



ASK THE EXPERTS

San Francisco Users Group Meeting Thursday, February 10, 2005

Version 7.6.300

1. Creation of 1099's: we are not able to save payor city, state and zip information. It has to be entered every time the 1099's are printed.

There is no way to save the payor information when you exit the screen, it has to be typed in each time you go to print the 1099's.

2. How do you modify the 1099 such that it uses the vendor address 2 as the vendor address instead of vendor address 1?

The form cannot be changed to replace address line 1, but you can add address line 2, but we are not sure if it will print on the 1099's correctly.

Version 7.6.100a

1. Have the inventory issues (i.e. out-of-balance lots, bins and QOH) been fixed in 7.6.300?

Exact has made several corrections to the stability of O/E, POP and Inventory specifically related to out of balance situations in the lot layers. We cannot guarantee that we have addressed all potential issues that a client may uncover, but the support team will address them diligently to resolve once we identify the issue. Patricia Reisch as well as Jim Clinger of our development group have indicated that they are both personally committed to this statement.

2. In confirm ship, when unshipping an order or rolling back inventory, the transactions do not complete in full leaving an out-of-balance bin and/or lot in IM. When will this issue be resolved? Is there a way to prevent this out of balance from happening?

According to our support group, there is a bug 06.144.587 that was corrected back in Feb 2003 which was included in SPA. There have since been other issues related to Lots and/or Roll Backs and/or Confirm Ship that have been subsequently corrected under bug numbers 12.750.946, 12.643.525, 10.882.768, 9.723.430, 9.258.450, 2.584.396. (Goes back to number one, we have found

issues and have been correcting them in order to stabilize the lot adjustment process)

3. What are the known issues when upgrading from 7.6.100 to 7.6.300a?

Known issues upgrading from 7.6.100 to 7.6.300a are posted to the portal as hot topics on the Service Pack A download page. Currently there are no known issues except for the update process itself. Clients are required to update to 7.6.300 with the CD then apply SPA CD.

4. Is there a way to speed up the database access on large tables on a Pervasive SQL system?

See docs 00.662.374 and 00.685.027 for performance tuning and troubleshooting. Pervasive 8.5 is the only supported PSQL version. Pervasive 8.5 includes additional performance enhancements over previous versions. We recommend that you read the Pervasive.SQL V8 Performance white paper available at: <http://www.pervasive.com/psql>

5. Are there any guidelines for 'tuning' the database other than using the defaults?

See docs 00.662.374, 00.685.027, and 09.326.045 for performance tuning and troubleshooting.

6. We have had an ongoing problem with using kits. In many instances when we invoice the kit (confirm ship), it does not relieve inventory for the kit components. However, a GL distribution is made for the transaction. The problem is inconsistent and neither we nor Exact has been able to find a solution for the problem. Any ideas?

This would need further research. We would recommend that we review your data to see if we can pinpoint why the kit components are not being relieved from inventory prior to confirm ship.

7. When a customer has a credit on their account, can that credit be applied against a future invoice from the OE module either at the time of order entry or at time of invoice?

Yes, they can enter an unapplied cash receipt at order time or time of billing select. The Credit Memo must be an unapplied type.

8. How can I best achieve real time remote access to my Macola information? For example, I want to give sales people real-time visibility into stock levels via the web, i.e. without a VPN or other such technology. The access should be from a simple HTML web page or form. (Example 2, I want to accept sales orders via the web and be able to allocate stock to the order in real time so that when I accept payment for the order I know I can deliver.)

Yes, there is some of that real time information of Macola ES visible in e-Synergy concerning stock levels (specifically on an integrated set up, not consolidated.) As well you can see a number of the previous progression Web.Views reports as well in e-Synergy by replacing the bp.asp with bpwv.asp on the URL of e-Synergy.

As for sales orders being taken over the web and allocating stock real time that is not possible currently. The Web Shop feature of e-Synergy will allow you to take an order that comes into ES as a quote and then it is converted to an order manually in the back office. We are investigating the option to take an order in real time over the web with e-Synergy, but there needs to be an enhancement made to the Macola side before we can make it happen. We are currently looking into this, but there is no ETA as to when we may see this functionality.

9. What data and how often should we really purge our systems? In order to optimize performance, how often should audit trails, etc. be purged?

There are no rules as to when it is best to purge but if your data files get too large eventually this can adversely impact the functionality of the software (slower processing times, when completing a process you may receive errors based on lack of disk as well as the system timing out. The audit trails can get very large and it is recommended that you purge these every 6 months. You may want to set up a purging/ maintenance routine to run against certain files and run this every few years. Backup prior to purging is critical. A link to purging information is included in doc. 00.942.225.

Version 7.6.200.5

1. From the standpoint of both quickness and stability, what is the best way to connect Progression to MS SQL if you have an application server, SQL server, and client all on separate machines? Does the Named Pipes library vs.. the TCP/IP library makes a difference?

TCP/IP is the only supported protocol for Progression SQL.

2. Is there a way to run a screen report for an admin to show who has which screen versions? If I have created a custom screen in the past for five users, we hire three more users and lose two users, and have 30 users on staff altogether, how do I manage screens when people have varying degrees of access? New users get the Macola screen automatically. When you go to Designer and choose a screen, you can see who has custom screens, but no way to identify whether they are the same custom screens.

Paste the following into SQL Query Analyzer to find all non-default screens.

Use Screens

```
DECLARE @iname varchar(20)
```

```
DECLARE @sqlcode varchar (200)
```

```
DECLARE table_cursor CURSOR FOR
```

```
select name from sysobjects where name like '%%scrfil_sql'
```

```
OPEN table_cursor
```

```

FETCH NEXT FROM table_cursor INTO @iname
WHILE (@@fetch_status = 0)
BEGIN
set @sqlcode = 'select screen_id, screen_name from ' + @iname + ' where
screen_name <> "MACOLA" and screen_number = 1'
--print @sqlcode
Exec (@sqlcode)
FETCH NEXT FROM table_cursor INTO @iname
end
DEALLOCATE table_cursor

```

3. Is there a way to get the information in System Manager/Reports/Lists - 2/User Setup... directly out of SQL? The report for a single user takes forever and the report is unreadable.

If they go to the Syspass file in SQL or Crystal, they can pull that information. The data is stored in the SYSPASS_SQL table of the SCREENS database. Crystal Reports can be used to gather this information. The following script can be run in Query Analyzer to extract the same data. The "PASS_COMPANY = 0" is the Demo data. Change this number to report on other databases.

```

SELECT * FROM SYSPASS_SQL
WHERE (PASS_USER = 'test' AND PASS_COMPANY = 0)
order by PASS_USER asc,PASS_COMPANY asc,PASS_MENU_NAME
asc,PASS_MENU_LEVEL asc,PASS_GRANDPARENT
asc,PASS_MENU_PARENT asc

```

4. Is there a way to create multiple POs from the same vendor with the same items, quantities, prices, etc. that only vary by P.O. number?

A new function is available in 7.6.300 which allows PO Master to be created and allows the Master be converted to a regular PO to any vendor. See What's New in 7.6300 doc.