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Sending and Receiving Data



Send



Overview The **Send** process provides the communication between head office and remote sites, such as salespeople, branch offices and customers. It is through the **Send** process that data, messages, new item pricing, new customers and new orders are sent for processing.

The **Send** screen has two tabs. When the **Send** button is clicked, RemoteDesk bundles all the data that was selected in the **What?** screen, and sends it to the destinations set on the **Where?** screen.

The Administrator can send:

- A. Order Status
- B. Customer file
- C. Lookup tables
- D. Items price list
- E. External files

The Remote Client can send:

- A. New sales orders
- B. New customer records
- C. External files

SEND

What? Tab



The **What?** screen is used to indicate the data files that are to be sent. You can select different data files such as orders, tables and external files.



Once you become familiar with the system, you do not have to come here, you can go straight to the **Send** option.

Administrator Options:

The following options are controlled by the Administrator for update to the remote sites.

Site#: This field shows the current site number.

Order data: This is reserved for the remote site users.

RemoteDesk data:

To activate, click on each or any of the options. This will result in the selected information being sent.

◆ **Order Status:**

This option is automatically set so every time the Administrator sends anything to a remote client, all order status information belonging to that remote site is also updated. This ensures that the remote clients have current information regarding the status of all orders they created and sent to the Administrator.

◆ **Customers:**

This option is used by the Administrator to update customer profiles and lists to the remote sites. The Administrator selects this option when changes to customer profiles or the entire customer list must be updated to certain or all remote sites. By clicking on the **Customer** select box, customer records and new or modified customer ship-to addresses are sent.

◆ **Lookup Tables:**

This option is used by the Administrator to download initial lookup table contents or update selected or all remote sites when required. By clicking on the **Lookup Tables** select box, RemoteDesk sends the Salesperson, Terms, Ship-via, Tax and Territory table information.

- ◆ **Items:**
This option is used by the Administrator to send new or updated price lists to all remote clients. The entire item price list, including new inventory items, information and the units of measure table, is sent by activating the **Items** select box. This can be sent as often as necessary. The user-definable fields, such as “Quantity on Hand”, are also sent with the price list.

- ◆ **External Data:**
This option is used to send miscellaneous files such as word processing documents, credit information, spreadsheets, sales forecasts, quarterly reports, or any type of information. By clicking on the **External Data** select box, up to 5 files can be attached to the information already being sent. To send more than 5 files, you can use a compression utility to group the files together as one file before sending them.

Remote Site Options

The following are the options and information that the Remote Site can send to the Administrator:

Site#: This is preset for the remote client and is not editable.

Order data:

◆ **Active Orders:**

This option is used by the remote client sites to send sales orders to the central Administrator for order fulfilment. New “**Active**” orders that have not been previously sent are chosen by clicking on the **Active Orders** select box. The program automatically checks the send dates on each order.

Starting and ending selection criteria can also be entered. You can choose to send a particular range of “active” **order numbers, customer numbers or order dates**.

If no range is set, RemoteDesk selects all “active” orders that have not been previously sent. Once orders are sent, the order records are marked as such to prevent accidental sending of the same information. If there is a need to send orders again, you can click on the “**Send again**” button.

RemoteDesk data:

◆ **Customers:**

This option is used by the remote client to send new customer profiles to head office, providing the remote site has rights to create customer records. If the remote site is not granted the rights to create customer records, then this option is dimmed on the screen and cannot be selected. By clicking on the **Customers** select box, customer records and new or modified customer ship-to addresses are sent.

External data:

This option is used to send miscellaneous files such as word processing documents, credit information, spreadsheets, sales forecasts, quarterly reports, or any type of information. By clicking on the **External Data** select box, up to 5 files can be attached to the information already being sent. To send more than 5 files, you can use a compression utility to group the files together as one file before sending them.

Send Again

RemoteDesk keeps a copy of the last data bundles sent. The **Send Again** button is used when you want to re-send previously sent data files. If the data was lost during communications, or a hardware failure caused problems, the sent archive is accessed for data bundles.

Click on the **Send Again** button.

Select Site - Choose the site you want to send the files to again. If you are a remote client, this is always set to the Administrator site.

Then click on the **Next** button.

The site and its name are displayed with a list of file sets that were sent. You can use the **Preview** button to see the contents of the compressed data bundle.

Click on the file bundle that you wish to send and then select the **Resend** button.

Once you have completed your selection or wish to exit the operation, select **Done**.

When you are ready to re-send the files you have selected to a particular site, select **Send**.



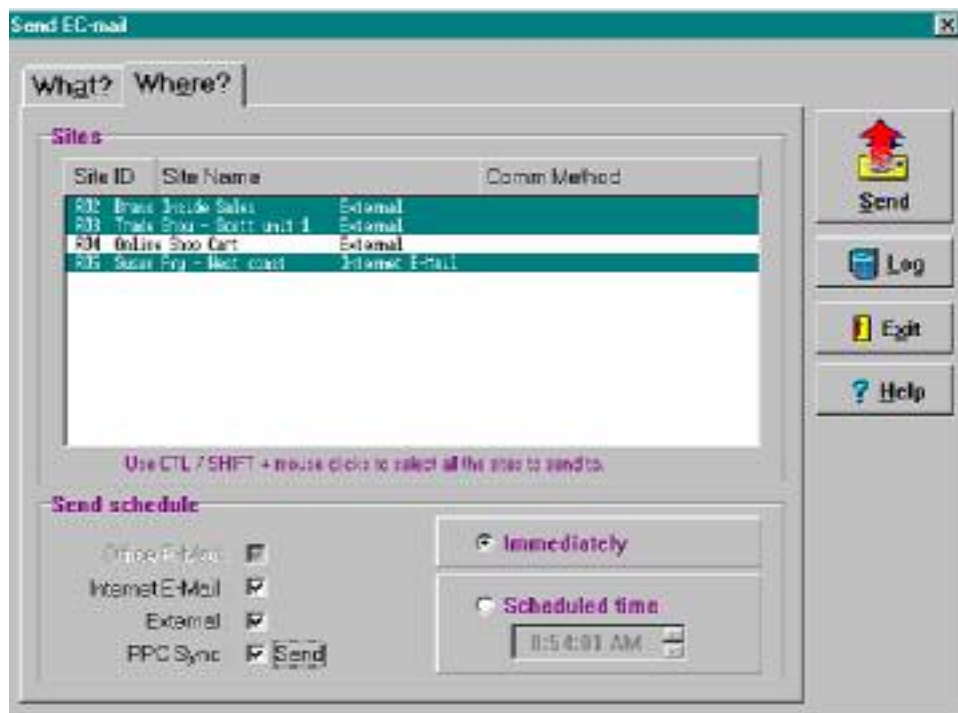
You should inform the Administrator or remote site before using the **Send Again** button to ensure they want the data files to be re-sent. Sending multiple copies of the same data will cause duplicate or out of sequence data error conditions at the head office. Although these issues can be handled by RemoteDesk, they may give the operator some concern.



After you have finished sending your data, select the **Process Audit** from the **Reports** menu. This report lets you see the most recent files that have been sent to a site, and the sequence number associated with them. It is a summary of the send operation and lets you track the sites and data that was processed.

Where? Tab

The **Where?** screen shows all possible destinations for sending information. (**Note:** You do not have to go here unless you want to schedule the send operation. Sending otherwise is automatic).



◆ Sites

In the Administrator version, all remote client sites will appear on the list. Only the Administrator can send to numerous sites at the same time. You can select sites by clicking on them, or by holding your left mouse button and dragging the pointer down over the list of available sites. You can also de-select or select sites by clicking on them individually.

◆ Send Schedule

This is where you can set the e-mail source, and schedule when the send operation will occur.

Send Immediately - Click on "Immediately" option.

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Schedule the Send - To set when you want the Send operation to begin, click on the “**Scheduled Time**” option and set the exact time. Use the UP/Down arrows to enter the time for hours and minutes.

PPC Sync option - When RemoteDesk has been configured for PPC Handheld interface, this option is enabled and can start the automatic synchronization of data to your handheld device.

Special note for Pocket PC users:

There is a feature added to the **SEND** option that will start the Pocket PC synchronization of data files to the PPC device. Using the mouse, **Right-click on the “Send” button**. A menu appears allowing you to select “**Pocket PC Sync**”. This requires your Pocket PC to be connected to your PC. This process assumes that the Customer and Item data has already been collected by the send program and you only require it to be updated to the PPC device.



When you click on the **Send** button RemoteDesk prepares the data that has been selected and displays messages on the screen as each step is performed. The program reads the various files that have been selected and collects them into a working directory. The files are compressed and encrypted before sending.



RemoteDesk uses your existing E-mail connections, so if you have to dialup to establish a connection before you send your general E-Mail, then for RemoteDesk you will have to connect first and then click on the **Send** button.

Log



You can follow the status in the **Log** file that is displayed, or you can click on the **Log** button to view the send log history at any time. This log can be very useful for troubleshooting any problems.

Receive



Overview The **Receive** process picks up mail, messages and data from other sites and provides features to update the database with the new data. If you are using the remote version, then you only need to click on the **Receive** button and the automatic process is performed. In the Administrator version, there are a number of options available.

The **Receive** program has 2 forms. The **From?** tab is where the communication method can be chosen. The **Received** tab lists the data that has been received and its origin. This display allows information from many sites to be scanned instantly. You can then choose between automatically updating orders to the master file, or previewing new customers before the update step.

The Administrator can receive:

- A. New or changed sales orders
- B. New or changed customers
- C. External files
- D. Registration Acknowledgment

The Remote Client can receive:

- A. Customer records
- B. Item price list
- C. All lookup tables
- D. External files
- E. Order status information
- F. Options and configuration

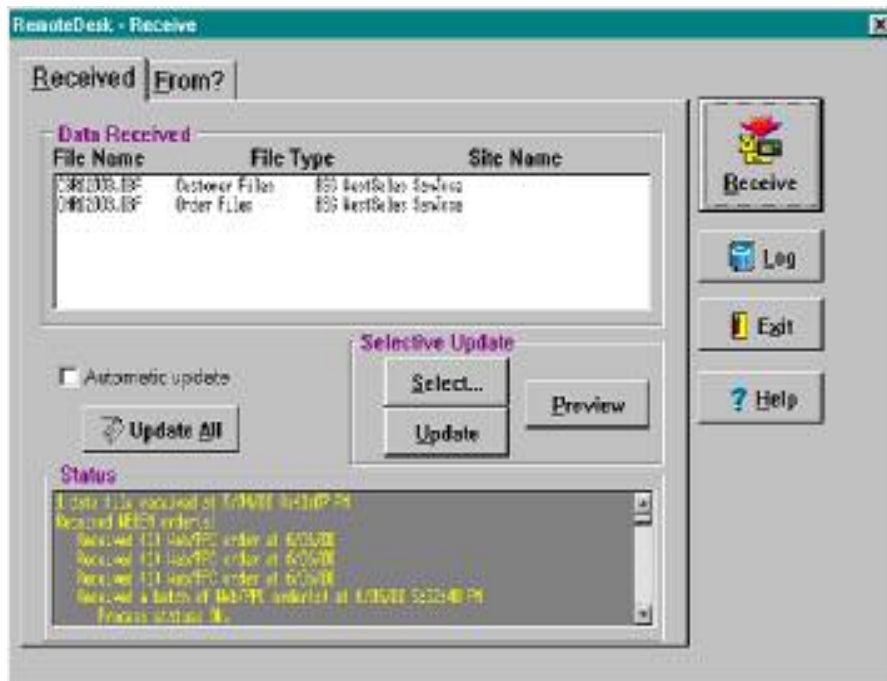


In certain environments, such as CompuServe or AOL, you will have to dial-up and establish a connection before you actually send or receive your E-Mail. You have to connect first and then click on the **Receive** button. Some E-mail connections are set up so that the dial-up is automatic when you want to check your E-mail box. RemoteDesk will work this way also.



Received Tab

Once you click on the **Receive** Button, the **Received** form is displayed and the program accesses your mailbox through the specified communications method. As the program proceeds, the status of the receive process is displayed in the process log box.



- ◆ **Automatic Update**
If this is toggled on, it will check the time settings and perform the operation automatically.

Special Note:

This task does not run in the background, you must leave the application active for the automatic processing to occur. You can perform other tasks, as long as they are not RemoteDesk related.

◆ **Remote Client -**

The receive process is a single step. Once the communication has been completed, all files are updated automatically to ensure data is always current, and the received data is displayed in the “Data Received” box. Data, such as order status information or a new price list may come in. You can see what data came into your system, either through the Status box displayed on the screen, or by using the report called **Process Summary**. When external files such as spread sheets are received, the process places the received files into the file directory; i.e. C:\REMDESK\EXTERNAL. A message indicates that these files were received. Since the data update process is automatic for remote clients, the **Update**, **Select** and **Preview** buttons are disabled.



Registration acknowledgment data files must be received from a new Remote client before live data can be sent to the remote. Unlike all others, the Administrator cannot control when the update for these files is done.

◆ **Administrator -**

Once the final “All Communication Complete.” message appears, the **Received** form shows all the newly acquired data files. The operator can select one or all data files to be updated to the RemoteDesk database. You can use the “Data Received” window to mark data by using the <Enter> key, or by clicking the left mouse button on each of the data files.

The Administrator can also use two features to help organize and post the collected orders.

Selective Update



- ◆ **Select** - provides a quick way to select a particular type of data file from a specific site name.



The **Select** screen provides a list of sites that have data in the "Data Received" list. You can click on a specific site from which to update data or choose all sites using the **Select All** button. This **Select** feature allows you to select specific sites if there are special considerations such as priorities in processing that you wish to handle, or the need to manually verify information from sites before it is posted.

Once the Site is selected, you can click on one or both of the file type boxes: **Orders** **Customers**



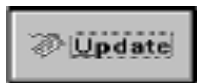
- ◆ **Select All** - when you click on, both the Orders and Customers are selected. With this feature you do not have to scroll through the list of files for a large number of sites.

With only a few mouse clicks, it is quite easy to update only new received orders from all sites. Click on the **Select All** button, then click off the **Customers** box, and then click on the **Done** button. When the "Received" screen is displayed, click on the **Update** button to post all received orders to the RemoteDesk database.



- ◆ **Preview** - is used to view the contents of selected files in the "Data Received" list. You can see specific customer records, orders and ship-to addresses.

Once you have clicked on particular data files from a site, you can use **Preview** to examine data before it is posted. In this way the head office can check the data, such as new customers, before it is brought in.



"Automatic Update"

The Automatic Update box is by default set on. This instructs the program to update RemoteDesk data with all orders and new customers received. If you want to preview or do selective updating of specific data received, then click this option off, by removing the tick mark.

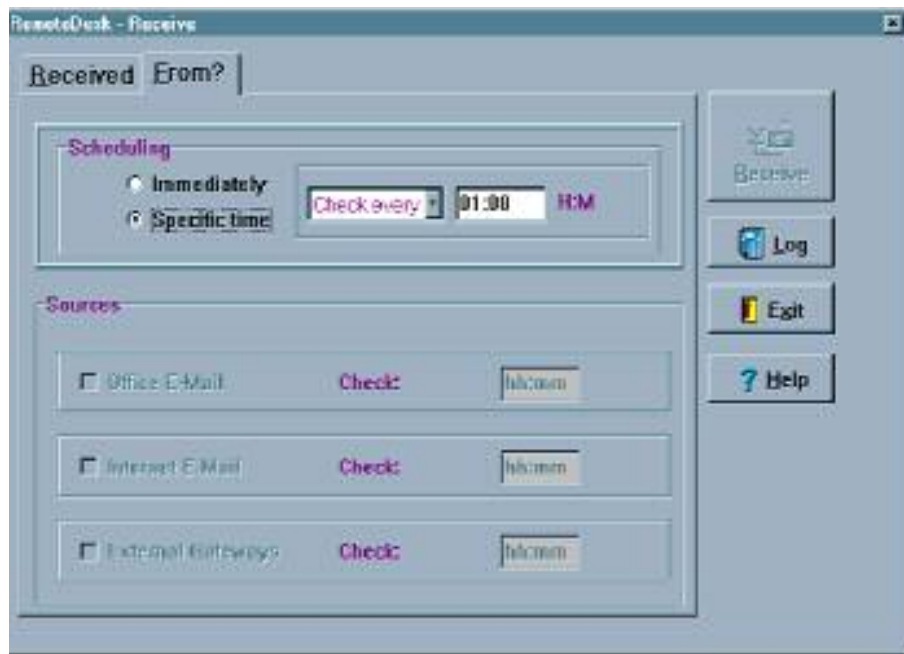
Once one or more data files are selected (highlighted), the **Update** button is active and can be clicked on to post received data into the RemoteDesk database.

The Administrator can control when new or changed sales orders and customer records are updated in the RemoteDesk database. When the Administrator receives external files, the status box displays a message to indicate what external data has been received. The process will place these files into the RemoteDesk external file directory i.e. C:\REMDESK\EXTERNAL

An example would be :

- Updating order files...
- 25 order(s) added.
- 0 order(s) updated.
- Updating order files completed.
- OHR02001.DBF has been deleted.
- 1 file(s) updated.
- ◆ The first message shows the type of file that is being updated.
- ◆ The second and third messages are a transaction operation count.
- ◆ Once the file updating is complete, it is deleted from the \DOWNLOAD directory.
- ◆ The file is created with the following format;
- ◆ **OHR02001.DBF** The file format is follows:
 - OH** - Describes file type, Order Headers in this case.
 - R02** - These three characters are the remote site ID.
 - 001** - The next 3 digits are the sequence numbers automatically assigned and incremented during transmission, to ensure all files are received and in the correct order.
- DBF** - This represents a database file format.
- ◆ The final message shows the number of data files that have been updated.

From? Tab



The **From?** screen shows the communication methods that can be used to receive data. It defaults to the Company Profile settings. If you are using the Remote client version, you can only receive data from the Administrator. When the Remote site is registered, the **From?** screen is set and cannot be changed. The Administrator sets which source the Remote will use to receive data. Click on the appropriate method select box.

Scheduling:

Immediately - this will receive the data right away

Specific Time - this allows you to schedule the receive and automate how frequently it retrieves orders

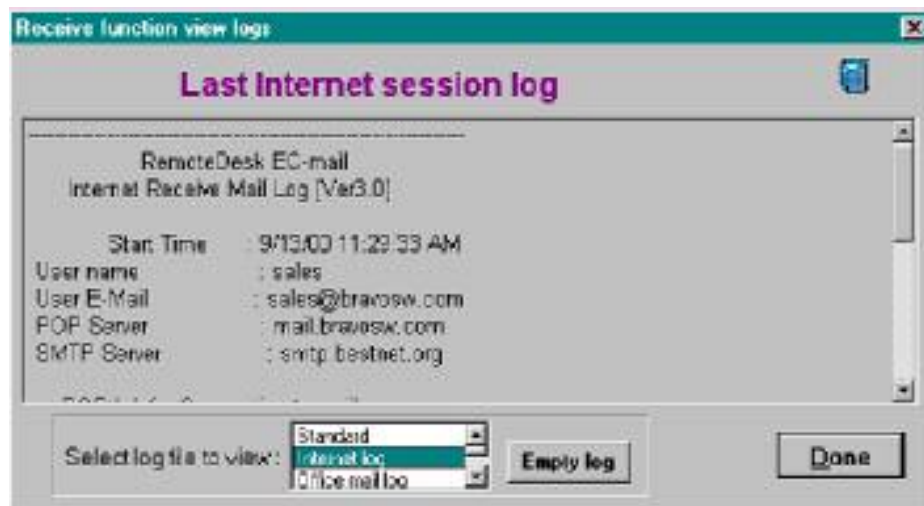
Sources:

This is the method of e-mail or retrieval that you are using. It can be Office, Internet or external gateways. If you have specified a scheduling format, you can also specify a time here for it to check the system.

Log



After communication has been completed, the user can click on the **Log** button to display the Receive log.



The Log form can display a number of different session logs that RemoteDesk creates during the communication sessions, such as the time you accessed the Internet mail server, what mail you received, and when you logged off.

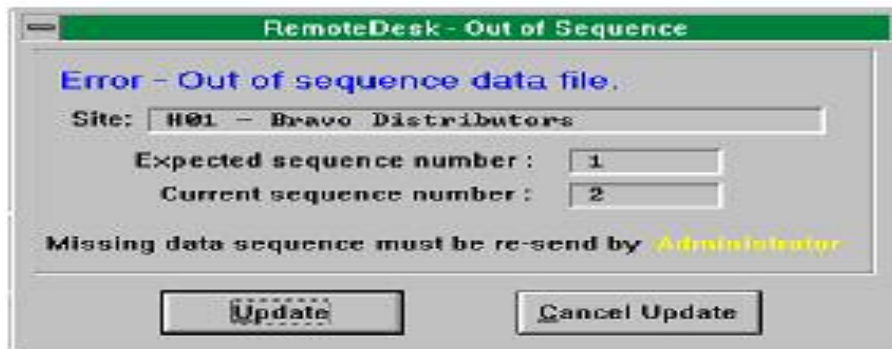
You can select the Log you want to see from the list. The **Standard** Log gives basic date/time stamp information and which communications were enabled. The **Internet Log** shows detailed Internet hand-shaking and all e-mail details.

The log can assist you when there are problems logging onto your mail server.

Receive Data Integrity

RemoteDesk keeps track of all data sent and received from each remote client site. When a file is received, the program knows if the file was previously sent or received already. The program also knows if there was a file sent before the current one that was not received. (i.e. missing or the files are not being processed in the correct order). In this case an **“Out of Sequence Data File”** message is displayed. It indicates the file that was received and also the one that should be processed first. In most cases this will not affect data integrity. It indicates that there is a data packet file that was not received and possibly should be re-sent from the remote source. It could also indicate that the files are not being processed in the actual order they were sent.

Receiving Out of Sequence Data



When you get the **“Out of Sequence Data”** message, if you are an Administrator, you can either accept and process the data or wait until you receive the missing file. Typically you would accept the file as they are usually all new ones. This alerts you to the fact that a data bundle is missing and should be noted.

You can click on the **Update** button to proceed with the data update anyway, or you can click on the **Cancel Update** button and the file will be saved in a special directory in RemoteDesk.

Retrieving and Updating Previously Sent Data



To retrieve data that was previously “out of sequence” so that it can be updated to the database, press **<Ctrl> Ins** while you are anywhere in the **Receive** function. If you are the Administrator, you can select both the site number and the saved out of sequence file. The Remote client can only select a previously saved file.

You should consider the following when updating out of sequence files...

◆ Remote -

If the Administrator has sent several item price file updates to you, it is important that you have only the most recent one, since the Administrator will usually send all items in the price list. The prices that may have been sent last week are no longer important if a new complete price list was sent this week.

◆ Administrator -

The order in which you receive new files is not as important as the fact that you receive and update **all** data. However, if you are updating out of sequence customer records, you may not want to update customer records from last week that have been manually changed this week.

What Next?

Reports



Once received data has been sent to and updated into RemoteDesk, you can obtain more details by using the Audit reports. There are three reports that are used to see more details from the update step.

Detail Order Audit - This report lists the orders and some header information about each order. It is sorted by date and site to help the Administrator track orders from various sites on each day.

Process Audit - This report shows the site numbers and data files that were updated in RemoteDesk. It is a summary of the update step and lets you track the sites that were processed.

File Update Log - This report summarizes changes to all files in RemoteDesk, (other than orders,) and indicates when they were changed. The report is sorted by file type, and then by the date the changes were made.