

ADMINISTRATOR

Cleanup Duplicates Program on System Administrator Menu 2 Changed to Handle Record Numbers greater than 999,999

Release Level: 4.05.007 Program Request: ---- (cleanup)

If duplicate records are found when re-indexing a corrupt data file, the duplicates are written out to a special file for “clean up.” The “Cleanup Duplicates” utility program is used by Mylee customer support personnel to fix the data file. A change was made to this program to handle record numbers greater than 999,999 because some customers have data files (such as the point of sale line item file) with over a million records.

Script Change to Properly Detect a User Already Logged In

Release Level: 4.05.013 Program Request: ---- (setup.profile)

The “setup.profile” script that runs when users log in checks to see if a user is already logged in. Prior to this release, the script did not differentiate between two login ID’s when the name of one login ID was embedded in another. For example, the script did not detect a difference between “jeff” and “jeffr” and thus would not allow “jeff” to login if “jeffr” was already logged in. A correction has been made to the “setup.profile” script to address this issue.

Option to Install a Tag-n-Trak Release Update from CD on New Systems without a 3.5” Diskette Drive

Release Level: 4.05.014 Program Request: ---- (update.ms, install.ms, verifyupdt.ms)

The script for installing Tag-n-Trak release software was modified with an option to install from a CD for new computer systems that do not have a 3.5” diskette drive.

Login Script Change for TinyTerm Telnet and Secure Shell Connection Types

Release Level: 4.05.016 Program Request: ---- (flex)

A change in how the Tag-n-Trak login script assigns a device name was made to accommodate users logging on a Unixware system using TinyTerm telnet or ssh (secure shell) connection types.

Option to Print General Ledger Valid Charts Report

Release Level: 4.05.019 Program Request: 3379 (optglcht)

G/L Chart Options is a selection on the Options Menu. A print option has been added to this program to print a list of all valid charts to the system default printer. To print, select G/L Chart Options from the Options Menu and then press F12 for the Action box. Choose ‘P’ to ‘Print list.’ A report titled “OPT – Valid Chart Report” will be printed listing each chart number and description.

Option to Set Date and Time on System Administrator Activity Menu

Release Level: 4.05.020 Program Request: ---- (updt405020.ms)

The System Administrator Menu has been enhanced with an option to set the date and time on your server. To use this feature, login as “menu.” Go to the Activity Support Menu and

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select "**Set Date and Time**." You will be prompted to enter new values for month, day, year, hour and minutes one field at a time. The year is entered as a 2 digit rather than 4 digit year. The "hours" must be entered in "military" 24 hour format.

A sample dialog screen is shown below. The time is changed from 14:36 (2:36 PM) to 15:32 (3:32 PM).

The current date and time is Mon Nov 12 14:36:16 CST 2007.

Do you want to change the date and time? Y or N Y

Please enter month 01-12: 11

Please enter day 01-31: 12

Please enter year 01-80: 07

Please enter hour 00-23: 15

Please enter minute 00-59: 32

The new date and time is Mon Nov 12 15:32:00 CST 2007

Press Enter for menu ...

POINT OF SALE

Lock POS Files Just Prior to Update to Prevent Internal Audit Errors

Release Level: 4.05.001 Program Request: ---- (posmain, positem, positemd, posxfprt, posqrvc, posritem, postotal, pospyloc, posqload, posiload)

Changes were made to ten point of sale programs to “lock” files immediately prior to an update to ensure the most current data is used when updating a sales order. These program changes were made to help prevent “Internal Audit Errors” that can occur when users unlock an order that is “in use” by another person. Also, a warning message displays just prior to taking a payment or closing an order if the order totals have been changed by another user:

```
*****  
*  
* Since coming to this screen, the order totals have been *  
* changed by a user accessing this same order on a *  
* different terminal. Please clear the order from the *  
* other terminal and then read the order back up before *  
* taking a payment or closing the order. Press any key. *  
* *  
*****
```

After the message above displays, the program exits the order when any key is pressed. As the warning message instructs, find out who has the order “called up” on their terminal or PC and have them exit. Then, call up the order, go to the totals / closing screen and take a payment or close the order as usual.

When “Order is in Use” displays, an order should not be unlocked if another person is working on it. Under some circumstances, there is an abnormal exit from an order and the “Order is in Use” message will display even though no one else is working on it. Under these circumstances, it is appropriate to unlock the order. Some examples of an “abnormal exit” from an order include when a terminal “locks up” and “kill terminal” is used, when a user closes a TinyTerm session without properly exiting from Tag-n-Trak, when a shutdown is done with users still logged on with POS orders “read up,” and when a power failure occurs with users in the midst of working on orders.

Salesperson Allowable Override Flag ‘P’ can Partially or Fully Backorder Items

Release Level: 4.05.006 Program Request: ---- (posritem)

The salesperson Allowable Override Flag of ‘P’ for Partial backorder also can be used when an item is being entirely backordered (Flag ‘B’).

When the salesperson Allowable Override Flags include P but not B:

The Salesperson cannot select ‘B’ at the “Insufficient QAV” prompt, however, the salesperson can select ‘P’ to partially backorder or fully backorder an item. On the related item screen, the salesperson can partially backorder or fully backorder an item. This change was made to encourage salespersons to reserve what is available and only backorder what really needs to be backordered.

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When the salesperson Allowable Override Flags includes B but not P:

The Salesperson can use B to fully backorder an item but cannot use P to partially backorder an item.

New Options to Sell Alternate or Choose No Sale when Converting Quote to Order

Release Level: 4.05.009 Program Request: 3349 (positem)

When converting a quote to an open order, there are two new options when an item has an insufficient quantity available. The first is the option to sell an Alternate item. If an item with an insufficient quantity available has an Alternate, the salesperson can choose 'A' to sell the alternate item instead of the original item. When selling an alternate is chosen, the program replaces only the vendor code, item number and cost of the original item with the alternate item. All other information associated with the original item is maintained for the alternate, including the selling price, description, notes and related items.

The second option for an item with an Insufficient Quantity Available when converting a quote to an order is 'N' for NO SALE. When 'N' is chosen, the line item is deleted from the order and the order total will reflect the item not being sold.

POS Non-Deliverable Report Prints Purchase Order Status & Date Ordered

Release Level: 4.05.010 Program Request: 3357 (posodrrpt)

When printing the Non-Deliverable Order Report and choosing to print the non-deliverable line items, if the item is on a purchase order the ordered date of the purchase order will print. The report also has been enhanced to print the status of the purchase order.

Job Label Enhanced with Option to Print Related Item (Bulb) Description

Release Level: 4.05.018 Program Request: 3329 (armailsc, posjoblb)

The Job Label print program has been enhanced with the option to print the related item description. The new field designators are %R1D, %R2D, %R3D, %R4D which allow printing the related item's description for the first four related items associated with a fixture.

This enhancement is most likely to be used by Lighting Showrooms that sell Satco or Westinghouse bulbs or that use generic bulb item numbers that point to "real" Satco or Westinghouse bulb item numbers. Instead of printing the bulb item number on the job label, the bulb's description can be printed.

For example, assume you have a generic bulb item number "40ACL" that points to a "real" item number "S6041" (Satco bulb) or "03986" (Westinghouse bulb). Instead of printing S6041 or 03986 on the job label as the bulb for a fixture, the description for the bulb such as "40W MB A19 CLEAR 120V" can be printed.

If you are currently printing the related bulb on your job labels and want to begin printing the bulb's description instead of the bulb item number, please contact Mylee Customer Support for assistance. The Job Label form is accessed by selecting Accounts Receivable from the Main Menu, then Customer Reports Menu and then "Label Forms Setup." JL is the form ID for the Job Label. The F1 Help Screen for the Job Label form includes the new field designators:

%R1D - %R4D = Related Description

M=Mark. Mark discontinued items by updating the "Mfg" field with 'D' for Discontinued, but do not print a report of the discontinued items.

B=Both. Mark the "Mfg" field with 'D' for Discontinued AND print a report of the discontinued items.

N=No. Do not mark the "Mfg" field with 'D' for Discontinued and do not print a report of discontinued items. This option should be chosen if a "new items only" or "supplement" price file is being loaded.

For those who choose to print the report of discontinued items, the report has been changed to provide more information. The report heading has been changed from PRICE LOAD EXCEPTION REPORT to PRICE LOAD DISCONTINUED ITEMS REPORT. Previously, the report printed the vendor code, item number and the words "RECORD NOT ON FILE." The following information is printed on the new report:

Vendor Code, Item Number, Qty-on-Hand, Qty Reserved, Customer Backorder Qty, Qty on Order, Qty Backordered, Date Last Sold and Date Last Purchased.

4. Change UPU "Price Update Process Batch" program dialog question pertaining to printing a report of new items.

Prior to this release, the UPU Price Update Process Batch included the following dialog prompt:

`PRINT PRICE LOAD ITEMS NOT FOUND IN INVENTORY _ (Y or N)`

This dialog question has been changed to:

`PRINT NEW ITEMS _ (Y or N)`

If 'Y' is chosen, the program prints a report of new items added to the inventory file. The report title has not changed. It continues to be titled: PRICE LOAD EXCEPTION REPORT – ITEMS NOT FOUND IN INVENTORY. If 'N' is chosen, the report is not printed.

5. Change UPU "Price Update Process Batch" program to update the "Mfg" field with 'N' for New Item if the user answers 'Y'es to "Load Items if Not in Inventory." Also, update the "Date New Item" field in the item master with the current system date for new items.

When items are manually added to inventory using the Item Master screen, the program will update the "Date New Item" field with the current system date. (There is no update to the "Mfg" field when an item is added using the Item Master Screen.)

6. Creation of a new program on the Universal Price Updating Menu labeled Print/Purge Discontinued Items. This program provides the following functions:

- Print a report listing discontinued items by start / stop vendor code. This report is titled MANUFACTURER DISCONTINUED ITEMS/ PURGE REPORT. Users can choose to print all discontinued items or only those that qualify for purging. Mylee strongly recommends that users print a report of discontinued items BEFORE choosing to PURGE them in a batch process. Once purged, deleted items cannot be retrieved. The

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report prints the following information: PRG (P means the discontinued item qualifies for purging; blank means the discontinued item does NOT qualify for purging); VC (vendor code), Item Number, QOH, QRV, CBO, QOO, QBO, Date Last Sold & Date Last Purch.

- Option to Purge Qualified Discontinued Items in a Batch Mode with the following criteria:

a) QOH, QRV, CBO, QOO, QBO fields must all be zero.

This program will NOT purge any discontinued item if it has a quantity on hand, quantity reserved, quantity on customer backorder, quantity on order or quantity on backorder with the vendor.

b) The user is prompted to enter a Purge Date for "Date Last Sold" and for "Date Last Purchased." If all quantities are zero and there is a D in the Mfg field, the program purges all discontinued items within the vendor code start/stop range if date last sold AND date last purchased fall on or before the purge dates entered. If you enter purge dates for Date Last Sold and/or Date Last Purchased, the program will not purge items sold or purchased before those dates (even though the item has no quantities and has a D in the MFG field.)

c) The program asks if the Stock Flag should be updated with 'X' for Discontinued items that remain in the inventory file following the purge. To automatically place an X in the Stock field of discontinued items not purged, respond 'Y' to 'Update Stock flag with 'X' for Discontinued Items,' otherwise respond 'N' for No.

The dialog screen for the new program is shown below:

```
MM/DD/YYYY  MANUFACTURER PRINT / PURGE DISCONTINUED ITEMS PROCESS
SELECT OUTPUT DEVICE (PRINTER OR $ = FILE)          _
START VENDOR                                         _
STOP  VENDOR                                         _
DATE LAST SOLD PURGE DATE                           _____
DATE LAST PURCHASED PURGE DATE                       _____
PRINT ITEMS (Discontinued, qualified for Purge, Both or No)  _ (D, P, B, N)
PURGE QUALIFIED DISCONTINUED ITEMS                    _ (Y OR N)
  (Inventory qtys = 0 and Purge Date qualified)
UPDATE STOCK FLAG WITH 'X' FOR DISCONTINUED ITEMS      _ (Y OR N)
READY TO BEGIN                                         _ (Y OR N)
```

Other Notes:

You can choose to print discontinued items only without purging by responding "N" to "Purge Qualified Discontinued Items."

If you have an item that could get coded with a D because it is not in the manufacturer's price file AND you never want it purged, change the Mfg field to "K" for "KEEP."

The "A" in the Mfg field in the item master means "Active." This means the item existed in your inventory file and in the manufacturer's price file when you ran the UPU Price Update procedure.

PURCHASING

Backorder Status Report Enhanced to Qualify by Code Field in I/P Vendor Master

Release Level: 4.05.008 Program Request: 3331 (ipcborpt)

The Backorder Status Report was enhanced to provide the option to print it for a specific group of vendors. If you wish to use this feature, select "Vendor Master" from the Inventory Purchasing Menu. Read up each vendor that should be part of the "group." Enter an alpha-numeric code in the "Code" field to identify this group of vendors. The code may be up to four characters. For example, assume you review a group of vendors every Monday, a different group on Tuesday, and another group on Wednesday. MON could be used for the code in the I/P vendors reviewed on Mondays, TUE for those vendors reviewed on Tuesday, WED for those on Wednesdays. When the Backorder Status report is printed, the new prompt is labeled: ENTER VENDOR MASTER CODE. This field defaults to **** which will qualify all vendors between the start and stop range. Enter the appropriate code to restrict the vendors that qualify.

Display Date Last Received on Purchase Order Line Item History Lookup

Release Level: 4.05.015 Program Request: 2539 (ippohstl)

If an item on a Purchase Order has not been received, the PO Order date will display on the Purchase Order Line Item History Lookup screen. (The date is displayed in MMDDYY format.) If the item has been partially received or received in full, the program displays the date of the last receipt.

Enhancement for Summarized Purchasing Receiving Screen

Release Level: 4.05.021 Program Request: ---- (ipposcrn)

The purchasing receiving program has been enhanced with an option to receive a Purchase Order by Item Number rather than by Purchase Order Line Number. The same item number appearing on multiple lines of a purchase order will be combined into one line on a summarized receiving screen. With some exceptions, the summarized receiving screen will mirror the printed purchase order. The purpose for this enhancement is to speed up the receiving process.

The regular Receive Line Items screen has not changed other than it displays the word "DETAIL" in the upper right hand corner. The summarized receiving screen is accessed from the detail "Receive Line Items" screen by pressing F12 for the Action box and selecting 'Y' for "summarY" mode.

The summarized receiving screen will display "SUMMARY" in the upper right hand corner to distinguish it from the normal "DETAIL" screen. Users can toggle back and forth between Detail and Summary modes by pressing F12 and Y.

When in SUMMARY mode, the program will display the first line item on the purchase order and find all other purchase order lines with the same item number. The quantity on the summarized receiving screen will reflect the total quantity ordered for that item number. This holds true whether or not the lines for that item are contiguous. In other words, if the same item number appears four times on the detail receive line items screen (lines 10, 20, 30 and then again on line 150), the summarized receiving screen will add the quantities for

all four lines.

In summary mode, the line number will be the line number of the first occurrence of an item based on the detail screen.

After the first item is summarized and displayed, the program will read the next item on the purchase order and sum the quantity to order. This process will be repeated until all items on the purchase order have been summarized. The summarized receiving screen will "mirror" the printed purchase order with the following exception:

The summarized receiving screen combines quantities for the same item number on the purchase order regardless of the PO line number. The printed Purchase Order combines quantities for the same item number ONLY if the lines are contiguous or "in succession."

If the total quantity ordered for an item is zero (as is the case when a line item is moved to a stock PO), that item will not display on the SUMMARY receiving screen.

The summarized receiving screen will display the Cost of the item based on the first line item found.

The body of the summarized receiving screen will appear similar to the standard receiving line item screen in that it will display Line#, Item Number, VC, Qty, F, Qty Rec and Qty Bko.

The word "NOTE" will display on the summarized screen indicating that one or more lines associated with the item have a line note (such as a customer backorder). The user will not be able to view the notes while in summary mode. The user would need to view line notes from the detail screen.

All function keys operate the same in summary mode as they do in detail mode.

Just like it does on the detail Receive Line Items screen, when in summary mode, the program will "assume" all quantities have been received and will display the total quantity in the "Qty Rec" column.

When in summary mode, if the quantity is partially received with the remainder backordered, the program will FILL the DETAIL line items in the following order and then backorder the remaining lines:

- (a) Customer backorders with a delivery date prior to the current system date will be filled first, followed by customer backorders with a delivery date nearest to the current system date and so on.
- (b) Customer backorders without a delivery date.
- (c) Stock line items.

When finished receiving, the user can F12 and S to "poSt receive" from the Summary screen. The user also may F12 and Y from the SUMMARY screen to return to the DETAIL screen and then F12 and S to "poSt receive." There have been NO changes to the "Post Received Order" report.

QUERY

Begin Printing Query Report immediately after Processing Records

Release Level: 4.05.004 (4.05.000b) Program Request 3139 (qrwmain)

The following change was made on a prior release: "When printing a query to a printer OR a disk file, change the program to pause when the query has finished running so that users can view the number of "Printed" records (those records that qualified). Require a 'press any key to continue' before cursor returns to the Process Selection screen."

A problem was created with the above change because it required the user to 'press any key to continue' before the report started printing (or before the disk file was created).

The program now "closes" the print job (whether sent to an actual printer or sent to a disk file) PRIOR to pausing to display the record count. Query reports begin printing immediately after processing records.

Query Report Writer Changed to Print 58 rather than 60 Lines Per Page

Release Level: 4.05.012 Program Request: ---- (qrwmain)

The query report writer program will print 58 lines per page and then perform a form feed. Prior to this change, the program output 60 lines. Due to the limitations of some Ink Jet/Laser printers, it was necessary to reduce the number of lines printed on a page.

GENERAL LEDGER

Correction to Balance Sheet Program when Printing Specific Department (Store) or Range of Departments (Stores)

Release Level: 4.05.017 Program Request: ---- (glbalanc)

The Balance Sheet Report program was changed so that a specific general ledger department (store) or range of departments (stores) could be printed when the balance sheet report format specified a range of accounts. For example, if the format specified printing from Account # 01001 Dept 01 through Account# 01050 Dept 04 for a particular entry, Dept 02 through Dept 02 could be entered at "run time" to print that entry for department (store) 02 only.

ADDENDUM

Release 4.07.000a through 4.07.000o Changes

4.07.000a – A change was made to the script that provides the option to install a Tag-n-Trak software release from CD.

4.07.000b – A program change was made to prevent a blank vendor code and item number for a not-on-file item on a point of sale order.

4.07.000c – A change was made to not display “bu.sys” or “training” as store names when installing a Tag-n-Trak software release.

4.07.000d – A Point of Sale enhancement was made to provide the option to clear all “ship to” fields on the POS header screen when beginning a new sales order. The option is controlled in POS Terminal Options (see Options Menu), Screen 1, Field “STOP AT CUSTOMER NAME AFTER CUSTOMER READ.” The new option is “A” to “clear All.” The purpose of this option is to provide a way to capture mailing addresses for “homeowners” from sales orders entered under the builder’s customer account.

If “Stop at Customer Name after Customer Read” is flagged ‘A’ for “clear All,” the program will check the ship address line 1 that is read from the customer master record. If ship address line 1 is NOT blank, the program will clear the customer NAME only. (When the ship address line 1 is not blank, the ‘A’ “clear All” option will work just like the ‘C’ “clear name” option.)

If ship address line 1 read from the customer master record is blank (as it is with most “builder” accounts), the program will clear the customer name, ship address line 1, ship address line 2, city, state, zip code, phone number and contact fields. When entering a sales order for an accounts receivable customer such as a builder, a mailing address for the “homeowner” can be entered as follows:

Enter the homeowner’s street address in ship address line 2.

Enter the homeowner’s city, state & zip code in the ship-to city, state & zip code fields.

Enter the homeowner’s phone number in the phone number field.

Enter the homeowner’s name in the contact field as it should appear when addressing an envelope.

Note: This option can be used by lighting showrooms that currently use the name and address line 1 fields for other information (such as subdivision, lot number, job#).

4.07.000e – A program change was made to prevent a blank vendor code and item number on the POS line items screen. (While selling an item, the vendor code and item number could get “blanked out” if a user “up-arrowed” from the room location field to the Line# field, pressed Enter and then pressed F10 while in the Qty field. The program change prevents this.)

4.07.000f – N/A (This program change was cancelled.)

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4.07.000g – N/A (Internal program change only.)

4.07.000h – A change was made to the “Purge data” function selectable from the Action box from the Customer Master screen. The dialog question “Are you sure you want to delete?” defaults to “N” for No. It requires the user to respond “Y” followed by the Enter key to proceed with the deletion.

4.07.000i – A program change was made to ensure that a user select F2, F7 or F8 from the “Store Transfer” screen in point of sale to complete a transfer. A transfer will not occur if a user displays the “Store Transfer” screen and then presses F12 and exits.

4.07.000j – The number of “Lines” for an order displayed on the header screen was inaccurate in some cases for backorder tickets. This has been corrected.

4.07.000k - An enhancement provides the option to print the System Date on Job Labels. The special field designator to print the system date is %X. If you would like the System Date printed on the job label, determine where it should print on the job label and then contact Mylee Customer Support for assistance in changing the Job Label format.

4.07.000l - The PO Create Program and the BKO Status Report program have been changed to allow users to qualify on the Supp (supplier) field for purchasing customer backorders (CBO's).

For example, if Supp in IP Vendor Master=P (to represent vendor “Preferred Pricing”), ONLY those CBO's that have a P in the Supplier field of the item master record will get picked up on the purchase order or print on the BKO status report. Some purchasing vendors have Preferred Pricing for a Subgroup of Items & require separate PO's. This program change accommodates that requirement.

Prior to this release change, the Supp field could be used as a qualifier for purchasing stock items, but not Customer Backorders.

4.07.000m - Under certain levels of release 4.07.000, using the TAB=SUM TTL function on the POS Order Heading screen could create an order number 0 and result in the display of error message “Duplicate Records Not Allowed in File Status 28 #20 3108.” This problem has been corrected. (Note: If you installed release 4.07.000 at the level of “m,” “n” or “o,” you would not have experienced this problem.)

4.07.000n - A change was made to ensure that the correct sales tax is calculated when an order is closed with backorders, the backorders are not “charged for,” AND the Sales Tax Rate record has a “Dollar Item Limit.”

4.07.000o - N/A (Internal program change only.)