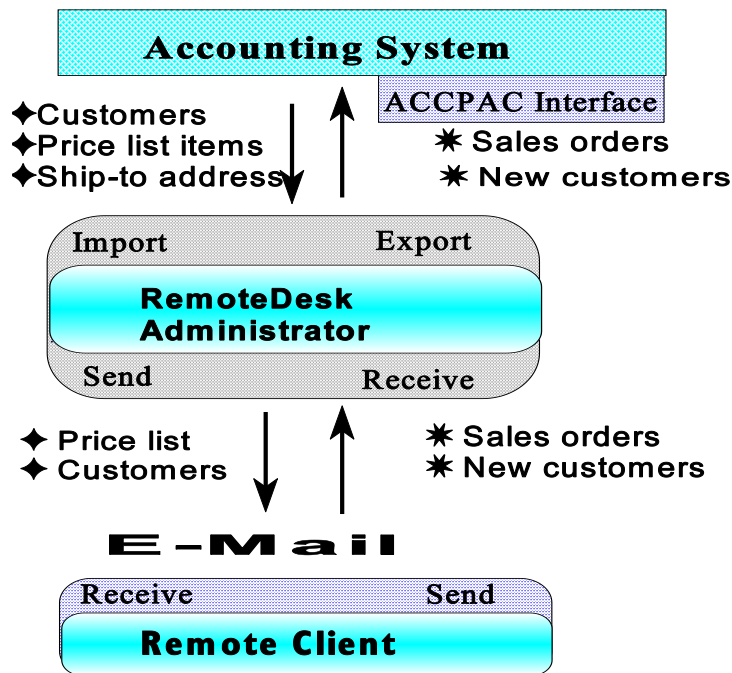


7 Daily Operations in RemoteDesk



Overview This chapter is written to provide a concise and graphical overview of daily functions and procedures in RemoteDesk. If you want detail, refer to the other chapters for specific function areas. This is designed for someone to pick up the general operation of RemoteDesk quickly.

RemoteDesk Data Flow



RemoteDesk provides extensive remote client management, data distribution and data collection services for your central accounting system. The Administrator allows you to configure each remote client and control the options and order integrity for your clients. Whether your client is a salesperson, a remote office or a customer who you want to provide quick and convenient ordering, the Administrator has features to satisfy all unique requirements. The Administrator distributes price lists and customer profiles to each remote client through a comprehensive site management and communication system.

The Remote client and the Administrator can also send other data files, such as spreadsheet and word processing documents, with sales orders and customer profiles. Depending on the remote's capabilities, sales orders can be sent along with a new customer record just added.

RemoteDesk provides a number of audit reports for tracking order activity with date/ time and the type of data. There is database and document tracking to ensure that data and files that are sent, arrive at their destinations. There are messages that alert you to inconsistencies in data transmissions, and give you the option to easily re-send previously sent data. All communications processes and document tracking are the same for either Internet or MS-Mail type transmissions.

Daily Operation at a Glance

Remote Client Site



① Check your mail by selecting **Process** and then using the **Receive** function for any new order status or item pricing information sent overnight. You want to ensure that your data files are always up-to-date.



② Use the **Order Status** function to review previously sent orders to find out if they have been shipped, invoiced or are on backorder. Using this function is optional and can be done at any time.



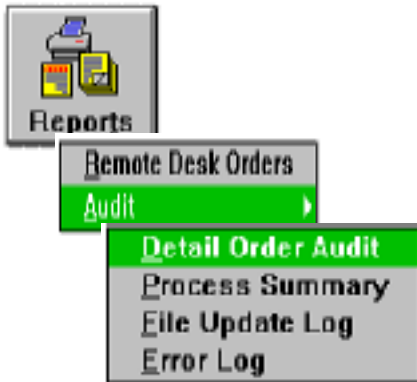
③ **Enter New Orders**, quotes and if applicable customers for the day. They are all saved and then sent as a complete batch during the SEND process. It is here that the majority of RemoteDesk operation is done.



④ **Send** all new sales orders into head office for processing and shipping by selecting **Process** and **Send**. All new orders and customers should be sent daily to ensure prompt order processing.

Daily Operation at a Glance

Remote Client Site



⑤ Select **Reports** then **Audit** to get the detail or summary of new orders created and to ensure all have been sent. You can also use the audit lists to tell if a new price list has been sent, when you received data last or when orders were sent. There are also file activity logs and if applicable, an error log. This function is optional and can be accessed at any time.

Daily Operation at a Glance

Administrator Site



① To ensure the RemoteDesk database has the most current order shipment and invoicing information from the previous day, access the **Order Status** function and click on the “**Update Order Status**” button which refreshes order information from the accounting system.



② Select **Process** and use the **Import** function to update RemoteDesk from your accounting system with any item price changes or any customer records and credit information, for sending to all remotes.



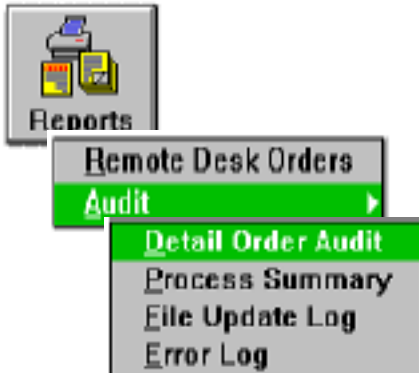
③ Select **Process** and **Send** any updated order status information along with any new price changes or customer updates to all remote clients.



④ Check E-Mail for any sales orders that were sent overnight from remote sites. Use the **Select** and **Preview** options to look for orders that should be processed immediately. Use the **Update** button to accept selected data files into RemoteDesk. Also you may want to review any new customer records before they are updated to the RemoteDesk database.

Daily Operation at a Glance

Administrator Site



⑤ After data is Received from E-Mail and updated in RemoteDesk, use the **Reports** and **Audit** option to check out new orders and new customers from each of the remote sites. Select the **Detail Order Audit** and the **File Update Log** respectively. Also verify that you have received data from all active sites recently using the **Process Summary**. Some followup actions may be required here.



⑥ Once all new orders and customers have been reviewed and updated in RemoteDesk, you need to post them to your accounting system's database for order invoicing and shipping using the direct feed through **Export**.



⑦ The Administrator may also enter sales orders for the head office. You can also make adjustments to any remote site orders if required. In fact, RemoteDesk can be used to off-load daily order entry operations and contention in the main accounting database. You can use multiple remote workstations to enter sales orders and then have them E-Mailed to the Administrator station.

Daily Operation at a Glance

Administrator Site



⑧ RemoteDesk can also send extra files, such as word processing documents and spreadsheets. You can use the **Launch** button to start a DOS batch script that copies regular files to the remote site upload directory for sending.



⑨ At the end of the day you may want to collect the latest **Order Status** information from the accounting system by clicking on the Update Order Status button in the Order Status function.



⑩ As a last activity for the day, select **Send** to update remote clients with the latest order status information and any extra data files such as word processing documents or spreadsheets for corporate reporting. By selecting all remotes, they will by default get their relevant order status information. When external files are entered on the screen, all remotes selected will receive those files. If there are extra data files in their individual remote site upload directories, they are sent to each specific site as well.