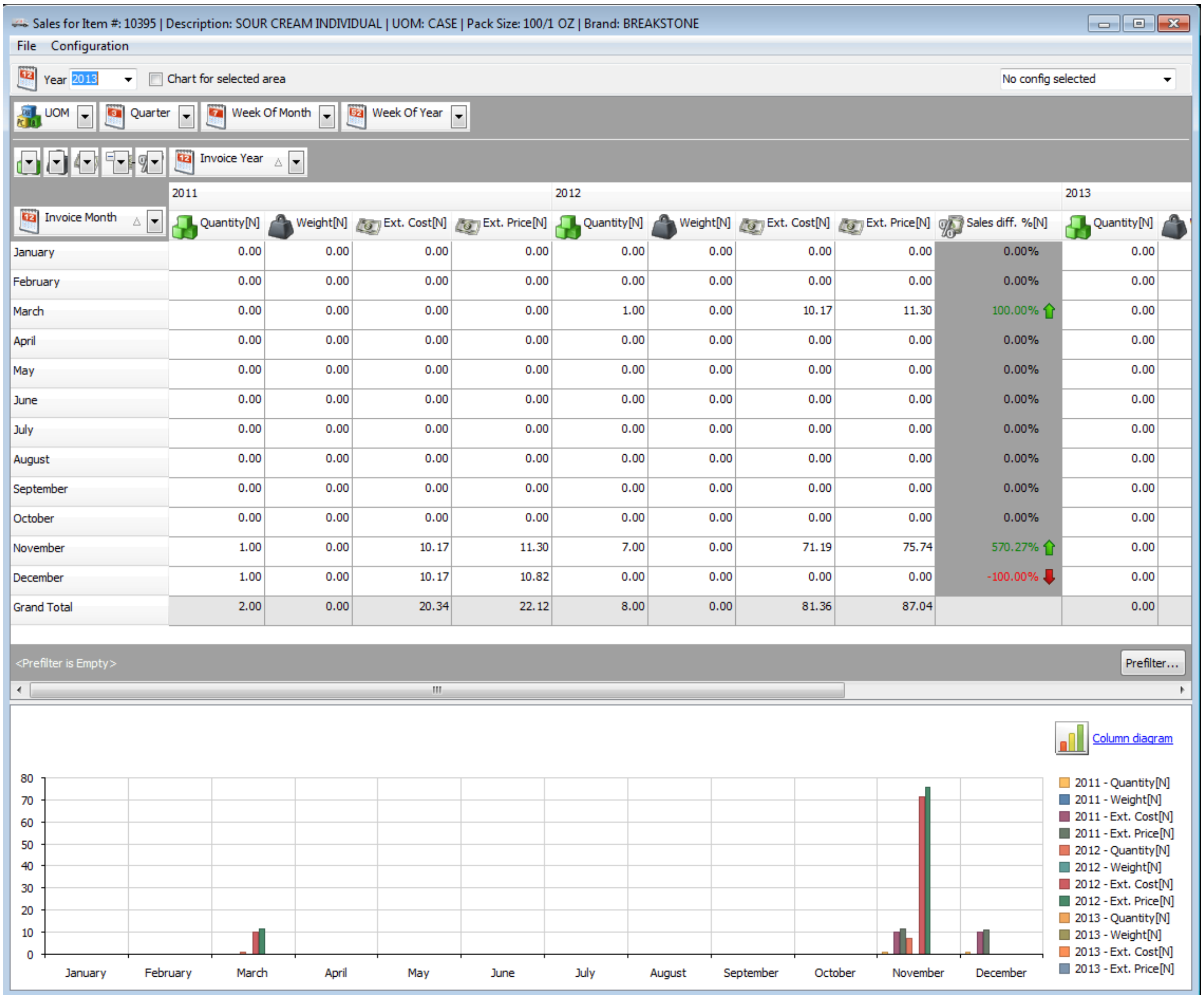


Example Inventory Returns

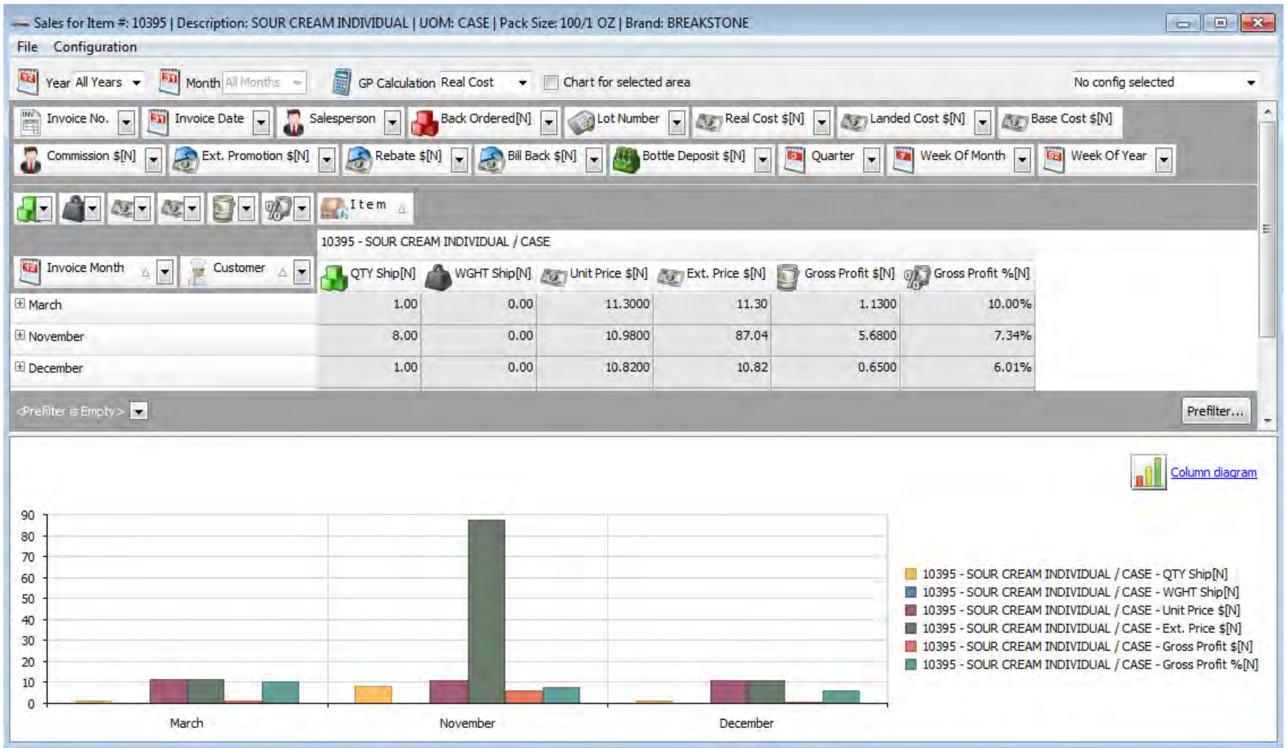


Example Inventory Compare Sales by Years

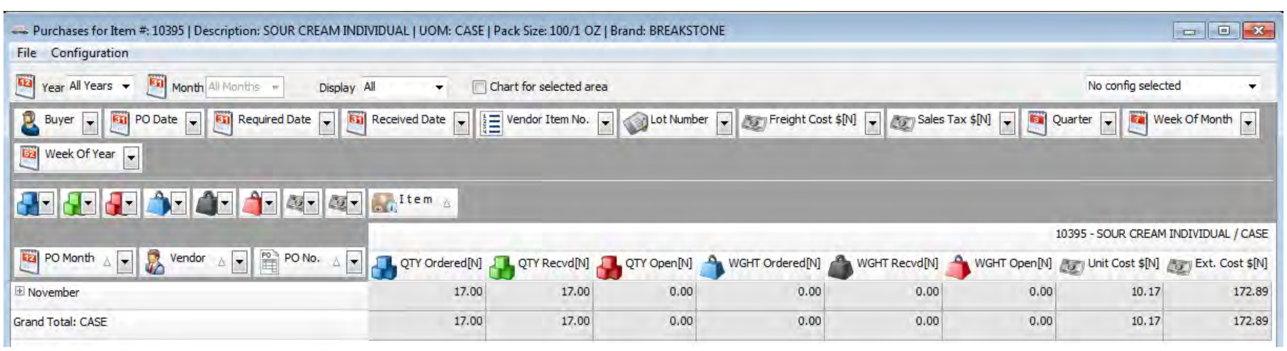
In this dashboard the **Sales diff. %** column will show you the growth percent in **green** with an up arrow or the shrinkage in **red** with a down arrow so you can quickly see the sales comparisons.



Example Inventory Sales



Example Inventory Purchases



7.3 Brand Dashboard

To access the **Brand Sales** dashboard first locate the item and click the **Dashboard** button. Brand only has a **Sales** dashboard. As you can see in the Brand Maintenance screen on the right the brand URL and brand logo are a part of the brand information.

entrée version 4 has built into it a database of over 600 brands with their logos and URLs.

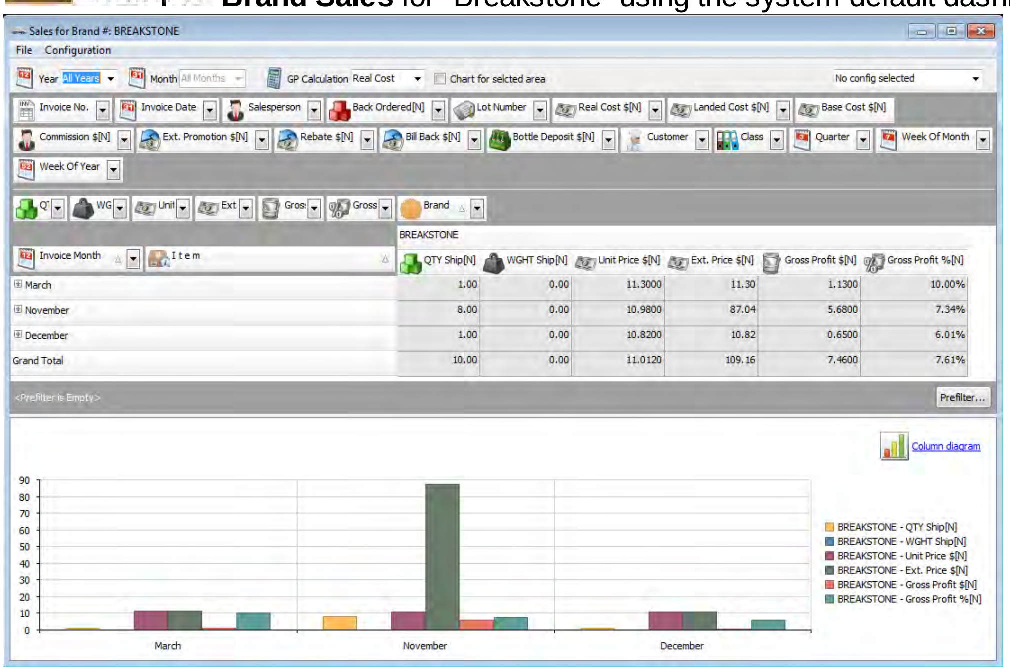
The brands database is accessible through the **Add** and **Edit** features in the **Brand Maintenance** dialog.

- **Brands Update Utility Option**

During the process to update to **version 4** you will have the option to automatically install the brand logos and URLs for the brands already in your system.

The information in the NECS reference database for brands will grow over time as NECS adds information for new brands.

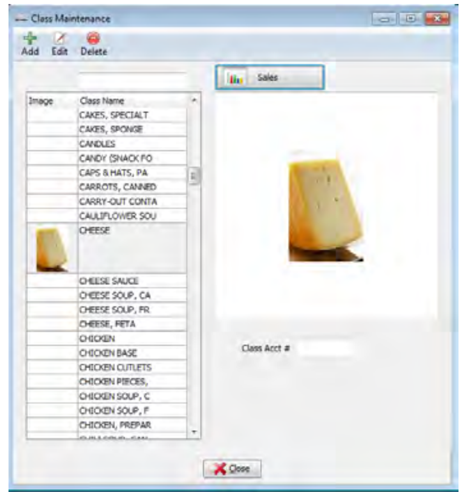
Example **Brand Sales** for "Breakstone" using the system default dashboard configuration.



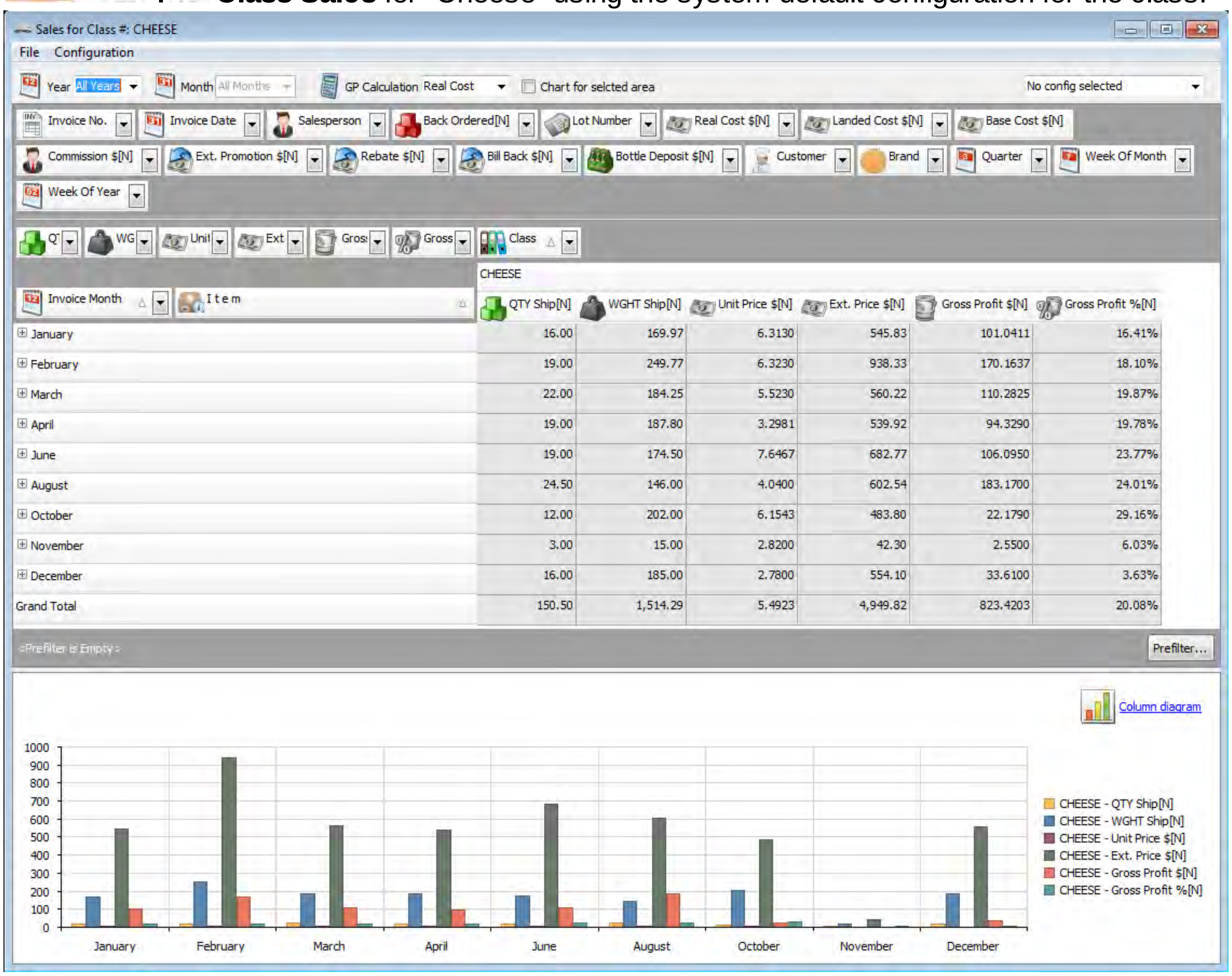
7.4 Class Dashboard

To access the **Class Sales** dashboard first locate the item and click the **Dashboard** button.

Class only has a **Sales** dashboard.



Example **Class Sales** for "Cheese" using the system default configuration for the class.



Invoice Month	QTY Ship[N]	WGHT Ship[N]	Unit Price $[N]	Ext. Price $[N]	Gross Profit $[N]	Gross Profit %[N]
January	16.00	169.97	6.3130	545.83	101.0411	16.41%
February	19.00	249.77	6.3230	938.33	170.1637	18.10%
March	22.00	184.25	5.5230	560.22	110.2825	19.87%
April	19.00	187.80	3.2981	539.92	94.3290	19.78%
June	19.00	174.50	7.6467	682.77	106.0950	23.77%
August	24.50	146.00	4.0400	602.54	183.1700	24.01%
October	12.00	202.00	6.1543	483.80	22.1790	29.16%
November	3.00	15.00	2.8200	42.30	2.5500	6.03%
December	16.00	185.00	2.7800	554.10	33.6100	3.63%
Grand Total	150.50	1,514.29	5.4923	4,949.82	823.4203	20.08%

7.5 Customer Dashboard

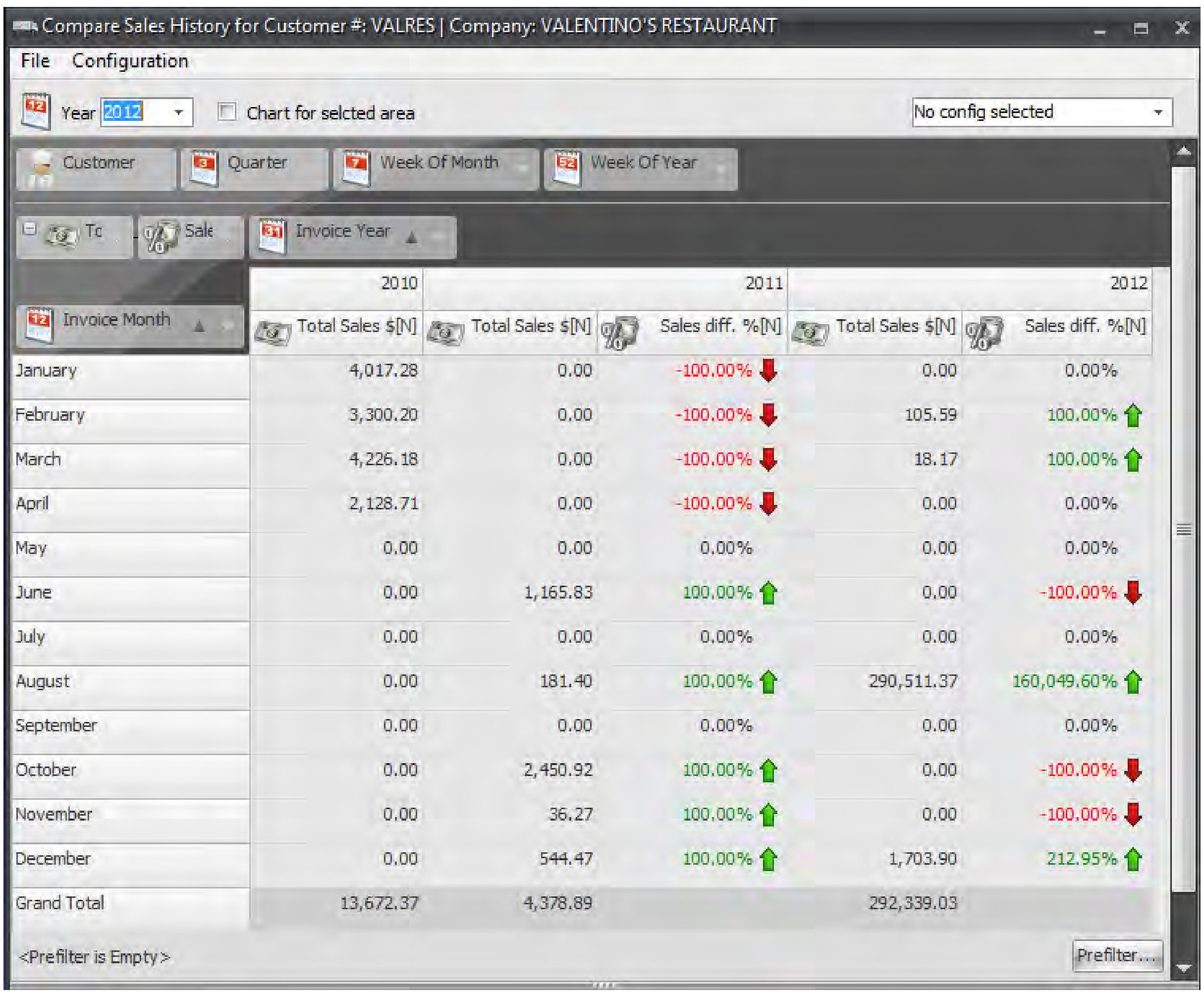
To access the Customer dashboards first locate the desired customer in Customer Maintenance. Then click the **Dashboard** button to make a selection from the drop down menu.

The **Customer Maintenance** dashboards are:

- **Sales**
- **Payments**
- **Compare Sales**
- **Returns**
- **Short Ships**
- **Backorders**

Example Customer Compare Sales

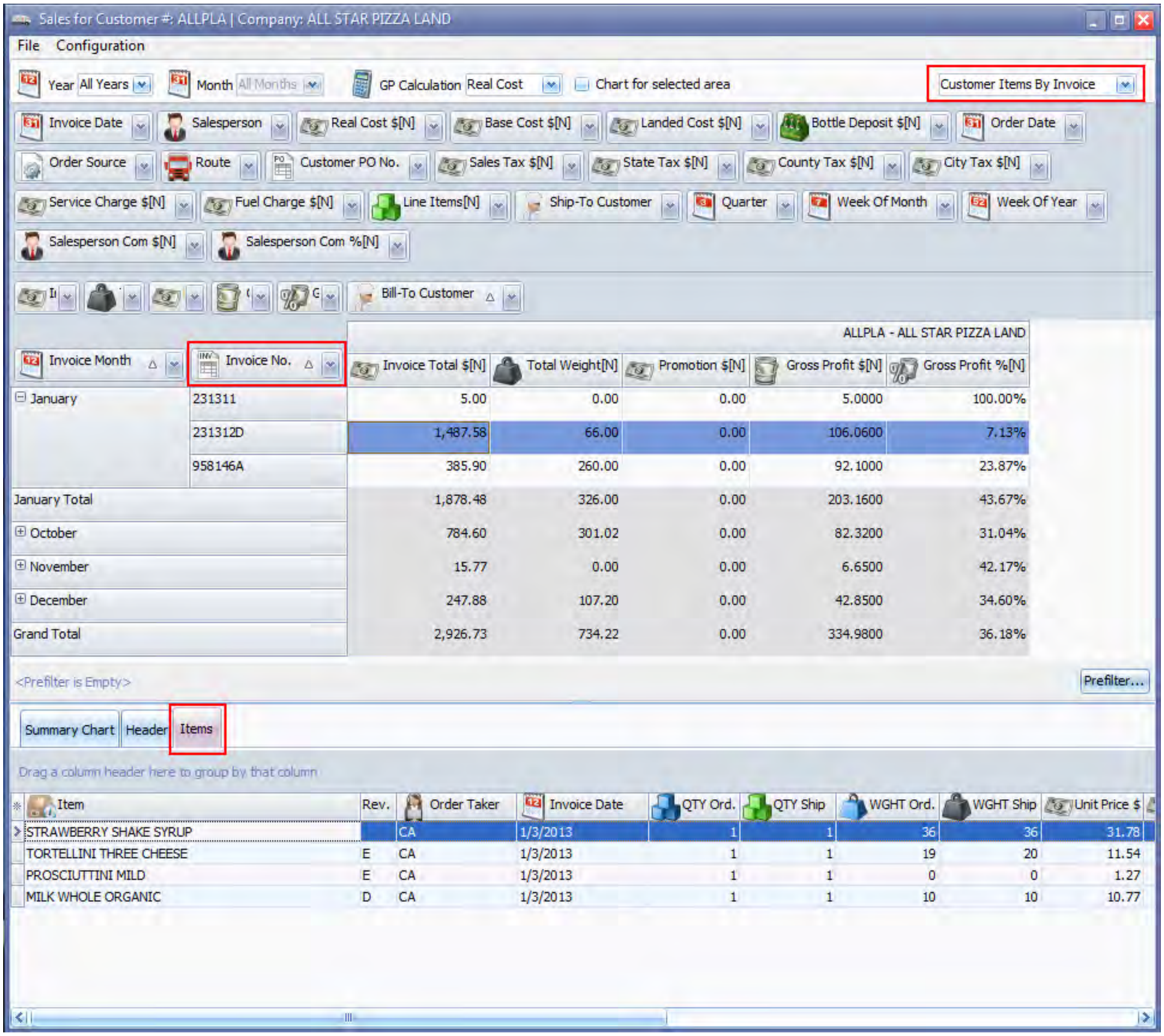
In this dashboard the **Sales diff. %** column for the selected year and the two past years will show you the growth percent in **green** with an up arrow or the shrinkage in **red** with a down arrow so you can quickly see the customer sales comparisons.



Invoice Month	2010 Total Sales $[N]	2011 Total Sales $[N]	2011 Sales diff. %[N]	2012 Total Sales $[N]	2012 Sales diff. %[N]
January	4,017.28	0.00	-100.00%	0.00	0.00%
February	3,300.20	0.00	-100.00%	105.59	100.00%
March	4,226.18	0.00	-100.00%	18.17	100.00%
April	2,128.71	0.00	-100.00%	0.00	0.00%
May	0.00	0.00	0.00%	0.00	0.00%
June	0.00	1,165.83	100.00%	0.00	-100.00%
July	0.00	0.00	0.00%	0.00	0.00%
August	0.00	181.40	100.00%	290,511.37	160,049.60%
September	0.00	0.00	0.00%	0.00	0.00%
October	0.00	2,450.92	100.00%	0.00	-100.00%
November	0.00	36.27	100.00%	0.00	-100.00%
December	0.00	544.47	100.00%	1,703.90	212.95%
Grand Total	13,672.37	4,378.89		292,339.03	

Example Customer Sales with Invoice Number

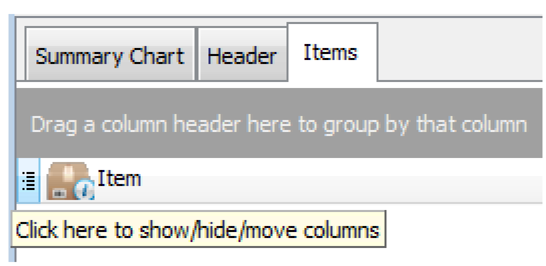
In the system default dashboard configuration for Customer Sales you will see the sales by Invoice Month with the monthly totals for that customer.
Below we added the **Invoice No.** field to the row area to add a second group to the analysis. The invoice data enabled the display of information in the **Items Tab** of the diagram area below when an Invoice was selected.



• Diagram Area Controls Overview

Once the Items Tab has data to display a few tools to manage the data in the diagram area are enabled.

These tools are:



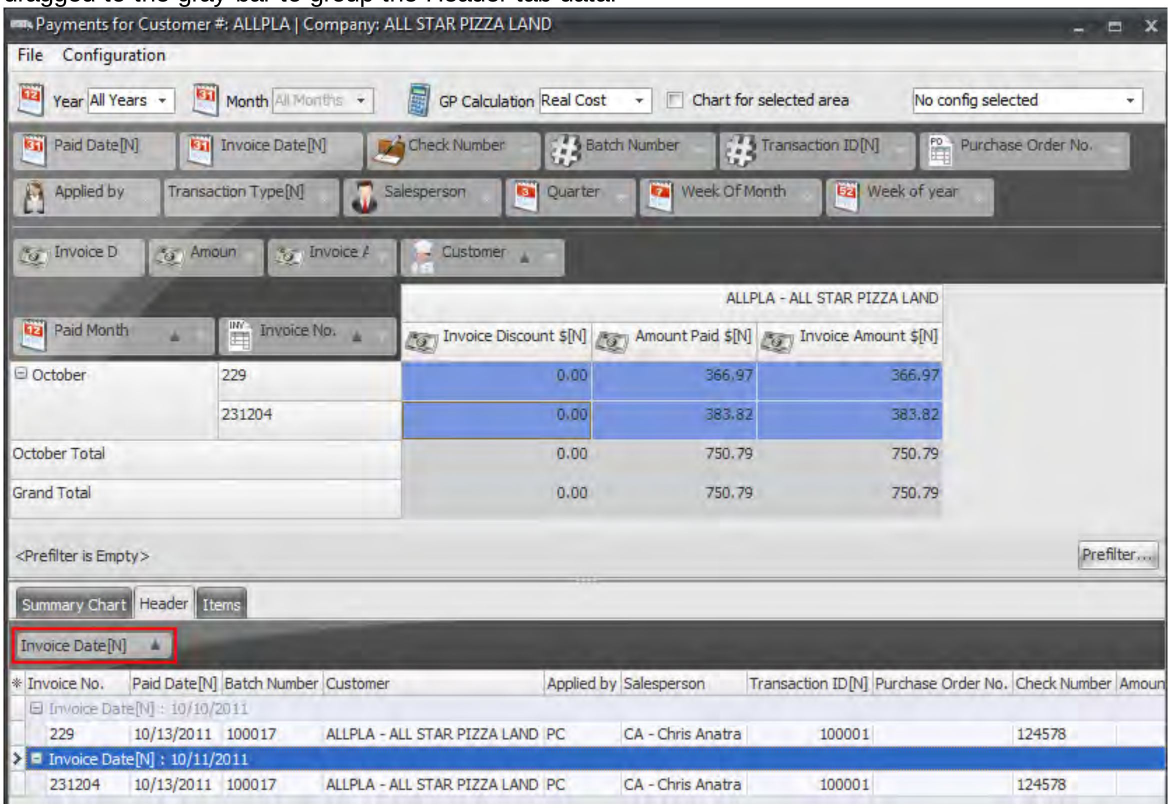
- **Drag a column header here to group by that column**.
- **Click here to show/hide/move columns**.

Some examples follow.

Example Customer Payments

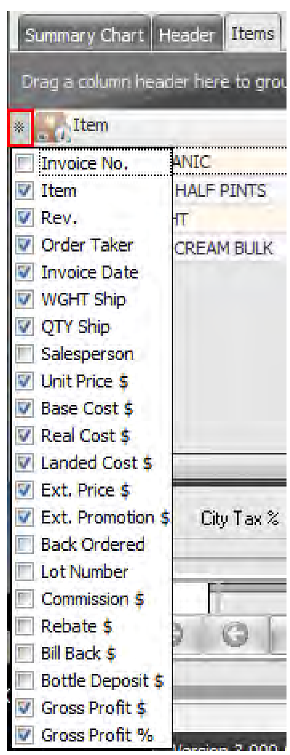
- **Drag a column header here to group by that column**

Drag any field from the columns listed in the diagram area to the gray drag to bar (outlined in red in Customer Payments above) to group by that column. In the dashboard diagram area above the **Invoice Date** field was dragged to the gray bar to group the Header tab data.



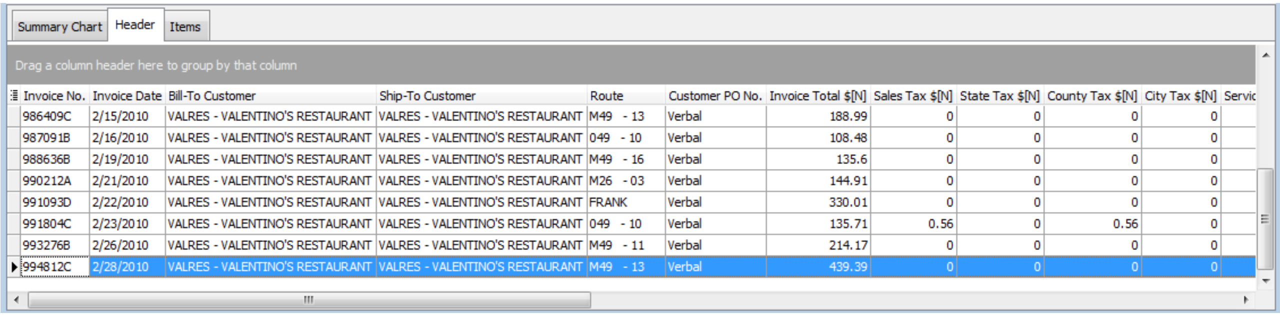
- **Click here to show/hide/move columns**

- Click the icon to open the drop down list of columns in the diagram area (outlined in red on the right) .
- Check columns to add them to the column list
- Uncheck columns to remove the column from display
- Drag columns to new positions in the column list to move them.



Header Tab

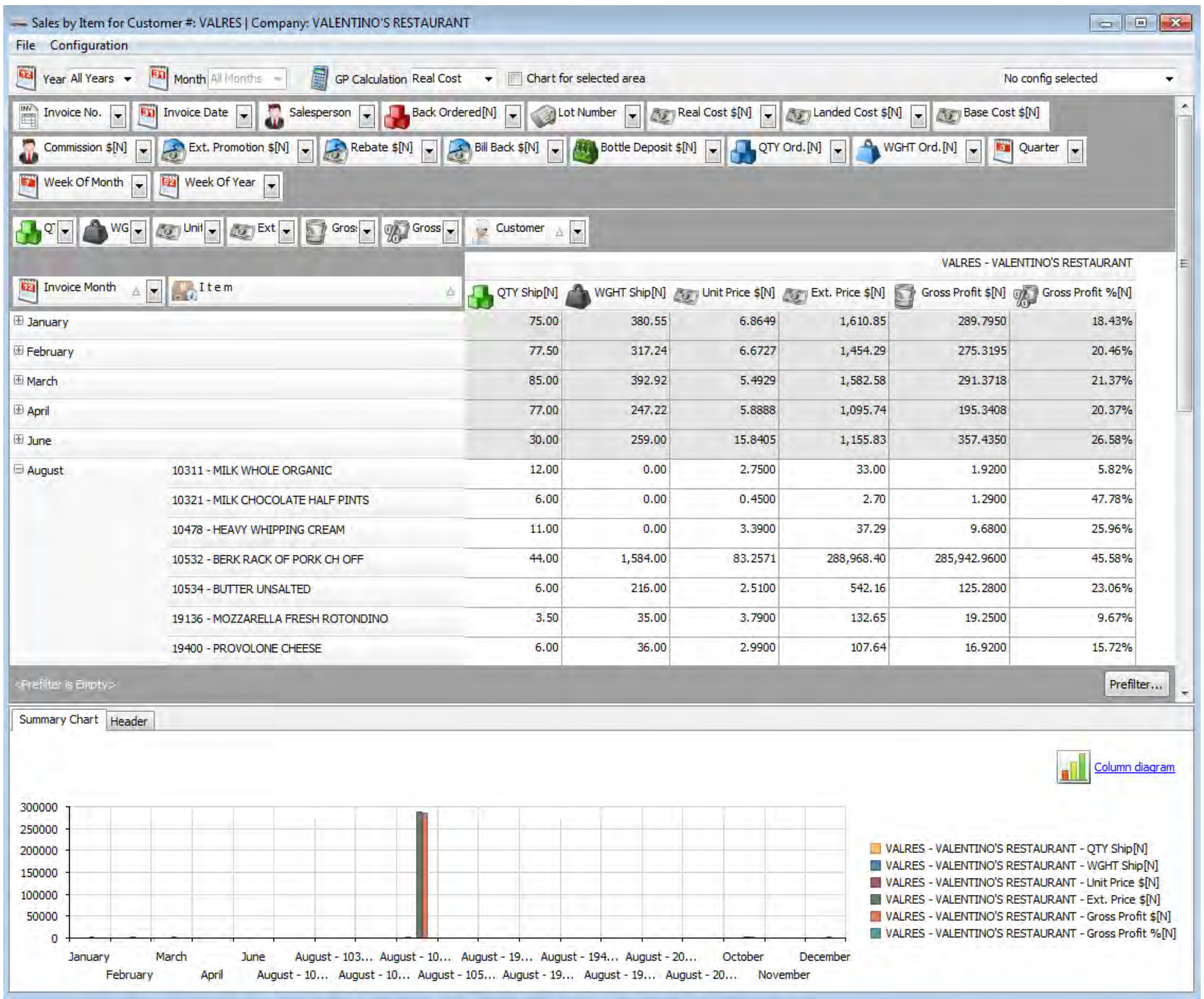
When item 10532 Rack Of Pork is selected, in the **Customer Sales By Item** dashboard on the following page, you can click the **Header Tab** in the diagram area to reveal the sales header details for that item as shown below.



Invoice No.	Invoice Date	Bill-To Customer	Ship-To Customer	Route	Customer PO No.	Invoice Total $[N]	Sales Tax $[N]	State Tax $[N]	County Tax $[N]	City Tax $[N]
986409C	2/15/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 13	Verbal	188.99	0	0	0	0
987091B	2/16/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	049 - 10	Verbal	108.48	0	0	0	0
988636B	2/19/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 16	Verbal	135.6	0	0	0	0
990212A	2/21/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M26 - 03	Verbal	144.91	0	0	0	0
991093D	2/22/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	FRANK	Verbal	330.01	0	0	0	0
991804C	2/23/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	049 - 10	Verbal	135.71	0.56	0	0.56	0
993276B	2/26/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 11	Verbal	214.17	0	0	0	0
994812C	2/28/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 13	Verbal	439.39	0	0	0	0

Example Customer Sales By Item

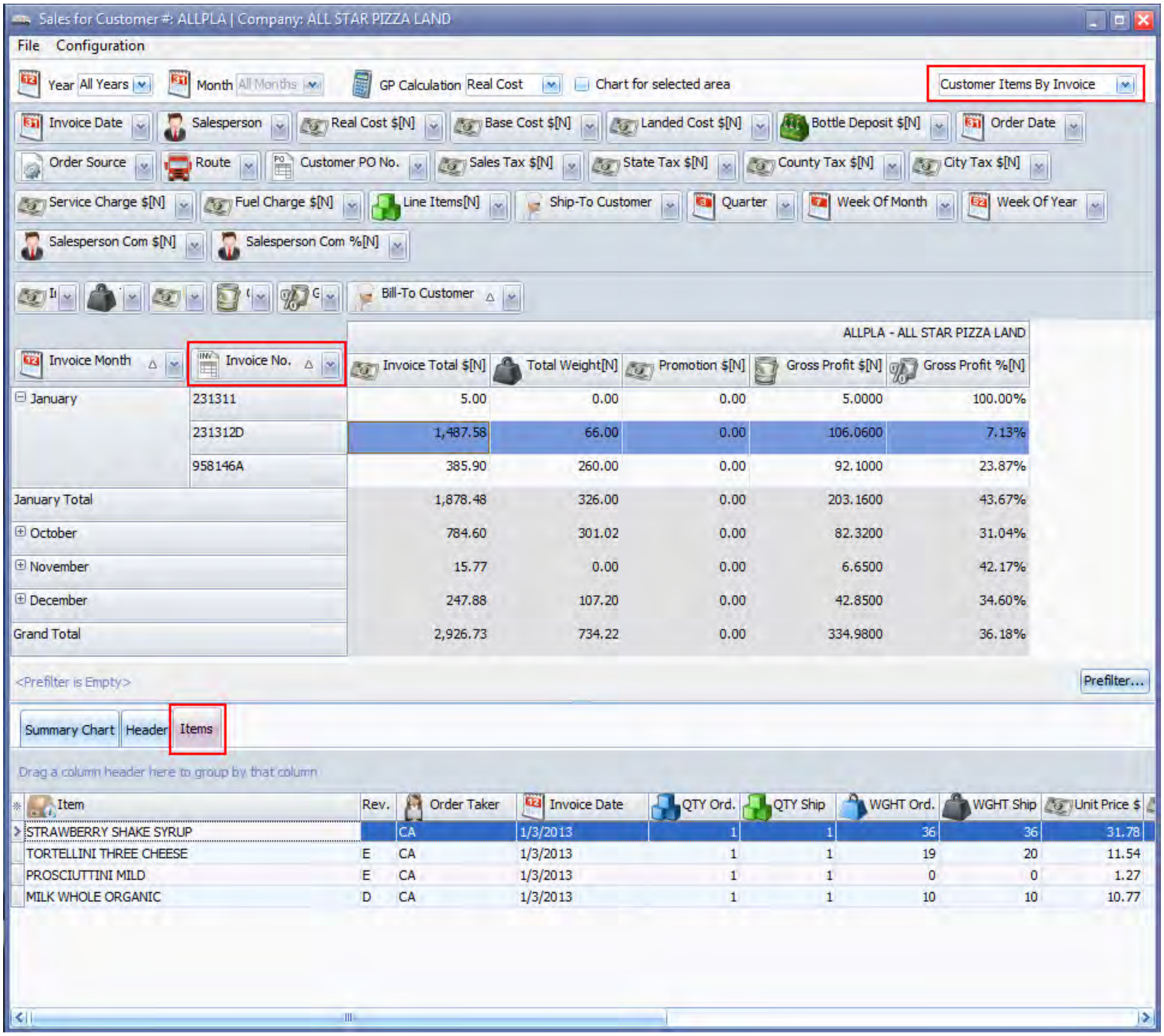
Shown here is a configuration for Sales by Item. You are encouraged to customize the analysis to fit your business model.



Invoice Month	Item	QTY Ship[N]	WGHT Ship[N]	Unit Price $[N]	Ext. Price $[N]	Gross Profit $[N]	Gross Profit %[N]
January		75.00	380.55	6.8649	1,610.85	289.7950	18.43%
February		77.50	317.24	6.6727	1,454.29	275.3195	20.46%
March		85.00	392.92	5.4929	1,582.58	291.3718	21.37%
April		77.00	247.22	5.8888	1,095.74	195.3408	20.37%
June		30.00	259.00	15.8405	1,155.83	357.4350	26.58%
August	10311 - MILK WHOLE ORGANIC	12.00	0.00	2.7500	33.00	1.9200	5.82%
	10321 - MILK CHOCOLATE HALF PINTS	6.00	0.00	0.4500	2.70	1.2900	47.78%
	10478 - HEAVY WHIPPING CREAM	11.00	0.00	3.3900	37.29	9.6800	25.96%
	10532 - BERK RACK OF PORK CH OFF	44.00	1,584.00	83.2571	288,968.40	285,942.9600	45.58%
	10534 - BUTTER UNSALTED	6.00	216.00	2.5100	542.16	125.2800	23.06%
	19136 - MOZZARELLA FRESH ROTONDINO	3.50	35.00	3.7900	132.65	19.2500	9.67%
	19400 - PROVOLONE CHEESE	6.00	36.00	2.9900	107.64	16.9200	15.72%

Example Customer Sales By Item with a Custom Configuration

You can access the configurations saved for a dashboard in the drop down menu in the top of the screen on the far right (outlined in **red**). In this example the saved configuration “Customer Items By Invoice”, discussed previously in **Managing Dashboard Configurations**, was applied to the dashboard.



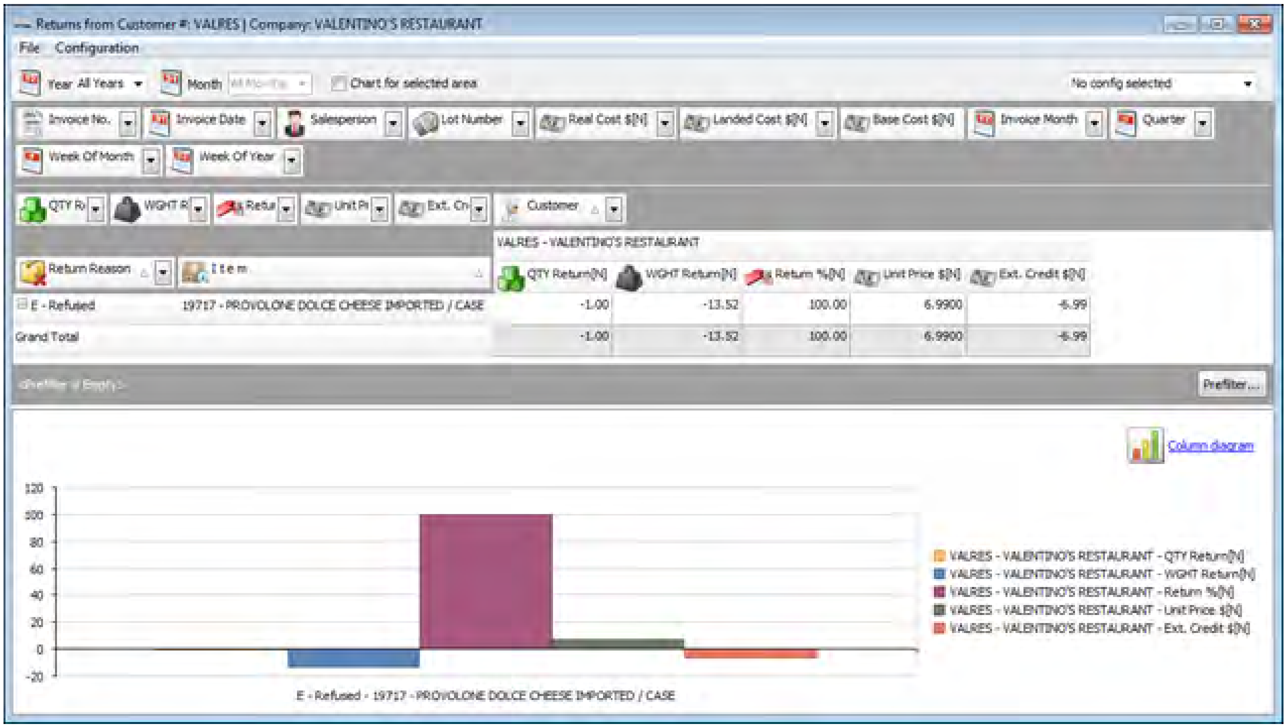
Items Tab

If there is a set default configuration it will automatically be loaded and applied to the dashboard data when it opens. Once the **Invoice No.** field was added to the row area on the left individual invoices were listed and the **Items Tab** now had data to display.

Invoice 231312D was selected and then the **Items Tab** in the lower section of the screen was clicked in the diagram area. Now the tab shows the items on that invoice with the item details as shown in our example.

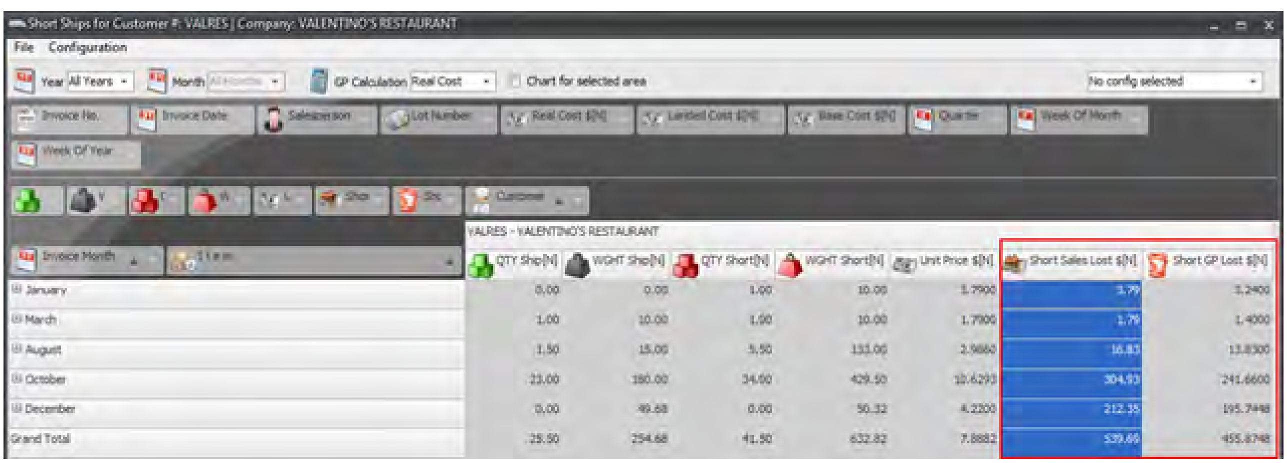
Example Customer Returns

Here you will see the record of returns from each of your customers. You can use this dashboard to quickly identify any patterns or recurring problems with a customer. Columns are grouped using the **Return Reason** codes built into the **entrée** system.



Example Customer Short Ships

Here you see the **Short Sales Lost** and the **Short GP Lost** columns will quickly tell you where the potential sales from the customer were lost. This dashboard will help you find patterns where possibly the same item caused lost sales with many customers. Click the **+ plus sign** and expand the list to see what items were involved in the lost sales.



7.6 Vendor Dashboard

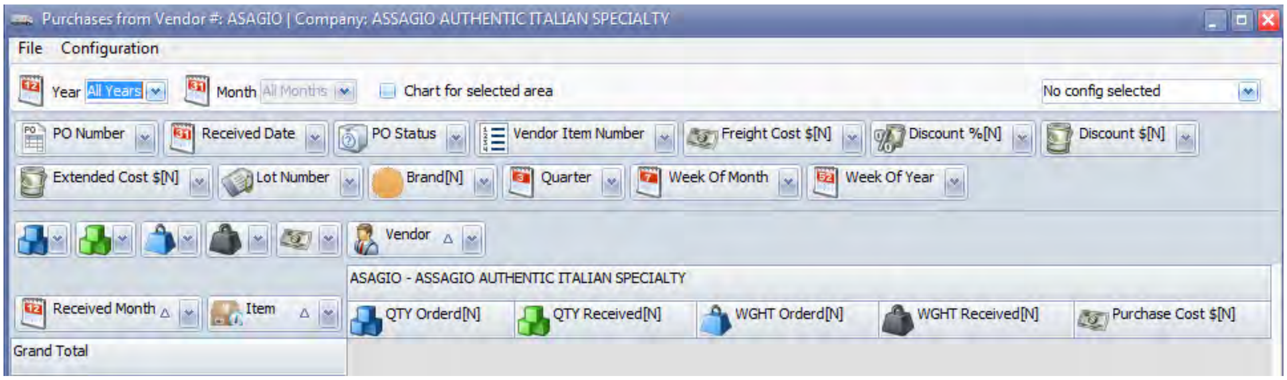
The Vendor Maintenance dashboards menu includes:

- **Purchases**
- **Payments**

The system default dashboard configurations for Vendor Purchases and Vendor payments are shown below.

Example **Vendor Purchases Dashboard**

With this dashboard it is fast and easy to keep track of your purchases from the many vendors you deal with on a daily basis.



Example **Vendor Payments Dashboard**

It is important to manage and monitor your cash flow. The Vendor Payments dashboard allows you to verify payments to avoid double payments and other mistakes.

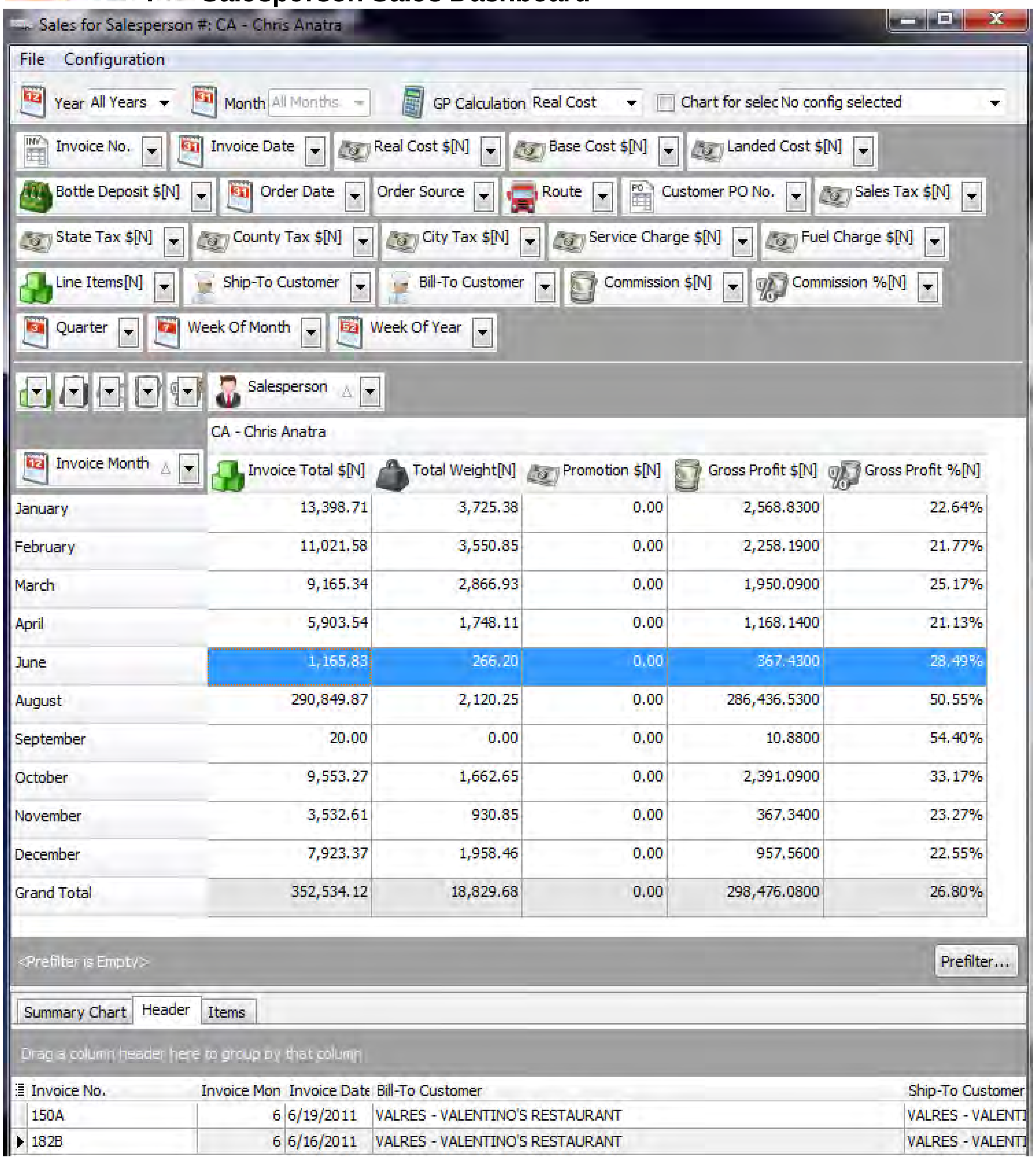
7.7 Salesperson Dashboard

To access the Salesperson dashboard first find the desired salesperson in Salesperson / Broker Maintenance. Then click the **Dashboard** button to make a selection from the drop down menu.

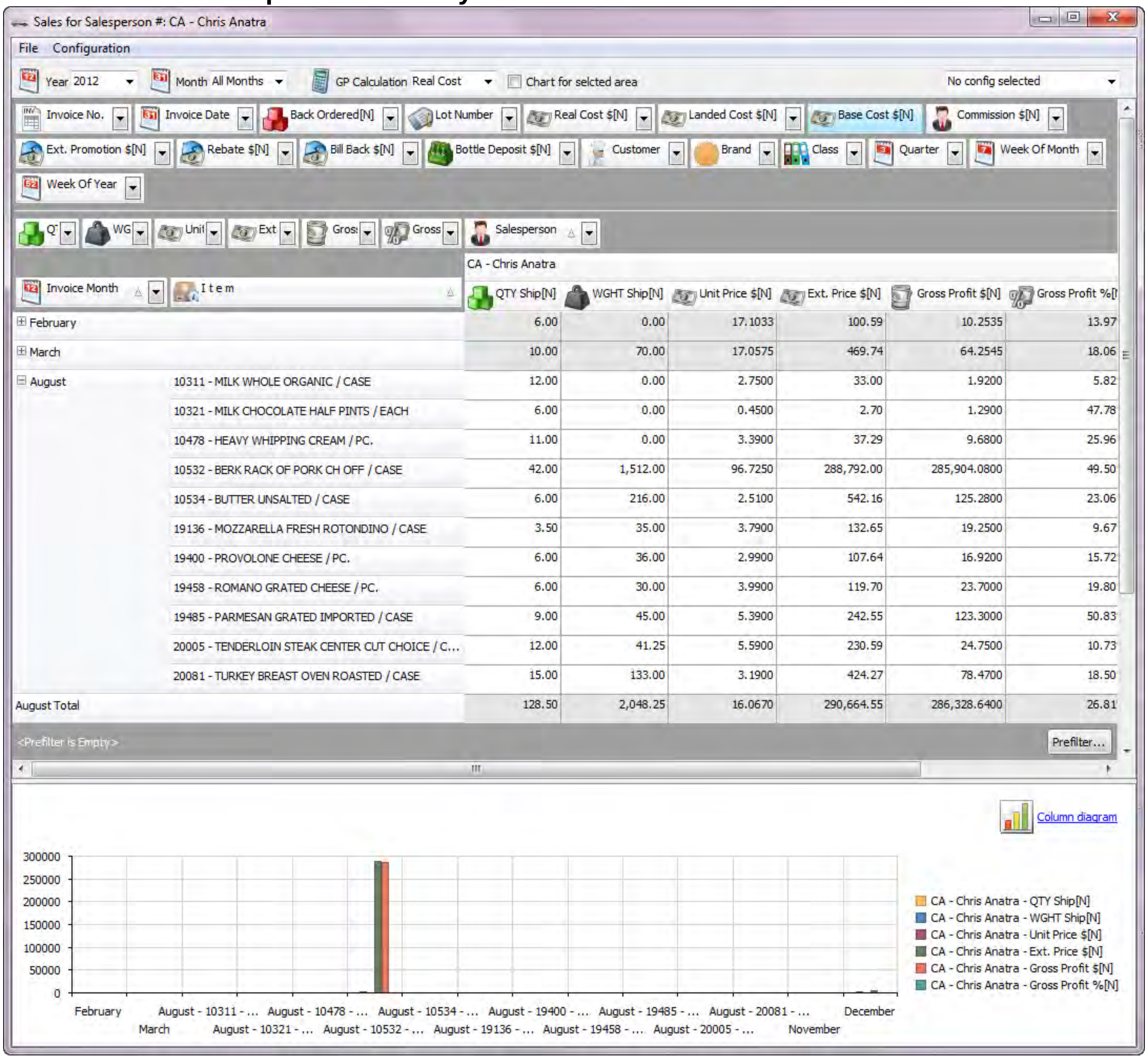
The Salesperson / Broker Maintenance dashboards are:

- **Sales**
- **Sales by Item**
- **Compare Sales by Years**

Example **Salesperson Sales Dashboard**

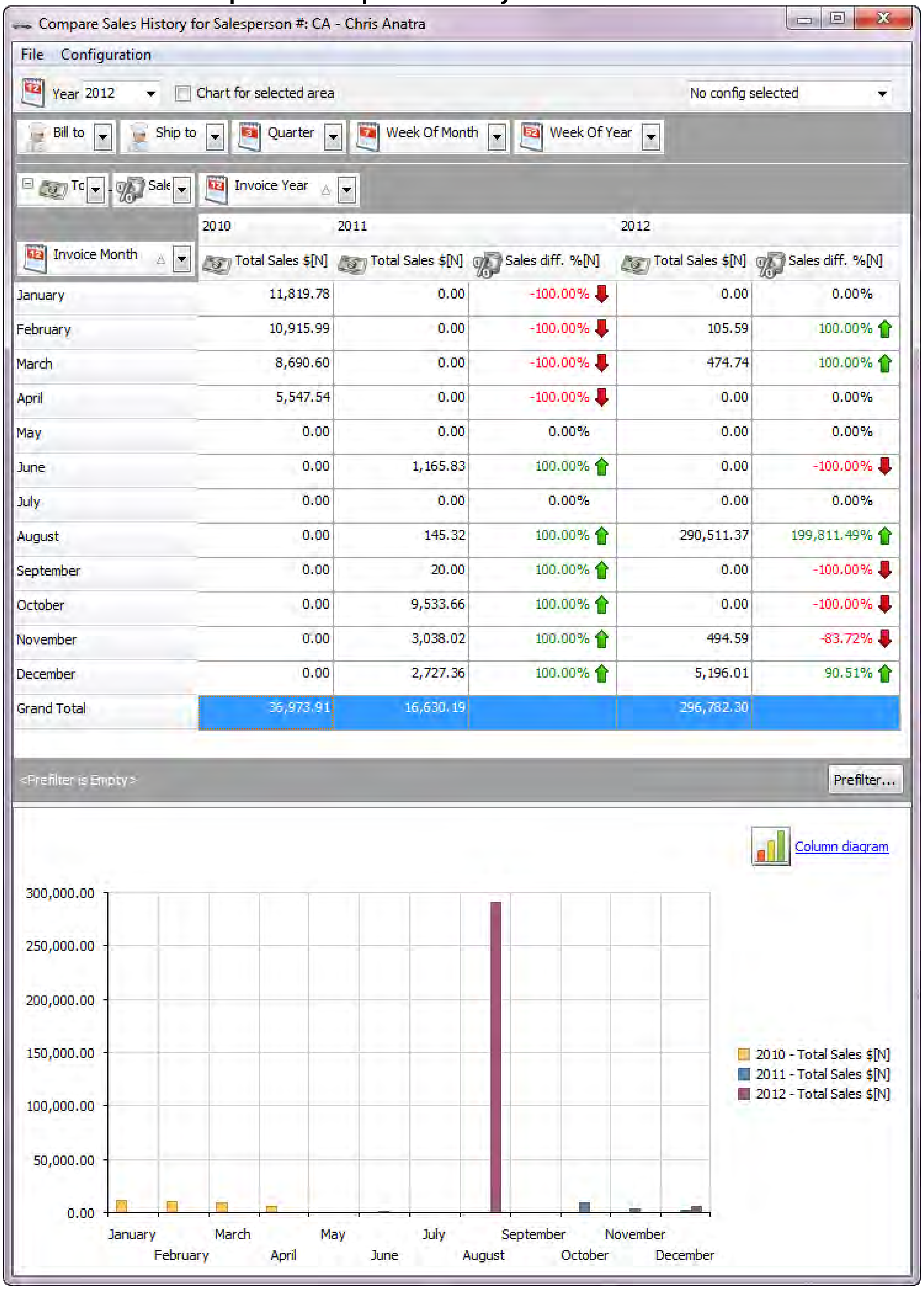


Example Salesperson Sales By Item



Invoice Month	Item	QTY Ship[N]	WGHT Ship[N]	Unit Price $[N]	Ext. Price $[N]	Gross Profit $[N]	Gross Profit %[N]
February		6.00	0.00	17.1033	100.59	10.2535	13.97
March		10.00	70.00	17.0575	469.74	64.2545	18.06
August	10311 - MILK WHOLE ORGANIC / CASE	12.00	0.00	2.7500	33.00	1.9200	5.82
	10321 - MILK CHOCOLATE HALF PINTS / EACH	6.00	0.00	0.4500	2.70	1.2900	47.78
	10478 - HEAVY WHIPPING CREAM / PC.	11.00	0.00	3.3900	37.29	9.6800	25.96
	10532 - BERK RACK OF PORK CH OFF / CASE	42.00	1,512.00	96.7250	288,792.00	285,904.0800	49.50
	10534 - BUTTER UNSALTED / CASE	6.00	216.00	2.5100	542.16	125.2800	23.06
	19136 - MOZZARELLA FRESH ROTONDINO / CASE	3.50	35.00	3.7900	132.65	19.2500	9.67
	19400 - PROVOLONE CHEESE / PC.	6.00	36.00	2.9900	107.64	16.9200	15.72
	19458 - ROMANO GRATED CHEESE / PC.	6.00	30.00	3.9900	119.70	23.7000	19.80
	19485 - PARMESAN GRATED IMPORTED / CASE	9.00	45.00	5.3900	242.55	123.3000	50.83
	20005 - TENDERLOIN STEAK CENTER CUT CHOICE / C...	12.00	41.25	5.5900	230.59	24.7500	10.73
	20081 - TURKEY BREAST OVEN ROASTED / CASE	15.00	133.00	3.1900	424.27	78.4700	18.50
August Total		128.50	2,048.25	16.0670	290,664.55	286,328.6400	26.81

Example Salesperson Compare Sales By Years



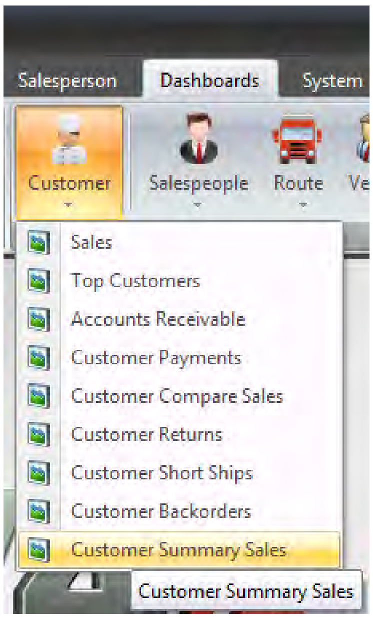
Invoice Month	2010 Total Sales $[N]	2011 Total Sales $[N]	2011 Sales diff. %[N]	2012 Total Sales $[N]	2012 Sales diff. %[N]
January	11,819.78	0.00	-100.00%	0.00	0.00%
February	10,915.99	0.00	-100.00%	105.59	100.00%
March	8,690.60	0.00	-100.00%	474.74	100.00%
April	5,547.54	0.00	-100.00%	0.00	0.00%
May	0.00	0.00	0.00%	0.00	0.00%
June	0.00	1,165.83	100.00%	0.00	-100.00%
July	0.00	0.00	0.00%	0.00	0.00%
August	0.00	145.32	100.00%	290,511.37	199,811.49%
September	0.00	20.00	100.00%	0.00	-100.00%
October	0.00	9,533.66	100.00%	0.00	-100.00%
November	0.00	3,038.02	100.00%	494.59	-83.72%
December	0.00	2,727.36	100.00%	5,196.01	90.51%
Grand Total	36,973.91	16,630.19		296,782.30	

7.8 Summary Dashboards

In V4.0.38 the new **Summary Dashboard** feature was implemented for Inventory, Customer and Vendor File Maintenance. This dashboard allows you to examine up to 25 years of history data from the ARSUMRY table.

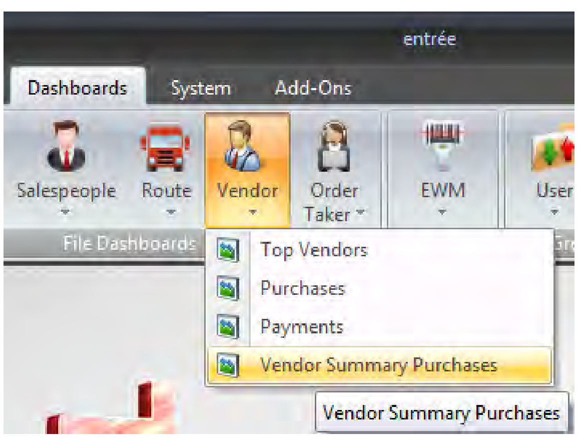
- The Summary Dashboards can be accessed via the main **Dashboards** ribbon menu using the Inventory, Customer and Vendor sub-menus.

Dashboard Ribbon Customer Menu

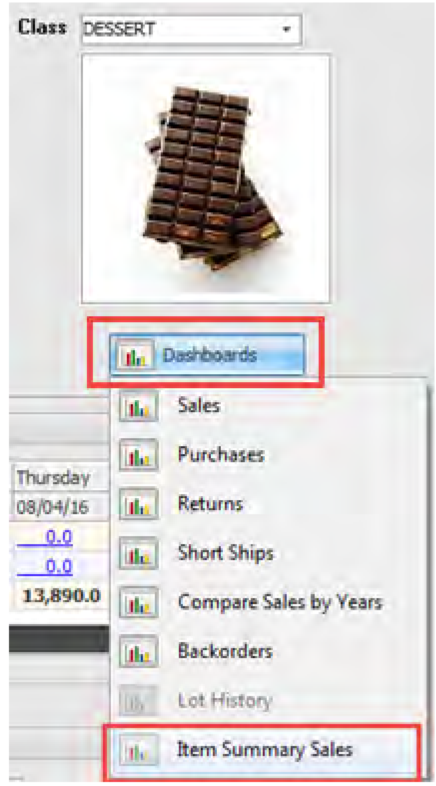


Dashboard Ribbon Inventory Menu

Dashboard Ribbon Vendor Menu

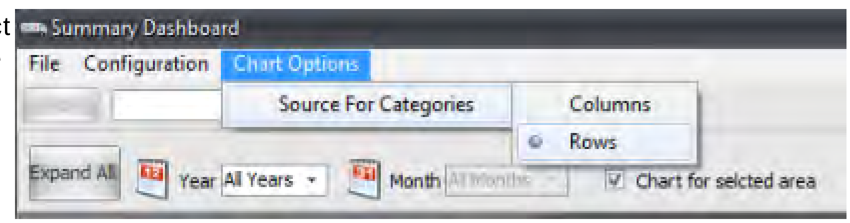


- The Summary Dashboards can also be accessed using the **Dashboards** menu in the Inventory File, Customer File and Vendor File Maintenance screens.



- The new **Source for Categories** feature has been added to dashboards in the **Chart Options** menu.

This menu feature allows you to direct the dashboard processes to only use the data in the rows or columns you have highlighted to generate the summary chart.

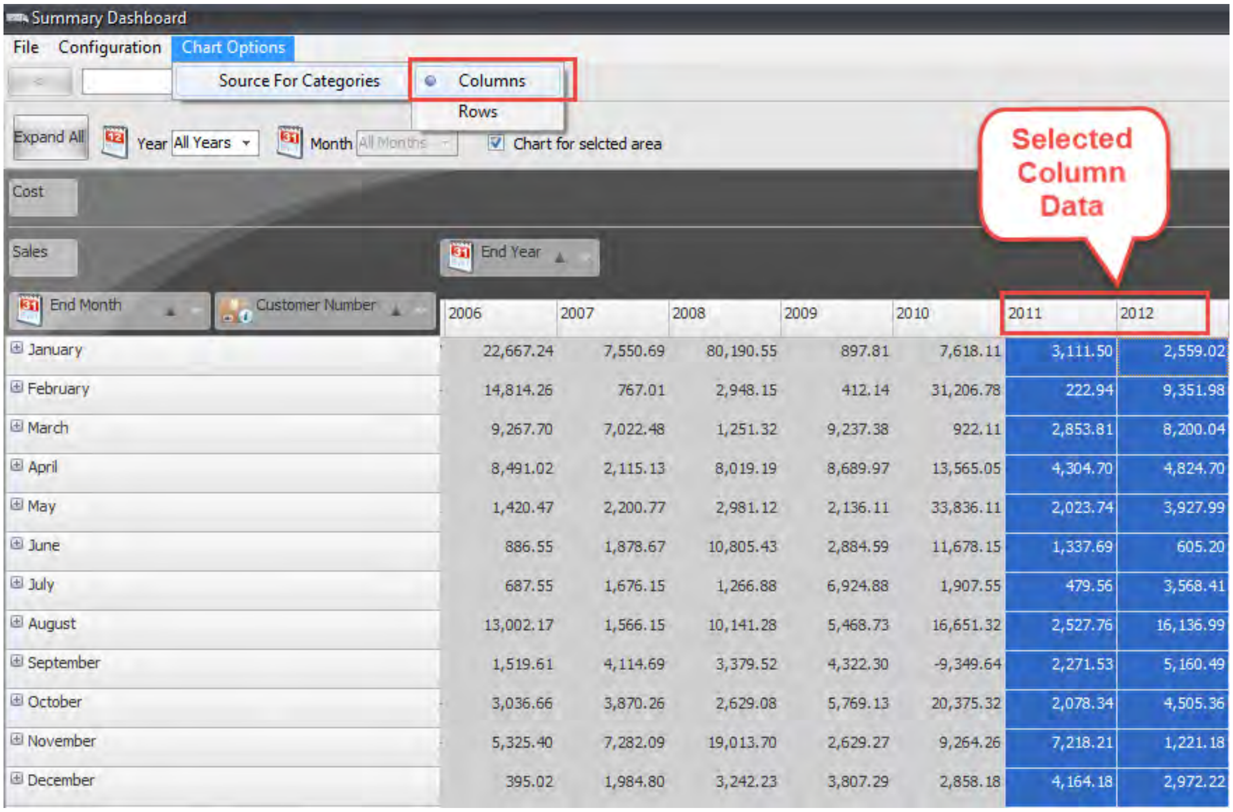


Hot Tip! Be aware that some chart styles, like Stacked Area, may not provide you with a chart that has a meaningful comparison of the data. Some experimentation may be required to work with this new feature and various chart styles.

The **Rows** and **Columns** options in the menu allow you to switch the graph data source category for the horizontal **x-axis** in the chart. The vertical **y-axis** will reflect the range of data values for the selected data comparison.

Example **Summary Dashboards Source for Categories Options**

- First the 2011 and 2012 columns were highlighted and the **Columns** option selected in the menu.

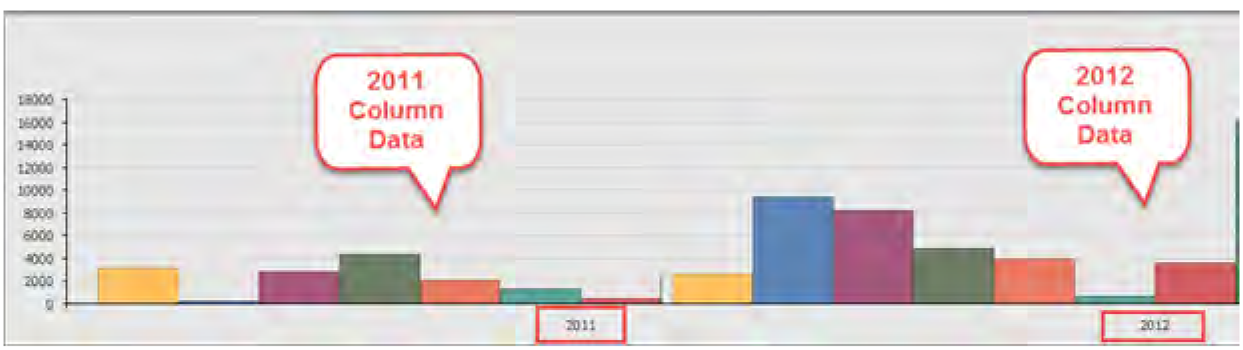


	2006	2007	2008	2009	2010	2011	2012
January	22,667.24	7,550.69	80,190.55	897.81	7,618.11	3,111.50	2,559.02
February	14,814.26	767.01	2,948.15	412.14	31,206.78	222.94	9,351.98
March	9,267.70	7,022.48	1,251.32	9,237.38	922.11	2,853.81	8,200.04
April	8,491.02	2,115.13	8,019.19	8,689.97	13,565.05	4,304.70	4,824.70
May	1,420.47	2,200.77	2,981.12	2,136.11	33,836.11	2,023.74	3,927.99
June	886.55	1,878.67	10,805.43	2,884.59	11,678.15	1,337.69	605.20
July	687.55	1,676.15	1,266.88	6,924.88	1,907.55	479.56	3,568.41
August	13,002.17	1,566.15	10,141.28	5,468.73	16,651.32	2,527.76	16,136.99
September	1,519.61	4,114.69	3,379.52	4,322.30	-9,349.64	2,271.53	5,160.49
October	3,036.66	3,870.26	2,629.08	5,769.13	20,375.32	2,078.34	4,505.36
November	5,325.40	7,282.09	19,013.70	2,629.27	9,264.26	7,218.21	1,221.18
December	395.02	1,984.80	3,242.23	3,807.29	2,858.18	4,164.18	2,972.22

- The first chart was generated for Columns and used the selected column's headers as the x-axis categories.

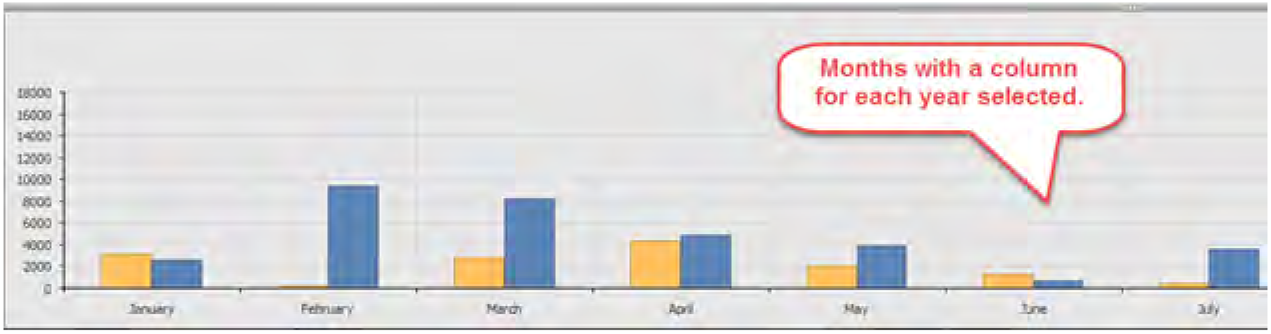
The result was a comparison of the Summary data for the years 2011 and 2012 with a column for each month.

(Note: The two charts below were edited to remove some columns to fit on the page.)



- Using the same data when the **Rows** option is selected the months are the x-axis categories.

The years 2011 and 2012 are the yellow and blue columns in the chart for each month.

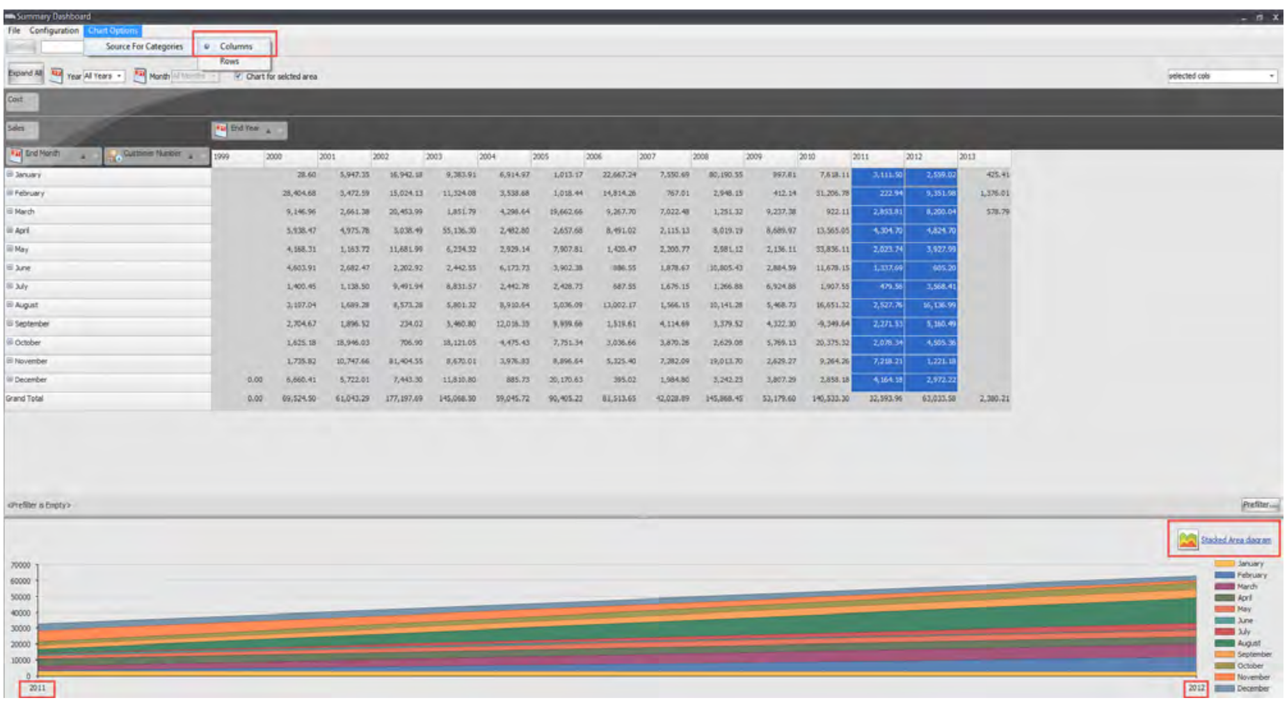


Example Summary Dashboard with Invalid Anaylysis

This is an example of a Summary Dashboard for Customer Summary Sales that provided no real analysis of the sales data because of the choices made for the Source for Categories (columns) and the Type of Chart generated (Stacked Area).

As you can see below the data for the two years selected, 2011 and 2012, is not compared properly so there is no analysis just a meaningless stack of data.

So be aware that your Summary Dashboard choices can impact whether you get a valid analysis generated.



Chapter 8

V4 SQL Search Features

8 V4 SQL Search Features

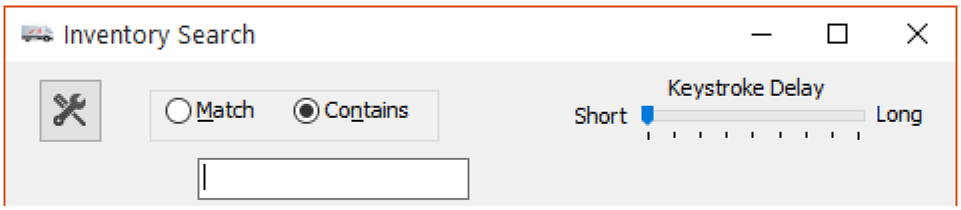
The **entrée V4 SQL** has brought with it advances in search capabilities and options. The integrated search engine allows users to quickly customize a search and quickly locate the data they need. This chapter will provide an overview of the latest search engine features.

Note Any time the search button is displayed in the entrée system, the appropriate search screen can be opened by clicking that button. Pressing the **F5** key, while the cursor is located in a field that has a search button, will open the search screen.

New Search System Features

• Keystroke Delay Slider

V4 feature enhancements include the new Keystroke Delay Slider feature to searching. This feature allows you to control the amount of time that the system waits before applying a search term that you have typed in.



Moving the slider toward the "Short" setting reduces the time that the system waits but this means that you have to type faster to stay ahead of the computer.

Moving it toward the "Long" setting means you are able to type more slowly but the system will take longer to respond to your input.

This is a "per user" setting but the same setting applies across all searches. However there are separate settings for the "Classic" and "Server Mode" search styles discussed below.

• Setting Search System Defaults

In entrée V4 SQL the search system has a few new features one to configure the default search style and the other to refresh the search screen data whenever you like. **Search Style** and **Matching Method** are two new customizable features of the search system.

You can set the default Search Style for **entrée V4 SQL** in the "**Search System Options**" configuration accessed via **Additional Features** on the System Options tab of System Preferences. See the **Additional Features** section of the System Options chapter for detailed information.

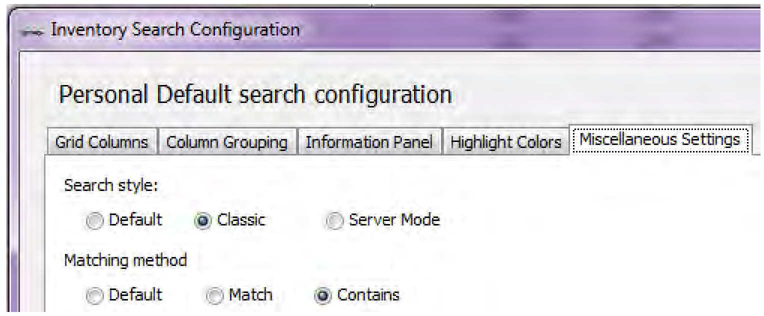
New Search Configuration Miscellaneous Settings

• Search Style

This new feature allows you to select whichever search style works the best for you and allows you to make that the default for all of your entrée searches.

- **Default:** The default search style is configured in the "**Search System Options**" utility found in System Options Additional Features. See the **Additional Features** section of the System Options chapter for more detailed information.

- **Classic**
- **Server Mode**



- **Matching Method**
  - **Default -** The default matching method built into the **entrée** system for that screen.
  - **Match -** Uses the entire input phrase as a whole for the search ('TEST ITEM%') rather than breaking out each word and matching the words individually ('TEST%' and 'ITEM%').
  - **Contains**

Hot Tip! See the [Miscellaneous Settings]() tab topic for more details about the new **Search Style** and **Matching Method** options.

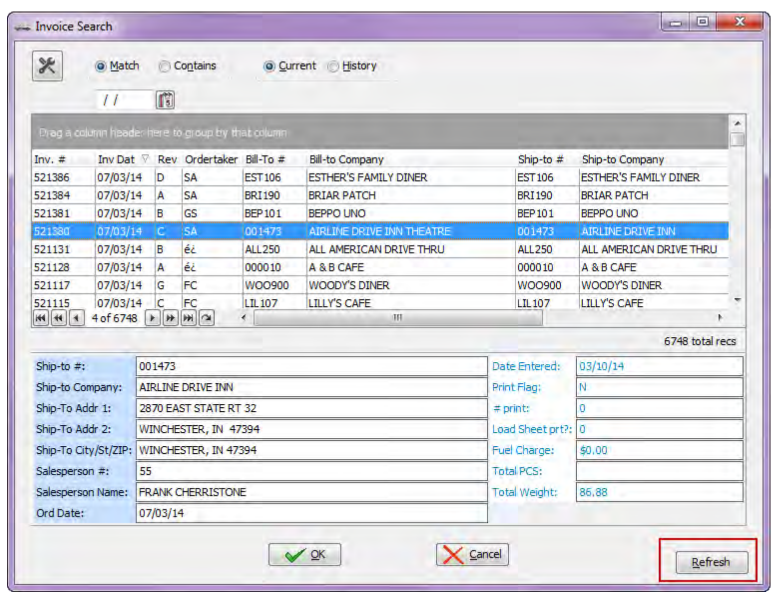
Keyboard Shortcut

In the **entrée** V4 search system you can now use the **entrée** V3 keyboard short cut of **[CTRL]+ left/right Arrow** to move the search box along the top of the grid.

Search Refresh Button

Caching of the search results can cause the information being shown to become stale (out-of-date) especially in files that change frequently throughout the business day like the Invoices database. The **Refresh** button in the lower right-hand corner of the search screen when clicked will reload the current search with the latest available information.

So as new invoices are processed in the system during the day when you hit the **Refresh** button it will show all the invoices in the system at that moment for you to search.



Topics covered in the V4 Search Features Chapter

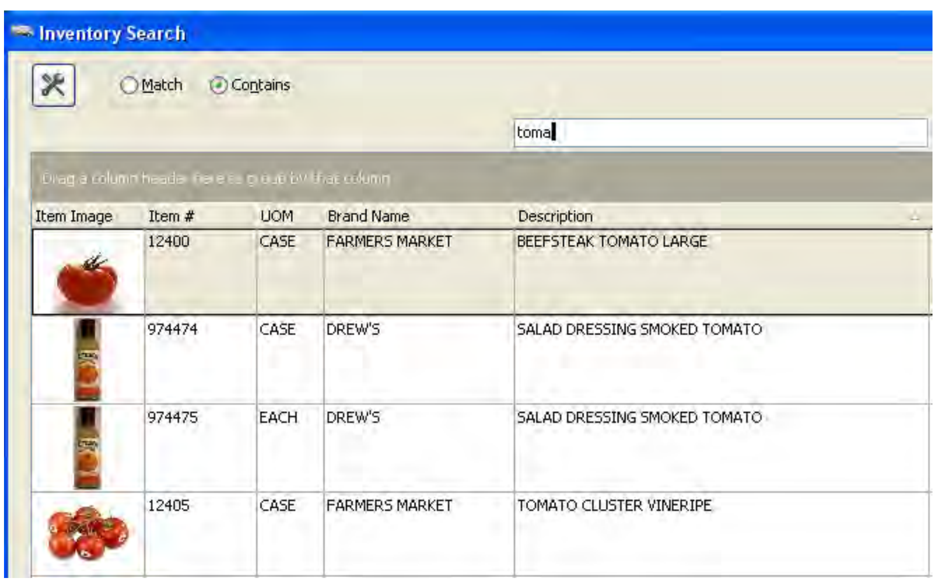
8.1 Performing a Search

Configurations for searching the Inventory, Customer, Salesperson, Vendor, Manufacturer, Comment, Invoice, Lot Location and Purchase Order files can easily be customized in entrée by clicking the **Configure** button. See the Search Configuration Overview section of this chapter for details.

General Search Features

Once the desired search screen opens a white edit box will be located above the default search column. In the Inventory Search screen below the Description column is default. Just start typing the first characters of the value you are seeking and entrée will dynamically move you closer to the correct value.

Example For the letters "toma" in the **Description** column the search results are shown below.



- If you wish to search on a different value than the default for that file click the desired **column heading** and the white edit area will move above that field. Now enter your search text.
- You may re-size a column by clicking and dragging **either edge** of the **column title**.
- The order of the columns may be changed by clicking the **column title** and **dragging** it to a new position.
- Any changes made to the search window are for the **current search only**.

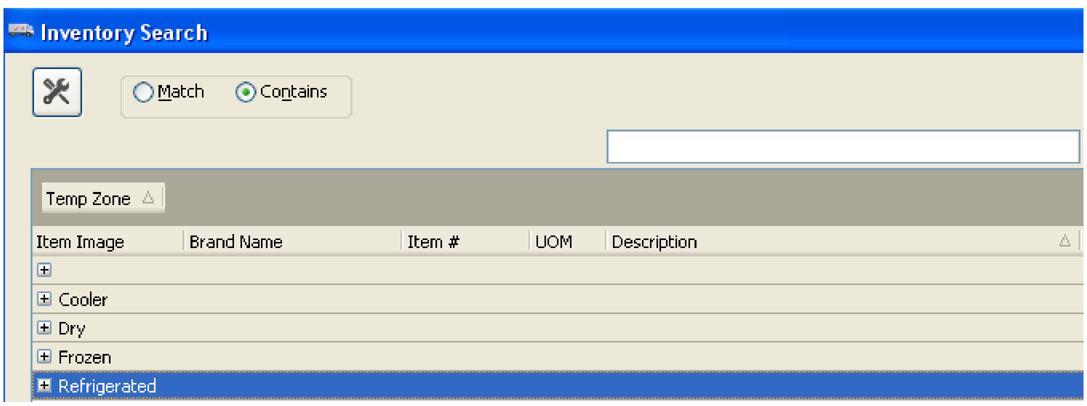
- Sort any column in ascending or descending order by clicking the column header to change the sort arrow into the desired direction.

  Example In the example on the right the Item # column is being sorted in descending order.

  If you click the Item # header again it will reverse the sort order to ascending.

- Drag any column heading to the "Drag any column header here to group by that column" area and the screen data will automatically be grouped by that column. Use the **+** and **-** icons to expand or collapse each group list.

  Example Below the Inventory Search screen was grouped by Temp Zone and the search text box is in the Description column.

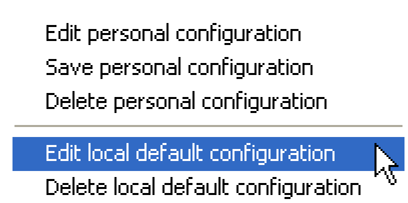


- If you would like to save your changes for all subsequent searches you will need to use the Search Configuration window accessed by clicking the  **Configure** button, located in the top left corner of all entrée search grids. The **Search Configuration Overview** section follows with complete details.

8.2 Search Configuration Overview

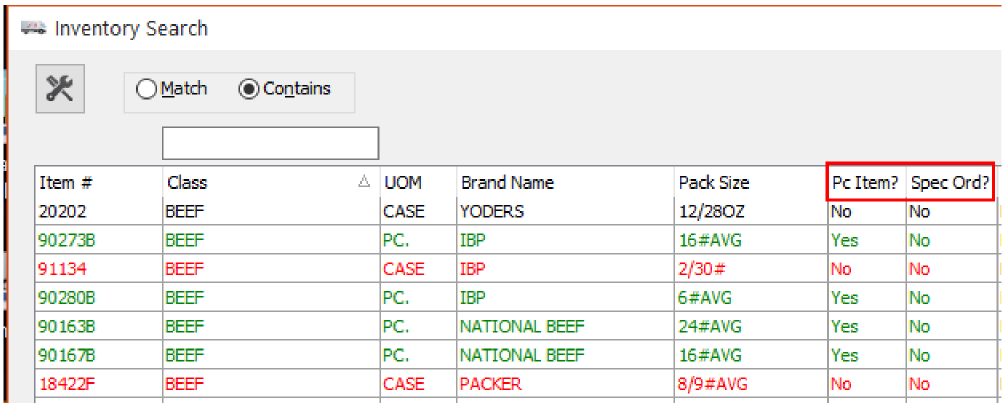
Configurations for searching the Inventory, Customer, Salesperson, Vendor, Manufacturer, Comment, Invoice, Lot Location and Purchase Order files can easily be customized in entrée.

When you click the  Configure button you will have a drop down menu listing Personal Configuration options and Local Default Configuration options.



- Be sure to check the list of columns on a regular basis because new columns are being added all the time. In the version 4.0.29 release the “Pc Item?” and “Spec Ord?” columns were added to Inventory searches. Both columns show “Yes”/”No” values:
  - “Pc Item?” is “Yes” if the item Units of Measure is “PC.”

- If “Spec Ord?” is “Yes” if the item is defined as a “Special Order” item.

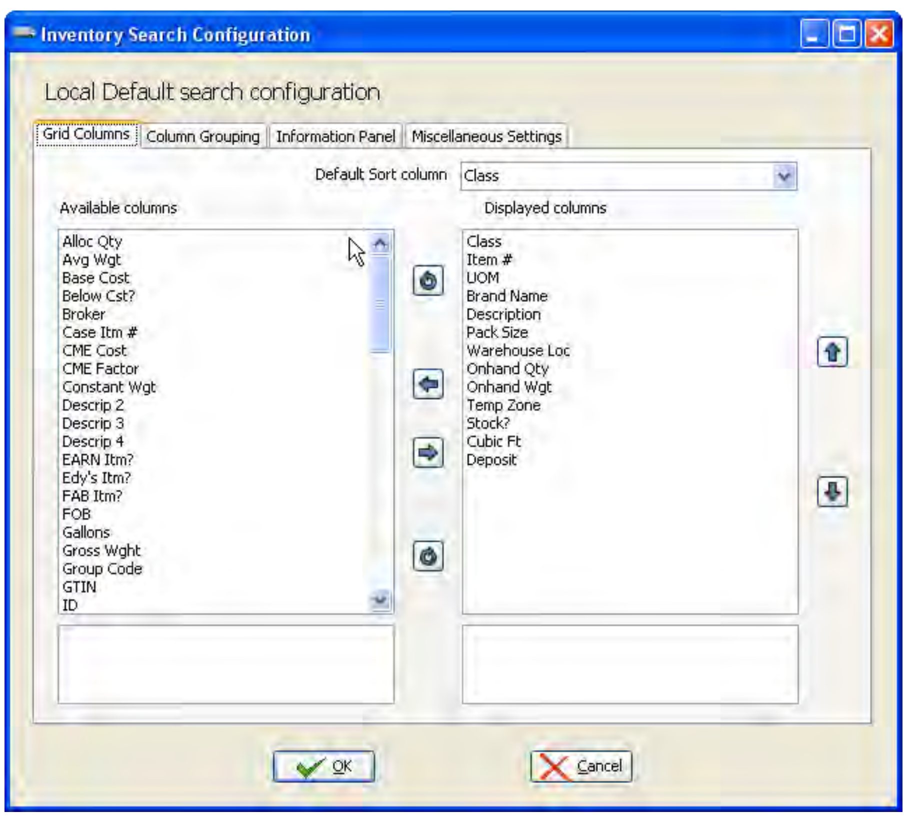


Note The **Configure** button will be hidden if the user does not have authorization to create a **Personal Default** configuration.

Local Default Configuration

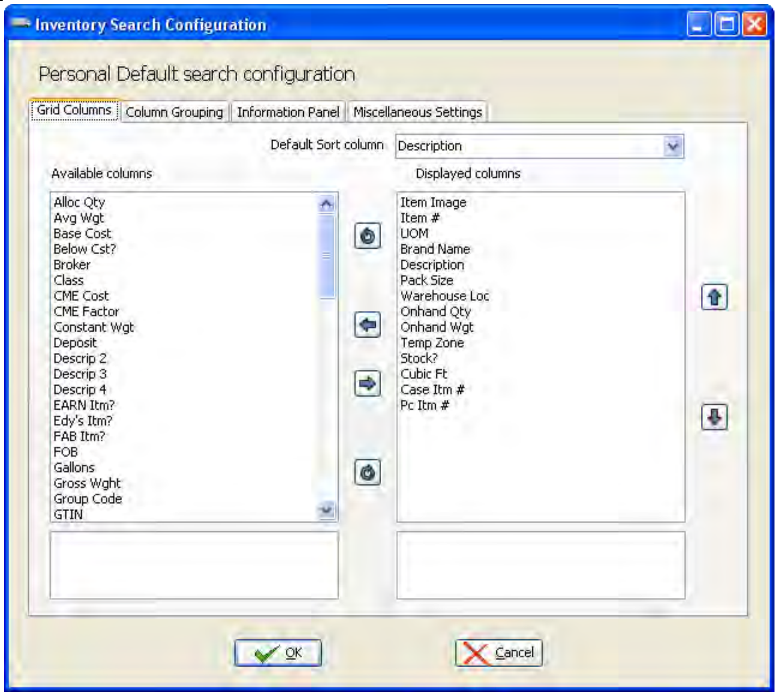
Local Default search configurations are setup by an authorized user, usually the System Administrator, and that configuration will become the search default for all users of entrée.

The System Administrator can customize the Local Default search configuration to align with the way you do business. This option allows each distributor to create their own preferred search layout and have it automatically applied to everyone without the need to update each workstation individually.



Personal Default Configuration

The Personal Default Configuration option allows only the authorized User Account to save a customized search configuration that only that user will see and use.



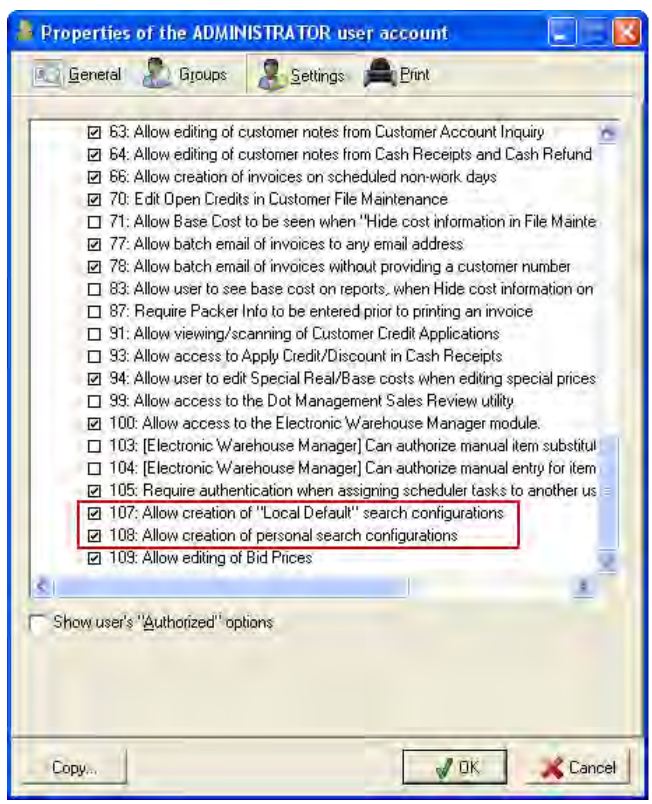
A user who does not have the Personal Default Configuration authorization is prevented from making any changes to the search configuration including not being able to change column positions, column width, or column grouping.

Any saved Personal Default Configurations will be ignored in favor of the Local Default or the built-in default (the default embedded in the entrée code).

Note The Local Default and Personal Default configuration windows use the same tabs and search options as shown here.

Search Configuration Password Options

In the entrée **Security Manager** > **Settings** > **Miscellaneous** options list there are two new options controlling whether a User Account can create Local or Personal search configurations. These options are **#107** and **#108**. Remove the check mark for these options to turn off this feature for individual user accounts.



- Option **#107** is "**Allow creation of 'Local Default search configurations**" controls whether or not a User Account is authorized to create search configurations that will become the Local Default for all users in entrée. This authorization is usually given to the System Administrator and is tightly controlled.

- Option **#108** is "**Allow creation of personal search configurations**" which controls whether or not the User Account is allowed to save a personal search configuration. Each business can decide if they will allow employees to personalize their search screens or use a standard screen for the entire company.

Setting Search Configurations

Whether a Local Default or a Personal configuration in entrée V4 SQL the new Search Configuration window has the same four tabs to assist you with search customization.

These four Search Configuration tabs will be covered in the next sections of this chapter:

- Grid Columns
- Column Grouping
- Information Panel
- Miscellaneous Settings

Using the Available / Displayed Column Configuration Feature

The Grids Columns, Column Grouping and Information Panel tabs will use the Available / Display lists to control columns in the configuration. Below is an explanation of the controls in the Available / Display columns feature.

The **Available Columns** list contains all of the available fields that are not currently displayed on the current search screen.

- A column in the Available columns list can be moved to the Displayed columns list by selecting the column to move and clicking the button.

The **Displayed Columns** list contains all of the fields that will be displayed in the current search screen.

- A column in the Displayed columns list can be removed and put back in the Available columns list by selecting the column to remove and clicking the button.

Settings Displayed Column Order

- The first field in the displayed fields list will appear on the far **left** of the search grid with each subsequent field appearing to the right of the previous one. To relocate a field in the Displayed columns list, select it with your mouse and click the appropriate or buttons until it is where you would like it.

Remove All Columns

- All of the columns in the Displayed columns list can be removed at once by clicking the button.

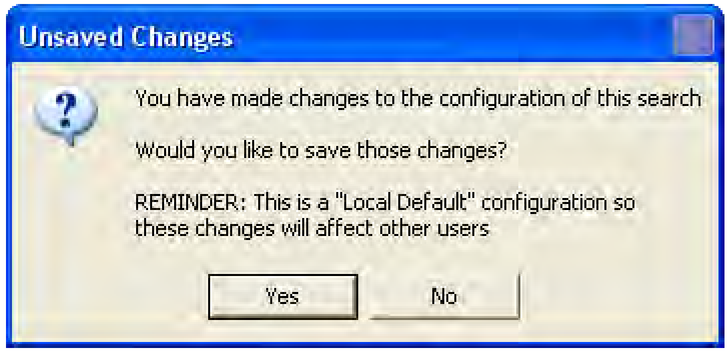
Add All Columns

- All of the columns in the Available columns list can be added to the Displayed columns list at once by clicking the button.

Unsaved Configuration Changes

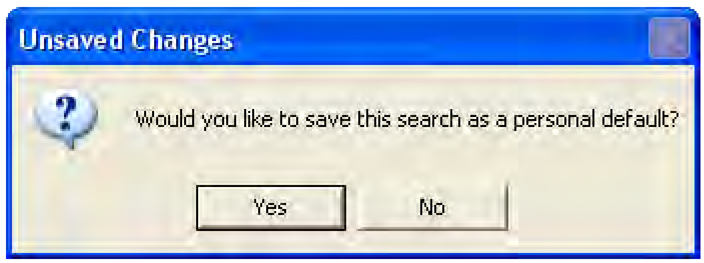
Once you have configured your Local Default or Personal Default search screen and click OK. Now use your customized search configuration. When you exit the search screen, if you have changed a search configuration, a message will be displayed. The message displayed is different for Local and Personal search configuration defaults.

- If you changed the **Local Default** this Unsaved Changes message will display.



Caution Click **No** here unless you want the search defaults for every entrée user updated.

- If you changed the **Personal Default** configuration this message will display. Click **Yes** here if you want to save your recent changes as your *new* default.
- Click **No** here and your **Personal Default** configuration will not be changed



8.2.1 Grid Columns Tab

The Grid Columns tab is used to configure the default behavior of the current search screen. Here you can customize which columns will be displayed and their order, the default sort column and the default search column.

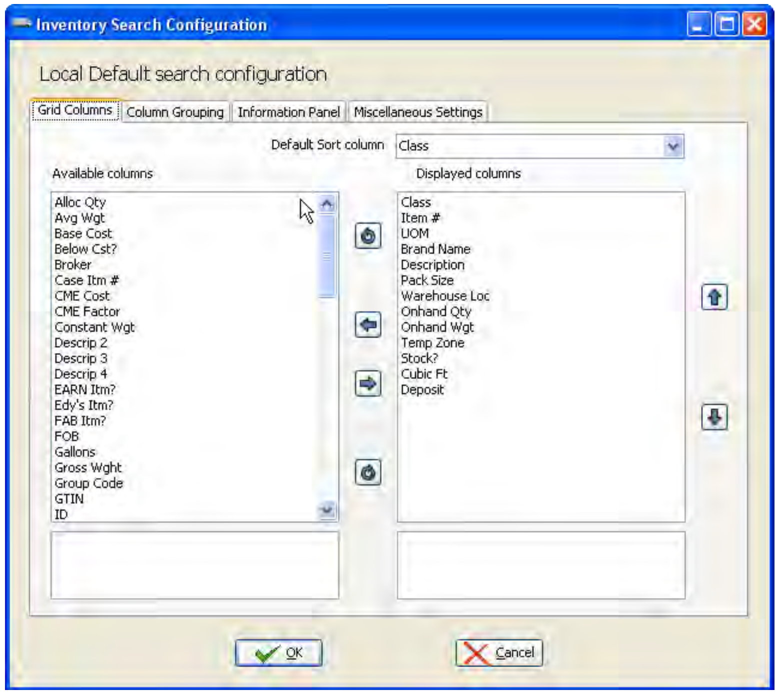
Controlling the Search Screen Grid Columns

- Move a column from the **Available Columns** list to the **Displayed Columns** list by selecting the column to move and clicking the  button. You can do the reverse with the opposite arrow as you customize your configuration.
- Organize the column order in the **Displayed Columns** list using the  arrows.

Note Find a detailed explanation of the **Available / Displayed Columns** feature in the **Search Configuration Overview** section of this chapter.

- **Default Sort Column**
  Once the columns to be displayed are added to the **Displayed Columns** area use this drop down menu to select your default sort column.

  Click **OK** to save your selections.



Example Typically Class, as seen in the image below, or Item # are used as the default sort column for Inventory Search.

Class	Item #	UOM	Brand Name	Description	Pack Size	Warehouse Loc
APPETIZERS	30118	CASE	CONTESSA	BATTERED GREEN BEANS	4/3#	FA1322B
APPETIZERS	30133	CASE	ALEXIA	ONION RINGS BEER BATTERED	6/2.5#	FA1261B
APPETIZERS	30145	CASE	ANCHOR	BREADED FIESTA BOLD POPPERS	2/4#	FA1302A
APPETIZERS	30147	CASE	ANCHOR	BREADED MAC & CHEESE WEDGES	6/3#	FA1222B

8.2.2 Column Grouping Tab

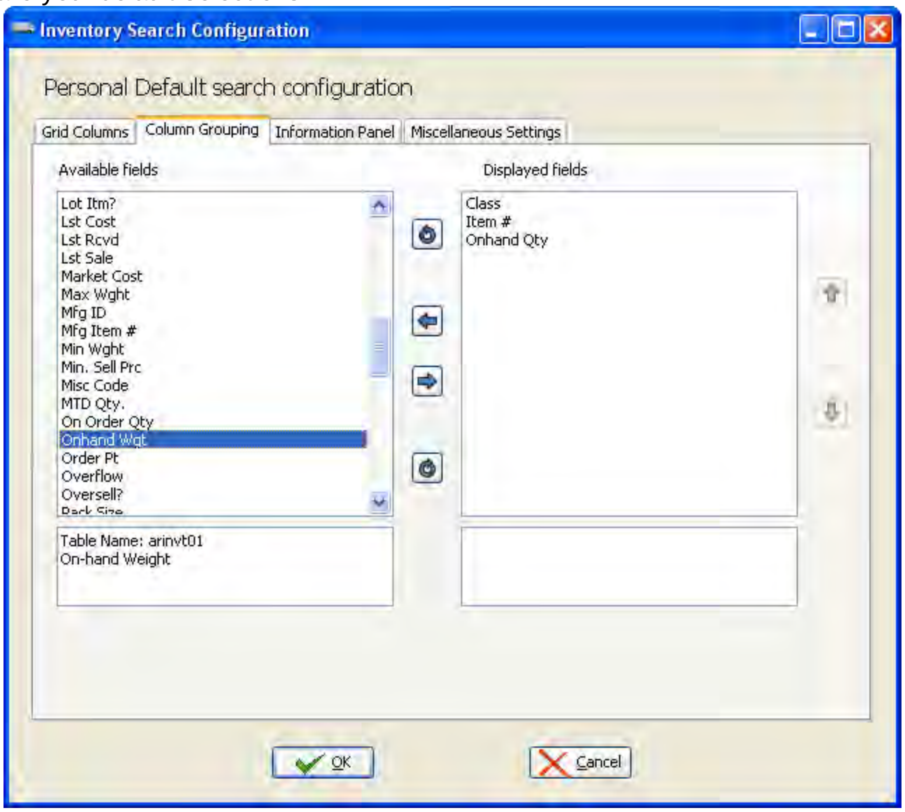
The Column Grouping tab is used to configure a hierarchical data structure in the Inventory Search screen and will become the default behavior of the current search screen. In the column grouping example below Class is first followed by Item # then Onhand Qty. The top column in the Displayed fields list is the first level of the grouping hierarchy.

Customizing Column Grouping

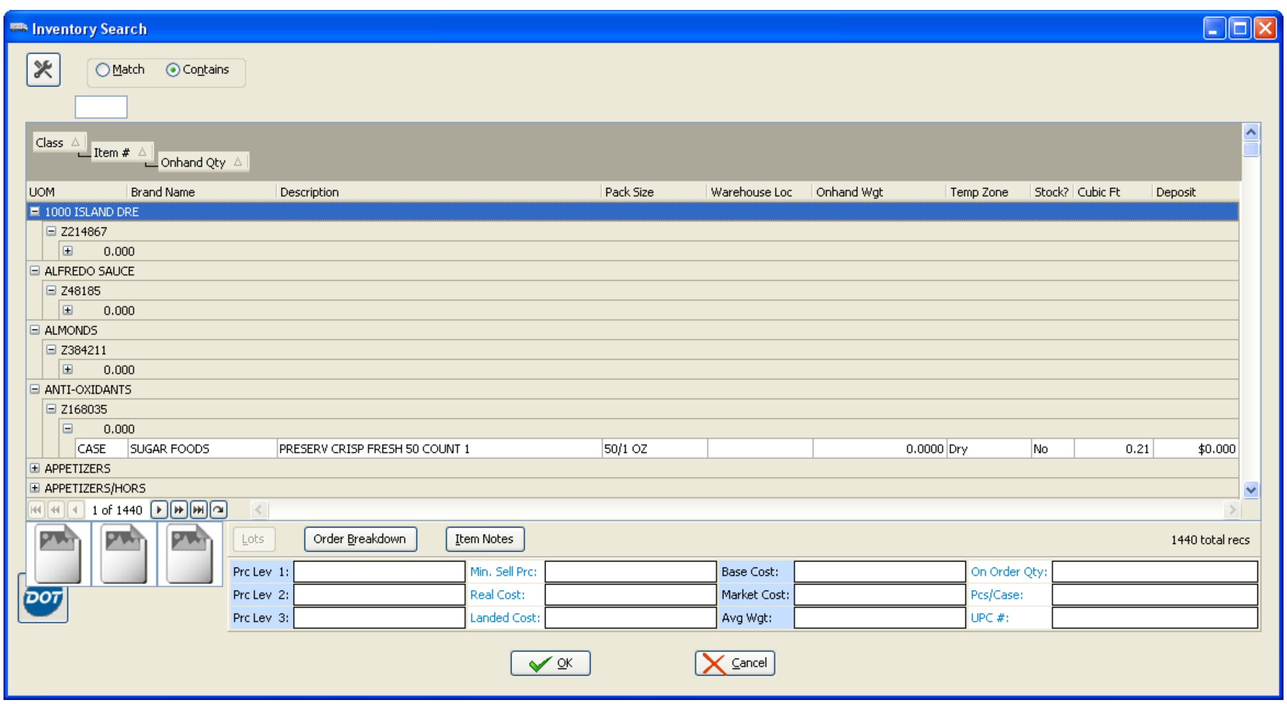
- Move a column from the **Available Columns** list to the **Displayed Columns** list by selecting the column to move and clicking the  button.
- Organize the column order in the **Displayed Columns** list using the  arrows.

Note Find a detailed explanation of the **Available / Displayed Columns** feature in the **Search Configuration Overview** section of this chapter.

- Click **OK** to save your default selections.



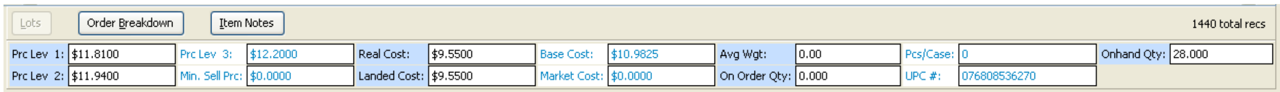
Example Here we see the columns grouped in the Inventory Search screen according to our Column Grouping tab settings above, Class, Item # and Onhand Qty. In Inventory Search once you open the 3 grouping levels the rest of the columns are displayed as shown in the **Anti-Oxidants** example here.



8.2.3 Information Panel Tab

The **Information Panel** feature is used to further customize your view of an item's information by adding more item information in the panel located in the lower section of the Inventory, Customer, Salesperson, Vendor, Invoice and Purchase Order search screens.

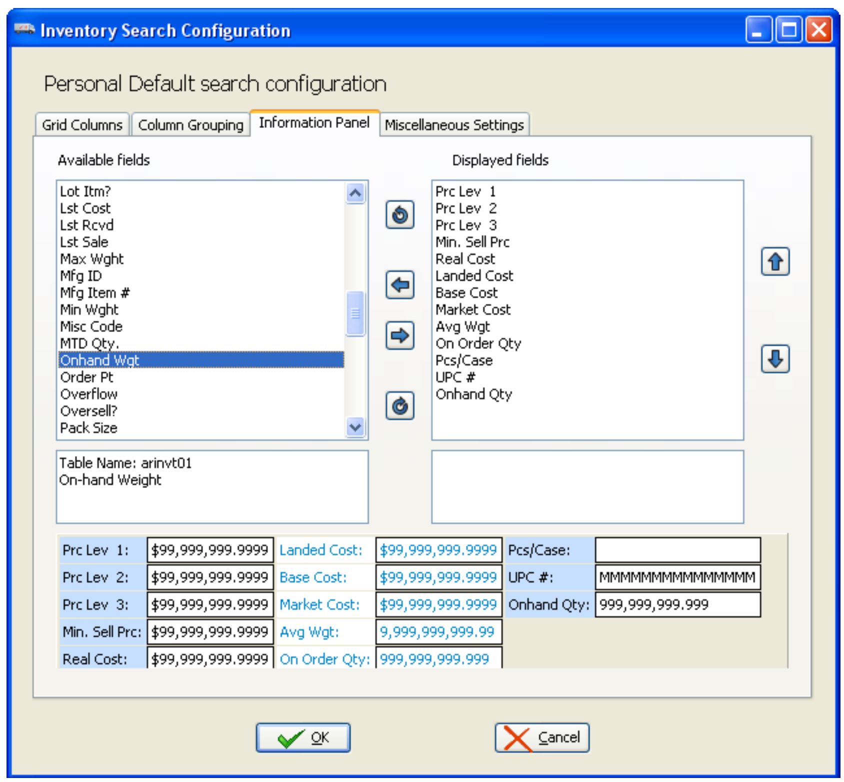
When you click an item in the Inventory search screen more item information can be displayed in the Information Panel below. Here you see the Information Panel display created by the Personal Default search configuration shown below.



Customizing the Information Panel

- Move a column from the **Available Columns** list to the **Displayed Columns** list by selecting the column to move and clicking the  button.
- Organize the column order in the **Displayed Columns** list using the  arrows.
- Click **OK** to save your selections.
- The **Preview** area below will show the Displayed fields as they will appear in the Information Panel.

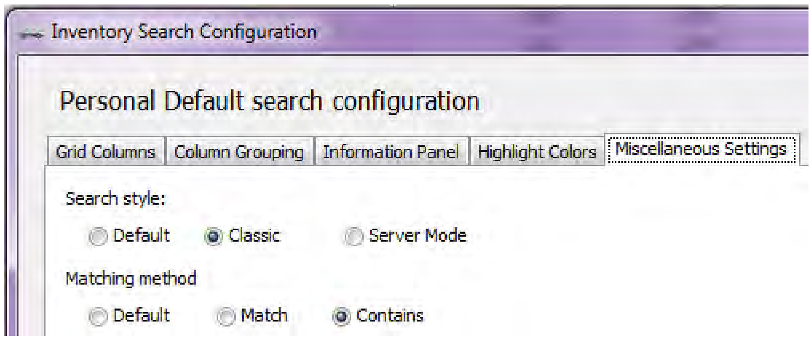
Find detailed explanations of the **Available / Displayed Columns** feature in the [Search Configuration Overview](#) section of this chapter.



8.2.4 Miscellaneous Settings Tab

The **Miscellaneous Settings** tab options will vary for each of the files; Inventory, Customer, Salesperson, Vendor, Manufacturer, Comment, Invoice, Lot Location and Purchase Order.

- All search configuration dialogs in the system will have **Search Style** and **Matching method** on the **Miscellaneous Settings** tab.



Search Style

Select whichever search style works the best for your environment and make that the default for all of your searches. At NECS we have found that the “Classic” style can be faster than “Server Mode” and in other cases they are more or less the same speed in returning search results. Choose what works best in within your technology and networking environment.

- **Default:** The default search style is configured in the “**Search System Options**” utility found in System Options Additional Features. See the **Additional Features** section of the System Options chapter for more detailed information.
- **Classic:** To try and maximize performance in the search grid the "buffering" option is enabled. So it only physically loads a set number of records into the grid at any one time (currently set to 150 records). Column grouping is not supported in this search style. When you select it a message box will display warning you about this and ask if you would like to proceed.
- **Server Mode:** Collects all of the records in the database at once to load the search grid.

Note **Having your Personal or Local Default configurations explicitly set to "Classic" Search Style overrides the default setting in System Preferences.**

Matching Method

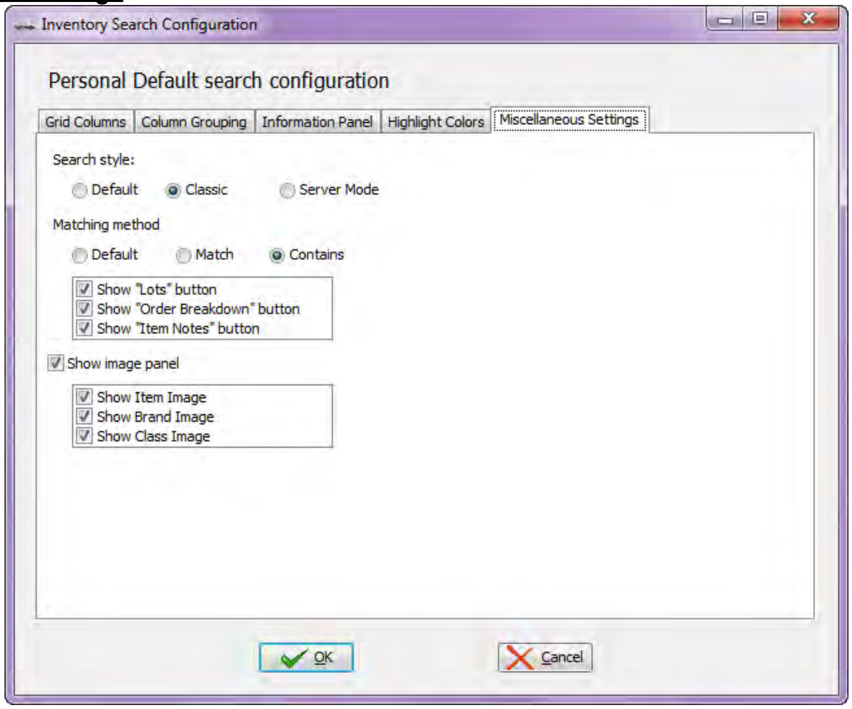
- **Default -** The default matching method built into the entrée system for that screen.
- **Match:** By default the **entrée V4 SQL** search system will use **Match**. You can use the Up, Down, Home, End, Page Up and Page Down keys on your keyboard in the search screen once you run your initial search.
- **Contains:** Performs a partial match which is good if you only know a portion of the value you are looking for. The search screen will update immediately as you enter the search text, only showing items that contain the text you are typing.

Hot Tip! In each search configuration in the system you can override the **Search Style** or **Matching method** setting on a “per search” basis using the **Configure** button and changing the options on the Miscellaneous Settings Tab.

- At this time there are some files that only have the **Matching method** option in the Miscellaneous Settings Tab. These files are: Purchase Order, Manufacturer, Vendor, Salesperson, Invoice, Comment and Warehouse Location.

Inventory Search Miscellaneous Settings

In addition to **Search Style** and **Matching method** you have the following options.



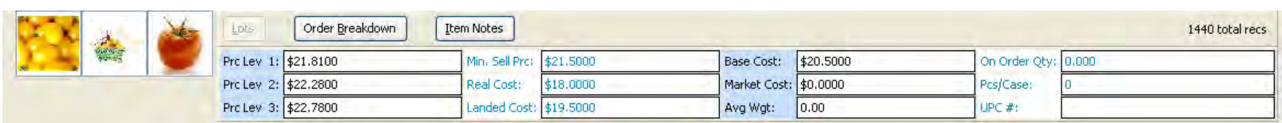
Buttons:

- **Show Lots button**
- **Show Order Breakdown button**
- **Show Item Notes button**

Note If you do not have Lots turned on in entrée the **Show Lots** button will not be displayed.

Images:

- **Show Image Panel** - Check to display the image panel to the left of the Information Panel at the bottom of the inventory search screen.

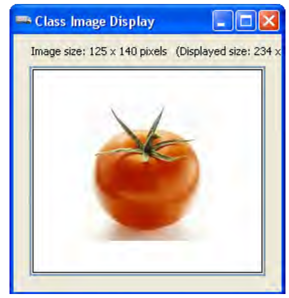


Once the Image Panel is enabled you can choose what images to display in the panel depending on the images you have in your entrée system.

- **Show Item Image -** Assigned to the item in Inventory File Maintenance.

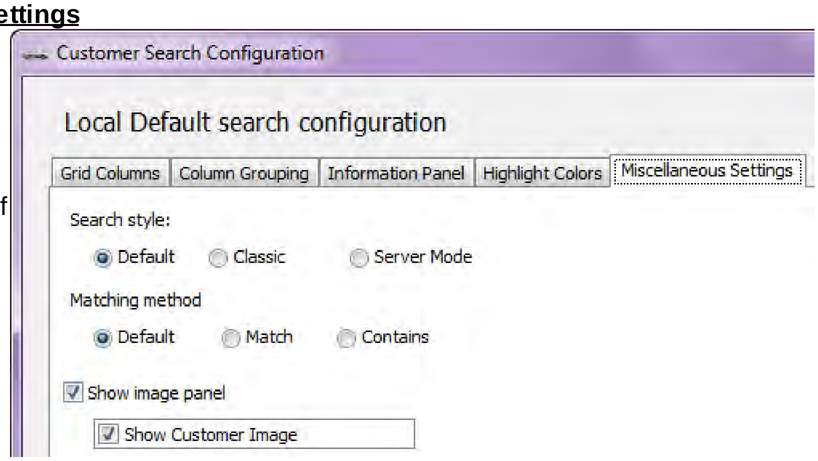
- **Show Brand Image -** Added to entrée in Brand Maintenance and assigned to the item in Inventory File Maintenance.

- **Show Class Image -** Added to entrée in Class Maintenance and assigned to the item in Inventory File Maintenance.



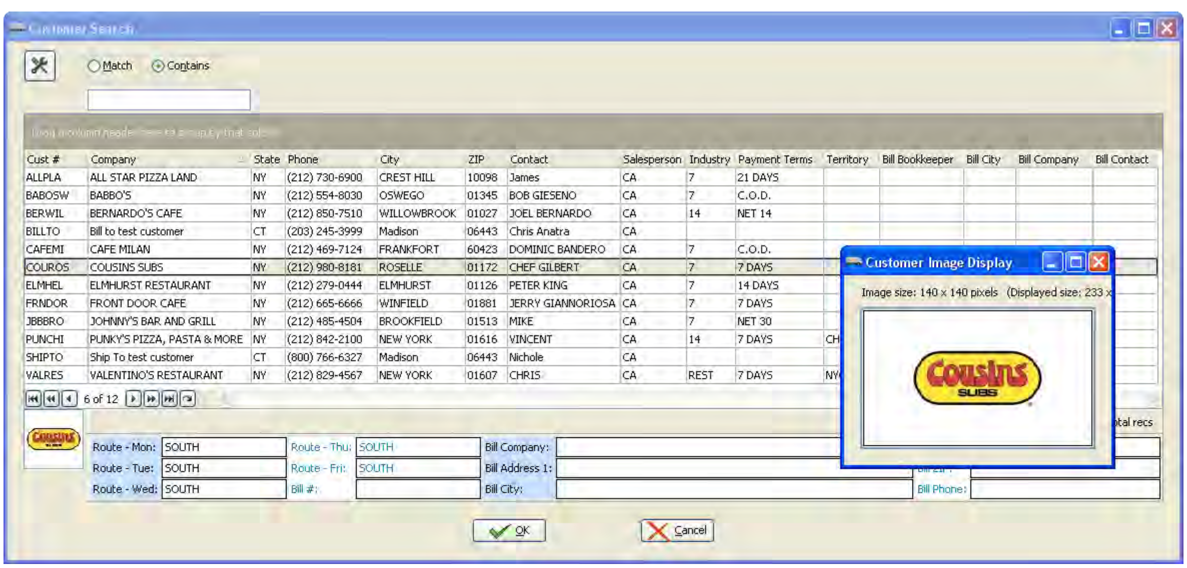
Customer Search Miscellaneous Settings

In addition to **Search Style** and **Matching method** you have the following options.



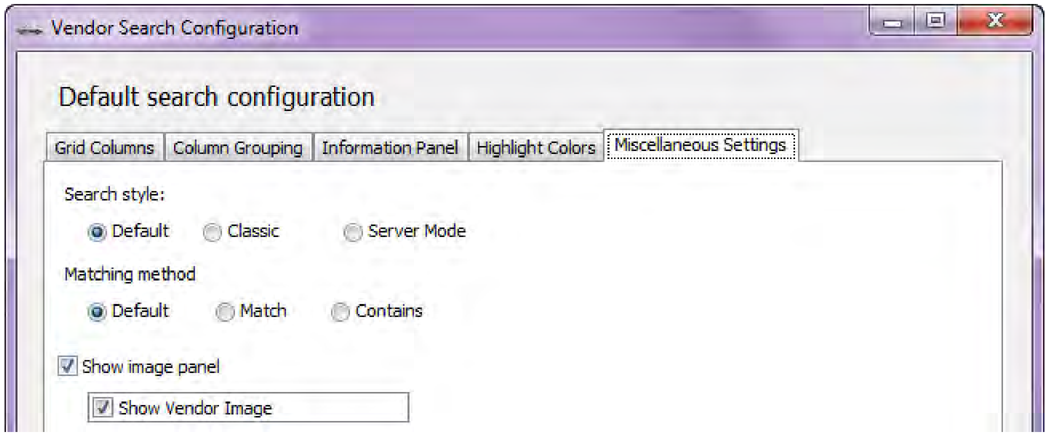
- **Show Image Panel** - Check to display the image panel to the left of the Information Panel at the bottom of the search screen.
  - **Show Customer Image -** Assigned in entrée Customer File Maintenance.

Example The Customer Search screen below shows the image panel in the lower left corner. When the customer's small image in the image panel is clicked a larger image is displayed in the Customer Image Display dialog box. Click the red **X** box to close the image display box.



Vendor Search Miscellaneous Settings

In addition to **Search Style** and **Matching method** you have the following options you have the new vendor image.

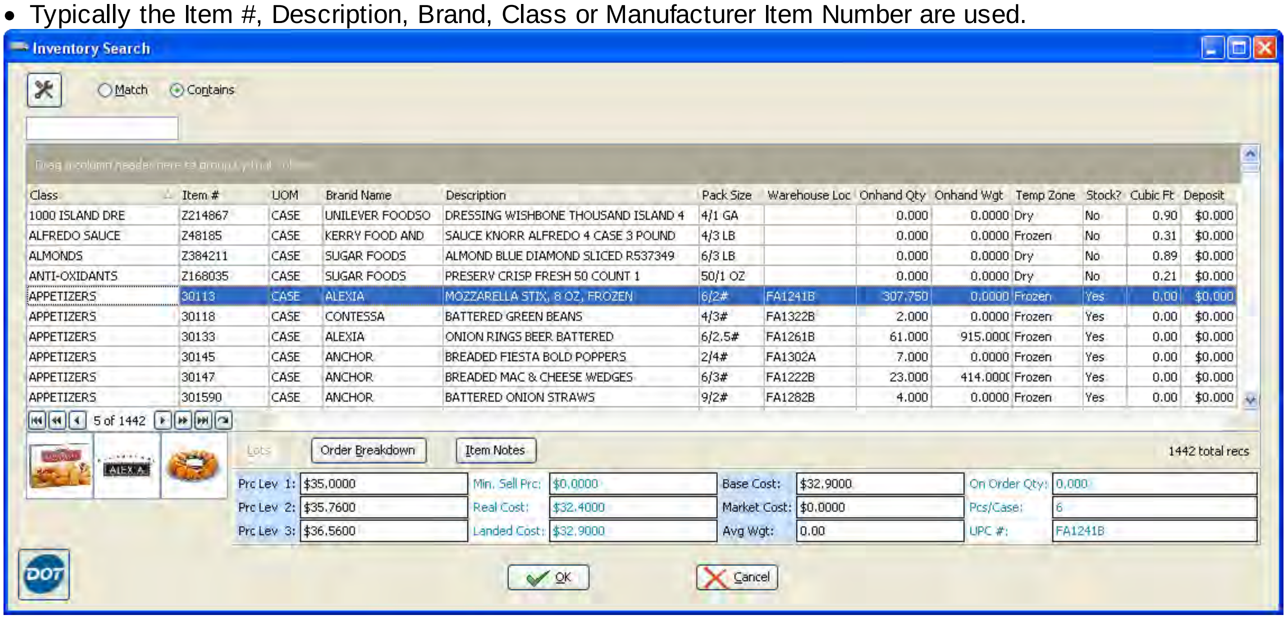


- **Show Image Panel** - Check to display the image panel to the left of the Vendor Panel at the bottom of the search screen (image below).
    - **Show Customer Image -** Assigned in entrée Vendor File Maintenance.

8.3 Inventory Search Screen

The **Inventory Search** screen will assist you in looking up any inventory item.

- Searches can be performed using any column in the search screen.
- Click the desired column and enter your search text in the white search text box that appears above the column.
- Typically the Item #, Description, Brand, Class or Manufacturer Item Number are used.

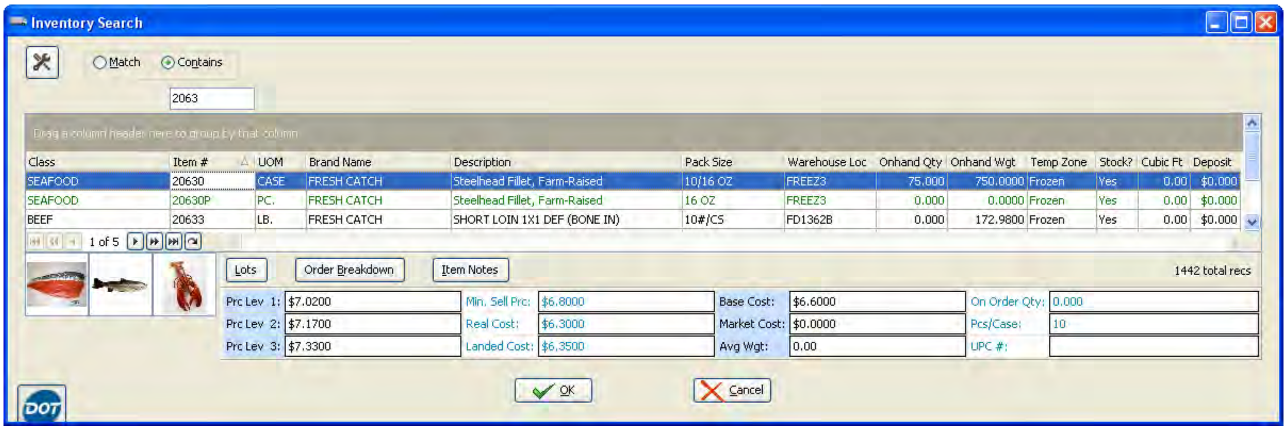


- When you click an item in the Inventory search screen more item information can be displayed in the Information Panel below if the configuration for the Information Panel tab has columns in the Displayed fields section in your search configuration.

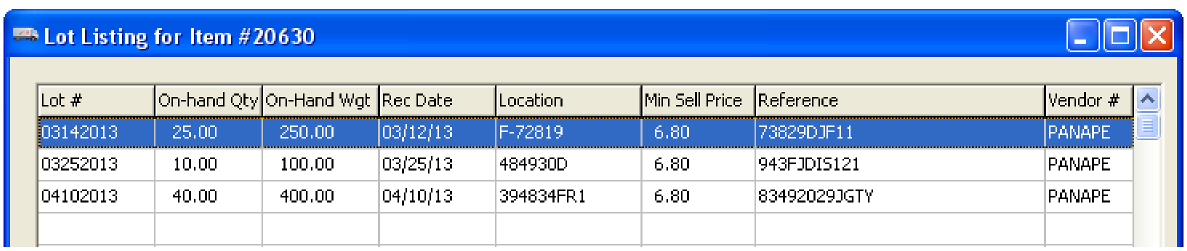
Inventory Search Buttons

Lots Button

- If the currently selected item is a Lot based item the **Lots** button will be enabled as seen in the image below.

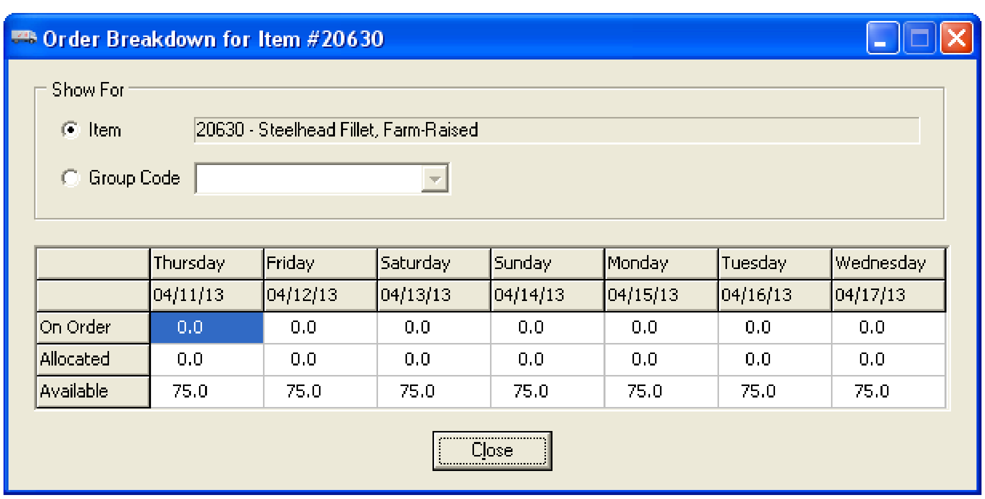


- Click the **Lots** button to view the **Lot Listing** details for the selected item.



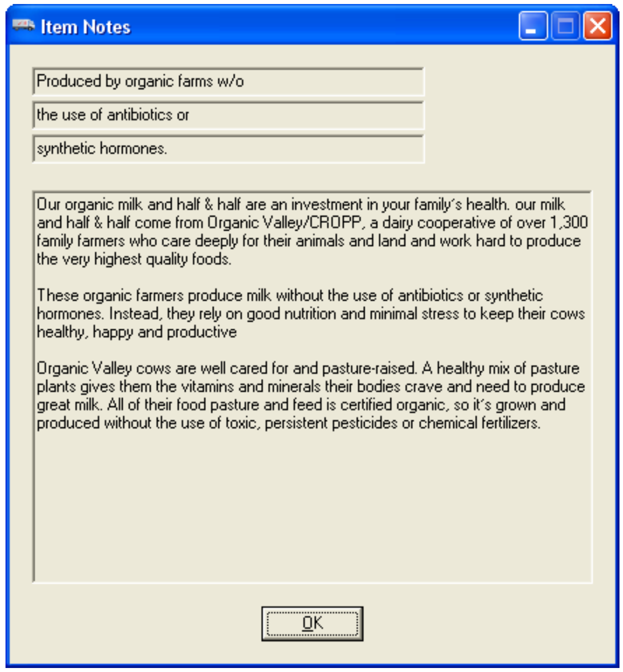
Order Breakdown Button

- Click the **Order Breakdown** button for the selected item to see the next seven days of orders. Here you see the information for a Lot Item.

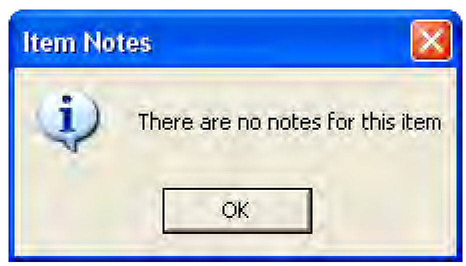


Item Notes Button

- Click the **Item Notes** button to view any notes on the item.



- If no there are no **Item Notes** this message box will display.



- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

8.3.1 DOT Foods Inventory

The **entrée.DOT** software add-on module is designed for NECS **entrée** users who purchase from **Dot Foods**. It allows **entrée** users to automate procedures related to costs, pricing, purchasing and receiving, along with the ability to make your entire order guide from Dot Foods available to your customers.

Items purchased from Dot Foods can be integrated into the NECS **entrée** system providing you the ability to drastically increase the number of products you can supply to your customers – without having to increase the size of your warehouse.

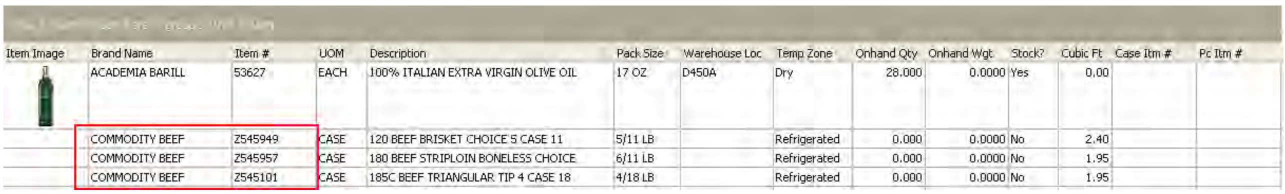
If your company does not have the **entrée.DOT** software module you will not see this feature.

entrée V4 SQL gives you the ability to control whether items from the **DOT Foods** catalog are visible or hidden in the Inventory Search screen.

The **DOT** icon in the lower left corner of the Inventory Search screen is the switch used to hide or show items from the **DOT Foods** catalog.

When the DOT icon is gray DOT Foods catalog items are hidden. Click the gray DOT icon to load your DOT Foods Catalog items into the Inventory Search screen.	When the DOT icon is the color blue your DOT Foods catalog items are loaded and visible. Click the blue DOT icon to hide the DOT Foods Catalog items again.

- In the Inventory Search screen DOT Foods item numbers usually begin with the letter '**Z**' as seen in the example below.



Item Image	Brand Name	Item #	UOM	Description	Pack Size	Warehouse Loc	Temp Zone	Onhand Qty	Onhand Wgt	Stock?	Cubic Ft	Case Itm #	Pc Itm #
	ACADEMIA BARILL	53627	EACH	100% ITALIAN EXTRA VIRGIN OLIVE OIL	17 OZ	D450A	Dry	28.000	0.0000	Yes	0.00		
	COMMODITY BEEF	Z545949	CASE	120 BEEF BRISKET CHOICE 5 CASE 11	5/11 LB		Refrigerated	0.000	0.0000	No	2.40		
	COMMODITY BEEF	Z545957	CASE	180 BEEF STRIPLOIN BONELESS CHOICE	6/11 LB		Refrigerated	0.000	0.0000	No	1.95		
	COMMODITY BEEF	Z545101	CASE	185C BEEF TRIANGULAR TIP 4 CASE 18	4/18 LB		Refrigerated	0.000	0.0000	No	1.95		

<u>Manufacturer's Item Number and DOT Foods</u>

Why would you need the manufacturer’s item number?

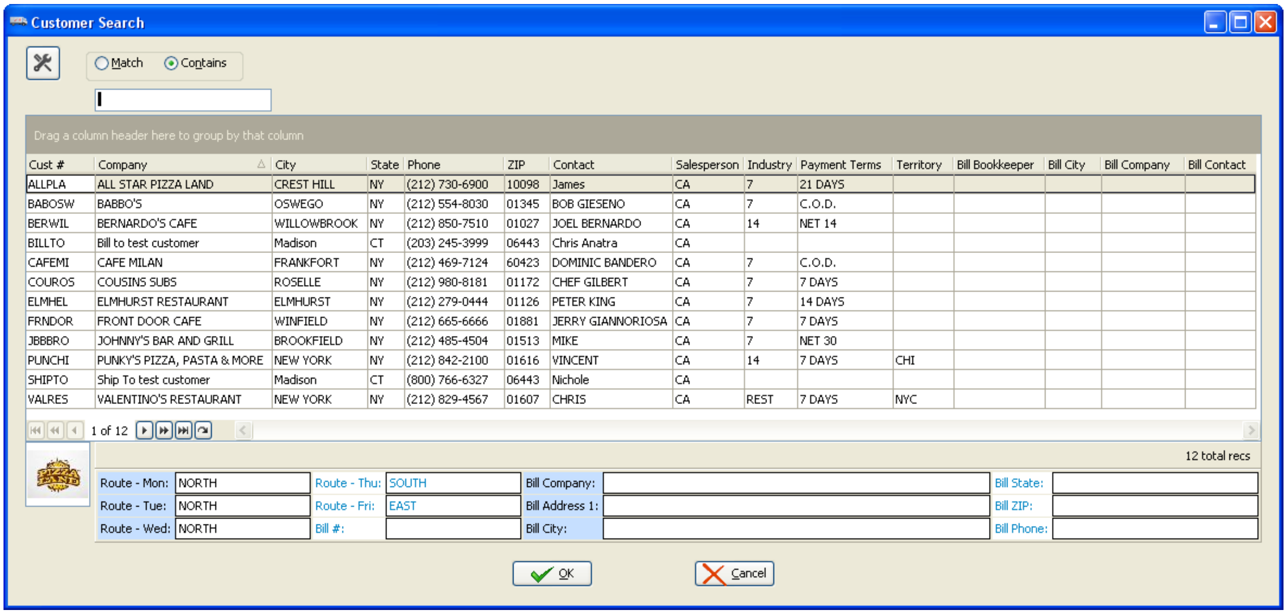
If you purchase from Dot Foods or would like to in the future this field will be used for those items. Also using the manufacturer and their item numbers on your **entrée** inventory items can assist you in the event of product recalls. Over 65 reports in **entrée** can print, group by and sort by Manufacturer ID, Manufacturer Name and Manufacturer Item Number as well as filter by Manufacturer ID.

How to add manufacturer’s item numbers: Use Manufacturer File Maintenance to add manufacturers to the **entrée** system. Then add the manufacturer’s item numbers to each item using the Vendor tab in Inventory File Maintenance.

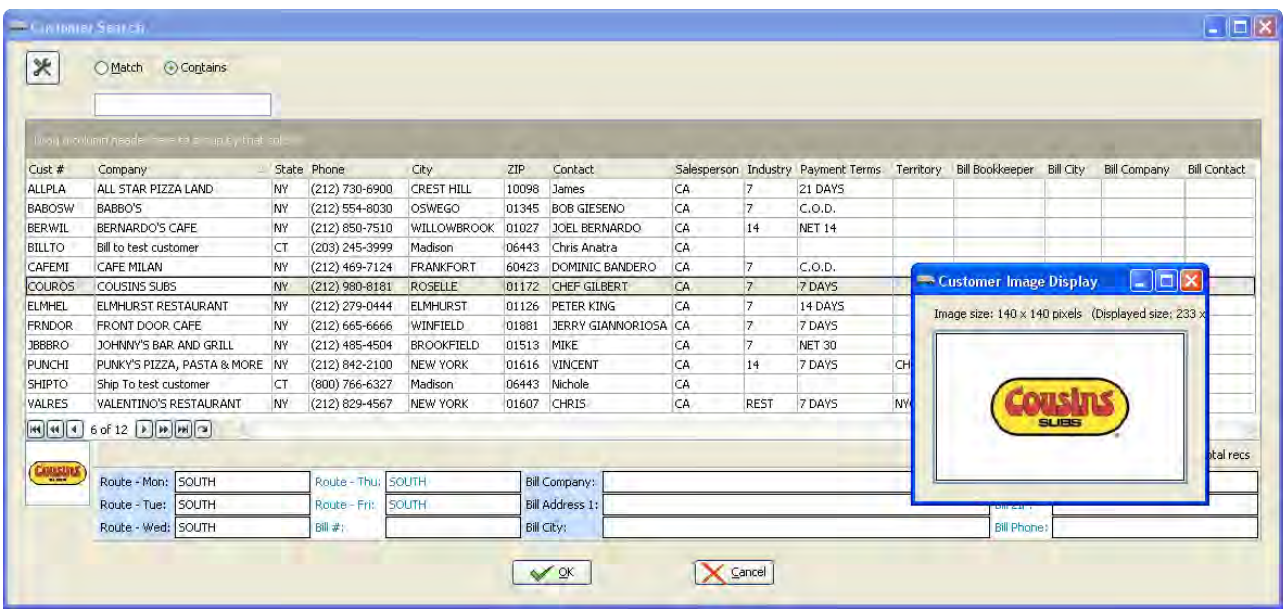
8.4 Customer Search Screen

The **Customer Search** screen will assist you in looking up any customer in entrée.

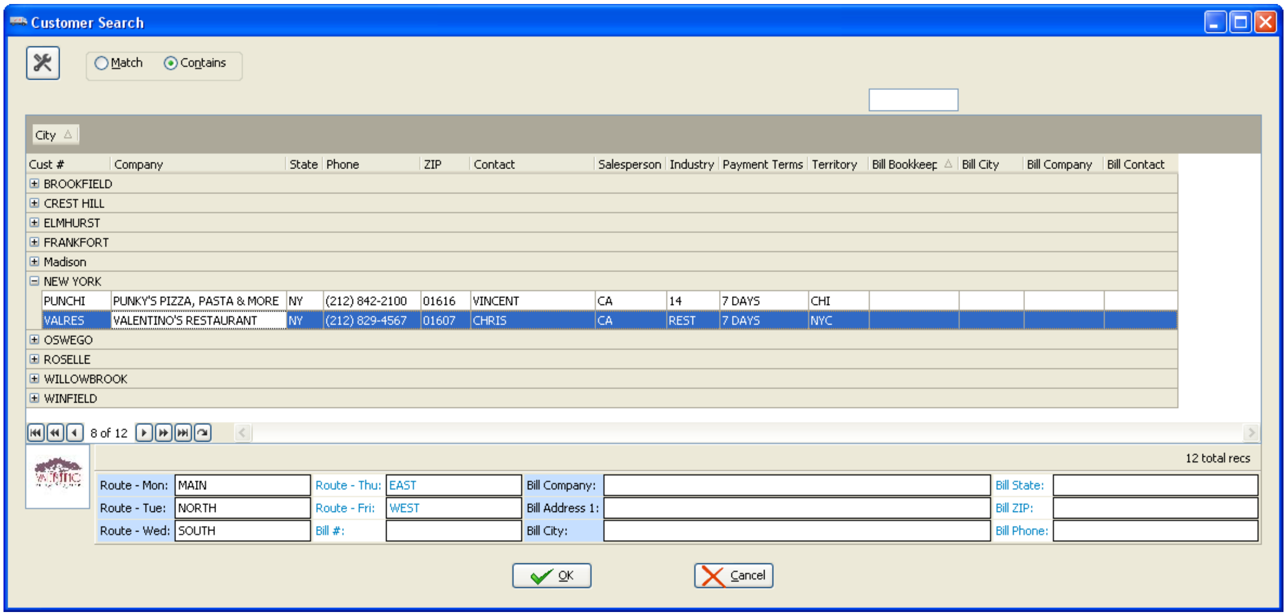
- entrée will allow users to perform searches against any of the columns in the grid including customer number, company, bill to #, city, zip, and phone number.



- When the search configuration **[Miscellaneous Settings]** **Show Customer Image** option is enabled any customer image assigned in entrée Customer File Maintenance will be displayed in the **Image Panel**. Click the customer's small image and a larger image is displayed in the Customer Image Display box as shown below.



Example This is an example of customers grouped by City in the Customer Search when the column header was dragged to the group by area.

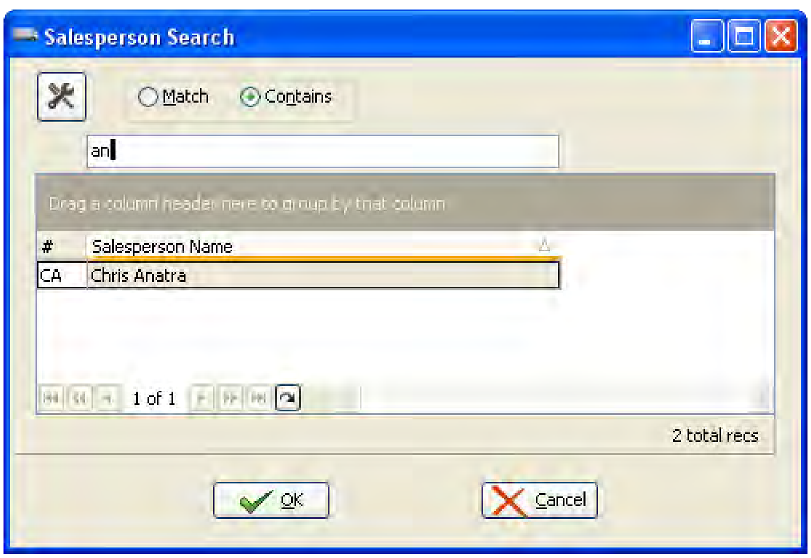


- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

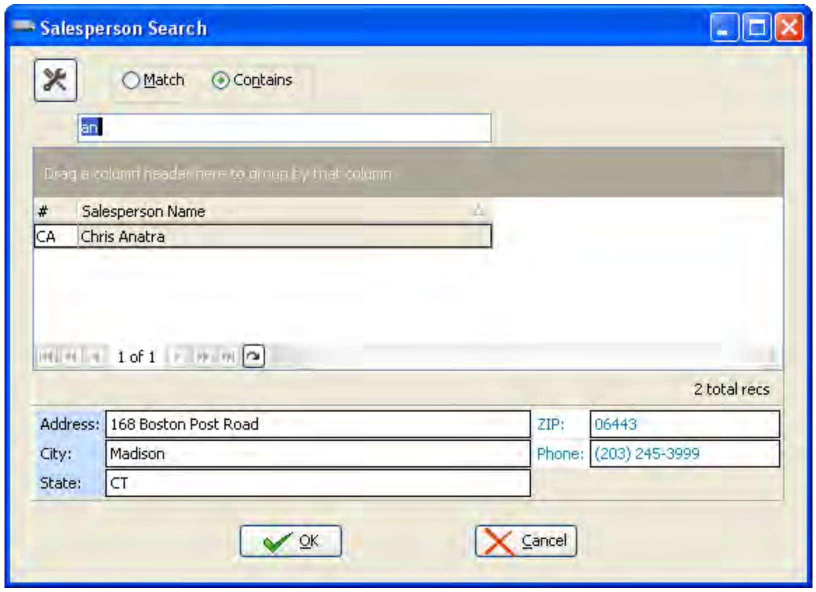
8.5 Salesperson Search Screen

The **Salesperson Search** screen will assist you in looking up any Salesperson or Broker.

- entrée will allow users to perform searches against the salesperson's number or the salesperson's name.



Example This is an example of a search using the **Salesperson Name** field using the letters 'an' with the Information Panel displayed.



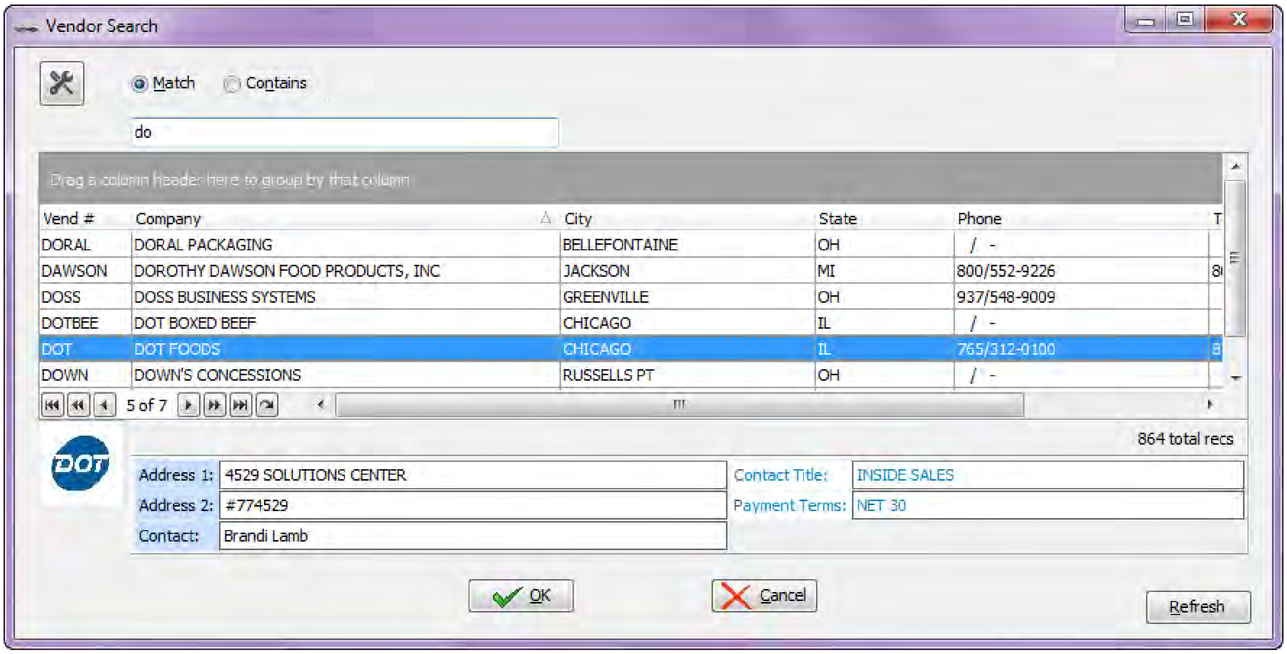
- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

8.6 Vendor Search Screen

The Vendor Search screen will assist you in looking up any vendors that have been added to the system using Vendor File maintenance.

- Searches can be performed using any column in the search screen grid.

Example This is an example of a search using the Company field using the letters 'do' with the Information Panel displayed below.

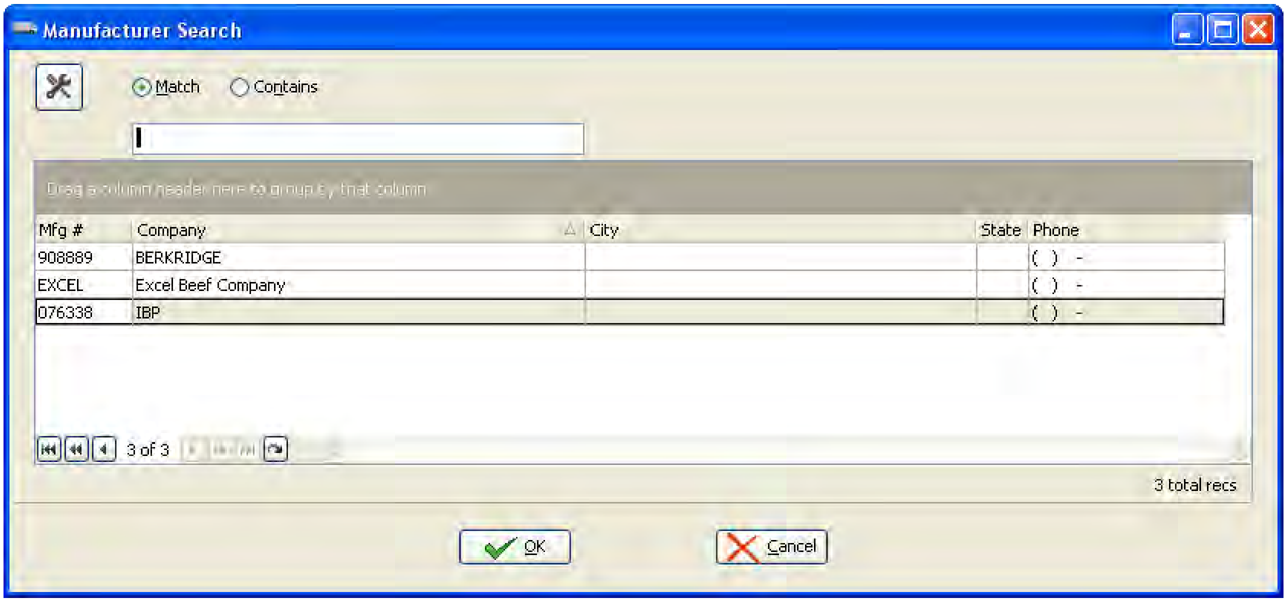


- Click the desired column and enter your search text in the white search text box that appears above the selected column.
- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

8.7 Manufacturer Search Screen

The Manufacturer Search screen will assist you in looking up any vendors that have been added to the system using Manufacturer File maintenance.

- Searches can be performed using any column in the search screen.
- Click the desired column and enter your search text in the white search text box that appears above the column.

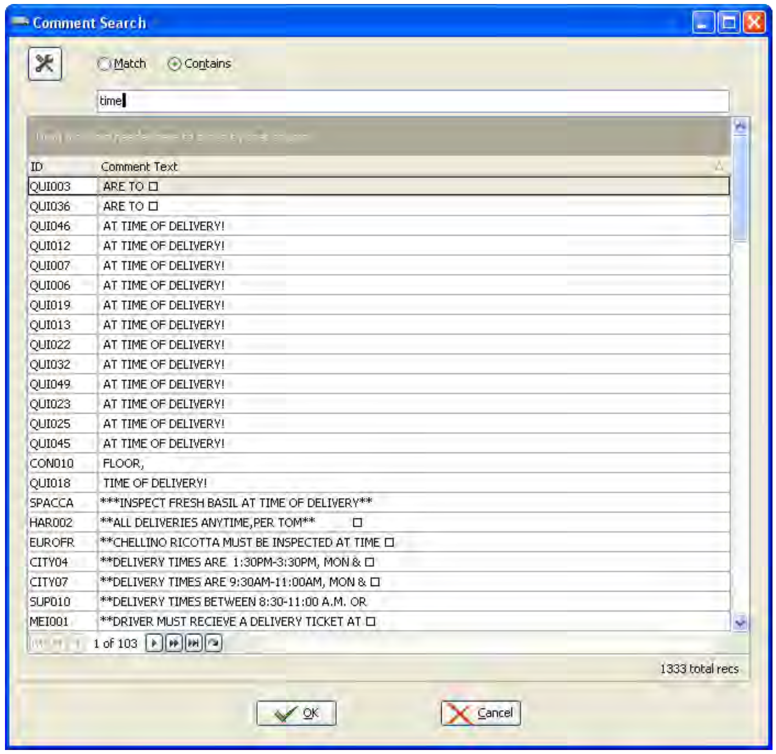


- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

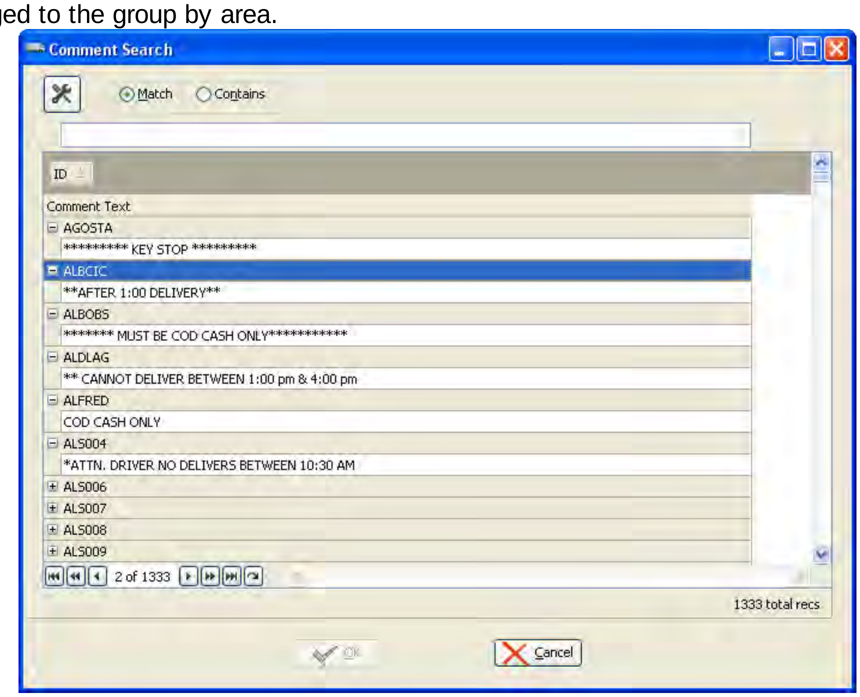
8.8 Comment Search Screen

The Comment Search screen will assist you in looking up any **Comment ID**.

- entrée will list each line of text in the comment on the Comment Search screen.
- When selecting a comment be sure to select the first line of the desired comment.
- The Comment Search screen displays the comment ID and the Comment Text. In the image here the search text box is over the Comment Text field where you can enter text or words to search for in the Comment Text field. In this example we searched for 'time' in the Comment Text with the results you see below.



Example This is an example of comment grouped by ID in the Comment Search when the column header was dragged to the group by area.



- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

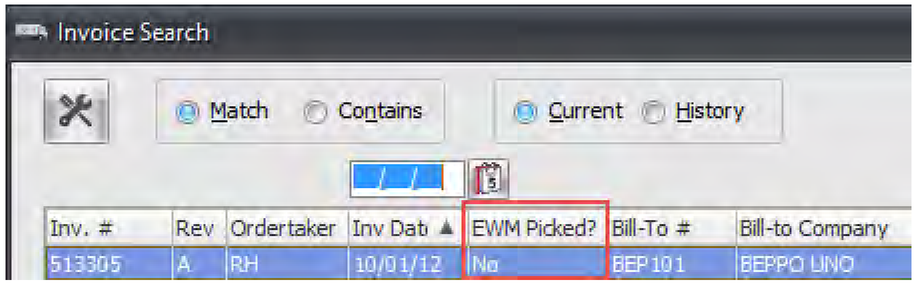
8.9 Invoice Search Screen

The Invoice Search screen will assist users in looking up any invoice number. The addition of "Current" or "History" file selection along with the Match / Contains feature allows you to perform a more focused search especially when looking for an older invoice that may be in the History file.

 Click the **Configure** button and customize the columns used in the search screen.

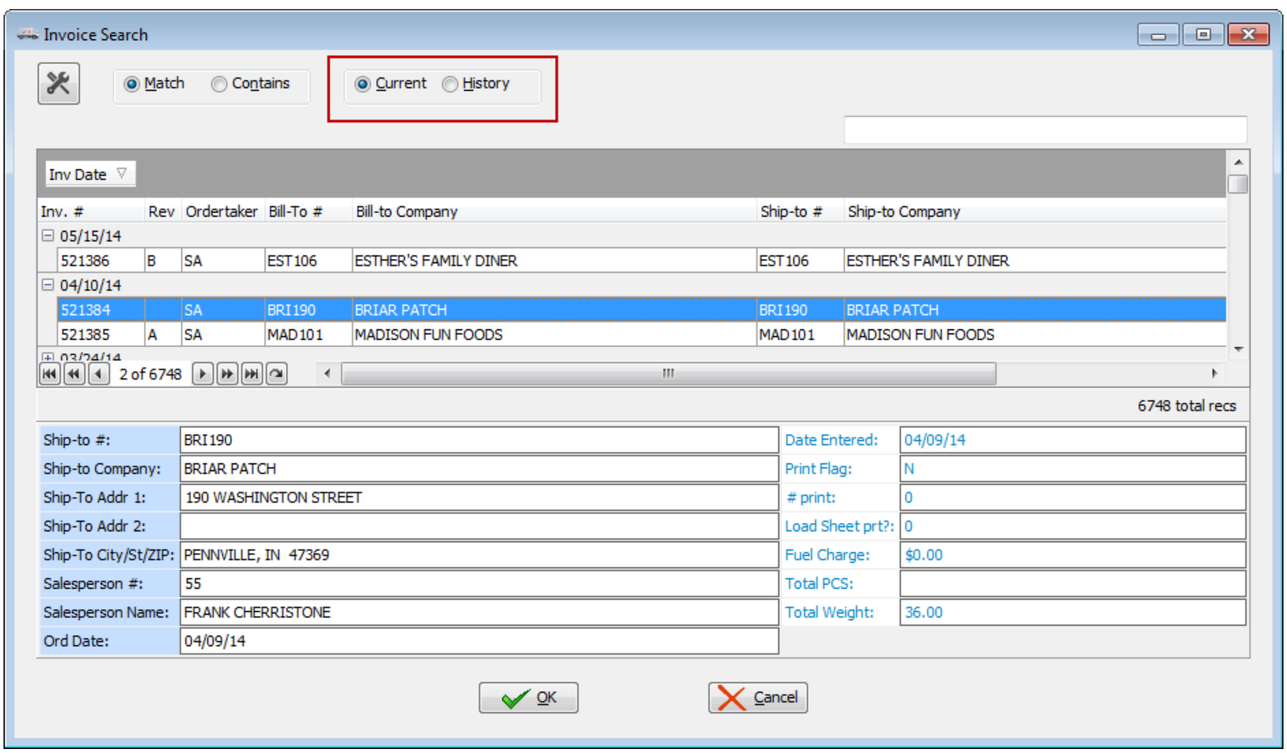
To support the Electronic Warehouse Manager the **EWM Picked?** column has been added as an option.

When the column has a "**Yes**" the newest invoice revision has been fully picked.

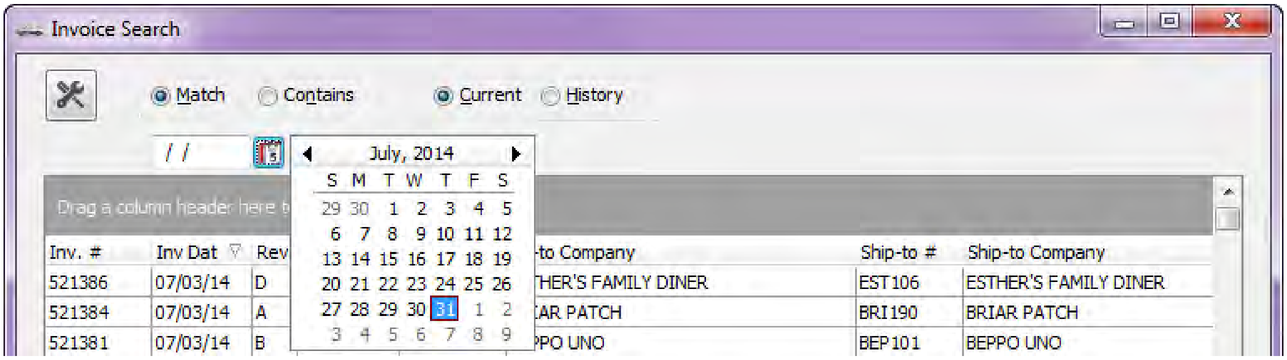


entrée will allow users to perform searches against any column including the invoice number, customer number, invoice date, order number, ship to company, and the bill to company.

- Invoices that have been moved to the history files by the **Close Period Utility** may also be searched for here by clicking the **History** option.

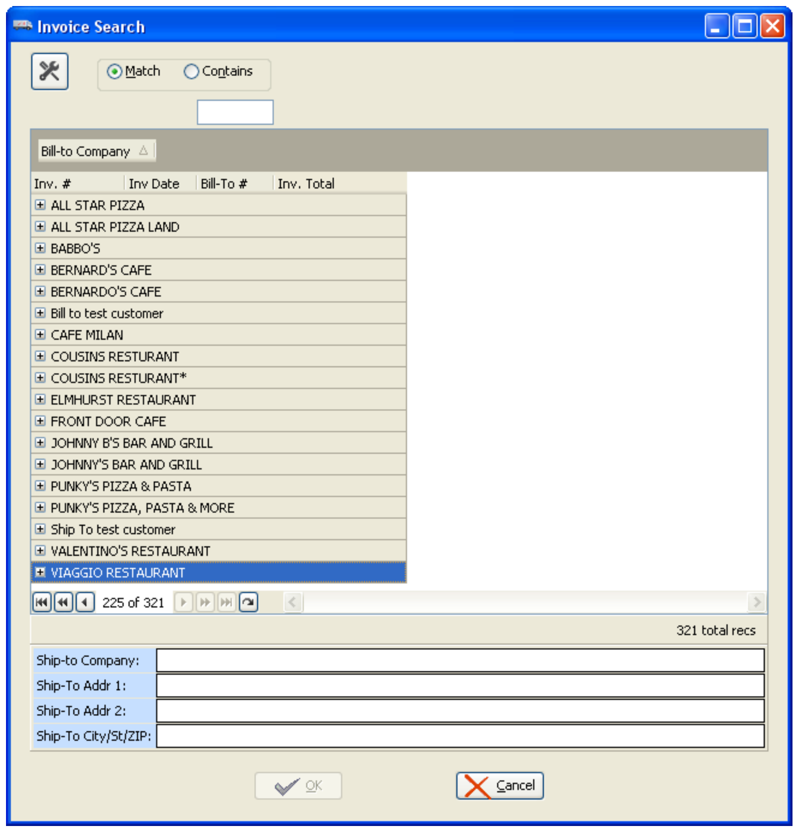


- When a date field is selected the calendar is displayed to allow you to search by date.



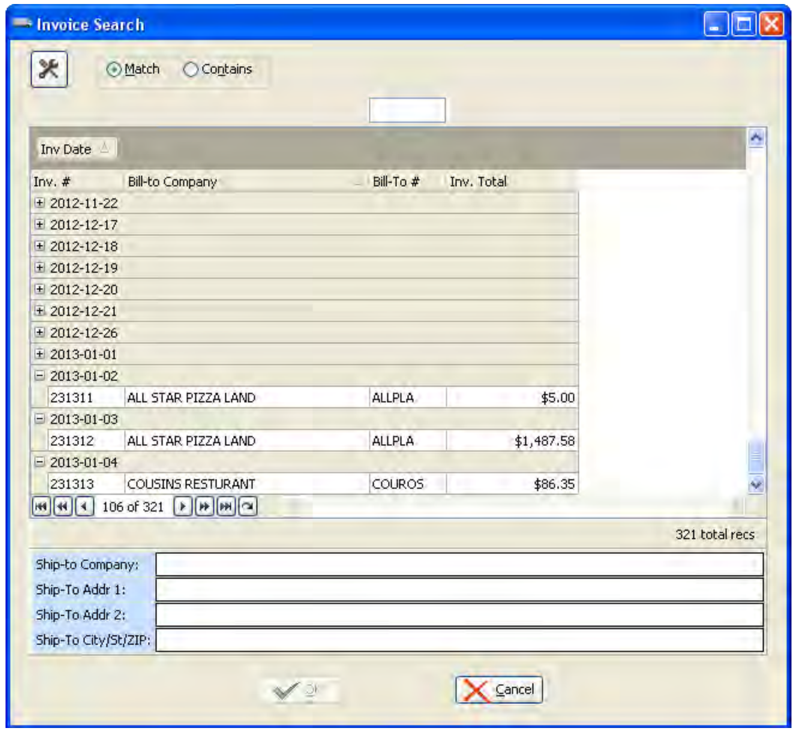
Example

This is an example of invoices grouped by **Bill-to Company** in the Invoice Search when the column header was dragged to the group by area.



Example

This is an example of invoices grouped by **Inv Date** in the Invoice Search when the column header was dragged to the group by area.



- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

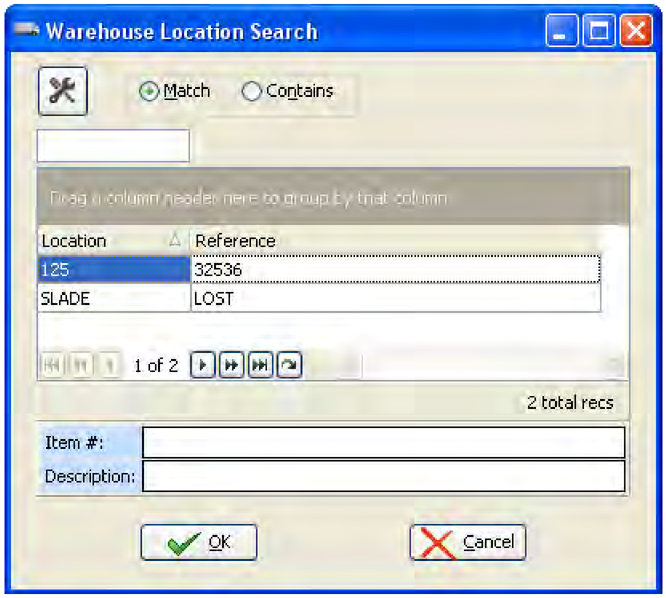
8.10 Warehouse Location Search screen

The **Warehouse Location Search** screen is accessed in the File menu and will assist users in looking up any Lot's location ID.

- The Warehouse Location search screen can display these fields for lots: Location, Reference, Description of the location, and the designated Item # for that location.

- The Warehouse Location search screen is only search-able on the **Location** field.

- In this example the Information Panel below has been enabled by adding columns to the Displayed fields list above.



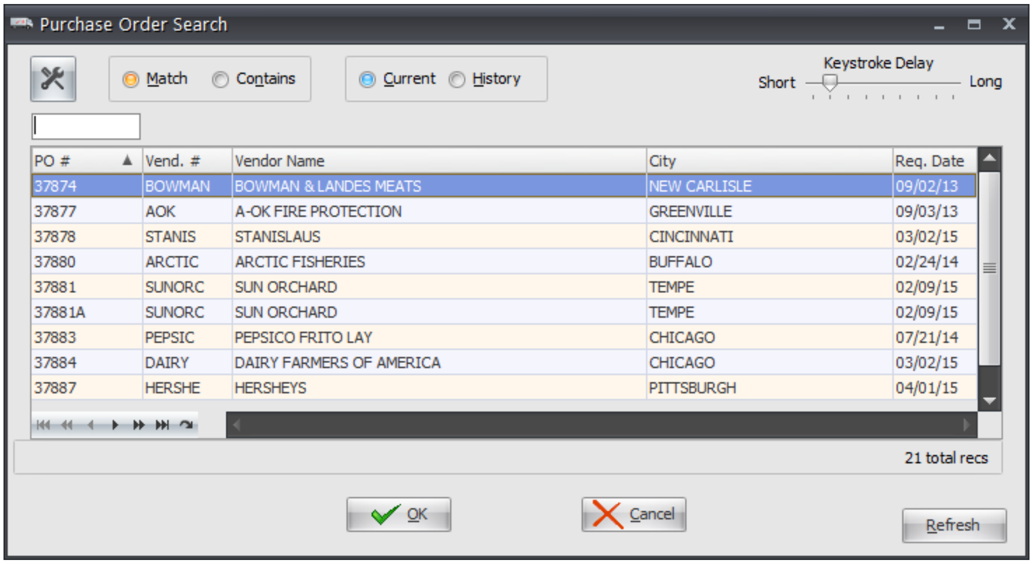
- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

8.11 Purchase Order Search Screen

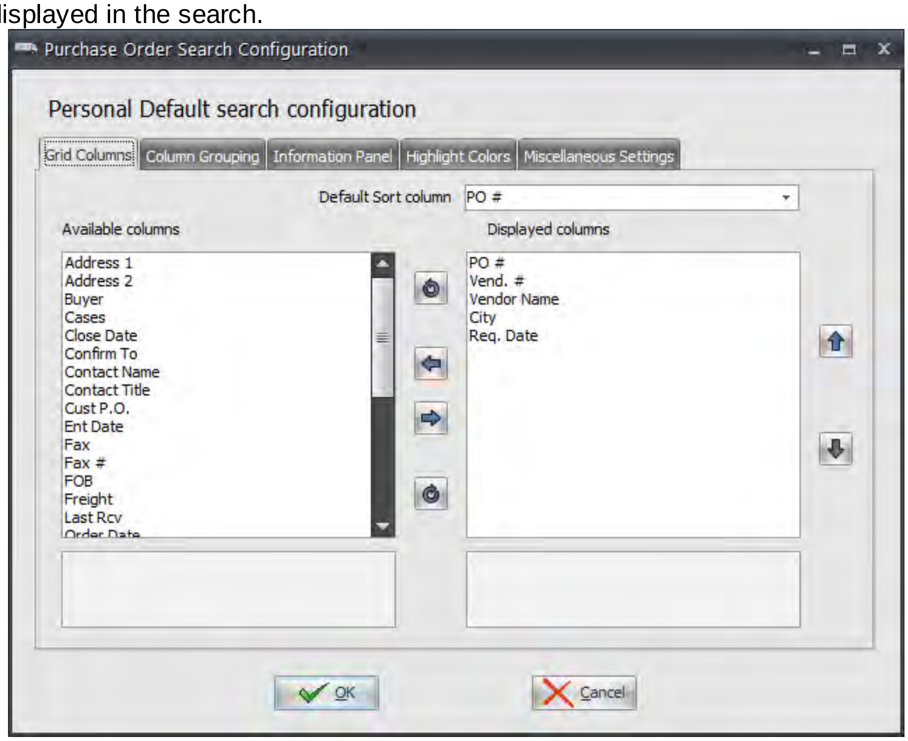
The Purchase Order Search screen will assist users in looking up any purchase order numbers. entrée allow users to perform searches against any column including the purchase order number, vendor number, and the vendor name.

Hot Tip! Use the **Current** / **History** file selection options to limit the number of records searched.

- Searching the "**Current**" Purchase Order file will *not include* "*Closed*" Purchase Orders.
- Searching the "**History**" file will show you the "**Closed**" Purchase Orders.



Example The example below the PO Search Configuration dialog where you can customize the columns to be displayed in the search.



- See the **Search Configuration Overview** topic for more information about searching capabilities and options.

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