

Total Order Plus

User Appendix

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1

MICROSOFT WINDOWS

- How To Create A Shortcut**
- Cancel Print Jobs**
- Add A Printer**
- Share A Printer**
- Connect To A Shared Printer**
- Map A Network Drive**
- Map UNIX Drives**
- Turn On Sharing**
- Add New PC to Network**
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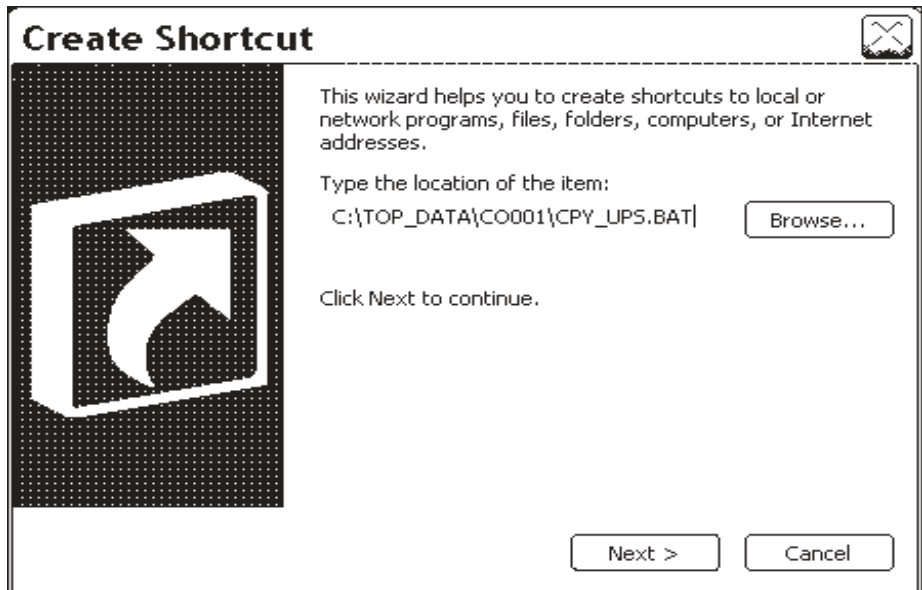
How To Create A Shortcut

Overview

You can create a shortcut to provide a quick way to access the applications that you use frequently. You can place the icon on the Windows desktop to let you open an application quickly. Shortcuts can be created for folders, disk drives, printers or other computers.

Right Click on Windows desktop ---> Select New ---> Click Shortcut to display the Create Shortcut window. Browse to select the file, folder, etc. and Select Next. Enter the name of the icon and Select Finish.

The shortcut is created and placed on the Windows desktop.

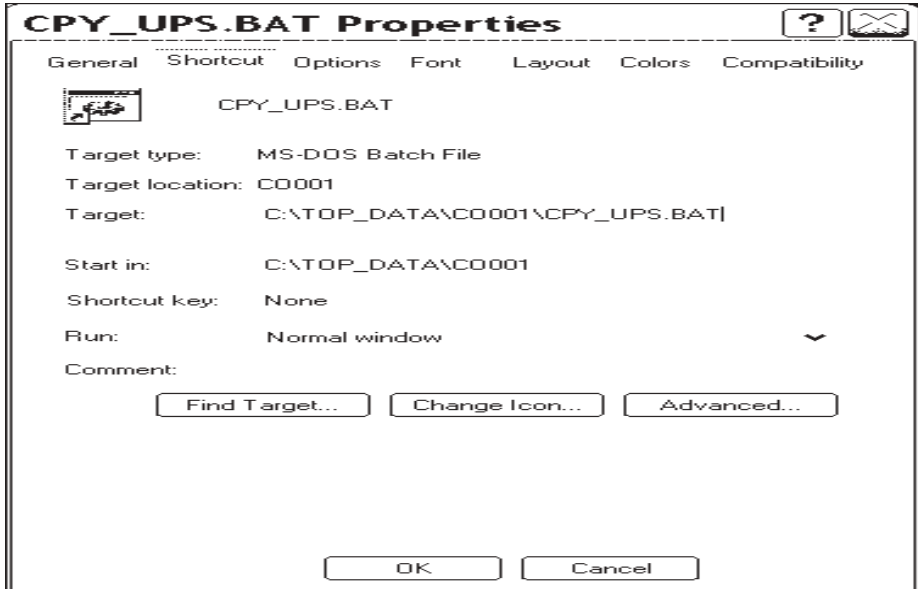


A shortcut has properties that allows you to enter a command line to open the icon for use. Right click on the shortcut icon to display a pulldown menu.

Click on Properties ---> Click on Shortcut Tab.

In the Target area, you have to enter the drive designation, directory and the executable program for this icon. The Start area designates the drive and working directory for this application.

To display different icons for this item, click on the Change Icon button and select your choice from the dialog box.



□ Tips

Can I rename a shortcut?

To rename a shortcut, right click the shortcut , select Rename, type a new name for the shortcut and press the **Enter** key.

If I delete a shortcut, will the original file also be deleted?

A shortcut only contains information needed to find the file and does not contain the information from the file itself. If you delete an icon, the original file is not affected and remains on your computer. The icon is sent to the Recycle Bin.

How can I find the location of the original file?

Right click on the shortcut, select Properties. In the Properties dialog box, select Shortcut Tab and Click on the Find Target button. The folder containing the file opens and the file is selected.

What happens if I try to use a shortcut to a file that has been removed from my system?

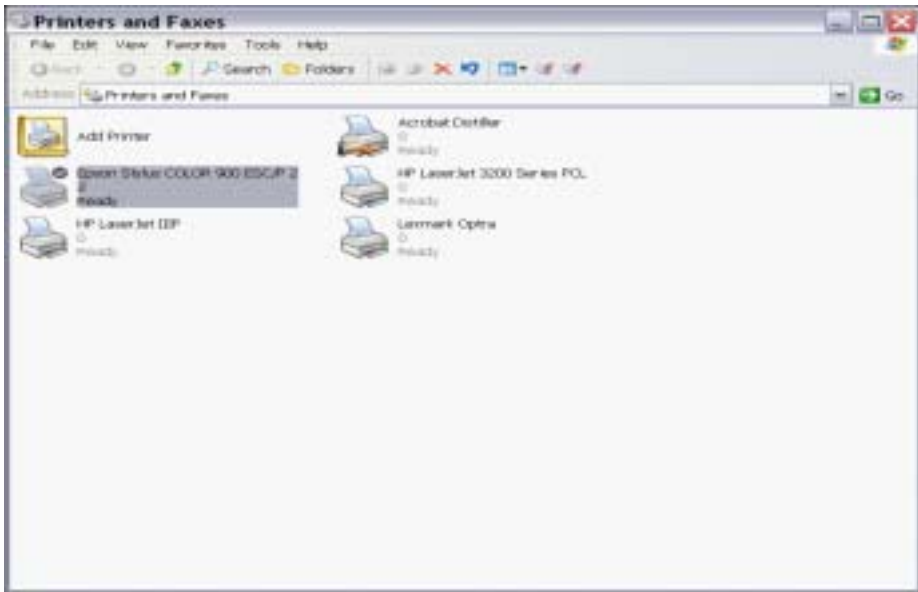
Windows will display a message to tell you that there is a problem with the information in your shortcut.

Cancel Printing

You can stop the printing status of a document while it is printing or you can cancel a print job waiting to print. Windows allows you to cancel a single print job or purge the entire print queue. A print queue is a listing of documents waiting to be printed. If you are on a network, you can only cancel your own print jobs.

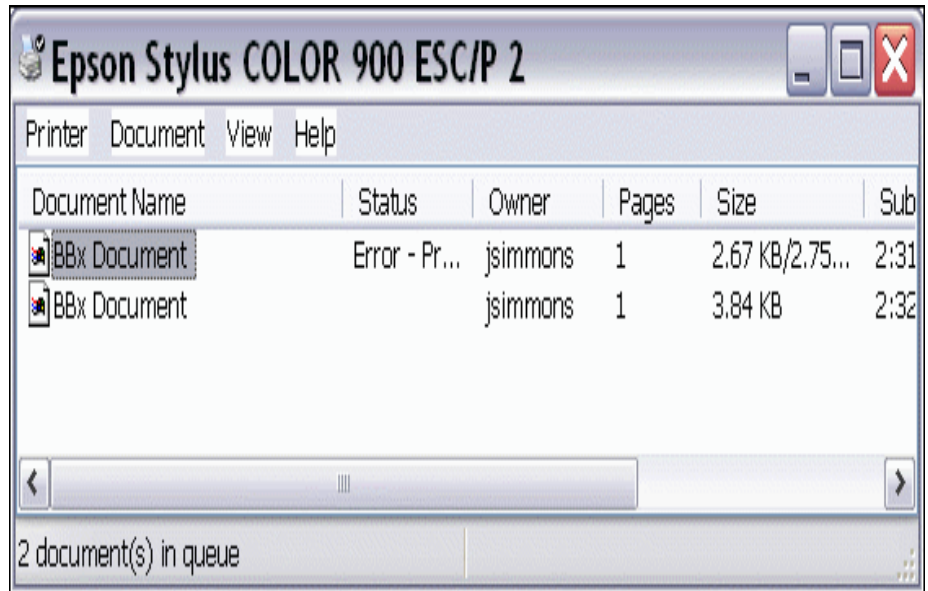
When you cancel printing a document or cancel all print jobs, Windows will not offer you a warning or an undelete option. It may be wise to pause printing first while you decide if you want to cancel a print job or which print job you want to cancel.

Click on Start ---> Click on Settings ---> Click on Printers and Faxes. The printer icons display.



Double click on the printer icon to display the print queue. Highlight job to delete.

Right click on document name ---> Select Cancel



□ Tips

Can I cancel jobs while the printer is printing?

You can cancel all jobs while the printer is printing, but this can cause problems and you may have to reset the printer.

Can I cancel a document while it is printing?

You can cancel a document while it is printing but it can cause problems with the next print job. You may have to reset the printer.

What happens if I shutdown the computer and there are paused print jobs?

When you reset your computer, you will see a dialog box giving you a message that certain documents were not printed.

Add A New Printer

The Add Printer Wizard helps you to install your new printer correctly and that it works properly. You will be asked a series of question about your printer and then the wizard sets up the printer according to the information you provided.

Each printer comes with printer drivers, which is a program that helps your computer to communicate with your printer. The drivers you need will be on a floppy diskette or on a CD-ROM. Windows supports hundreds of different models. If your printer is not on the list of printers, you will need to read the documentation that came with your printer to indicate that your printer is compatible with a similar model on the printer list.

Click on Start ---> Click on Settings ---> Click on Printers and Faxes. The printer box appears, displaying an icon for each installed printer.

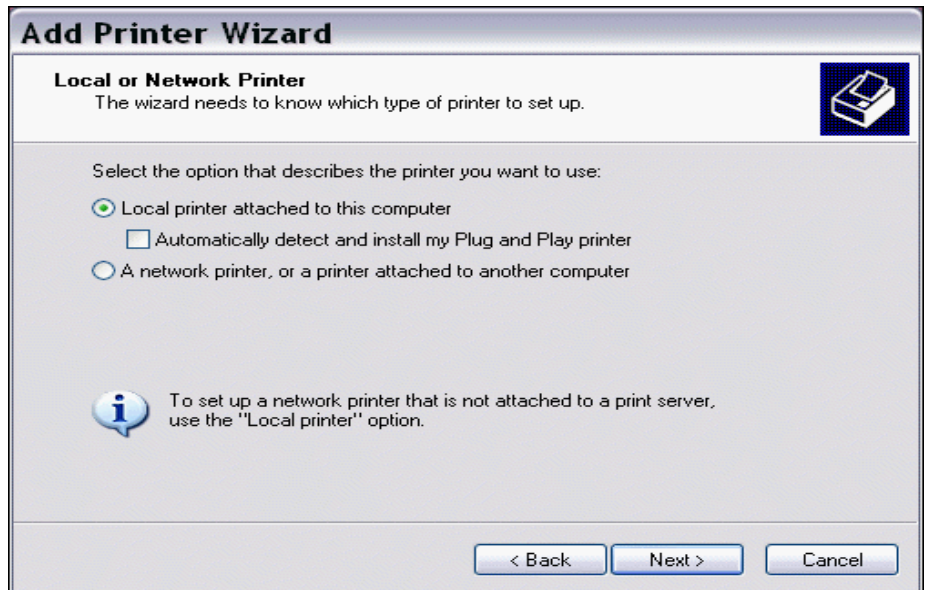


Double click on the Add Printer icon to begin installation of your new printer.

The Add Printer Wizard dialog screen displays.

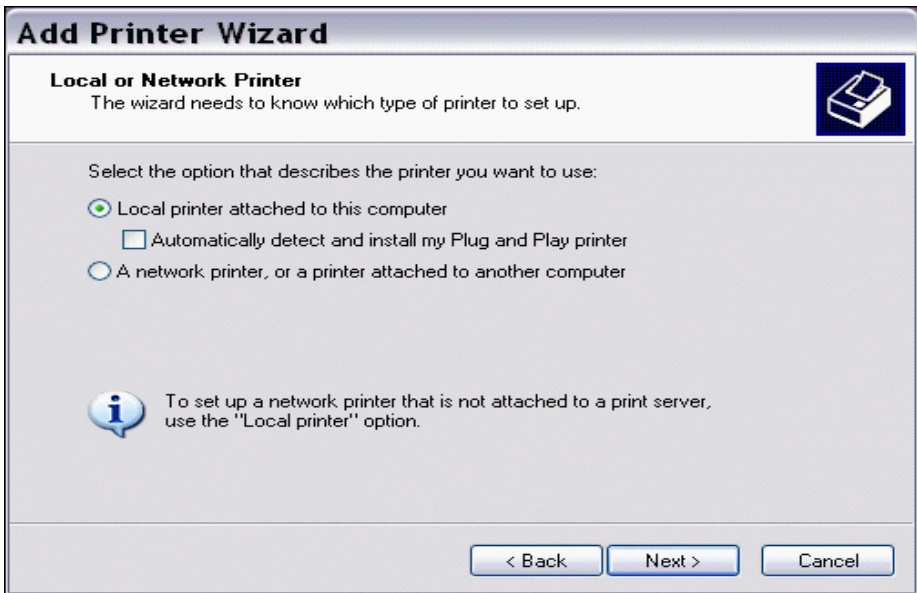


Click on Next to start the installation.

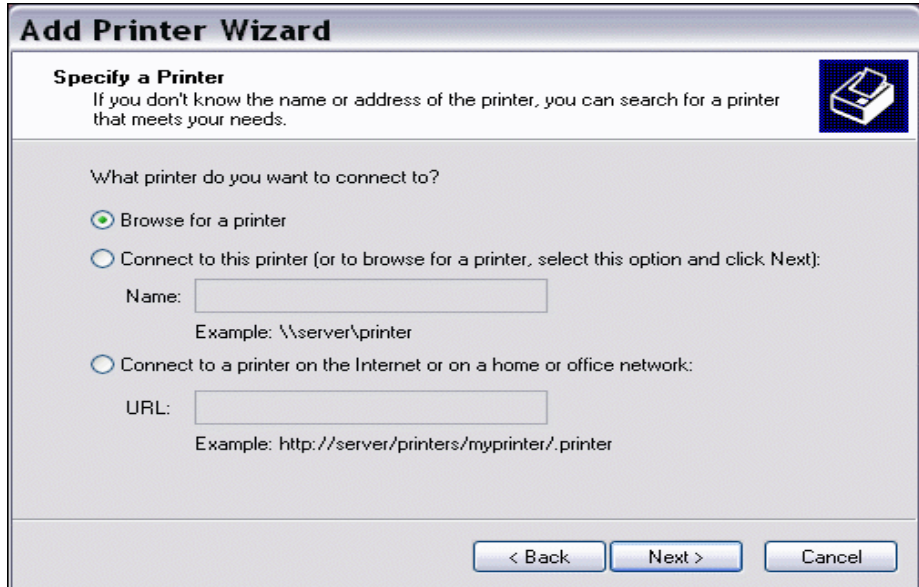


To install a printer that connects directly to your computer, Click Local printer. Skip the following page.

Select Network printer if your printer will be shared across a network.



For a local printer, you will be asked to select the printer port and the printer drivers to install.



To install a network printer, Click Browse to view all of the printers on the network and select the printer you want to connect to.

Click on Next to continue.



Check Yes or No to use the new printer as your default printer.



Select Finish to complete the installation.

□ Tips

How can I change the default printer after installing a printer?

Click on Start ---> Click on Settings ---> Click on Control Panel ---> Click on Printers and Faxes

Right Click on the printer you want to be the default printer ---> Click on Set As Default

How can I rename a printer after installing it?

Click on Start ---> Click on Settings ---> Click on Control Panel ---> Click on Printers and Faxes

Click on the printer you want to change ---> Press the F2 key. Type the new name for your printer.

Note: If your printer is shared, this will cause other users to lose their connection to your printer.

How can I print another test page to make sure my printer is working properly?

Click on Start ---> Click on Settings ---> Click on Control Panel ---> Click on Printers and Faxes

Right Click the printer ---> Click on Properties ---> Click the Print Test Print button

Share A Printer

Printers on a network can be shared with other users on a network. Sharing printers allows you to save money since every person on the network does not need their own printer.

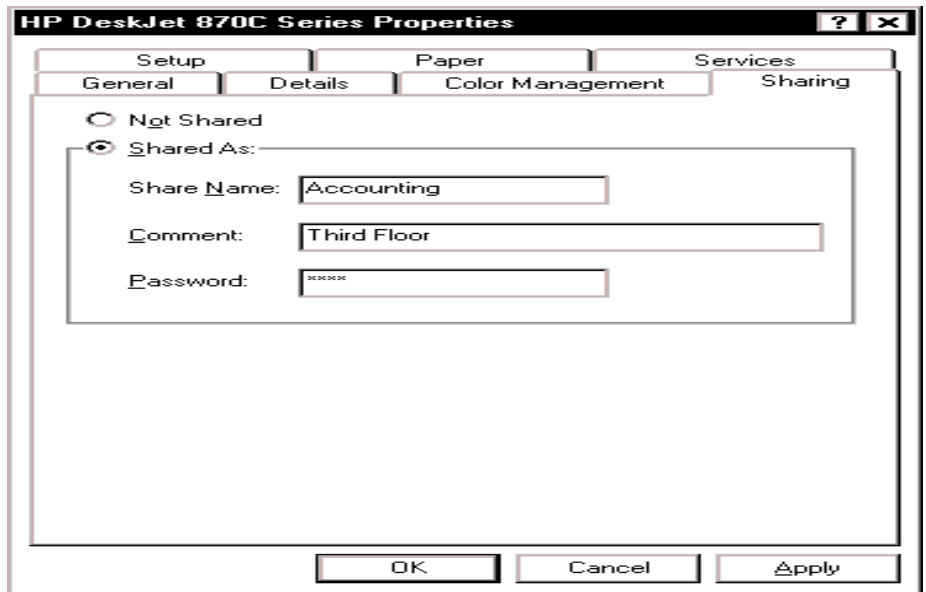
When setting up shared printers, you can assign a unique name so when other users browse for a shared printer, they will immediately identify the printer name they are searching for. You can use a printer name that may specify a location or a specific person. This will help to distinguish your printer from other printers on the network. If you are sharing a printer with others on the network, you have to make sure that your computer and printer are turned on to make your printer accessible to others.

Click on Start ---> Click on Settings ---> Click on Printers. The printer window displays.





Click File ---> Click Sharing. The Properties dialog box displays.



Click on Shared As. Windows displays a name for your printer. Double Click the name and type a new printer name. You can add comments and a password, if applicable. Click OK. The printer is now available to others on the network. A hand displays under the printer icon to designate a shared printer.

□ Tips

Will sharing a printer affect my computer's performance?

The files sent by other users are stored on your computer. Therefore, your computer will perform more slowly while your printer is being used.

Can I hide my computer from other users on the network?

If you do not want other users to see your printer when they browse for shared printers, type a dollar sign (\$) at the end of the printer's name.

How can I restrict access to my shared printer?

You can assign a password to your computer. Only person who know your password will have access to your printer.

How can I stop sharing my printer?

You would select Not Shared instead of Shared As in your printer properties dialog box.

How do I connect to a shared printer on the network?

If you want to use a printer on the network, you must install the printer software on your computer. See 'Connecting To A Shared Printer' elsewhere in this appendix.

Connect To A Shared Printer

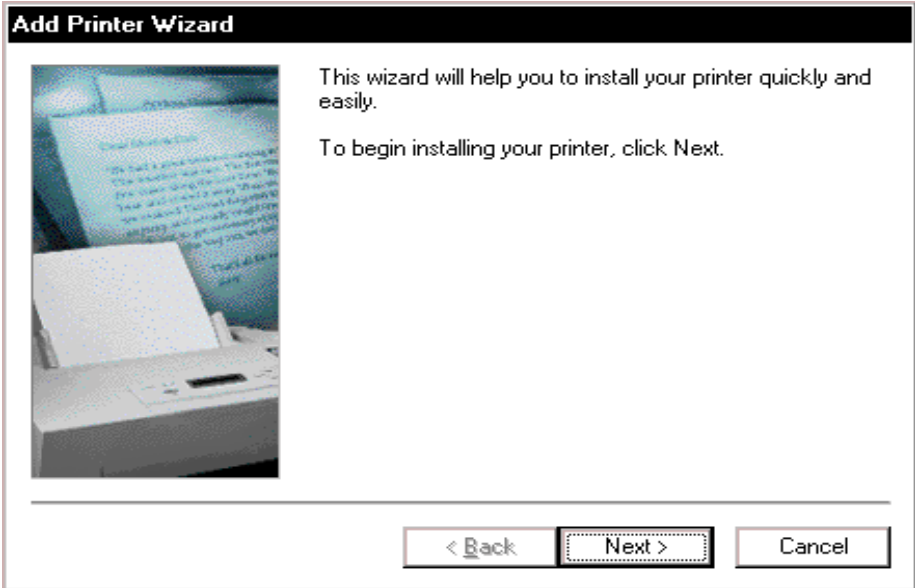
You can connect to any printer that is already a part of your computer network. Some printers on a network that are attached to computers whose only function is to process print jobs and other printers can be attached to built-in connectors directly to a network cable. These printers are known as dedicated printers.

Dedicated printers are usually faster and more reliable than standard printers. They can be placed in a central location of your building or office to make it easy for users to retrieve their print jobs. Some printers have the capability to process print jobs in an organized manner.

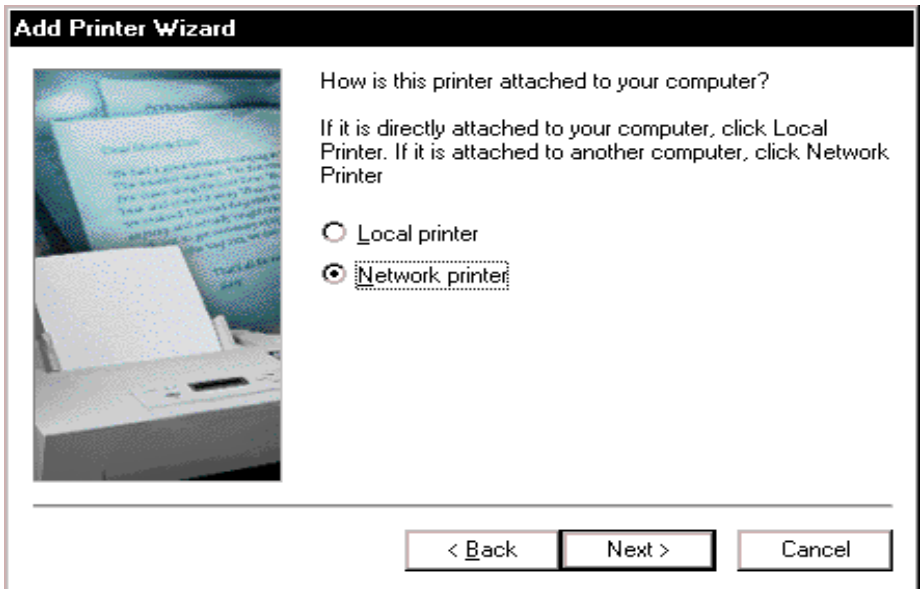
Click Start ---> Click Settings ---> Click Printers. The Printer window displays an icon for each printer installed on your system.

Double Click Add Printer to set up a connection to a new printer.





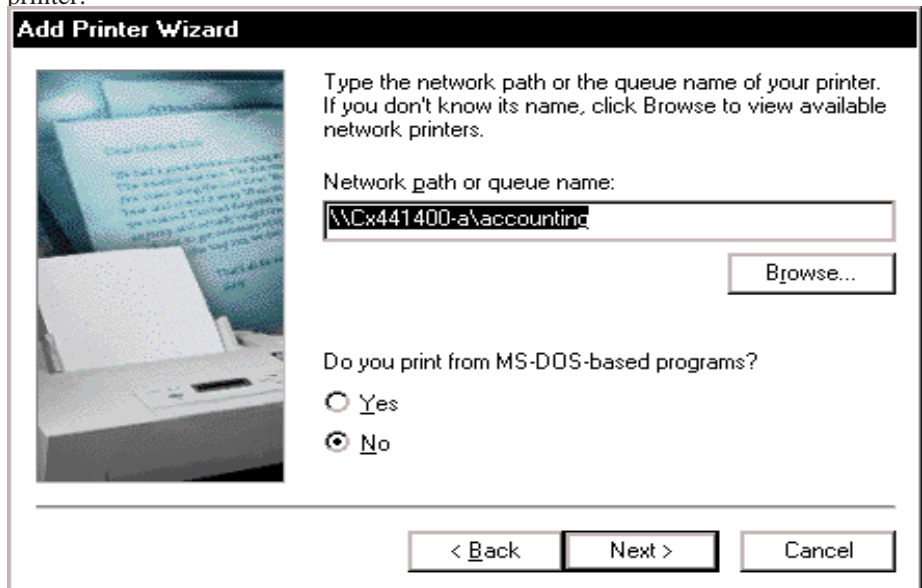
The Add Printer Wizard displays. Click Next to continue.



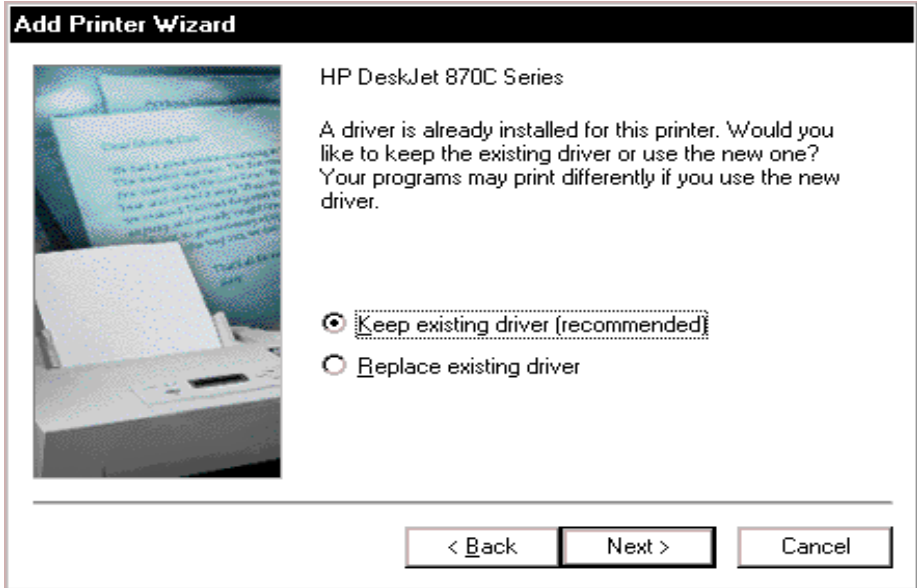
Click Network printer to connect to a printer already on the network ---> Click Next to continue.



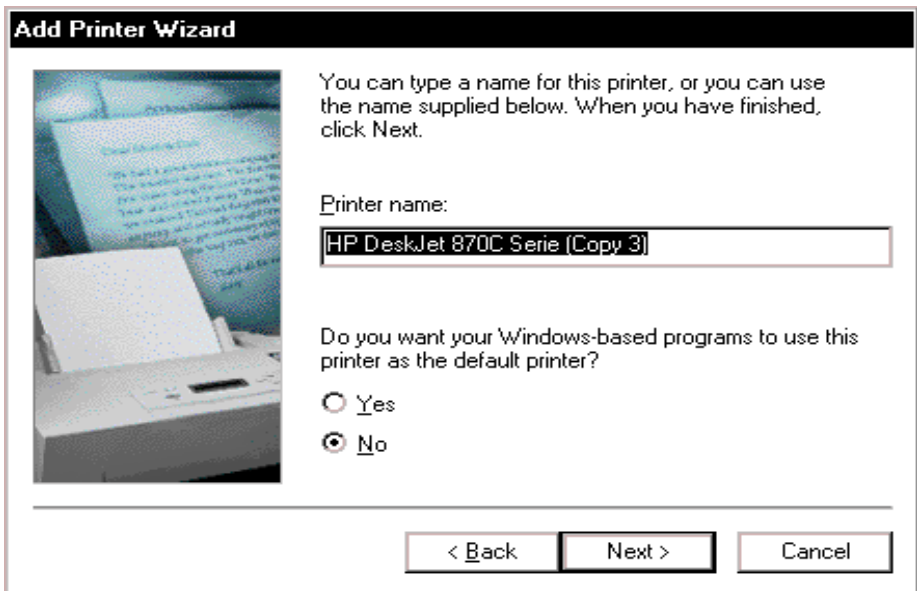
Click on Browse to display the available printers on the network . The Browse For Printer box displays. Click on the printer to connect to ---> Click OK to select the printer.



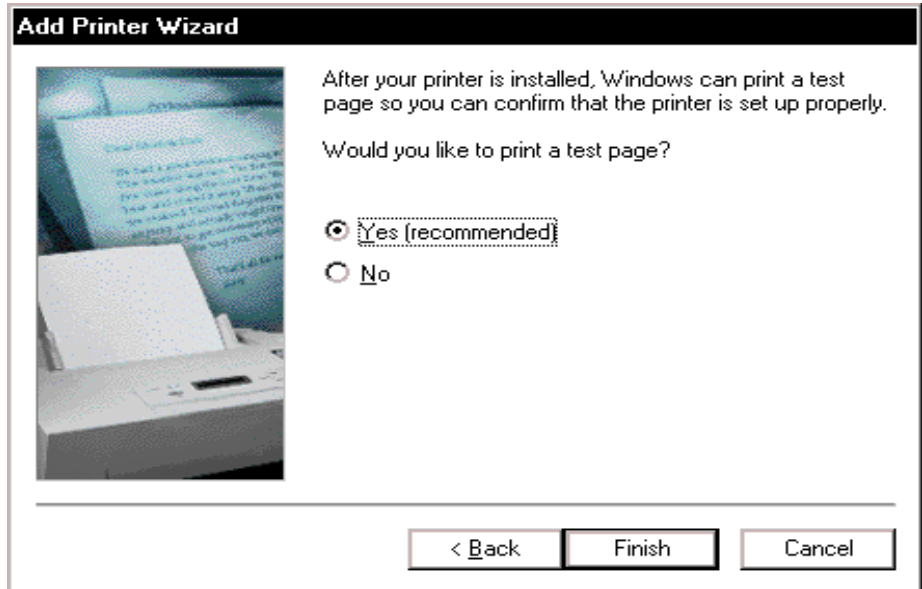
Click an option Yes or No to print from MS-DOS programs ---> Click Next to continue.



Select the option to keep the existing driver. Click Next to continue.



Windows supplies the name of the printer. To use a different name, type in a new name. Specify an option Yes or No to use this printer as a default printer. Click Next to continue.



Click an option Yes or No to print a test print ---> Click Finish to connect the network printer.

Note: A test print is recommended to assure the printer is working properly.

□ Tips

Can I connect to more than one network printer?

You can send print jobs to any printer connected to your network but you can only one default printer. Windows sends all print jobs to your default printer unless you specify another printer.

Why does it take longer to print my work on a network printer?

Many users on the network share the same printer and may be sending large print jobs. These factors may be slowing down the printing of your work.

What if I cannot find the printer that I want to print to?

If the printer is connected to the network but does not show in the selection list, you may have to install another network service before you can access the printer. Ask your system supervisor.

Map A Network Drive

Mapping a network drive provides a quick way to access the information on another computer on the network. You can share information just like it was on your own computer. If you frequently use information stored on another computer, mapping can save you time. Windows simplifies the process by assigning a letter to specify the location of the mapped drive. You can have access to a mapped drive each time you log on to the network.



Double-Click Network Neighborhood ---> Double-Click the computer containing the information you want to have access to.

A list of the items shared by the computer displays. Click the folder you want to have access to.

Click File on the menu bar ---> Click Map Network Drive ---> Select drive to map

Check Reconnect at Login ---> Click OK.

Note: You can view mapped drives by accessing My Computer on the Windows desktop. The My Computer dialog box displays. The icon for the mapped network drives display a disk attached to a cable. You can access the contents of any mapped drive by clicking on the drive icon.

Map UNIX Drives

Map the following drives:

R	\\192.168.1.2\top	(Used for UPS Interface)
S	\\192.168.1.2\share	
T	\\192.168.1.2\top_text	
U	\\192.168.1.2\top_export	
V	\\192.168.1.2\top_import	
W	\\192.168.1.2\top_remote	

Use Explorer to map the drives:

Right Click on the Start button ---> Select Explore ---> Select Tools on the Menu Bar

Select Map Network Drive ---> Select drive letter to map (i.e. Drive S for share drive)

Push Tab key to advance to the path field

Type the path of the Unix drive (i.e. \\192.168.1.2\share)

Note: If you need to connect as a different user and you are using Windows XP, select Connect as different user, enter a valid TOP name and password.

Check Reconnect at Login ---> Click OK

Note: You can also enter this net use command from the DOS prompt:

net use U: \\192.168.1.2\top_export

Disconnect a mapped drive:

Right Click on the Start button ---> Select Explore ---> Select Tools on the Menu Bar

Select Disconnect Network Drive ---> Select drive icon to disconnect

Note: To have access to a Unix file server, you must sign in on the Windows PC with a valid Unix user name and password.

PC Network Setup

Note: The network card must already be installed. When a new network card is installed, windows should prompt you to install the drivers for it after the computer is turned on.

Enter Network Configuration

1. Right click on network neighborhood icon
2. Select Properties

Setup Identification

1. Select Identification tab
2. Enter the Computer name, (example: Tom, Accounting, etc.. The Computer name must be a unique name)
3. Enter the Workgroup, (example: Workgroup. All computers must have the same Workgroup name)
4. Enter the Computer description, (example: Acer 8400. The Computer description is only for information)

Setup TCP/IP

1. Select Configuration tab
2. Double click on TCP/IP (example: TCP/IP -> 3Com etc, Not Dial up adaptor or AOL adaptor)
3. If TCP/IP is not setup, install:
 - a. Select Add
 - b. Select Protocol
 - c. Select Microsoft
 - d. Select TCP/IP
4. Select Specify an IP address
5. Enter IP address, (example: 200.1.1.2, IP address must be an unique address. The first 3 sections must be the same)
6. Enter the Subnet mask, (example: 255.255.255.0, must be the same for all computers on the network)

File and Print Sharing

1. Select File and print sharing button
2. Select options needed, if you want other to use your files or printers

Note: After making changes to networking properties you will have to reboot the computer.

You can also use netsh command to trouble shoot networking problems.

Windows XP PC Setup

Initial Setup

Connect monitor, keyboard, mouse, power and turn PC on

Select Next for Welcome screen

Select Next for Dates and Currency screen

Select Yes for End User License Agreement, then select Next

Select Option for Automatic Updates, then select Next

Enter computer name (cannot match user name), example john_PC or graphics

Enter computer description, example AcerPower

Enter super for administrator password ---> Select Next

Is computer in a domain? Select No ---> Select Next

Select Yes for Connect to the Internet Directly, then select Next

Select No for Register with Microsoft? Select No

Enter user name (must match TOP user name) ---> Select Next

Select Finish ---> System will now restart

Change Window Settings

Right click on Task Bar ---> Click on Properties

Click on Start Menu tab ---> Select Classic Start Menu

Select OK

Select Start ---> Select Settings ---> Select Control Panel

Select Switch to Classic View

Select Start ---> Select Settings ---> Control Panel

Click on User Accounts

Change the way users log on or off

Remove check from Use the Welcome screen

Select APPLY OPTIONS

Select Start ---> Select Settings ---> Control Panel

Click on User Accounts

Pick account to change

Change my password

Enter current password (blank)

Enter password twice (Must match TOP password on server)

Select Change Password

Select APPLY OPTIONS

ADD NETWORK PRINTER TO WINDOWS

Log on PC using top asuser name & mca as password

Double click on My Computer Icon

Double click on Printer Icon

Double click on Add Printer Icon ---> Select Next

Select Network Printer ---> Select Browse

Double Click on scosysv (or top) (if printer shared using SCO)

elect printer to use ---> Select OK

Select Next

Select Printer from list or use disk from printer

Except printer name and choose default printer if desired

Select print a test page ---> Select Finish

TROUBLE SHOOTING PRINTING

PROBLEM:

I cannot print to a printer using windows, but you can print using TOP and the printer is a selection using windows.

SOLUTION:

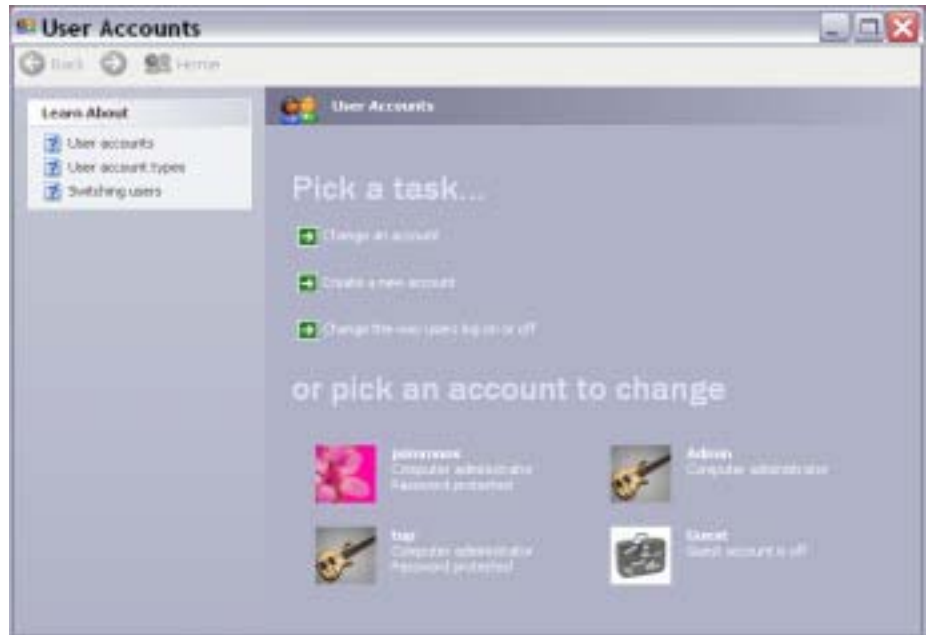
You must login to windows with a valid UNIX password to access resources on the UNIX system. Shut down windows and enter a valid UNIX name and password when the system restarts.

If the printer still doesn't print, check that the printer is not set to work offline. To check the setting, select Start, Settings, Printers, then right click on the printer. If Work Offline is checked, click to remove the check.

Add New User to Windows XP

To add a new user to Windows XP PRO, you must log in as Administrator and follow these instructions:

Select Start ---> Select Settings ---> Select Control Panel ---> Double Click on the User Accounts icon.



Select Create A New Account ---> Type the name of the new user ---> Select Next

Note: The user name will appear on the Welcome screen and the Start Menu.

Click on Computer Administrator for account type ---> Click on Create Account

Note: The computer administrator is able to create, change or delete an account, make system wide changes and install programs and access all files. We encourage all users to be set up as a computer administrator.

The Limited user account type is only able to access, view and change his own files and password.

Configure Print Server

With Windows 2000 and XP PRO, you should configure printing directly to a HP Jet Direct print server instead of printing through a UNIX file server. Before beginning the configuration, print a testpage from the jet direct to get the IP address information.

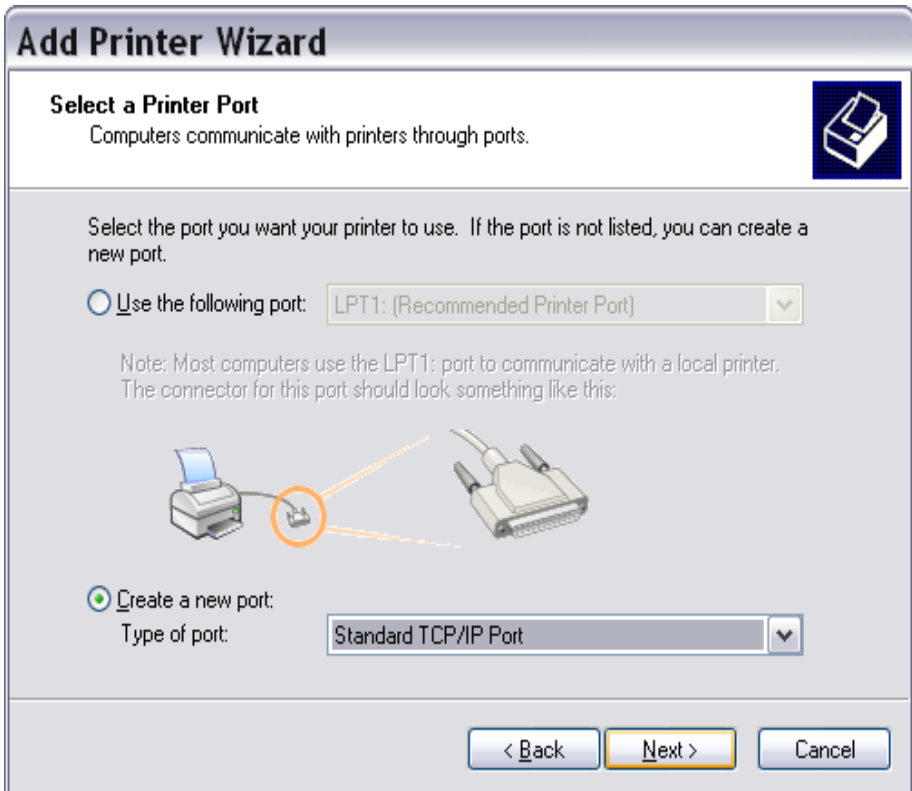
Select Start ---> Select Settings ---> Select Printers ---> Select Add Printer

Select Next for 'Welcome to the Add Printer Wizard'

Select Local Printer ---> Uncheck Automatically detect and install plug and play printer ---> Select Next

Select Create new port option ---> Select Standard HPTCP/IP for port type ---> Select Next

Select Next for 'Welcome to the Add Standard TCP/IP Printer Port Wizard' --->

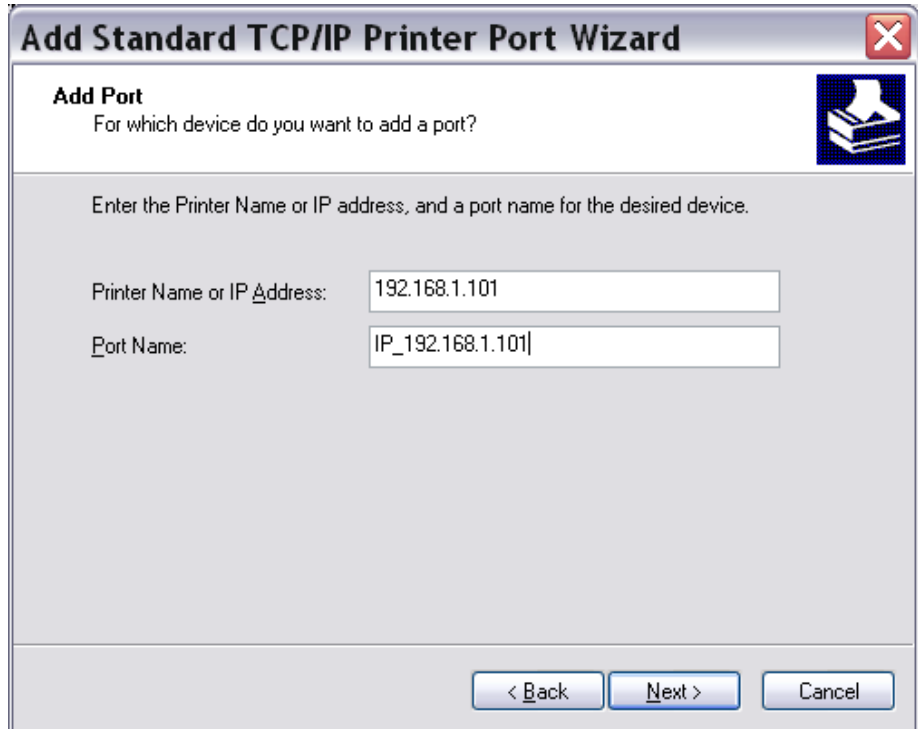


Select printer IP address ---> Enter port name ---> Select Next

Note: You will need to print a test page from the jet direct box to get the IP address. The port name depends on the number of ports available. If the jet direct has three ports, the port names would be A through C.

Enter device port ---> Select Next

Note: For device port use parallel 1 for single port and parallel 1, 2 and 3 for a 3 port jet direct.



Select Finish ---> Choose manufacturer and printer model ---> Select Next

Select printer name and printer default option ---> Select Next

Select Do Not Share this printer ---> Select Next for Printer Sharing

Select Next to print test page ---> Select Finish

Setup Windows Remote Connection

Host PC

Right Click My Computer

Select properties ---> Select Remote Tab

Select Allow users to connect remotely to this computer

Select OK

Remote PC

Select Start ---> Select Programs

Select Accessories

Select Communications

Remote Desktop Connection

Enter IP address of the Host PC

Select Connect to log in to the Host PC

Note: Login to the customer's Sonicwall --> Select Firewall --> Select Access Rules

Select Add --> Action: Allow --> Service --> Select Terminal Services

Destination Begin: IP address of remote PC --> Destination End: Same IP address

Comment: Remote Control PC --> Select OK

Access Local Files During a Remote Session

Click on Start ---> Select Accessories --> Select Remote Desktop Connection

Click the Options button

Click the Local Resources tab

Click on the More button under Local Devices and Resources

Click on Disk Drives

Click Connect

2

UNFORM INSTALLATION

- SCO Unix Installation 6.0**
- SCO Unix Installation 7.0**
- Windows UnForm Installation**

SCO Unix Installation UnForm 6.0

Login in as root ---> Create directory for UnForm

```
mkdir /usr/uniform6
```

Place UnForm CD is in drive on file server

Mount CD

```
mount -o lower -r /dev/cd0 /mnt
```

Change to UnForm directory on CD-Rom:

```
cd /mnt/uniform60/unix
```

```
cp /mnt/uniform60/unix/* /usr/uniform6
```

Run install script

```
./install.sh
```

Y to agree with agreement

Enter for /usr/uniform6 directory

1 for PRO5

/u/top (or /a/top) for PRO5 directory

/u/top/top.rul (or /a/top/top.rul) for default rule file

Change to uniform directory

```
cd /usr/uniform6
```

Unmount CD

```
umount /mnt
```

Start UnForm

```
uf60d start
```

Test UnForm

```
uf60c -v
```

Edit UnForm parameter file: /usr/uniform6/uf60d.ini

```
rulefile=/u/top/top.rul (or /a/top/top.rul)
```

```
library=/u/top/GRAPHICS
```

Add UnForm to config.bbx file

Add "**|uf60c | lpr ...** to each laser printer alias

Set parameters for UnForm option in each TOP accounting module.

Examples:

```
alias P1 "|uf60c -r Labels | lpr -s -doptra -onb -or>/dev/null" "Lexmark Optra Lxi Laser  
(UnForm Labels)" CR,SPCOLS=80,CPCOLS=132
```

```
alias PP "|uf60c -p pdf -o ../EXPORT/PDF.PDF" "Create Adobe PDF File"  
CR,CPCOLS=132,SPCOLS=80
```

```
alias PQ "|uf60c -p pdf" "Create Adobe PDF Register File"CR,  
SPCOLS=80,CPCOLS=132
```

SCO Unix Installation UnForm 7.0

Login in as root ---> Create directory for UnForm

```
mkdir /usr/uniform70
```

Install by CD (SCO 6):

Mount CD

```
mount -o lower -r /dev/cd0 /mnt
```

Change to UnForm directory on CD-Rom and copy files:

```
cd /mnt/uniform70/unix
```

```
cp /mnt/uniform70/unix/* /usr/uniform70
```

Install by Download file:

Copy compressed file to /usr/uniform70

```
cp uf70_sco_os6_tar.Z /usr/uniform70
```

Change to uniform directory and uncompress file:

```
cd /usr/uniform70
```

```
uncompress uf70_sco_os6.tar.Z
```

Run install script to create uf70d:

```
./ufsetup.sh
```

License UnForm:

```
./license.sh
```

```
Select 1 for permanent activation
```

```
Enter serial # and pin code (key will be returned)
```

```
Select q to quit
```

Unmount CD:

```
umount /mnt
```

Start UnForm:

```
uf70d -start
```

Test UnForm:

```
uf70c -v
```

Edit UnForm parameter file: /usr/unform70/uf70d.ini

rulefile=/a/top/top.rul (or /u/top/top.rul)

library=/a/top/GRAPHICS;/a/top/EXPORT

Add UnForm to config.bbx file

Add "|uf70c | lpr ..." to each laser printer alias

Set parameters for UnForm option in each TOP accounting module.

Examples:

```
alias P1 "|uf70c -r Labels | lpr -s -doptra -onb -or>/dev/null" "Lexmark Optra Lxi Laser  
(UnForm Labels)" CR,SPCOLS=80,CPCOLS=132
```

```
alias PP "|uf70c -p pdf -o ../EXPORT/PDF.PDF" "Create Adobe PDF File"  
CR,CPCOLS=132,SPCOLS=80
```

```
alias PQ "|uf70c -p pdf" "Create Adobe PDF Register File"CR,  
SPCOLS=80,CPCOLS=132
```

Add "|uf70c | lpr ..." to each laser printer alias

Set parameters for UnForm option in each TOP accounting module.

To finish installation, do the following steps:

Create S99unform7 in the /etc/rc2.d directory using vi.

Enter uf70d -start so it will automatically start UnForm upon boot up.

Stop the older version of UnForm if installed (i.e. uf60d -stop).

Enter the uf70d -start to activate Version 7.0.

Test by entering uf70c -v - should display the serial #, version, etc on the screen.

Print an order to make sure it is working properly.

Windows UnForm 5.0 Installation

1. Copy top.rul to top folder (i.e. COPY C:\TOP\MCA\UNFORM\TOP.RUL C:\TOP)
2. Insert UnForm CD into CD-Rom drive
3. Use explorer to locate the UnForm Windows Directory

Example: D:\UNFORM50\WINDOWS on the CD-Rom drive

4. Double click on the setup.exe program

Select Next ---> Select Yes for license agreement

Select default for UnForm Folder ---> Select default for program folder

Select Next ---> Select Finish

5. Click on the Run ufsetup icon

Enter path for PRO5 (example, C:\BASIS\VPRO5\VPRO5.EXE)

Enter path for rule file (example, C:\TOP\TOP.RUL)

Select OK

6. Click on the Unform Activation icon

Enter UnForm activation key ---> Select OK

7. Add Unform to config.bbx file

```
alias LP LP.TXT "HP Laserjet 5" CR,pton=
```

```
1B451B266C304F1B266C32411B266C36441B266C304C,ptoff=1B45,
```

```
SP=1B266B3053,CP=1B2873307031372E262648,
```

```
SPCOLS=80,SPLINES=60,CPCOLS=132,CPLINES=60,
```

```
O_CREATE,O_TRUNC,EXECOFF="unform.exe -ix LP.TXT -o /dev/lpt1"
```

```
# Add 3-Up Labels
```

```
alias P1 P1.TXT "HP LaserJet 5 (UnForm Labels)" CR,
```

```
SPCOLS=80,CPCOLS=132,O_CREATE,O_TRUNC,EXECOFF=
```

```
"unform.exe -ix P1.TXT -r Labels -o /dev/lpt1"
```

```
# Add PDF file format
```

```
alias PP PP.TXT "Adobe PDF File Format" CR,SPCOLS=80,CPCOLS=132,
```

```
O_CREATE,O_TRUNC,EXECOFF=
```

```
"unform.exe. -ix PP.TXT -p win"
```


Windows UnForm 6.0 Installation

Install the executable programs from the SDSI website to the Windows server.

Note: If Terminal Services are used, you must use Control Panel Add/Remove Programs.

Open your browser

Type <http://www.synergetic-data.com> for the URL address

SERVER INSTALL

Select Downloads --> Select UnForm

Type your email address and name --> Select Submit

Select Windows (2000 or higher preferred) --> Select Run

Select Next to begin installation

Select Next to accept License Agreement

Select Next to install in location C:/sdsi/uf60/server folder

Select Next to start installation --> Select Finish

Once the program is on your server, you must configure the server.

Select Start --> Program --> UnForm 6.0 Server --> Server Configuration

Enter location of top rule file located in TOP folder. Example: C:\top\top.rul

Select OK

Select Start --> Program --> UnForm 6.0 Server --> Server Manager

Select Licensing

Select Activate Demo Mode --> Select Show System ID

Enter serial number --> Enter activation pin --> Select Automatic Activation

Note: System key and jobs key will display.

Select Close --> Select Start --> Select Exit --> Select Install as a Service option

CLIENT INSTALL

Open your browser

Type <http://www.synergetic-data.com> for the URL address

Select Downloads --> Select UnForm

Type your email address and name --> Select Submit

Select Windows Client --> Select Run

Select Run from Internet Explorer - Security Warning

Select Next from Client Installation -->

Select Next for the location folder C:/sdsi/uf60/client folder

Select Next to start installation --> Select Finish

Once the program is on your server, you must configure the client.

Select Start --> Program --> UnForm 6.0 Client --> Configure UnForm Client

Enter server IP address. Example: 192.168.1.2

Select OK

Config.bbx file alias:

```
alias LP C:\TEMP\LP.TXT "HP Laserjet 5"  
CR,LOCK=C:\TEMP\LP.LCK,O_CREATE,
```

```
pton=1B451B266C304F1B266C32411B266C36441B266C304C,ptoff=1B45,
```

```
SP=1B266B3053,CP=1B2873307031372E262648,
```

```
SPCOLS=80,SPLINES=60,CPCOLS=132,CPLINES=60,
```

```
EXECOFF="unform.exe -ix C:\TEMP\LP.TXT -o lpt1"
```

Add 3-Up Labels

```
alias P1 C:\TEMP\P1.TXT "HP LaserJet 5 (UnForm Labels)"  
CR,LOCK=C:\TEMP\P1.LCK,O_CREATE,
```

```
SPCOLS=80,CPCOLS=132,EXECOFF=
```

```
"unform.exe -ix P1.TXT -r Labels -o /dev/lpt1"
```

Add PDF file format

```
alias PP C:\TEMP\PP.TXT "Adobe PDF File Format" CR,
```

```
LOCK=C:\TEMP\PP.LCK,O_CREATE,SPCOLS=80,CPCOLS=132,EXECOFF="unform.exe.  
-ix PP.TXT -p winpww"
```

3

ODBC Shipping Information

- Basis BLM License Installation**
- Basis ODBC Driver Installation**
- UPS Worldship Installation**
- Map Drive on UPS PC**
- Create Icon to Copy Ship-to File**
- Copy TOP ODBC Files**
- Create Data Source**
- Create UPS Map**
- Setup Keyed Import**
- Using UPS with TOP ODBC Interface**
- Setup Service Type in TOP**

Basis BLM License Installation

Create C:\TEMP folder on the UPS PC if not already there

Go to www.mindwarecorp.com --> Click on Download Upgrades link

Right Click on Basis ODBC 3.01 Driver and Save Target in C:\TEMP folder

Right Click on Basis BLM License Manager and Save Target in C:\TEMP folder

Click on Start --> Select Run --> C:\TEMP\blmgr11300.exe --> Select OK

UnZip to the C:\TEMP folder

Click on Start --> Select Run --> C:\TEMP\SETUP.EXE --> Select OK

Select English --> Select Next for Welcome Window

Select Yes for Software License Agreement --> Select Next for Location

Select Next for Select Program Folder Window

Select Next for Register for a BASIS License --Enter Registration Information

Company Name:

First Name:

Last Name:

Email Address:

Phone Number:

Serial Number: (on Registration Form)

Authorization Number:

Select Next --> Select Next for License Registration and Delivery Methods

Select OK for License Installed --> Select No for installing another license

Select Finish for Installation Complete --> Select OK to reboot

Uncheck the readme file option and select Finish

Select Finish for Setup Complete

System will reboot

Basis ODBC Driver Installation

ODBC Drivers

Click on Start --> Select Run --> C:\TEMP\1467301.exe --> Select OK

UnZip to the C:\TEMP folder

Click on Start --> Select Run --> C:\TEMP\SETUP.EXE --> Select OK

Select English --> Select Next for Welcome Window

Select Yes for Software License Agreement

Select Typical Setup --> Select Next for Setup Type

Select Next for Select Program Folder

Close BASIS ODBC Driver 3.01 Window

Check Only check this box if using BASIS License Manager --> Select Next

Select Yes for Attention warning

Check Configure this application to use the BASIS License Manager

Select Next

Click on Start --> Settings --> Control Panel --> System --> Computer Name

Enter name for PC in box --> Select Next

Select OK for Installation Successful

Select Finish for Installation Complete

Uncheck the readme file option --> Select Finish

UPS Worldship Installation

Note: Where ever you see ### you will need to replace that with the TOP company number (i.e. 001 for Company 1).

Install from CD-ROM

Note: Follow the UPS Worldship instructions to install the software on the UPS Worldship CD-Rom, if it has not already been installed.

Map Drive on UPS PC

It will be necessary to map the UNIX top directory to the R drive on the UPS PC.

1. Start Explore on the PC

Right Click on Start ---> Select Explore

or

(push the windows key + the E key)

2. Select Tools ---> Map network drive
3. Enter R as drive letter
4. Enter \\192.168.1.2\top as path (Unix) or name of server/top (Windows)
5. Check reconnect at login
6. Select OK

Create Folders on the UPS PC

1. Create the following folders on UPS PC (this can be done from the DOS prompt using the MKDIR command or by using My Computer icon). You will need to create a CO### folder for each TOP company that is going to be interfaced with UPS WorldShip.

C:\TOP_DATA (contains cpy_ups.bat)
C:\TOP_DATA\CO### (contains top_ups.tpm)
C:\TOP_DATA\SGDIR (contains *.1 files)

Download UPS Interface Files from Support Website

1. Go to www.mindwarecorp.com --> Click on Download Upgrades --> RIGHT click on UPS ODBC Files for TOP Interface --> Click on Save Target As --> Click on Browse --> Save files in C:\TOP_DATA\SGDIR folder

2. Unzip the interface files in the C:\TOP_DATA\SGDIR folder.

Right Click on Start --> Select Explore --> Highlight the C:\TOP_DATA\SGDIR folder --> Highlight the TOP_UPS.ZIP file --> Select File --> Click Extract All

3. Copy C:\TOP_DATA\SGDIR\cpy_ups.bat file to C:\TOP_DATA folder.

The contents of the file should be:

```
COPY R:\CO001\OEST1 C:\TOP_DATA\CO001
```

Note: If you are using a company number besides 001, you will need to use NotePad to edit the file. Change the 001 in both places to the correct company number.

4. Copy C:\TOP_DATA\SGDIR\ top_ups.tpm to the C:\TOP_DATA\CO### folder. You will need to do this for each TOP company.

The contents of the file should be:

```
DICTIONARY=C:\TOP_DATA\SGDIR\
```

```
DATA=C:\TOP_DATA\CO001\
```

Note: If you are using a company number besides 001, you will need to use NotePad to edit the file. Change the 001 in both places to the correct company number.

Create an Icon to Copy the Ship-To file

Right Click on desktop ---> Select New ---> Select Shortcut

Use browse to select the C:\TOP_DATA\CPY_UPS.BAT file

Enter icon name: Copy TOP### Ship-To File

Select Finish

Click on icon to copy the OEST1 file

Create Data Source

1. Select Start ---> Settings ---> Control Panel on UPS PC ---> Administrative Tools on the UPS PC

2. Select ODBC Icon ---> System DSN Tab ---> Select Add

3. Select Basis ODBC Driver ---> Select Finish

4. Enter Data Source Name: TOP_UPS###

5. Enter Data Source Description: Total Order Plus ### UPS interface (where ### is the company number)

6. Enter database configuration file:

C:\TOP_DATA\CO###\TOP_UPS.TPM (or Browse)

7. Select Read Only Access ---> Select OK

Note: Repeat for each company.

Create UPS Map

1. Start UPS Worldship software
2. Select Import/Export
3. Select Connection Assistant
4. Select Create a new map for import ---> Select Next
5. For Import Data Type select Freight Shipment ---> Select Next
6. Select By Known ODBC Source
7. Select TOP_UPS### for ODBC Source from list ---> Select Next
8. Select New Map
9. Enter TOP_UPS### for New Map Name ---> Select Next
10. Select Finish
11. Select OE_SHIPTO for ODBC Table
12. Select Ship To for WorldShip Fields
13. Connect the following fields, first select field from OE_SHIPTOVIEW and from Ship To then select connect.

OE_SHIPTO	SHIP TO
CC_NAME	Attention
SHIPTO_ADD1	Street Address
SHIPTO_ADD2	Address 2
SHIPTO_ADD3	Address 3
SHIPTO_CITY	City or Town
SHIPTO_NAME	Company or Name
SHIPTO_STATE	State/Province/County
SHIPTO_ZIP	Postal Code
ORDER_NO	Customer ID
RECV_UPS_NO	Receiver UPS Account Number

UPS Worldship Installation

14. Select ORDER_NO --> Select Define Primary Key for Import

15. Select Package for WorldShip Fields

OE_SHIPTO	Package
ORDER_NO	Reference 1
PO_NO	Reference 2
INVOICE_NO	Reference 3
SHPMNT_VALUE	Insured Value Amount

16. Select Shipment Information for WorldShip Fields

OE_SHIPTO	Shipment Information
SERVICE_TYPE	Service Type
BILLING_OPT	Billing Option
NOTIFY_FLG	QVN Option
NOTIFY_FLG	QVN Ship Notification 1 Option
EMAIL_ADDR	Notification Recipient 1 Email

17. Select Ship From for WorldShip Fields

OE_SHIPTO	Ship from
RETURN_NAME	Company or Name
RETURN_ADDR1	Street Address
RETURN_ADDR2	Room/Floor/Address 2
RETURN_CITY	City
RETURN_STATE	State
RETURN_ZIP	Postal/ZIP Code

18. Select OK

Setup Keyed Import

1. Select Import/Export Data
2. Select Keyed Import
3. Select More
4. Select TOP_UPS###
5. Select Import

Using UPS With TOP ODBC Interface

1. Double Click on Copy TOP Ship-To File icon
2. Start UPS Worldship
3. Select UPS OnLine Connect
4. Select Keyed Import
5. Select TOP_UPS
6. Enter TOP Order Number (Include leading zeros) and push the Enter or Tab keys

Setup Service Type In TOP

1. Enter a ? from any Order Entry Menu
2. Select Ship Via Maintenance
3. Enter F1 for Maintenance from display mode
4. Enter TOP ship via code for UPS
5. Select N to edit

6. Enter correct UPS service type for each corresponding ship via code:

Next Day Air Early AM

Next Day Air

Next Day Air Saver

2nd Day Air AM

2nd Day Air

3 Day Select

Ground

4

TERMINAL EMULATION SOFTWARE

- Anzio Lite

Anzio Lite Installation

Go to www.anzio.com --> Click Download

Select current version of Anzio Lite 16

Save to temp folder on C drive (if not present create)

Select Save --> Select OK

Select Open --> Select Run to display Install Wizard

Select Yes to License Agreement --> Select Next for Location

Select Next for Program Folder --> Select Finish

Setup Icon

Select Start > Programs > Anzio 16 > Anzio Lite 16 (New Connection)

Select SCOANSI for terminal type

Answer No to old style if SCO 5.0.7

Select SSH from Communications Setup Window for remote connection

Select Telnet from Communications Setup Window for internal connection

Enter IP address for server, example: 192.168.1.2 --> Click Connect

Select Yes for Please Verify SSH Key if using SSH

Enter login name and password

Select File --> Save Settings As

Use Total Order Plus for icon name

Type exit at \$ prompt

Slave Printer Setup

Start Anzio Lite

Select File > Printer Setup > In Print Level section select Spooler, on printer

Select OK

Disable X box to exit TOP

Start Anzio Lite --> Select Edit --> Select Advanced Options

Select Screen tab --> Uncheck System menu close box

Select File --> Select Save Settings --> Log out and log back in to take effect.



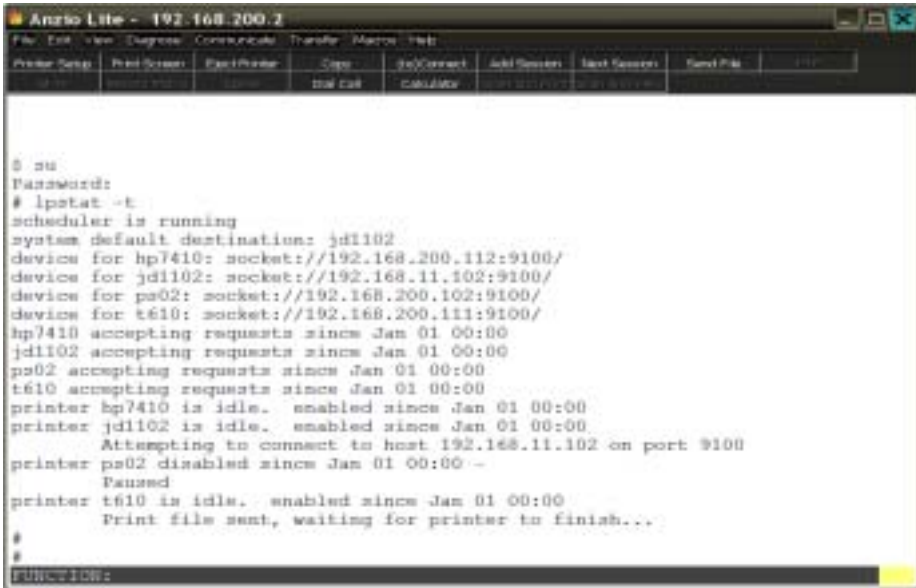
SCO UNIX

- How To Cancel A Print Job**
- How To Cancel A User Process**
- Create A New User**
- Retire A User**
- Shutdown File Server**
- Set System Date/Time**
- SCO System Login**
- Check Free Disk Space**
- Backup, Restore or List A Tape**

How To Cancel A Print Job

To list all of the system printer information, you must enter the following command:

```
Login:          root
Password:       xxxxxx (ask system supervisor)
# lpstat -t
```



Lpstat lists each system printer and print server and spooler print request number for each print job to be cancelled. It may also list any disabled print servers.

Once you have determined the print job to cancel, enter the following command:

```
# cancel printer_name-1234 (i.e. hp7410-xxxx)
```

The system will display a prompt telling you the print job has been cancelled.

To enable a print server, enter the following command:

```
# enable print_server_name (i.e. enable ps02)
```

To return to the login prompt, issue this command:

```
# exit
```


How To Cancel A User Process

To cancel an active user process on your system, you must enter the following command:

```
Login:          root

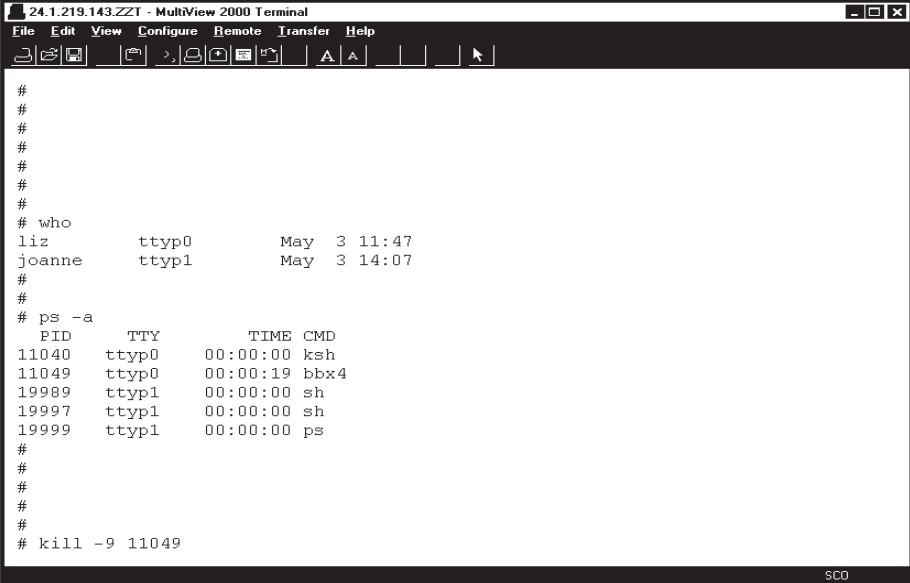
Password:       xxxxxx (ask system supervisor)

# who           - list all current users logged into the system

# ps -a         - lists active processes for all users

# ps -t ttyxx   - lists active processes for one specific user

# ps -u         - lists active processes for this user only
```



```
24.1.219.143.ZZT - MultiView 2000 Terminal
File Edit View Configure Remote Transfer Help
#
#
#
#
#
#
# who
liz      tty0      May  3 11:47
joanne   tty1      May  3 14:07
#
#
# ps -a
  PID   TTY      TIME  CMD
11040   tty0     00:00:00 ksh
11049   tty0     00:00:19 bbx4
19989   tty1     00:00:00 sh
19997   tty1     00:00:00 sh
19999   tty1     00:00:00 ps
#
#
#
#
#
# kill -9 11049
```

The processes for each user is listed on the screen. You must decide what tty number you want to cancel and what process to cancel for that tty. There are usually multiple processes running for one user. The process to cancel for Total Order Plus will always be the Business Basic PRO5 process. You will need the process identification number (PID). With this information you can enter this command:

```
# kill -9 11049 (PID number for PRO5)
```

The system will display a prompt telling you the print job has been cancelled.

To return to the login prompt, issue this command:

```
# exit
```

Create A New User

To add a new user to your SCO Unix system, you must use the SCO Administration shell. To activate the shell, issue the following command:

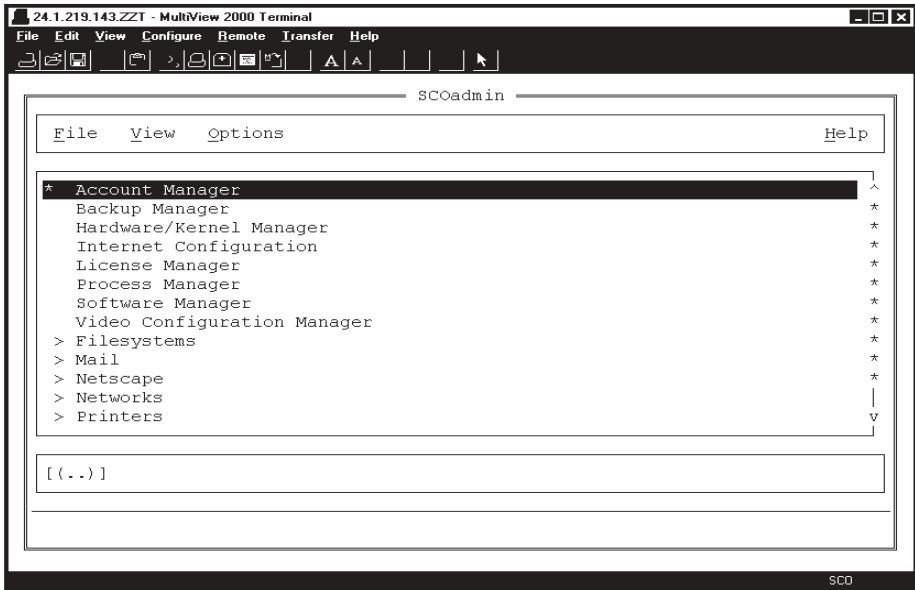
```

Login:          root

Password:      xxxxxx (ask system supervisor)

# scoadmin
    
```

The SCO Administration shell will display the menu selections on your screen.



Note: The TAB key moves the cursor position from top to bottom on the screen or vice versa.

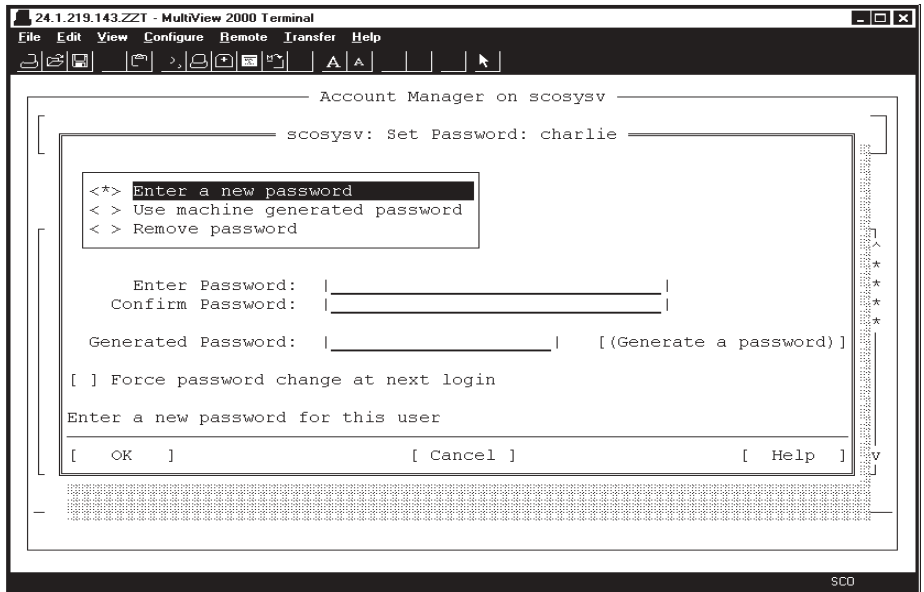
Select Account Manager ----> Select User ----> Select Add New User.

- Login: Type the login name of the new user in lower case letters and **Enter**.
- User ID: Press the **Enter** key to accept the user ID number supplied.
- Comment: Type the first and last name of this user in upper/lower case letters and **Enter**.
- Password: Highlight 'Set Password Now' and **Enter**.

Note: If you select 'Set Password Later', the user will not be able to login until a password has been established.

Shell: Press the **Enter** key to accept the shell name 'sh'.

- Home Directory: Press the **Enter** key to accept the user directory path displayed.
- Login Group: Press the **Enter** key to accept the group name 'group'.
- O.K.: Press the **Enter** key if all of the information is correct. Proceed to set up password information (if selected).
- Cancel: Highlight **Cancel** to re-enter the user information.
- Help: Highlight **Help** for more information on how to set up a new user.



- < * > Highlight Enter A New Password and **Enter**. There should be an asterisk (*) between the brackets.
- Enter Password: Type your password in lower case letters or numbers and **Enter**.
- Confirm: Retype your password to confirm that it is correct and **Enter**.
Note: The password will be encrypted for security purposes.
- < > Bypass Force password change at login by pressing the **Enter** key.
- O.K.: Press the **Enter** key if the password is correct.
- Cancel: Highlight **Cancel** to abort the creation of this new user.
- Help: Highlight **Help** for more information on how to set up a new user.

Press TAB to return to Host ----> Press Enter on Host ----> Select Exit ----> TAB to return to File----> Press Enter on File ----> Select Exit

Retire A User

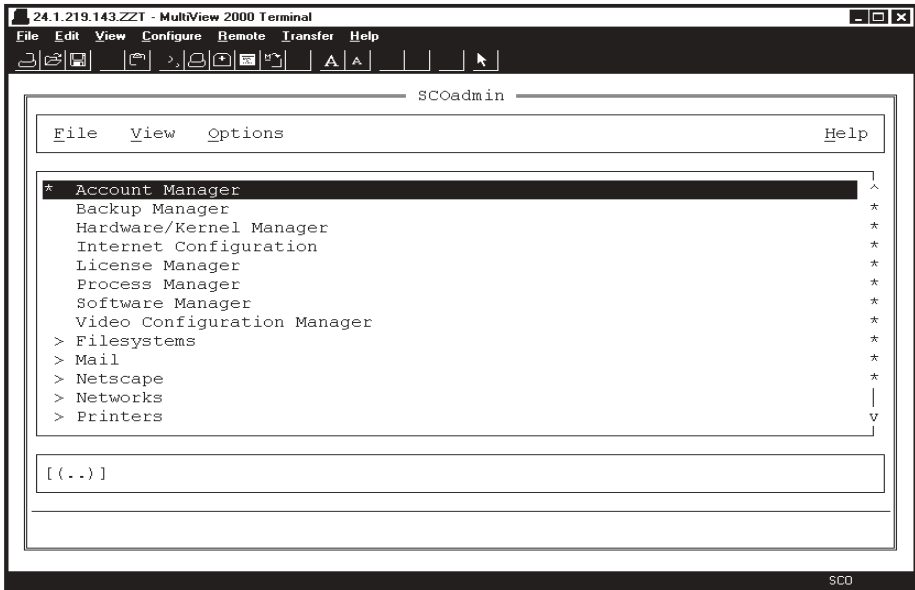
To retire a user on your SCO Unix system, you must use the SCO Administration shell. To activate the shell, issue the following command:

```
Login:          root

Password:       xxxxxx (ask system supervisor)

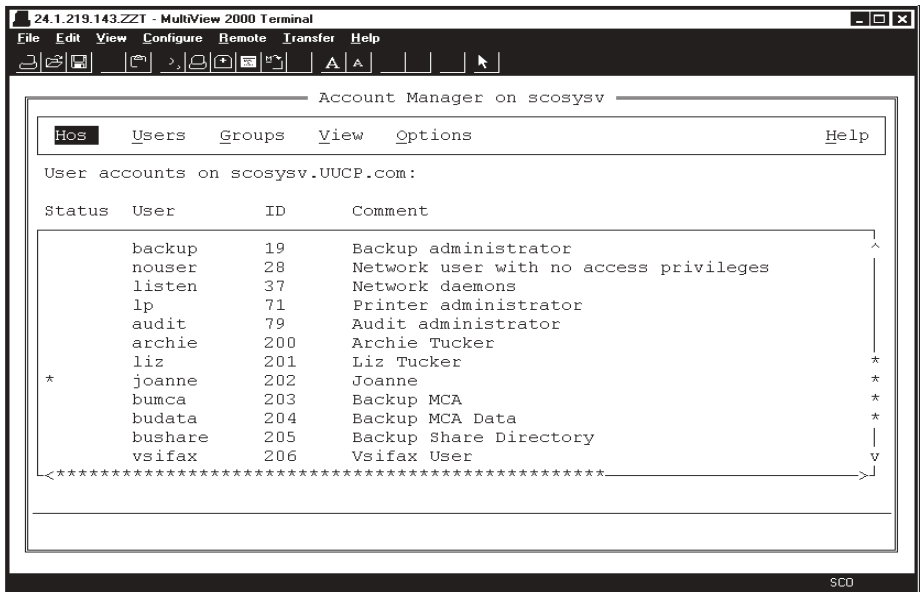
# scoadmin
```

The SCO Administration shell will display the menu selections on your screen.

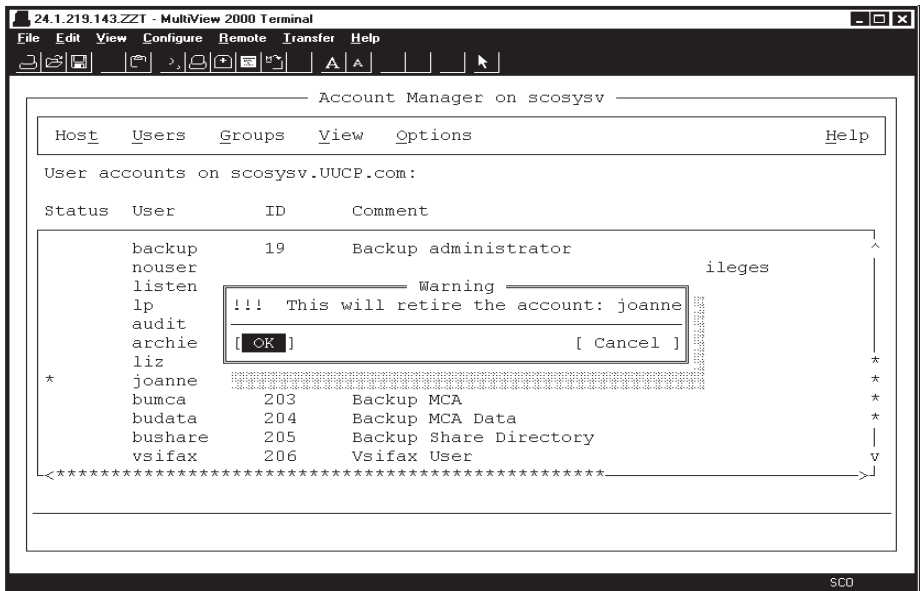


Note: The TAB key moves the cursor position from top to bottom on the screen or vice versa.

Select Account Manager ----> Press **TAB** key to select a user on the bottom half of the screen ----> Use the down arrow key to highlight the user you want to retire



Press TAB to return to Host ---> Select User ---> Select Retire a User ---> Select OK



Press TAB to return to Host ----> Press Enter on Host ----> Select Exit ----> Press TAB to return to File----> Press Enter on File ----> Select Exit

exit (to return to the SCO login prompt)

Shutdown File Server

Prior to issuing the shutdown command, you must determine if all users have exited back to the SCO login prompt. Just because a workstation has been turned off, it doesn't necessarily mean that they have logged off properly. To start the system shutdown, enter the following commands:

```
Login:          root
Password:      xxxxxx (ask system supervisor)
# who
```

The system should only display one user being logged in and that should be root. You can re-enter the who command until you see that everyone has logged off properly. When you are ready to continue, issue this command:

```
# shutdown -g0 -y (0=zero minutes before shutdown)
```

Shutdown automatically executes the sync and haltsys command and can allow 0 to 15 minutes before the shutdown takes place, allowing users to complete the work they are doing prior to issuing the shutdown command.

The shutdown is complete when you see this prompt:

```
** Safe To Power Off **
```

or

```
** Press Any Key to Re-Boot **
```

Press the **Enter** key ----> Type **CTRL+D** keys to proceed with normal startup ---->

Press the **Enter** key at the system date and time display.

The system will automatically return each workstation to their SCO login prompt.

ALT+CTRL+F1 keys to return to the normal SCO Unix scosysv login prompt.

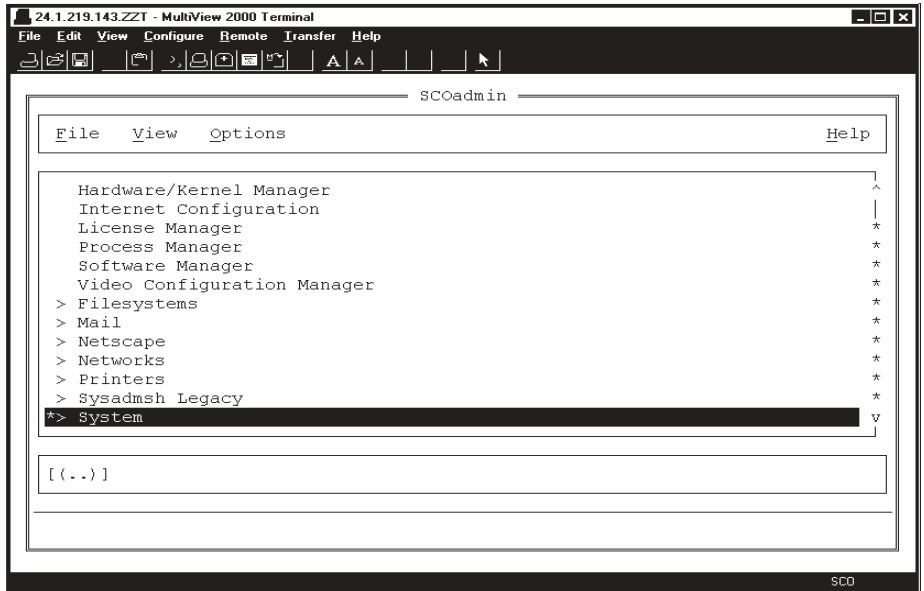
Note: If the system is shutdown incorrectly or loses power while users have data files open, there is a probability of damage being done to records within any given file, causing corrupt file integrity. You must either run a restore procedure from a backup processed before the shutdown or run file rebuild programs to try and correct the errors.

Set System Date/Time

To correct the system processing date, do the following procedure:

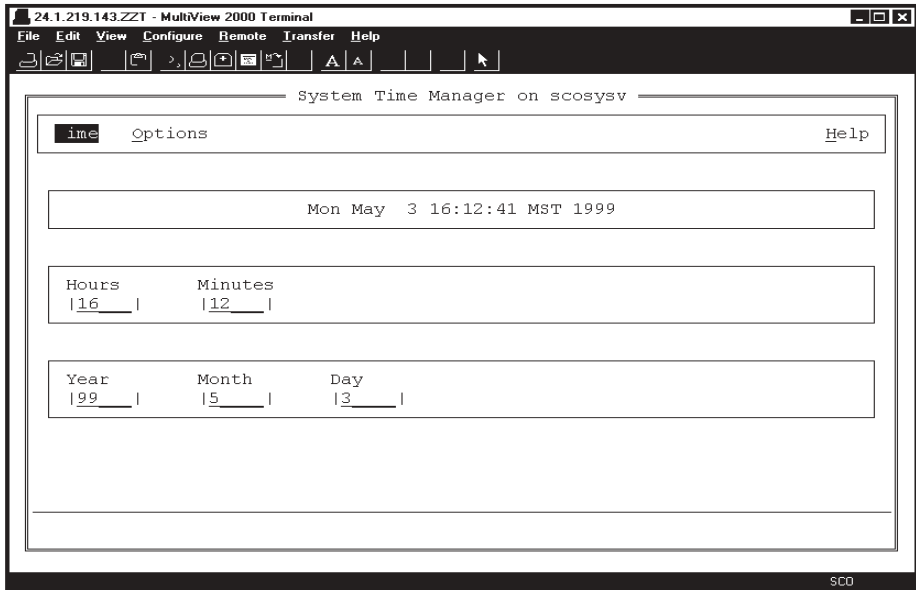
```
Login:          root
Password:       xxxxxx (ask system supervisor)
# scoadmin
```

The SCO Administration shell will display the menu selections on your screen.



Select System ---> Select System Time Manager ---> Select Time

Proceed to following page



Press the **TAB** key to edit the hours, minutes, month, day or year.

Select Time ----> Select Set ----> Select OK ----> Select Time ----> Select Exit

Press **TAB** twice to return to File ----> Press Enter on File ----> Select Exit

To return to the login prompt, issue this command:

```
# exit
```


SCO System Login

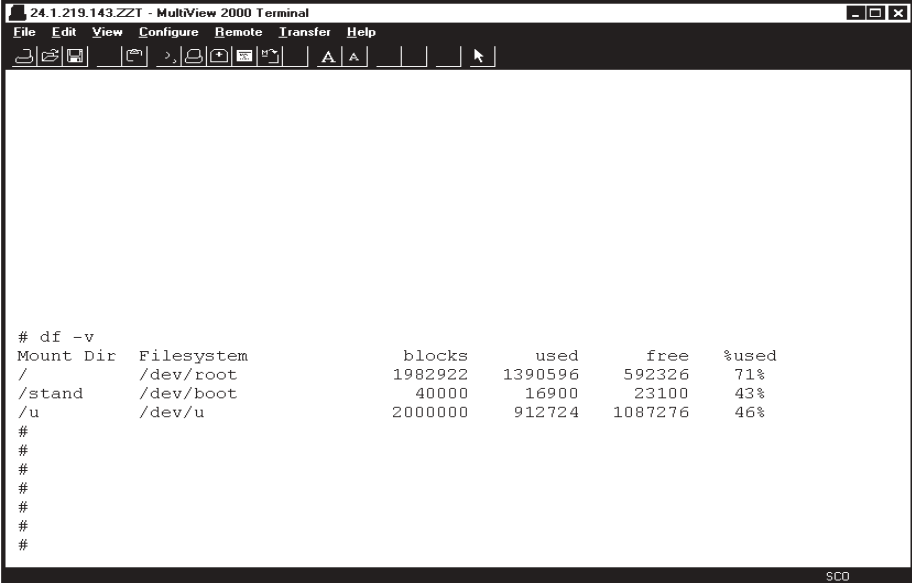
For users on a SCO Unix System V Operating System, the console screen automatically boots to the SCO graphical desktop screen during the boot up process. To bypass this screen and go directly to the user login, press the CTRL+ALT+F1 keys on your keyboard.

Check Free Disk Space

Periodically, you should check the status on your hard drive to see how much free disk space is available for processing. To find out this information, do the following commands:

```
Login:          root
Password:      xxxxxx (ask system supervisor)

# df -v
```



```
# 24.1.219.143.ZZT - MultiView 2000 Terminal
File Edit View Configure Remote Transfer Help
# df -v
Mount Dir  Filesystem      blocks    used    free  %used
/          /dev/root       1982922  1390596 592326 71%
/stand    /dev/boot       40000    16900   23100 43%
/u        /dev/u          2000000  912724  1087276 46%
#
#
#
#
#
#
#
```

The percentage free is what you need to be concerned about. The 'safe range' is between 80% to 85% used. If the percentage exceeds 85%, you are approaching a danger zone. You need to purge date files and reduce any dynamic files to create additional disk space. The Purge Utility programs are located on the Utility Options Menu and the Reduce Dynamic Files program is located on the System Utility Options Menu. See the TOP system manual for further instruction.

Note: If you want to know the number of available megabytes rather than blocks, take the number of free blocks and multiply by 512.

To return to the login prompt, issue this command:

```
# exit
```

Backup, Restore or List A Tape

Overview

The UNIX 'tar' command can be used to backup programs and data files on a daily basis, restore data from any backup tape to its original state or list the contents of a tape to assure that the backup procedure was successful. To issue these commands, perform the following:

Login: root
Password: xxxxxx (ask system supervisor)

To **list** the contents of a tape, issue the following commands:

```
# tar ft /dev/rct0
```

The directory and file names display on your screen.

To **backup** TOP programs and data files to a tape, issue the following command:

```
# tar cvf /dev/rct0 /u/top/
```

To backup TOP data files for Company 001, issue this command:

```
# tar cvf /dev/rct0 /u/top/CO001/
```

Note: Please call Mindware Corporation before restoring any data from a tape.

To **restore** the contents of a tape to the hard drive, issue this command:

```
# tar xvf /dev/rct0
```

To restore TOP programs and data files, issue this command:

```
# tar xvf /dev/rct0 /u/top/
```

To **reset** a tape and rewind to the beginning of the tape, issue this command:

```
# tape reset /dev/rct0
```

Register SCO License

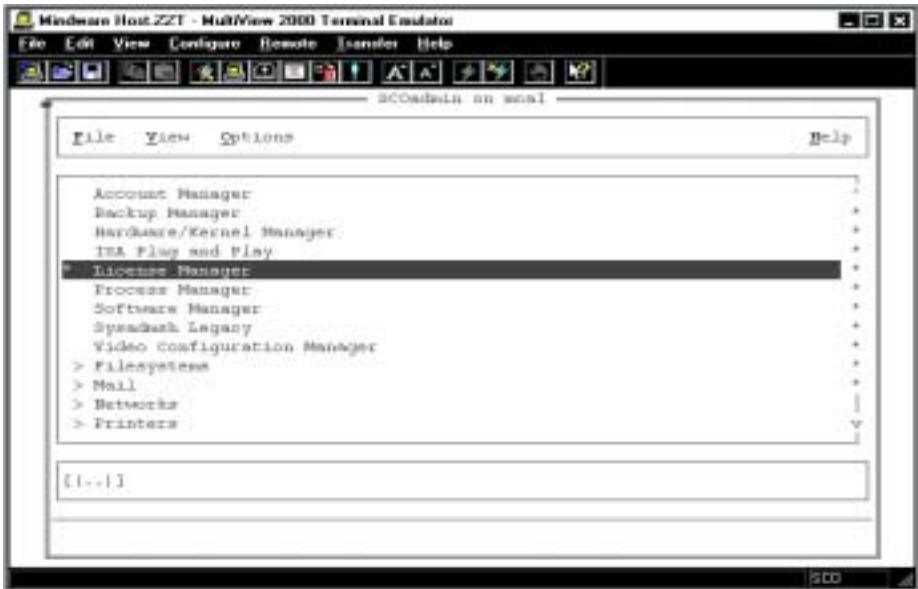
Overview

Any time you add a SCO new license or an upgrade to SCO on a Unix system, you must register the license with the manufacturer following the installation. Call Mindware Corporation for the telephone number for registration or ask Mindware Corporation to register it for you.

Following are the instructions for registration:

```
Login:          root
Password:      xxxxxx (ask system supervisor)
# scoadmin
```

The SCO Administration shell will display the menu selections on your screen.

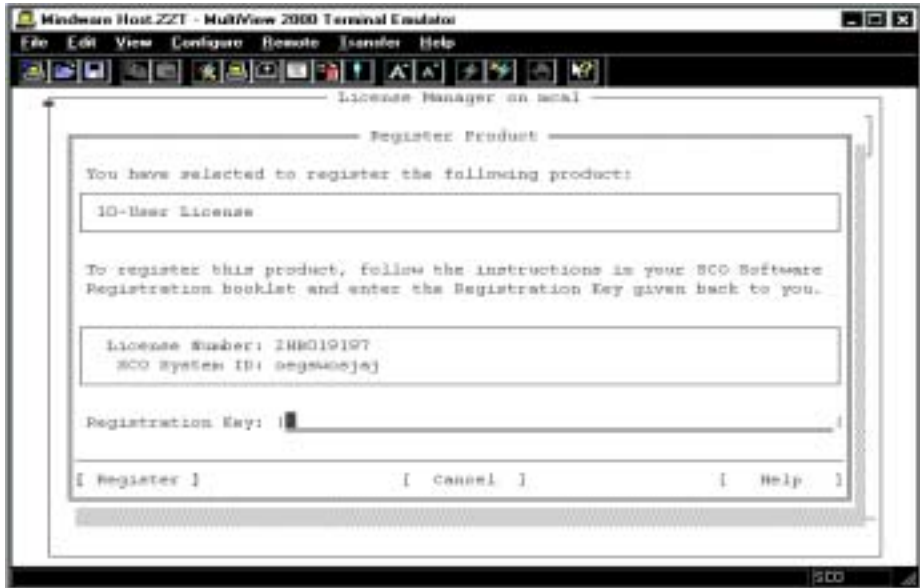


Note: The TAB key moves the cursor position from top to bottom on the screen or vice versa.

Select License Manager ----> Press the Enter key to display the product names

Press TAB key to the first product ---> Write down the SCO System ID

Press the Enter key on the product you highlighted to display the registration screen



Type the registration key ---> Press the TAB key to advance to Register

Press the Enter key to complete the registration

Press the TAB key to advance to License on the top of your screen ---> Press Enter

Select Exit ---> Press the TAB key to advance to File on the top of your screen

Press the Enter key ---> Select Exit

Make RecoverEDGE Media

When BackupEDGE software is installed on the file server for nightly backup procedures, a recover media DVD is created to be used in case a restore is ever necessary. The media contains the system configuration, printer designations, etc.

Periodically, updates are available from Microlite's website whenever a new version of the software is released. Once an upgrade is downloaded and upgraded, you need to make a new RecoverEDGE DVD to update the information. It is a good idea to label the DVD with the date it was generated.

You receive a nightly backup summary printout. When it is necessary to make new media, you will see this message on the printout 'RecoverEDGE Media is out of date'. It only takes a few minutes to create the media compared to hours of time that would be needed to configure a new operating system.

Following are the instructions needed to create a RecoverEDGE DVD:

Insert a new DVD disc in the file server

Login to the file server as root --> Type edgemenue at the # prompt

Select Setup on the menu --> Select Make RecoverEDGE Media

Select Boot Media (i.e. dvd0) --> Select Make Media --> Select Continue

Medium Generation Status will display.

Select OK after Bootable Medium Created Successfully message is displayed.

Update BackupEDGE Software

Login to the file server as root --> Type edgemenue at the # prompt

Select File on menu --> Select Check for Updates --> Select Check Now

BackupEDGE will check the Microlite website to see if a newer version is available.

Select OK if a newer version is ready to download.

You will be prompted for a series of responses:

Select OK to change log question --> Select Next to change log display

Select Download and Install --> Select Continue

Wait for Downloading Distribution to finish --> Select OK to proceed with installation

Select Begin to Installation Manager --> Select Accept to License Agreement

Select Next to upgrade --> Select Next to BackupEDGE is Activated

Select Next to images having been removed

Select DO NOT Schedule A Backup Now --> Select Next

Select Next to Setup or Change question --> Select Skip to Visual File Check

Select Next to Virtual File Check Later --> Select Exit to Installation / Setup Complete

Type exit at the # prompt

Access Backup File Server

Overview

Customers with backup file servers need to make sure their automatic nightly backup is working properly. Weather, electrical outages or spikes, etc. can all affect the main file server and at the same time the backup server. Without checking on the situation at least once a week, there is no guarantee that you data is being transferred.

We recommend that you do a shutdown on the two file servers at least once a week. There is a certain procedure to shutdown both servers and in this order: shutdown the main file server and leave it at the 'Press Any Key to Reboot' message. Shutdown the backup server, bring the backup server back up and then bring up the main server. To toggle back and forth between the two servers follow these instructions:

Press the Scroll Lock key twice --> Press the Up Arrow key to access the backup server login

The message SCO OpenServer Release (top2) will display on the backup server above the login prompt so you know you are on the correct server. You can do the shutdown from the prompt.

Press the Scroll Lock key twice --> Press the Down Arrow key to return to the main server

Note: To see if the data on the backup server is current with the main server, you can login on the backup server and look at invoice history.

TOP Daily Closing Procedures

Below is a check list for a normal TOP End of Day closing procedures:

ORDER ENTRY

Select Order Entry on the TOP Main Menu --> Select Order Entry System Menu

Press F5 to set the module date to today's date

Select Invoice Batch Print to make sure all invoices for the day have been printed

Print the Daily Sales Journal and Update

Press F5 to set the invoice date to the next day's processing date

ACCOUNTS RECEIVABLE

Select Accounts Receivable on the TOP Main Menu --> Select Accounts Receivable System Menu --> Select Invoice System Menu

Press F5 to set the module date to today's date

Print the Open Invoice Data Entry Register and Update

Press F5 to set the invoice date to the next day's processing date

Note: If your credit cards post to Cash Receipts automatically, you should print the Cash Receipts Journal and Update.

INVENTORY

Select Inventory Control on the TOP Main Menu --> Select Inventory Control System Menu

Press F5 to set the module date to today's date

Print the Transaction Data Entry Register and Update

Press F5 to set the invoice date to the next day's processing date

GENERAL LEDGER

Select General Ledger on the TOP Main Menu --> Select General Ledger System Menu

Press F5 to set the module date to today's date

Print the End of Day Processing report and Update

Press F5 to set the invoice date to the next day's processing date

TOP End of Month Closing Procedures

Below is a check list for a normal TOP End of Month closing procedures:

ACCOUNTS RECEIVABLE

Select Accounts Receivable on the TOP Main Menu --> Select Accounts Receivable System Menu --> Select Period-End Processing Menu

Press F5 to set the module date to the last day of the current month

Select Begin Period End Process

Print Discount Level Sales Report (optional)

Print Sales Tax Report

Print Aged Open Invoice Report

Select Finance Charge menu selections, if applicable

Print Statements

Update Finance Charges, if applicable

Run the Period-End Update

Press F5 to set the menu date to the first day of the next month

INVENTORY

Select Inventory Control on the TOP Main Menu --> Select Inventory Control System Menu --> Select Period-End Processing Menu

Press F5 to set the module date to the last day of the current month

Print Inventory Movement Report (optional)

Print Transaction Audit Report (optional)

Run Period-End Update

Press F5 to set the menu date to the first day of the next month

ORDER ENTRY

Select Order Entry on the TOP Main Menu --> Select Order Entry Report Menu

Press F5 to set the module date to the last day of the current month

Print the Deleted Orders/Invoice Report and clear the entries

Press F5 to set the menu date to the first day of the next month

TOP Closing Procedures

SALES ANALYSIS

Select Sales Analysis on the TOP Main Menu --> Select Sales Analysis Report Menu

Press F5 to set the module date to the last day of the current month

Select the reports that you want to print for the current month

Note: Once the month is closed, all month-to-date figures are set to zero.

Select Sales Analysis on the TOP Main Menu --> Select Sales Analysis System Menu
--> Select Period-End Processing

Press F5 to set the menu date to the first day of the next month

Note: Once all of the above modules have been closed, you may proceed with invoicing for the next month.

ACCOUNTS PAYABLE

Select Accounts Payable on the TOP Main Menu --> Select Accounts Payable System Menu

Press F5 to set the module date to the last day of the current month

Select Period-End Processing

An Open Invoice Report and a monthly Disbursements Register prints for the current month

Answer YES to run the Period-End Update

Press F5 to set the menu date to the first day of the next month

BANK RECONCILIATION

Select Accounts Payable on the TOP Main Menu --> Select Accounts Payable System Menu

Press F5 to set the module date to the last day of the current month

Select Bank Reconciliation

Enter the information on the bank account, bank fees and checks that have cleared

Print the Reconciliation Report

Clear the reconciliation file to remove paid checks

PAYROLL

Select Payroll from the TOPMain Menu --> Select Payroll System Menu

TOP Closing Procedures

Press F5 to set the module date to the last day of the current month

Select Month-End Processing on the Payroll System Menu.

Initialize Month-End Processing and the monthly payroll reports will print

Answer YES to clear month-to-date totals

Press F5 to set the menu date to the first day of the next month

Note: The system will automatically recognize if it is the end of a quarter or year-end and will prompt you to clear the figures. W2's must be printed and totals cleared from the employee file before a payroll can be processed in the new year.

GENERAL LEDGER

Select General Ledger on the TOP Main Menu --> Select General Ledger System Menu

Press F5 to set the module date to the last day of the current month

Select End-Of-Period Processing to print the Period Summary of Postings, a Financial Statement and a Trial Balance.

Answer YES to close the month and remove the detail postings for the current month

Press F5 to set the menu date to the first day of the next month

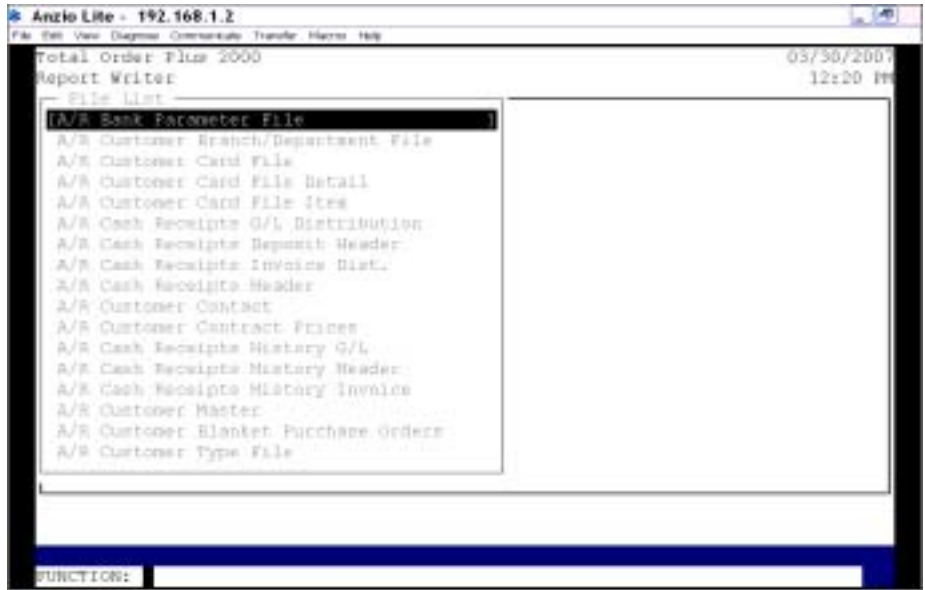
Total Order Plus Report Writer

Overview

The report writer allows users to create their own reports for printer or file output from the Total Order Plus ODBC data base. The file output can be imported into an Excel spreadsheet.

Files in each module are displayed for selection. Once the file is selected, you can select a range of data or you can filter the output by any field within a file. You have options to filter the data by fields that are 'equal', 'greater than', 'greater than or equal to', 'less than', 'less than or equal to' and 'not equal to'. You can select a range or filter option or both, as well as select to print to a printer or export to a file. As each field is selected for the report, the print positions for each column displays on your screen.

This report writer can be used if a specific field or fields are not available on the regular TOP Report Menu selections.

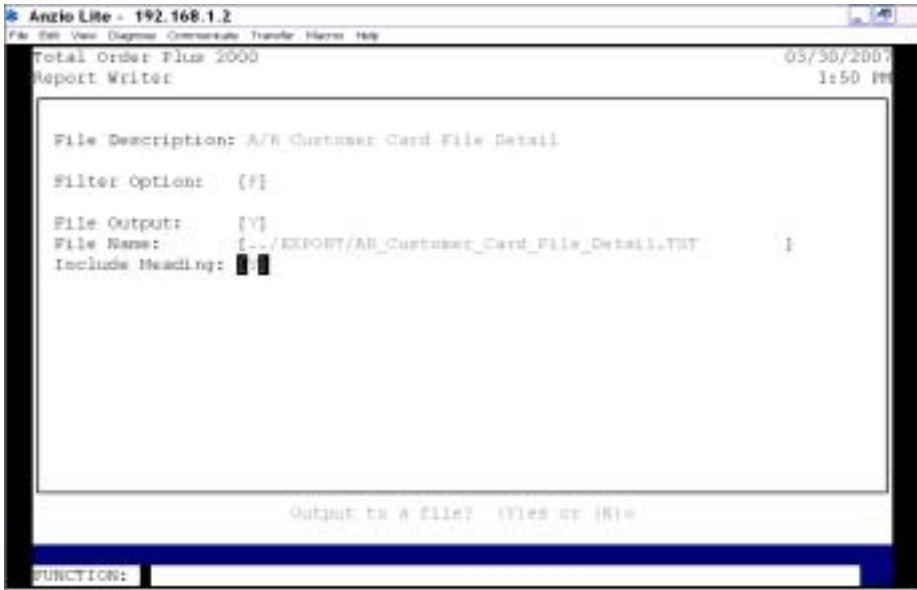


Procedure

1. Select the Report Writer on any of the TOP Report Menus.
2. File List:

Use your up or down arrow keys to select the file for your report. Once the file is selected, press the **Enter** key to continue with the Filter Selection.

3. Filter Option:



Type **R+** the **Enter** key to print the report by a range option.

Type **F+** the **Enter** key to filter the report by field selection.

Type **B+** the **Enter** key if you want to condition the report by a range and a filter.

4. File Output:

Press the **Enter** key not to output to a file or type **Y+** the **Enter** key to output to a file that can be imported into Excel, etc.

Note: The file name will be displayed on the screen and will be exported to the EXPORT directory, which should be mapped to the U drive on multi-user systems.

5. Print Selection:

If you selected 'R' or 'B' in Step 3, your cursor will go to the Print Selection window.

Note: Select the first and last range option displayed on your screen. Proceed to the Field Selection in Step 11.

If you selected 'F' in Step 3, proceed to the filter selection window in the next step.

Filter Selection

6. Number:

Press the **Enter** key to accept the next sequence number displayed.

Press **F4** to exit the print selection process. Go to Step 11.

7. Field List:

Use the up and down arrow keys to select the data field that you want as the filter.

8. Function:

Select numbers 1 through 5 to condition the output. For options, see the message on the bottom of your screen.

9. Value:

Type the value of the filter (i.e. customer type field could be 'WH' for wholesale) and **Enter**.

10. Is the Selection Correct? (Y)es, (N)o or (E)nd:

Type **Y**+ the **Enter** key if the selection is correct. Go to Step 6.

Type **N**+ the **Enter** key to re-enter your selection. Go to Step 6.

Type **E**+ the **Enter** key to exit the filter selection.



Field Selection



11. Number:

Press the **Enter** key to accept the next sequence number.

12. Field:

Press the **F1** key to select all fields to print 132 print positions (if output to a file all fields will be selected). Go to Setp 14.

Press **F4** to end the field selection.

13. Is The Selection Correct? (Y)es, (N)o or (E)nd:

Type **Y+** the **Enter** key if the selection is correct. Go to Step 11.

Type **N+** the **Enter** key to re-enter your selection. Go to Step 11.

Type **E+** the **Enter** key to exit the filter selection.

14. Select the appropriate printer for this report.

TOP PDF Print Defaults

Overview

There are reports from every module in TOP that can be printed and stored as a PDF file. The files are stored in the EXPORT folder+Company Number+Report Name. To view the reports or attach a PDF to an email, you need to map your computer to the EXPORT folder.

Below are the reports that can be set up on the PS Options Menu:

Accounts Payable:

AP1RAC - Open Invoice Report

APAG40 - Aged Open Invoice Report

APDR20 - Check Disbursement Register

APIE20 - Invoice Data Entry Register

APMC20 - Manual Check Data Entry Register

APSR20 - Payment Selection Register

Accounts Receivable:

AR1CRA - Cash Receipts Data Entry Report

ARAG40 - Aged Open Invoice Report

AROI20 - Open Invoice Data Entry Register

ARSF41 - Statement Print

ARTX40 - Monthly Sales Tax Report

General Ledger:

GLJE20 - General Journal Entry Report

GLAE60 - Allocating Entry Report

GLRE60 - Recurring Entry Report

GLDS20 - Daily Summary of Postings

GLPS40 - Period Summary of Postings

GLYS40 - Yearly Summary of Postings

GLFS40 - Financial Statements

GLTB40 - Trial Balance

Inventory Control:

ICTR20 - Transaction Data Entry Register

ICIM40 - Inventory Movement Report

ICTA40 - Transaction Audit Report

ICVI40 - Valued Inventory Report

ICPI40 - Physical Count Summary Report

Order Entry:

OESJ40 - Daily Sales Journal

OEPI41 - Invoice Print

OEBL40 - Zebra Label Print

Purchase Orders:

POTR20 - Transaction Data Entry Register

Sales Analysis:

SACA40 - Customer Analysis Report

SAIL40 - Inventory Item Report

Note: Program names are set up on the PS Options Menu.

