



iWEB New Release Information

Version 1.16.2
November 22, 2011

Presented by:
Tech Systems, Inc.

Follow the *Installation Instructions* to install this version of ***iWEB***. Perform the *Special Software Instructions* for ALL Release Notes between the version you are running and the version you are installing.

If you have modified ***iWEB*** programs and Tech Systems enhances or fixes the standard program, your modified (or custom) program must be updated to take advantage of the enhancements and fixes. Please contact our Custom Programming department for a quotation.

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Installation & Special Software Instructions

Installation Instructions

Definition

The following instructions must be performed in the order given. If you have any questions, please contact your support consultant.

1. Make sure you have a verified backup prior to installing the new iWEB update and remove all media (i.e. tapes & diskettes from your system.
2. Ensure the Maximum MF Directory Server Object Count is set to 4096. From the MF Enterprise Server Administration, Select Options under Configure and then select the General Tab.
3. Ensure all operators are out of the iWEB & iPOS software and insert the installation CD.
4. From the console login as root:

```
Login:    root          (Press ENTER)
Password: #####       (Enter your password and press ENTER)
cd /      (Press ENTER)
```

5. If you received a CD that contains the **iWEB** software, perform the following command depending on the Operating System you are on:

*Note: You may receive an error /mnt directory already exists when performing the first step in either Operating System section. That is fine, ignore the error message and continue.

For LINUX Operating System:

```
mkdir /mnt      (Press ENTER)
mount /dev/cdrom /mnt  (Press ENTER)
```

*Note: You may receive the message–Mount:block device /dev/cdrom is write-protected, mounting read only

This is a normal warning message and you can go ahead and continue.

```
cp /mnt/isweb-1.16.2tar.gz /isweb (Press ENTER)
umount /mnt      (Press ENTER)
```

For UNIXWARE Operating System:

```
mkdir /mnt      (Press ENTER)
mount -F cdfs -r /dev/cdrom/cdrom1 /mnt  (Press ENTER)
cp /mnt/isweb-1.16.2.tar.gz /isweb (Press ENTER)
umount /mnt      (Press ENTER)
```

6. cd /isweb
7. Perform the command below depending on the Operating System you are on:

For LINUX Operating System:

```
tar zxvf isweb-1.16.2.tar.gz
```

For the UNIXWARE Operating System:

```
gnutar zxvf isweb-1.16.2.tar.gz
```

8. sh install/iswebinstall.sh (press ENTER)

***** Note:** When you answer "Y" to install/upgrade the system to this release of iWeb, the installation will automatically install the software, apply all needed mysql updates, clear the server cache, perform the database merge and restart tomcat. Please ensure all users are logged off before proceeding.

9. Install any custom programming.

Special Software Instructions

Definition

1. Due to the modifications necessary for Recurring Contract Billing, new data fields were added to the EDOEINFO file. Those fields must be initialized before use. After installation of 1.16.2, please do the following for all installations:
 - cd to /isweb/install
 - sh oeedint.sh /gapsys/location/
2. New Order Pad functionality will utilize the swish-e indexing on the customer's machine. Please ensure that cron is set to run the swish-e indexing program nightly.
3. iWeb 1.16.2 is compatible with Firefox 8.0 and earlier.
4. To create the new file necessary for Recurring Contract Billing, please go to System Administrator/File Handling/Create Files/Order Entry and check the box next to Contract Codes (OECONTRACT). Then click the Save/Update button to create the file.
5. Three keys have been added to EDOEINFO in this release of iWEB. Go to Tools / System Administrator / File Handling / Reorganize Files / Order Entry. Click the box next to Customer Orders Master EDI Info (EDOEINFO) and click Save/Update. Ensure a total of 4 keys exists when you are finished. From the command line, do the following:
 - cd /isweb/files (or location of data files)
 - isinfo EDOEINFO

iWEB New Features

Recurring Contract Billing

(TB-110908-37 and TB-110921-02)

The Recurring Contract Billing functionality allows you to set up an order ONE TIME for all line items on a contract. That contract order can then be copied for each new billing cycle.

The Recurring Contract Billing new feature functionality has been fully implemented within the Order Entry module. If you have purchased the Order Entry module, you will be allowed to use the Recurring Contract Billing functionality in its entirety.

Order Entry/Posting/Enter Orders

General Tab: Set up your contract order as a Quote Order. Fill out the remaining fields as you normally would for any order.

The screenshot shows the 'Add Mode' window in the iWEB software. The 'General' tab is selected, and the following information is visible:

- Order Number:** NEXT
- Stage:** Ordered
- Type:** Quote Order
- Customer Number:** 118
- Customer Name:** AMSTERDAM COMPANY
- Address:** 9898 ELM STREET, DAVENPORT, IA 52803
- Ship To:** AMSTERDAM COMPANY, 9898 ELM STREET, DAVENPORT, IA 52803
- Approved:** No
- Requested Date:** 102011
- Reference:** (empty)
- PO Number:** (empty)
- Ship Via:** 7 TRUCK #101
- Shipping Instructions:** (empty)
- Zone:** (empty)
- Terms:** 1 NET 30
- Discount:** 2.00 %
- SalesRep:** 4 F WILSON
- Invoice Number:** ORD#
- Invoice Date:** (empty)

Customer Type:

Period 1:	11063546.18
Period 2:	.00
Period 3:	.00
Period 4:	.00
Period 5:	.00
Service Charge:	.00
Future Balance:	.00
Balance Due:	11063546.18
Ordered Balance:	23959543.86
Net Balance:	35023090.04
Credit Limit Remaining:	-

Detail Tab: Place a checkmark in the Contract Order field. Three additional fields display for entry.

- **Contract Code:** This is a required field. Enter the contract code previously set up through Order Entry/Setup/Contract Code Descriptions. The purpose of this code is to place contract orders into groups for billing purposes. For example, if you have a group of contracts that you would like to bill the first week of the month, enter WEEK1 for the contract code.

The contract codes are saved in a new file named OECONTRACT. This file must be created through System Administrator/File Handling/Create Files.

You can print a list of contract codes through the new Contract Codes option in the Print Master & Table Setups/Order Entry/Defaults function.

- **Contract Start Date:** This is an optional field of entry. When recurring billing contracts are processed through Order Entry/Posting/Copy Orders (see below), a range check is allowed on the Contract Start Date.
- **Contract Expiration Date:** This is an optional field of entry. When recurring billing contracts are processed through Order Entry/Posting/Copy Orders (see below), the Contract Expiration Date is checked.

Line Item Tab: Use this tab to enter the contract line items. No new procedures are needed on this tab.

Order Totals Tab: Use this tab as you always have. No new procedures are needed on this tab.

Order Entry/Posting/Copy Orders

A new Recurring Contract Billing Copy option has been added to this function. This option processes ONLY Quote Orders that have been marked as Contract Orders.

iWEB - BRICKBLOCK - Order Entry-Posting-Copy Orders

Regular Order Copy
 Recurring Contract Billing Copy

All Customers..... Begin... End...

All Contract Codes..... Begin... End...

All Quote Orders.....

All Contract Start Dates.....

Order Type to be Created.....

The range fields allow you to process groups of contracts according to the Customer Number associated with the contract (OE/Posting/Enter Orders-General tab), the Contract Code assigned to the contract (OE/Posting/Enter Orders-Details tab), the Order Number assigned to the Quote Order (OE/Posting/Enter Orders-General tab), or the Start Date assigned to the contract (OE/Posting/Enter Orders-Details tab).

The Quote Order can be copied to either a Stock Order or a Credit Memo. The original Quote Order remains intact for use during the next billing cycle.

If the Expiration Date assigned to the contract (OE/Posting/Enter Orders-Details tab) is previous to the Posting Date entered on the Copy Orders Parameters page, the contract order will not be processed.

Order Entry/Posting/Copy Orders - Journal

The Quote Order from which the recurring billing order was created is listed on the journal as the From Order.

The new order number created for the current billing cycle is listed on the journal as the Order Number.

From Order	Order Number	Customer#	Customer Name	Contract Code	Start Date	Order Total
98940-000	98950-000	118	AMSTERDAM COMPANY	WEEK1	10/24/11	115.00

JRNL	OE012781	PERIOD	1011	DATE	102411	DLV DATE	102411	JRNL	PRINTER	5664357	ORD#	REL NO#	000
ALL CUSTOMERS Y/N...	N	BEGIN...	118	END...	118								
ALL CONTRACT CODES Y/N...	N	BEGIN...	WEEK1	END...	WEEK1								
ALL QUOTE ORDERS Y/N...	Y	BEGIN...	-000	END...	-000								
ALL CONTRACT START DATES Y/N...	Y	BEGIN...	000000	END...	000000								
ORDER TYPE TO BE CREATEDSO												

Queries/Order Entry/Orders By Order Number

Three new fields have been added to the inquiry: Contract Code, Contract Dates, and Contract Order.

iWEB - BRICKBLOCK - Queries-Order Entry-Orders By Order Number

Order Number: Canceled Lines: Print: Printer Device: P132

Customer Number: 118 Ship To Number: .0000

Bill To Name and Address: AMSTERDAM COMPANY, 9898 ELM STREET, DAVENPORT IA 52803
 Ship To Name and Address: AMSTERDAM COMPANY, 9898 ELM STREET, DAVENPORT IA 52803

Order Type: SO Terms: NET 30 Entry Date/Time: 10-24-11 0959 Request Date: 10-24-11
 Stage: ORD Cash Discount %: 2.00 Entry By: MSR Invoice Date:
 Approved: N Sales Rep: F WILSON Zone: Invoice Number: 98950-000
 Reference: PO Number: Invoice Attachment:
 Ship Via: NH Shipping Instructions: Final Load: Contract Code: WEEK1 - BILL FIRST WEEK OF MONTH
 Contract Dates: Start: 10-24-11, Expiration: 10-24-12
 Contract Order: 98940-000

Ln	Note	Product Number	Description	PCAT	Whse	Qty Ordered	Qty Shipped	Unit	Cost	Price	Disc	Tx	Comm	Net	M\$	M%	St	Cash Disc
*1		ONE YEAR ...	BROADBAND	118	1	1.00	1.00	EACH	50.00	100.00	.00	Y	.00	100.00	50.00	50.00	A	2.00
FREIGHT		1.00	State: VA			6.00		Order Total		115.00								50.00
B & B		.00	County: FAIRFAX			3.00		Order Discount		.00								50.00
INSURANCE		3.00	City: SALEM			2.00		Cash Discount		2.00								
RESTOCK		.00	Down Payment			.00		Commission		.00								

Extra Header Information Previous Next Displaying 1-1 of 1

Cancel Display

Contract Code: The Contract Code originally assigned to the Quote Order from which the recurring billing order was created displays.

Contract Dates: The Contract Start Date and Contract Expiration Date assigned to the Quote Order from which the recurring billing order was created displays.

Contract Code: The Order Number assigned to the Quote Order from which the recurring billing order was created displays.

Order Pad

(TB-110610-66)

Order Pad provides for “express” line item entry during Order Entry/Posting/Enter Orders. Order Pad can be used exclusively during line item entry or can be used in conjunction with normal line item entry.

The Order Pad new feature functionality has been fully implemented within the Order Entry module. If you have purchased the Order Entry module, you will be allowed to use the Order Pad functionality in its entirety.

Order Entry/Posting/Enter Orders – Line Items Tab

To begin using Order Pad, simply press the **Order Pad** icon that displays on the mid right side of the Line Items page.

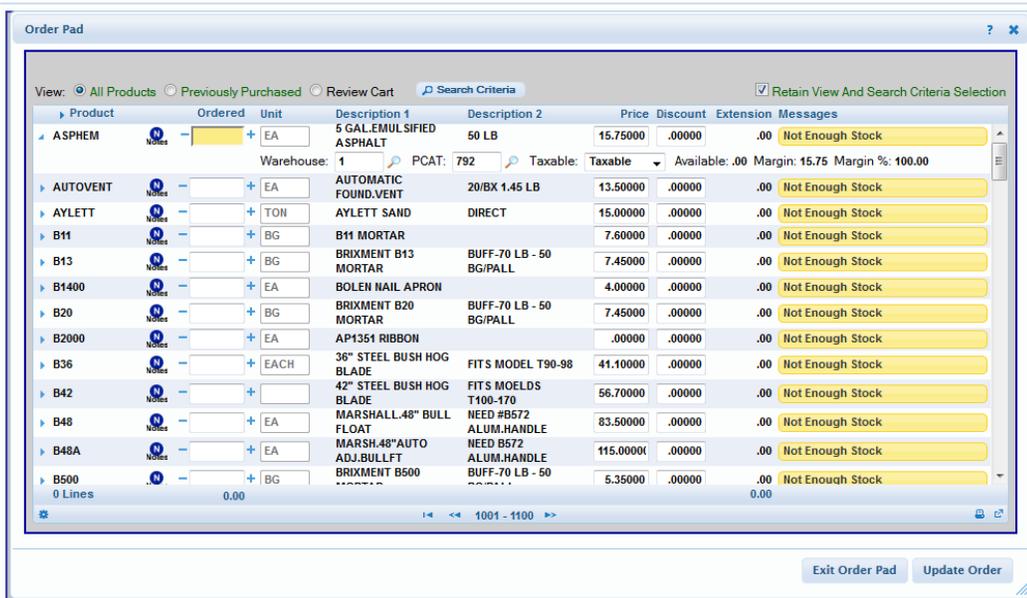
The screenshot shows the 'Order Pad' interface within the 'Line Items' tab. The main form is titled 'Add Mode' and 'Header Added'. It contains several sections:

- Form Fields:** Line Number (1), STOCK #, QTY ORD, UNIT, WHSE, QTY SHIPPED, and DESCRIPTION. Pricing fields include PRICE (.00000), DISC \$/% (.00000), COMM (\$.00), SMN, CAT, TAX (Taxable), COST (.00000), and SUB (N).
- Inventory Panel:** Quantity On Hand, Quantity Reserved, Quantity Received, and Selling Net Available (highlighted in yellow).
- Summary Bar:** Order Number (99140-000), Order Type (Stock Order), Customer (118 - AMSTERDAM COMPANY), Invoice Number (99140-000), Total Weight [lb], and Order Total (\$ 15.00).

Order Pad: Placing Products On Order

Potential line items display on the Order Pad. Notice that the cursor is focused in the Ordered field on the first line item, allowing you to quickly enter quantities as you move down the page using the Down Arrow key on your keyboard. Other entry fields are also available for each line if values need to be changed.

Initially, one line of product information displays for each product number. As your field focus moves to each line item, a second line of product information displays for each line. Messages also display for each line item. White and yellow-colored messages are informational; you will still be allowed to order the product. Red messages indicate that some action is required before the line item can be ordered.

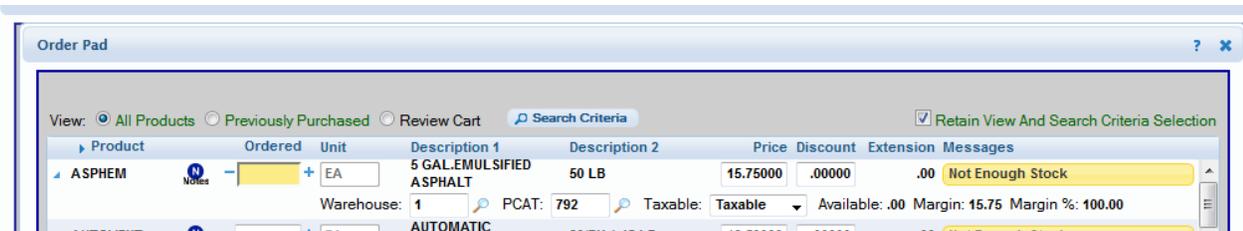


Order Pad: Controlling the Product Display

You can control which products display and where the product display begins by using the View and Search Criteria fields at the top of the Order Pad page. Once you set your View and Search Criteria, you can return to the same product display each time you access Order Pad by placing a check mark in the Retain View And Search Criteria Selection field.

As you enter order quantities you can use the Review Cart feature to verify which items have been ordered.

You can also control how many products display per scrollable page by using the Settings icon at the left bottom of the page. The left and right arrows at the center bottom of the page allow you to move between product pages.



Order Pad: Placing the Order

Use the **Update Order** icon at the bottom of the page to populate the ordered products in the normal line item section of Order Entry/Posting/Enter Orders. At that point, you can continue entering line items in the normal line item section or return to Order Pad to select additional products.

If you press the **Exit Order Pad** icon, Order Pad will close and the ordered products in your cart will be cleared. The products will NOT be brought back to the normal line item section.



iWEB Modified Features

System Wide

Focus Indication (TB-111013-51): A yellow outline now displays around check boxes and radio buttons to indicate the location of the field focus on that page. Note: Text fields and drop down boxes are already highlighted in yellow to indicate field focus.

iWEB - BRICKBLOCK - Inventory Control-Setup-Product Categories

★ Maintain Mode

Product Category Number: 1

Category Description: TOOLS

Quantity Price Break By Category: []

General Ledger Numbers

Sales: []

Cost: []

Line Discount: []

Inventory: []

Finished Goods: []

Raw Materials: []

Scrap: []

Work In Process: []

Cancel Save/Update

Order Entry

Order Entry/Posting/Enter Orders-Order Totals Tab (TB-111014-32): The Approved field is now available on the Order Totals Tab in addition to the General Tab.

iWEB - BRICKBLOCK - Order Entry-Posting-Enter Orders

★ Add Mode

General Details Line Items Order Totals

Order Discount: % .00 \$.00

Total: 83.50

Down Payment Cash: \$ [] Tender Cash

Credit Applied: 0.00

Down Payment Credit Card: 0.00

Amount Due: 83.50

Cash Discount: \$ [] 1.00

Approved: No

PO Number: []

Comment: []

Final Load: []

Addons:

FREIGHT: [] Taxable 10.00

B & B: [] Taxable 15.00

INSURANCE: [] Taxable 3.00

RESTOCK: [] Taxable .00

Sales Taxes:

State: 1 VA: 6.000% 3.00

County: 1 FAIRFAX: 3.000% 1.50

City: 1 SALEM: 2.000% 1.00

Total Tax: 5.50

Commission: 5.00

Gross Margin [%]: 50.00

Pre-Authorized Amount:

Reference:

Terms: NET 30

Order Entry/Posting/Copy Orders (TB-111103-63): During the Regular Order Copy function: If you select the Create New Orders In Customer Default Warehouse option, and warehouse records do not exist in the customer's Default Warehouse for any products on the order to be copied, warehouse records for those products will be automatically created.

iWEB - BRICKBLOCK - Order Entry-Posting-Copy Orders

★

Regular Order Copy Recurring Contract Billing Copy

Order Number to be Copied 151000156-001

Order Type to be Created Stock Order

Create New Orders In Customer Default Warehouse ...

Create New Orders With Customer's SalesRep

Copy To A Range Of Customers Copy To Individual Customers

(Press Enter To Add) 118