

Please read all attached instructions! To install the release, perform Part I instructions. Perform Part II instructions for ALL Release Documents received.

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Release Document



Release # 2.14

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NOTE: If you have a modified IntegraSoft program 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 quote.

Part I: Software Installation Instructions From Media

1. Make sure you have a verified backup prior to installing this update.
2. Remove ALL media (i.e. tapes and diskettes) from your system.
3. Make sure everyone is out of the system & insert the IntegraSoft Installation media.
4. From the console login as root:
Login: **root** (Press RETURN)
Password: ##### (Enter your password and press RETURN)
5. At the # sign enter the IntegraSoft command:
integra (Press RETURN)
6. Enter **SA** in the Smart Box. Select **7-System Support / 1-Install Updates**.
Press the **GO** key at the warning screen.

The following screen appears:

```
System Support Install Updates
Installation Drive (T), (C) or (I): C
Installing From CDrom Drive
CDrom Drive Name:
/dev/cdrom/c0b0t5l0
Program Directory: /i
Perform PMmerge? Y/N: N
```

Installation Drive (T) or (C) – If you received a tape, enter **T**. If you received a CDROM, enter **C**. The **I** option is for future use.

CDrom/Tape Drive Name –The Drive Name should default from information entered in SA/AO/System Options and should not be changed. Examples of Tape Drive Names are /dev/rmt/ctape1 and /dev/rStp0. An example of a CDROM Drive Name is /dev/cdrom/c0b0t5l0. The **l** is a lowercase L.



Program Directory - The program defaults /i and this should not be changed unless instructed.

Perform PMmerge? - Enter "N"

Press the **GO** key to start the installation.

7. Loading the Current COBOL—After the installation is complete, press the CANCEL key until your cursor is at the #. Type in the following:
sh /i/install/cobolinstall.sh (press RETURN)
8. Type exit and press RETURN at the # sign to return to a login on the console terminal.
9. **Perform the Special Software Instructions in Part II below!**

Part II: Special Software Instructions

After you load Release 2.14:

1. In System Administrator / File Handling / Create Files / Inventory Management, create the new Hits and Strikes file, IMHITS. This will allow you to accumulate Hits and Strikes by Product by Warehouse during the Inventory Management History Transaction Merge function. Further details are in the Release Notes By Module section herein.
2. In System Administrator / File Handling / Create Files / Inventory Management, create the new IMCYCLB file. This will allow you to post quantities in both primary and overflow bin locations in Cycle Counting. The Overflow Bin flag in System Administrator / System Support / Change GAPSYS4.0 must be set at Y for this new feature to work. **Overflow Bin Tracking is a separate module. Contact your IntegraSoft Sales Representative for further information and pricing.**

Release Notes By Module

Modules Enhanced
AP – Accounts Payable
AR – Accounts Receivable
DD – Direct Deposit
EC – E-Commerce
IC – Inventory Control
IM – Inventory Management
OE – Order Entry
PM – Production Management
PO – Purchase Orders
RF – Radio Frequency
SA – System Administrator
WT – Warehouse Transfer

General

PowerNOTES – TB# 34636 – If you are on Page 1 of a multiple page note you can now press the Page Up key to go to the last page.

AP – Accounts Payable

Setup / Vendors – TB# 34867 – When GO is pressed to maintain a vendor record, the message “Record In Use – Please Redo” will display when that record is already being updated from another session. Any changes will have to be re-entered.

Posting / Transactions – TB# 34968 – A new function is available for posting Electronic Funds Transfers (EFT) as Manual Checks. While in the Manual Check # field, the message “Press F6 for Next EFT Check #” displays. When F6 is pressed the value in the new option in System Administrator / Application Options / Accounts Payable, “Next Transaction # for EFT Manual Check Postings”, is pulled into the Manual Check # field. When that number is used, the value in System Administrator is incremented by 1.

AR – Accounts Receivable

Setup / Customer Master – TB# 34866 – When GO is pressed to maintain a customer record, the message “Record In Use – Please Redo” will display when that record is already being updated from another session. Any changes will have to be re-entered.

DD – Direct Deposit

All Functions – TB# 34801 – Lookups have been added on the Employee Number field in all functions.

EC – E-Commerce

Setup / Web Store Login – TB# 35072 – A Lookup [L] is now available in the Login field.

Setup / Web Store Login – TB# 35073 – If the Login is set up by Customer#, the Customer's Name, Address, City, State, Zip Code and Phone# now display.

Setup / Web Store Login – TB# 35074 – When an entry is made in the Reg E-Mail Address field, that same entry is automatically replicated in the Ack E-Mail Address field, if it is blank.

Setup / Create Product Lists – TB# 34963 – A new feature has been provided to add or delete products by product category from a favorite list.

Setup / Print Setup Lists / Web Store Login – TB# 35075 – If a Login is set up by Customer# and Y is entered for the option "Print IntegraSoft Info", the Customer's Name, Address, City, State and Zip Code will print.

IC – Inventory Control

Setup / Products & Warehouses – TB# 34865 - When GO is pressed to maintain a product or warehouse record, the message "Record In Use – Please Redo" will display when that record is already being updated from another session. Any changes will have to be re-entered.

Inquiry / Warehouses – TB# 35111 – The field previously called Classification has been renamed to Usage Classification. A new field, Hits Classification has been added.

Inquiry / Product & Whse Combined (NEW) – TB# 34836 – A new inquiry is now available that displays information from both the product record and the warehouse records on the same screen. This inquiry can be accessed from Inventory Control Inquiry, Order Entry Inquiry, Purchase Orders Inquiry and Warehouse Transfers Inquiry.

Posting / Transactions – TB# 34959 – Type 7 transactions (Warehouse Transfer) will now move the unit cost to the Replacement Cost in the warehouse transferring to.

IM – Inventory Management

Posting / History Transaction Merge – TB# 35111 – The merge function will now accumulate Hits and Strikes into the new IMHITS file. **Hits** are the number of times a product is issued, regardless of the quantity. For example, an issue for a quantity of 1 and an issue for a quantity of 100, are both considered 1 Hit. Positive Type 0, positive Type 1 and negative Type 7 transactions are used to accumulate the number of Hits. **Strikes** are the number of times a product is placed on reserve for a quantity greater than the quantity available for sale. Strikes are accumulated from positive Type 9 transactions only when the ICHIST Transaction Quantity > On Hand + Received – Reserved – the ICHIST Transaction Quantity. Twelve Period Buckets will be used to store both Hits and Strikes and will Roll like normal usage buckets.

Posting / Assign Classifications – TB# 35111 - Hits Classification has been added to the report. There are 5 Classifications for Hits. Class A items are the 20% of items that account for 80% of sales. Items responsible for the next 15% of sales are Class B, the next 4% are Class C, the last 1% are Class D and items responsible for no sales are Class X.

Posting / Set Purchasing Controls – TB# 35112 – Two new questions have been added to the screen. **Question 1:** "Dead Stock, Specials, & Catalog Products: Freeze & Set Purchasing Controls to 0? Y/N, Frozen Code:" If N is entered, no changes are made to the Purchasing Controls for these types. If Y is entered and the ARP Code is V, the Order Point, Line Point & SOQ is set to zero. If the ARP Code is 1-9999, the Min, Max and SOQ are set to zero. The Frozen Control Code Flag is set to Y. The Frozen Months is set to the value entered in the

Frozen Code field. **Question 2:** "Low Usage Products: Freeze Purchasing Controls? N/0/1/2: Frozen Code:" If N is entered, no changes are made to the Purchasing Controls for Low Usage Products. If 0 or 1 is entered, and the ARP Code is V, the Order Point, Line Point and SOQ are set to the value entered. If the ARP Code is 1-9999, the Min, Max and SOQ are set to the value entered. The Frozen Control Flag is set to Y. The Frozen Months is set to the value entered in the Frozen Code field. If 2 is entered, and the ARP Code is V, the Order Point and Line Point are set to 2 and the SOQ is set to 1. If the ARP Code is 1-9999, The Min and Max are set to 2 and the SOQ is set to 1. The Frozen Control Flag is set to Y. The Frozen Months is set to the value entered in the Frozen Code field.

Reports – Classification (NEW) – TB# 35111 – A new report has been added, #8 Classification. This report can be run for either Usage Classification or the new Hits Classification.

Inquiry / Specialized – TB# 34998 – # 10 Purchasing Controls has been renamed to Comprehensive Purchasing Controls. # 11 Gordon Graham has been renamed to Key Purchasing Controls.

Inquiry / Specialized / Key Purchasing Controls – TB# 35111 – The field previously called Classification has been renamed to Class. Usage. A new field, Hits has been added for the Hits Classification.

Inquiry / Specialized / Key Purchasing Controls – TB# 35111 – You can now press F7 to display the new Hits and Strikes period usage buckets.

Inventory Count / Cycle Counting – TB# 34757 – Quantity tracking by bin location is now available. A new field, "Bin Loc" has been added to the screen as part of this new offering. You can use this new function to post the quantities counted in each bin as you Cycle Count.

Overflow Bin Tracking is a separate module. Contact your IntegraSoft Sales Representative for further information and pricing.

Inventory Count / Cycle Counting – TB# 34803 – A new option has been added for the question "Which Device (T)elxon Or (W)orth" to allow for use of a Worth Data Tricoder external device. ***Contact your IntegraSoft Sales Representative for further information.***

Inventory Count / Physical Inventory – TB# 34752 - A new option has been added for the question "Which Device (T)elxon Or (W)orth" to allow for use of a Worth Data Tricoder external device. ***Contact your IntegraSoft Sales Representative for further information.***

OE – Order Entry

F20 PowerNOTES – TB# 34694 – You can now print the contents of Accounts Receivable PowerNOTES (F20) on Acknowledgments, Invoices and Pick Tickets. The note will print at the beginning of the line item section. To designate the text of the PowerNOTE that should print on the respective forms, use an ampersand (&) to mark the beginning of the print area, and use a carat (^) to mark the end of the print area. In addition, letters following the beginning and end characters designate which print form (A = acknowledgment, I = Invoice, P = Pick Ticket) the text is intended for. For example:

&AIP

This is a note for acknowledgments, invoices and pick tickets

^AIP

Posting – Enter Orders – TB# 34879 – On Direct Orders (DO type) the default cost will now be based on the costing method set up in the "Use Which Cost Default A/R/S:" field in System Administrator/Application Options/Purchase Orders.

Posting – Enter Orders – TB# 34993 – You can now enter the letter "P" or "p" in the Qty Ordered field when entering a line item to pop-up a window that will display the value in the Web Site URL field for the entered stock number. This field is in IC / Setup / Products on the F7-Ord/Web tab. Depending on your Terminal Emulator, you can click on the URL to go directly to that Web Site on the Internet.

Posting / Enter Orders – TB# 35044 – If a product is flagged as a kitted item (Kit flag is set to Y), and you are set to interface to Production Management from Order Entry, the message “Kit Has No Bill of Materials” will display on the posting screen when a bill of materials has not been set up for that product in Production Management. The bill of materials will have to be set up before the product can be entered in Order Entry.

Posting – Enter Orders – TB# 35117 – When adding or maintaining an order, you can now choose to not create a backorder for a line item from the Qty Shipped field. To do this, you enter the quantity to ship followed by a capital letter N. For example, if the customer orders 10 and only 6 are available to sell, the line item can be entered as follows to sell 6 and not create a backorder for the remaining 4:

<u>Stock#</u>	<u>Qty Ordered</u>	<u>Qty Shipped</u>
ABC	10	6N

Inquiry / Contact (NEW) – TB# 35034 – A new inquiry, #9 Contact, has been added for the Accounts Receivable Contact Master file.

Inquiry / Orders by Order # - TB# 35110 – An * will display to the right of the line number if the order is in the ORD stage and the Qty Ordered is greater than the Qty Available for that line item.

Inquiry / Blankets By Product (NEW) – TB# 35086 – A new inquiry has been added for Blanket Orders, #25 Blankets By Product. An entry is required only in the stock# field to display the active blanket orders. You can further define the blanket orders to display by entering a customer# and a warehouse#. Enter any character in the R column corresponding to the Blanket# and press enter or GO to display the Blanket Schedule. This inquiry can also be accessed from Order Entry / Inquiry / Orders By Product and Orders By Cust By Prod, Inventory Control / Inquiry / Warehouses and Inventory Management / Inquiry / Key Purchasing Controls. If a Blanket Order exists for the entered stock# the function “F6-Display Existing Blankets” will show in the message area. Press F6 to access the Blankets By Product Inquiry screen.

PM – Production Management

Setup / Change a Bill of Materials – TB# 34962 – A new function has been added that displays a list of the components of an existing bill of materials. Components can be added, maintained and deleted on this screen.

Inquiry / Parents & Components – TB# 35005 – A warehouse number can now be entered on the screen even when not setting up bill of materials by warehouse. The costs will display for the warehouse number entered.

PO – Purchase Orders

F20 PowerNOTES – TB# 34695 – You can now print the contents of AP Vendor PowerNOTES (F20) on Purchase Orders. The note will print at the beginning of the line item section. To designate the text of the PowerNOTE that should print on the PO, use an ampersand (&) to mark the beginning of the print area, and use a carat (^) to mark the end of the print area. Use the letter O following the & and ^ to designate the text should print on a PO. For example:

```
&O
This is a note for purchase orders
^O
```

Posting / Entry – TB# 34875 – The Division Check Warning Message is now displayed in a Popup screen instead of the normal message area.

Posting / Entry – TB# 34876 – When enter is pressed from a blank line number in the line section the next available line number will be inserted and the line mode will change to A for Add. If a line number is entered and that number does not already exist, the line mode will be changed to A. If it is an existing line, the line mode will change to M for Maintain.

Replenishment / Generate RRAR – TB# 33698 – A new option has been added to the screen “Combine Product Lines On Single Purchase Order Y/N”. If Y is entered, only 1 RRAR per vendor will be created regardless of the number of product lines. If N is entered, the program will work as it has in the past and a RRAR will be created for each product line and vendor.

RF – Radio Frequency

Verify OE Orders – TB# 34714 – If the Counted amount is changed on the Order Exceptions screen, the RF Order Entry Picking Posting Journal will show the original count and the net change from the amount entered.

Verify OE Orders / PO Receiving – TB# 34776 – You can now cancel from the Order Exceptions screen instead of having to GO thru each item that is not complete. You can then Cancel or Go to complete the order.

Cycle Counting – TB# 34935 – Quantity tracking by bin location is now available. A new field, “Bin Loc” has been added to the screen as part of this new offering. You can use this new function to post the quantities counted in each bin as you Cycle Count. ***Overflow Bin Tracking is a separate module. Contact your IntegraSoft Sales Representative for further information and pricing.***

Verify WT Ship / WT Receiving – TB# 34759 - During RF Verify Warehouse Transfer Shipping and RF Warehouse Transfer Receiving a new internal IN-USE field in WTMAIN is set at Y for each transfer. When posting is completed, the IN-USE flag is set at N. Access to a transfer in posting will not be allowed when the IN-USE flag is set to Y. The Transfer Master Audit Report has been modified to change the IN-USE flag from Y to N when entering a Y to “Update Erroneous Conditions”.

Verify WT Ship – TB# 34845 – You can now press F6 from the Qty field to modify one or all of your four bin locations. For example, use this function to assign a new bin location to a product if the existing bins are already full. The bin locations display from the Inventory Control / Setup / Warehouses screen. The changes you make will be reflected in the four Bin Location fields on the Warehouses screen.

SA – System Administrator

Application Options / Accounts Payable – TB# 34968 – A new option has been added, “Next Transaction # for EFT Manual Check Postings.” This option is used in conjunction with posting Manual Checks in Accounts Payable Posting. See Accounts Payable notes herein for more information.

Application Options / E-Commerce – TB# 35009 – A new option has been added “Disable Webstore Usage Y/N” to allow the Web Store administrator to disable the Web Store login. A field has also been added “Message Displayed When Logging Into Webstore While Disabled:” that will display when Web Store is disabled. Customers already logged in will still be able to place orders.

Application Options / Inventory Management – TB# 34752 & 34803 – A new option has been added “Physical Count Posting External Input Device T/W”. This option is the default value for the question “Which Device (T)elxon Or (W)orth” in Inventory Management Cycle Count and Physical Count Posting.

File Handling / Create Files / Inventory Management – TB# 34757 – The new Cycle Count Bin File (IMCYCLB) can now be created from this screen.

File Handling / Create Files / Inventory Management – TB# 35111 – The new Hits and Strikes file (IMHITS) can now be created from this screen.

File Handling / Reorganize Files / Inventory Management – TB# 34757 – The new Cycle Count Bin File (IMCYCLB) can now be reorganized from this screen.

File Handling / Reorganize Files / Inventory Management – TB# 35111 – The new Hits and Strikes file (IMHITS) can now be reorganized from this screen.

WT – Warehouse Transfer

Posting / Entry, Shipping, Receiving – TB# 34759 – During Transfer Entry, Shipping and Receiving a new internal IN-USE field in WTMAIN is set at Y for each transfer. When posting is completed, the IN-USE flag is set at N. Access to a transfer in posting will not be allowed when the IN-USE flag is set to Y. The Transfer Master Audit Report has been modified to change the IN-USE flag from Y to N when entering a Y to “Update Erroneous Conditions”.

Reports / Transfer Master Audit – TB# 34759 – Entering Y to “Update Erroneous Conditions” will change the IN-USE field in WTMAIN from Y to N.