

3

Product Setup



Overview RemoteDesk provides many features to let you create professional quotes, automatically convert those quotes to orders and then send orders electronically to a central location for automatic processing.

This chapter includes the following sections:

Startup - covers entering the serial number and your user name and password.

Setup - The cycle to establish communication with the central office and receive the data

- ▶ Set your E-mail address for communications with Administrator.
- ▶ Register with the Administrator (you are not required to register with Bravo).
- ▶ Send back a receipt acknowledgment
- ▶ Receive database parameters to start live quote and order processing

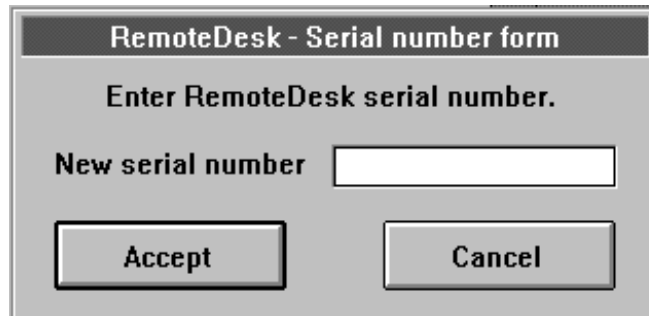
System Options - covers various functions

- ☐ - Setting your data options, Users, Changing Print Forms for Orders and Quotes, and Defining a .BMP logo

What Next? - Covers options you can select to continue after setup

Startup

Enter RemoteDesk Serial Number

A screenshot of a dialog box titled "RemoteDesk - Serial number form". The dialog box has a light gray background and a dark gray title bar. Inside the dialog, the text "Enter RemoteDesk serial number." is displayed. Below this text, there is a label "New serial number" followed by a white text input field. At the bottom of the dialog, there are two buttons: "Accept" on the left and "Cancel" on the right.

The first time you enter RemoteDesk, the serial number screen is displayed. When you run the program for the first time, remember to enter the “**Remote client**” **serial number**. You will find the serial number on:

- ◆ The product box, printed on a sticker
- ◆ The back cover of your manual or
- ◆ Provided by your Administrator

Once you have entered your serial number, press the **Accept** button to continue.

Logging On



Once the product serial number is entered, you are presented with this logon screen.

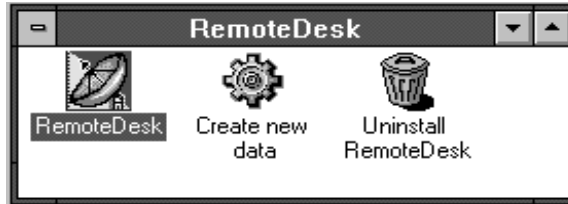
The **User** and **Password** fields should be left **blank** at this stage of running RemoteDesk. Press **OK** to continue.

Once you define users in the program, you will have the option to enter your own user name and password. See **Profile-Users** later in this chapter for more information.

Remote Setup

Preparing to Receive the Database

RemoteDesk comes with data so you can become familiar with the product, and set up an e-mail address to test transferring between you and the Administrator before you receive your live data.



Select the RemoteDesk option and proceed with the following setup steps.

(1) Set your E-Mail address

This is the only setup you are required to do. Once you set your communication method, the Administrator sets up the remaining options.

(2) Register with the Administrator

Once your communication method is setup, the Administrator will send you a registration e-mail to test your connection and link you to them.

(3) Send receipt acknowledgment message

The remote client sends back a message to the Administrator to say that its registration message was received and it can now receive all the live data.

(4) Receive a complete database

When the Administrator receives the acknowledgment, a full database can be sent to the remote client PC. Once this is received, you can begin full quote, order entry and daily communications with the head office.

(1) Set your E-mail Address



Company Profile- Communications

The first step is to set your e-mail address so that you can receive a **registration e-mail** from the Administrator.

In general, RemoteDesk can communicate using:

- (1) your existing **Internet E-mail** connection and mailbox with your Internet service provider.
- (2) your internal **office E-mail** system such as Exchange Messaging. In Windows 95 or NT, you can define Exchange Profiles that RemoteDesk can use.
- (3) Lotus cc.Mail, most MAPI (Messaging Application Program Interface) compliant mail systems, or any **external communications** product. You can also use a direct modem connection with the external gateway method.



The remote clients must be registered with the Administrator before any live communications can occur.

This screen contains all the setup information required by remote sites.

RemoteDesk - Company Profile

Internet

E-Mail Address

Account Name Password

Incoming Mail (POP3) Server

Outgoing Mail (SMTP) Server

Office

Profile name Password

User name

External

Other Gateways

Company / Process Options / Data Options / Communication

Status Bar

Internet Access

Internet

If you already have an Internet connection you can begin using it to communicate with head office. If you use a communications server such as Microsoft Exchange you can set up a Profile to access your Internet account.



If you are using **Windows 95** Exchange to communicate, do not use the “Internet” option. Skip to the “**Office**” option instead.

Your Internet address information is entered in this section if you are using "Dial-up Networking" with Windows 95.

Internet

E Mail Address

Account Name Password

Incoming Mail (POP3) Server

Outgoing Mail (SMTP) Server

**** You should contact your Internet Service Provider (ISP), for the information required on this screen.**

E-Mail Address: This contains your full Internet E-Mail address.

Account Name: This is the name of your Internet account with your Internet Service Provider.

Password: Enter the password associated with your Internet account.

Incoming Mail

(POP3) Server: The name of the incoming mail server at your ISP.

Outgoing Mail

(SMTP) Server: The name of the outgoing mail server at your ISP. Both of these may have the same name. These 2 fields contain default values that cannot be changed.

Settings: The settings button is typically not accessed. It is only necessary to adjust the timeout settings if you find logging onto the Internet and accessing your Internet Service Provider server requires more wait time. Examples include "timeout" messages or "server not responding". You must also ensure that your server names are completely correct. Changing the timeout settings to 60 can improve connections.

Setting up for Windows 95 (and beyond)...

Internet E-Mail:

You can use Windows 95 "Dial-Up Networking" to communicate on the Internet. If already connected, you would have used the "Internet Tools Wizard" to define an entry for "Dial-Up Networking". RemoteDesk can use these same connections. See Windows help for setup.

Office: Intranet/Internet E-Mail Information



You can use your Microsoft Mail or Exchange Messaging system to communicate via E-Mail. RemoteDesk can use any MAPI compliant mail system. E-Mail settings can be defined through the Windows 95 Exchange Profile. Windows 95 also uses this Exchange Profile to communicate with the Internet.

Your E-Mail information is entered in this section.

A screenshot of a Windows 95 dialog box titled "Office". It has a checked checkbox next to the title. Below the title, there are two fields: "Profile name" with an empty text box, and "User name" with the text "BBC RD Office" and a magnifying glass icon to its right.

Profile name:

Enter the name of your MS Exchange profile that contains your applicable E-Mail **User Name**. You can also leave this field blank and select everything from the User Name finder search button.

User name:

Click on the magnifying glass finder button to search the Exchange Profile name and select your User name from the Exchange recipient E-mail lists that it keeps. Double click on your E-mail name and it pops into this field.

Office E-Mail:

E-Mail programs, such as Microsoft Mail, are easy to use, and demonstrate the power of RemoteDesk. There are many other E-Mail packages that can work with MS Mail through what are known as gateways. These gateways provide a seamless connection to your MS Mail system, and hence to RemoteDesk. If you are using MS Mail to send mail within your organization or between companies using a gateway, then RemoteDesk can also use the same communications transport. Some of the gateways that Microsoft supports are: AT&T Mail, cc.Mail, DaVinci, DEC, Higgins, IBM AS/400 Office, Novell Netware, Sprint TeleMail.

Setting up for Windows 95 (and beyond)...

Office E-Mail or Microsoft Mail or the Internet- You can use Windows 95 Exchange Messaging Profiles to communicate to various mail systems. You may already be using Internet Explorer with Windows 95. Windows 95 and NT use Profiles to communicate through Microsoft Exchange. RemoteDesk can use the same Profile to do the same communications.

You need to start Microsoft Exchange and create a new Profile for RemoteDesk, so you can communicate via the Internet or MS Mail.

Once this information is saved, RemoteDesk will use it to send to and receive data from your Administrator.

See your Windows 95 manual, or use the Wizard, for help with creating a profile.



A note on AOL, Compuserve, MSN, Yahoo, Hotmail users

Because these service providers have their own proprietary dial-up methods to access the internet, RemoteDesk (as with Windows) cannot dial these directly. You must manually get online, then once online you can use the RemoteDesk Send and Receive functions.

External: Gateways

External

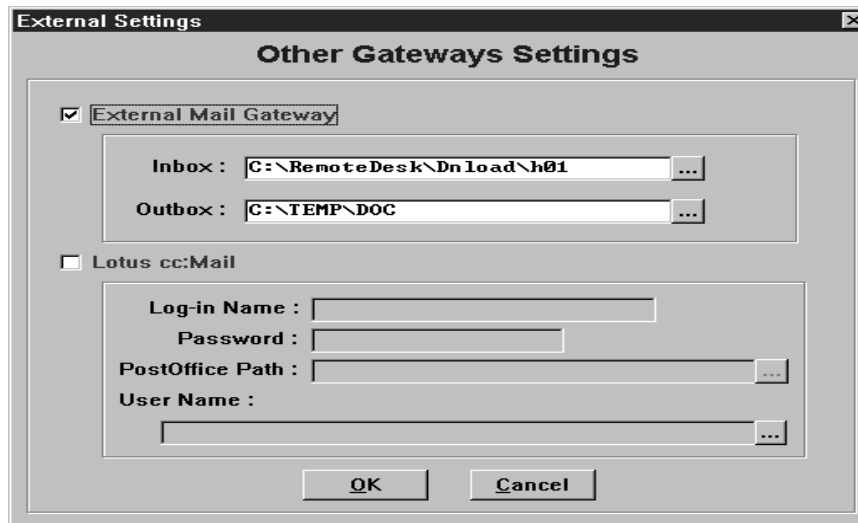
The External Gateway supports additional communication methods in RemoteDesk such as Lotus cc.Mail, modem or other external communication systems that can handle an encrypted data file. RemoteDesk communicates using the Microsoft MAPI standard and therefore can integrate with other mail systems that conform to this standard.

Supporting Multiple Mail Systems Simultaneously

With the variety of E-mail systems that can be used in your office, RemoteDesk supports a wide number of them. In the next section, other “**External**” mail gateways are supported.



Clicking on the **<Settings>** button brings up the following screen.



The external method is presently supporting two types.

► **External Mail Gateway**

► **Lotus cc.Mail**

Settings for External Mail Gateway

This option passes data tables as encrypted files in any user-defined directory on the system or network. This allows any communication method for sending and receiving data such as proprietary E-mail system or modem file transfers.

There is an **Inbox** and an **Outbox** data path. These should not be the RemoteDesk **Upload** or the **Download** directories used by regular E-mail communications. These should be separate directories created for passing data files between you and the Administrator using.

When the **Send** operation is being performed, the resulting data file is put in the **Outbox**. Once the Send is complete, an external application can pick up the compressed and encrypted file for communications.

When the **Receive** operation is being performed, the **Inbox** is checked by the program for any compressed and encrypted data files. The proprietary application should have deposited a file into the Inbox before running Receive.

Settings for Lotus cc.Mail:

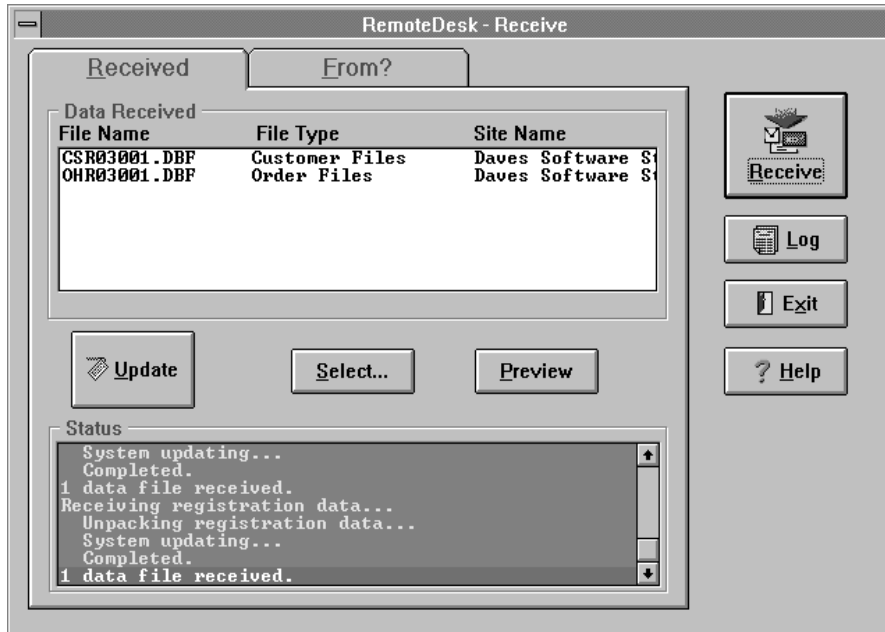
This interface can access a cc.Mail Messaging system and conforms to its standards for message delivery. Companies using cc.Mail version 6 or greater can use RemoteDesk for electronic commerce links to external or internal PCS.

Enter the **Log-in Name** and **Password** if applicable, for the cc.Mail recipient. Click on the search button to fill in the **PostOffice path**. The program checks to ensure the directory contains the Lotus cc.Mail Post office. You can click on the search button to find the **User Name** or you can enter it directly.

Click on **<OK>** to save these setting here and click on the Company Profile **<Save>** button to keep all settings.

(2) Register with the Administrator

Once you have set your e-mail address the Administrator should be informed so that they can send you a registration E-mail. Once the Administrator has sent you this message, select **Process** and click on **Receive**.



Select **Receive button** to start up the communications process that checks your E-mail box and picks up messages for RemoteDesk. You do not have to use any other options at this time. Chapter 5 will cover these options in detail.



The system will now tell you to exit and restart. Follow the instructions as per the screen display.

(3) Send Receipt Acknowledgment Message

This registration process in step 2 creates an acknowledgment message that must be sent back to the Administrator to say that the message was properly received.

Before sending however you should check to ensure the return E-mail address for the head office Administrator is correct. When using different E-mail systems between the remote PC and the Administrator, (for example using Network Dialup and cc.Mail), this sometimes must be reset.

Go into the **Remote Maintenance** function under the **Profile** button. In the middle of the screen is a section called "**Communication Method**". Check that the correct method and E-mail address for communicating to the head office is entered correctly. If not, make the correction and click on Save.

RemoteDesk - Remote maintenance

Site Information

Remote Data is sent
 Registered

Site name: Seattle Sales
Name: Daves Software Store
Contact: Dave
Address: 34570 Pier Front Street
City: Seattle State/Prov: WA
Zip/Postal: 45005
Phone: <206>770-1212
Fax: <206>770-1215

Communication Method

Office E-Mail Internet E-Mail Modem
User name: Dave Laptop
Modem: < >

Base Type

Remote SalesPerson Code Customer Code

Site I.D.: R03
Total Sites: 1

New Save Delete Register Update Unregister Close

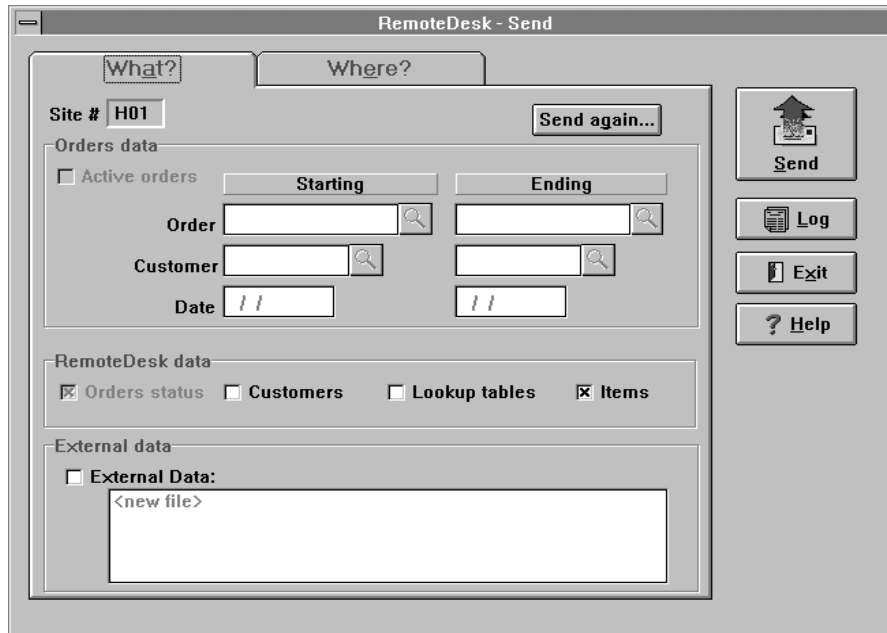
Site Profile Site Options

Once you have confirmed the E-mail address is correct, you can now **SEND** back the Registration Acknowledgement.

Once you have confirmed the E-mail address is correct, you can **SEND** back the Registration Acknowledgement.



Select **SEND** and the following screen appears.



Click on the **Send** option to begin the communications process.

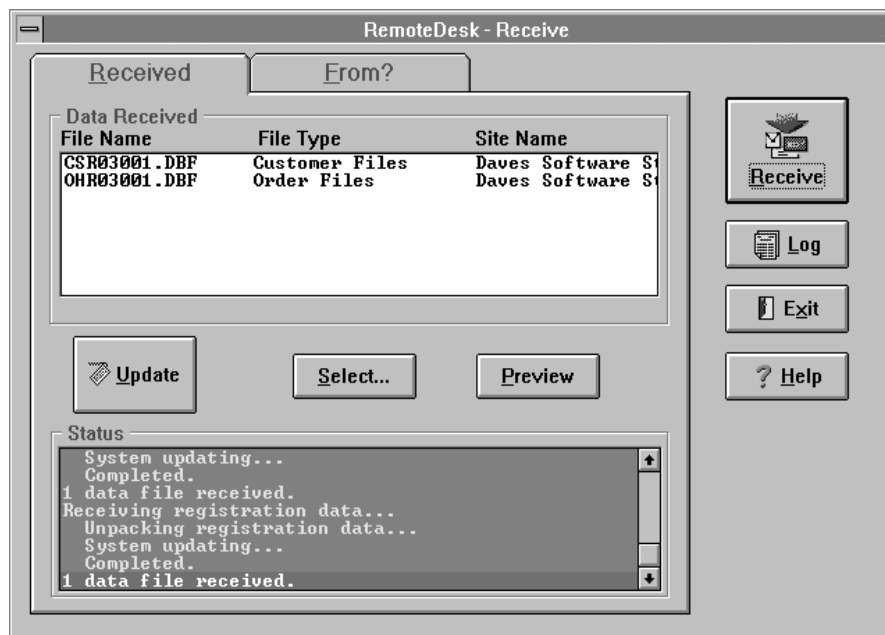
At this point you do not have to use any other options. Chapter 5 will cover these in detail.

(4) Receive a Complete Database

Once the Administrator receives the acknowledgment, they will send you the “full database” so that you can now be ‘live”. Once the Administrator has sent you the data, select **Process** and click on **Receive**.



Select **Receive button** to start up the communications process that checks your E-mail box and picks up messages for RemoteDesk.



The system will now load the data into the RemoteDesk database. You can now check the remaining setup options, and then proceed to do quote and order processing.

Table Maintenance



Profile

Company Profile
Customer/Ship To Maintenance
Table Maintenance
Order Template
Users
Remote Maintenance

Once you have received your live data, you should use this function to ensure that the Tax Jurisdictions and status received are applicable to your area, and the tax rates are set correctly. If any changes are required you can make them.

Table Maintenance- Taxes

RemoteDesk - Table maintenance

Table defaults

Jurisdictions	Description	Taxable	Description	Taxable
1	County	<input type="radio"/> Y <input checked="" type="radio"/> N	4	<input type="radio"/> Y <input checked="" type="radio"/> N
2	State	<input type="radio"/> Y <input checked="" type="radio"/> N	5	<input type="radio"/> Y <input checked="" type="radio"/> N
3		<input type="radio"/> Y <input checked="" type="radio"/> N		

Save

Tax Status

Status	Description	County	State	3	4	5
0	Taxable	7.00	8.00	0.00	0.00	0.00
1	Non-taxable	0.00	0.00	0.00	0.00	0.00
2	County only	7.00	0.00	0.00	0.00	0.00

Tables Taxes Inventory

Status Bar

Exit

Tax Jurisdictions

RemoteDesk has up to five jurisdictions for each of your tax statuses. Enter an applicable **description**, then specify whether that tax is taxable or non-taxable. "Y" will calculate the next tax on top of this

tax , and “N” will cause the taxes to calculate separately. Once you enter a jurisdiction, it is displayed in the tax table heading.

Tax Status

Tax status descriptions are the names you assign to identify the items and customer tax statuses in your system. Each description is associated with a tax status code. You can have up to ten tax status codes from 0 to 9.

All customers and items can have a tax status code assigned to them from the same table. When taxes are calculated, the lowest rate between the customers status and the items status is used.

Tax Rates

In the tax table use the arrow keys to move to the jurisdictions and tax status rows. Enter in the tax rate associated with each jurisdiction in each of the status rows. These rates are used to compute tax on the orders.



Once you have completed your tax jurisdictions and tax status, you must save your work for the information to become effective.



RemoteDesk tax table and status must be checked before processing orders between yourself and the Administrator. This ensures your tax information is calculating correctly.

System Options

Overview This next section groups together features and options that can be set up at any time.

- ◆ **Company Profile - Data Options**
 - Defining your import data path, contact management system data path, logo data path and how to create a Logo .BMP for order screen display
- ◆ **Profile - Users**
 - Entering multiple users into the system
- ◆ **Changing order and quote print formats**
- ◆ **What Next?**

Company Profile - Data Options

The screenshot shows the 'RemoteDesk - Company Profile' dialog box with the 'Data Options' tab selected. The dialog is divided into several sections:

- Inventory definable fields:** Contains two sections for optional fields. 'Optional field 1' has 'Qty Shipped' with a length of 12, type of Currency, and an 'Edit' button set to 'Yes'. 'Optional field 2' has 'Qty BackOrdered' with a length of 6, type of Number, and an 'Edit' button set to 'Yes'.
- Automatic numbering:** Contains three input fields: 'Starting Customer' (502), 'Customer prefix' (R), 'Starting invoice' (1018), 'Invoice prefix' (R0), and 'Starting Quote' (1).
- Data directories:** Contains two rows. The first row is for 'Accounting' with the path 'C:\PLUS\IN\SAMPLE\SAMINC\FieId.ddf', a 'Browse' button, and a 'Settings' button. The second row is for 'Contact Mgmt' with the path 'C:\ACT30\Database\cheryl's leads.dbf', a 'Browse' button, and a 'Logo' field with a browse button.
- Navigation and Action:** At the bottom, there are tabs for 'Company', 'Process Options', 'Data Options', and 'Communication'. Below the tabs is a 'Status Bar' and three buttons: 'Print', 'Save', and 'Exit'.

Access this option to set your Data Directory settings only.

Data Directories- Accounting:

This close-up screenshot shows the 'Data directories' section of the dialog. It features two rows of settings:

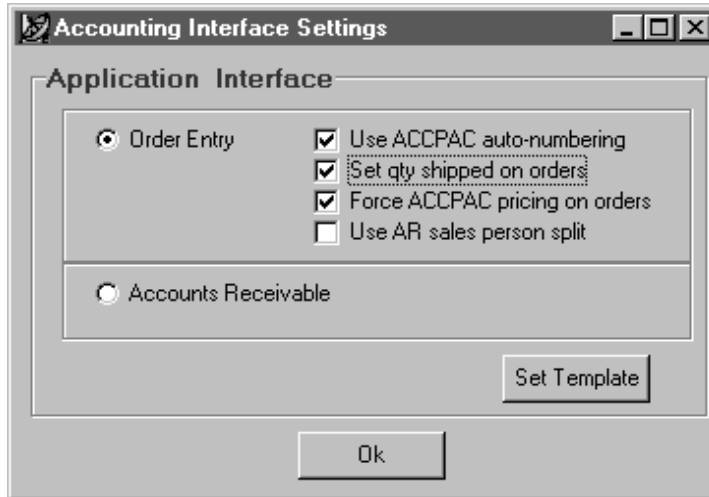
- Accounting:** A text field containing 'C:\PLUS\IN\SAMPLE\SAMINC\FieId.ddf', followed by 'Browse' and 'Settings' buttons.
- Contact Mgmt:** A text field containing 'C:\ACT30\Database\cheryl's leads.dbf', followed by a 'Browse' button and a 'Logo' field with a browse button.

This is the drive and data path used for Import from an external system only.

Contact Management:

Click on the browse button to enter the drive, directory and contact management system you are using. RemoteDesk can access your Contact Management system when orders are being entered. See the **Contact Management Appendix** at the back of this manual for further details.

Settings: Select the **Settings** button and the following screen appears.



This is where you set the **Application interface type** (Order Entry or Accounts Receivable-Note: For Accounts Receivable option to be applicable, you must have the RemoteDesk for ACCPAC Windows AR add-on).

Set Template: This is where your accounting default template is set. For details refer to your Accounting Interface Guide.

These **settings** will be **dimmed** however, as they are for Export only from the Administrator.

Logo File: This is the drive and path where your logo file is located. This file must be in a bitmap or .BMP format. You can create this file, or if applicable receive this file from the Administrator. Using this field is optional.

Browse: Select the **Browse** button at any time to locate directories and files. You should always use this option versus typing in the path, it ensures you select the correct one.

Defining Logo BMP for Order Screen

The logo displayed on the lower left-hand corner of the order screen can contain any defined .BMP (bitmap) file. The dimensions of the rectangular display area are 242 x 53 pixels. You can use Paintbrush or any graphics program to create your own .BMP.

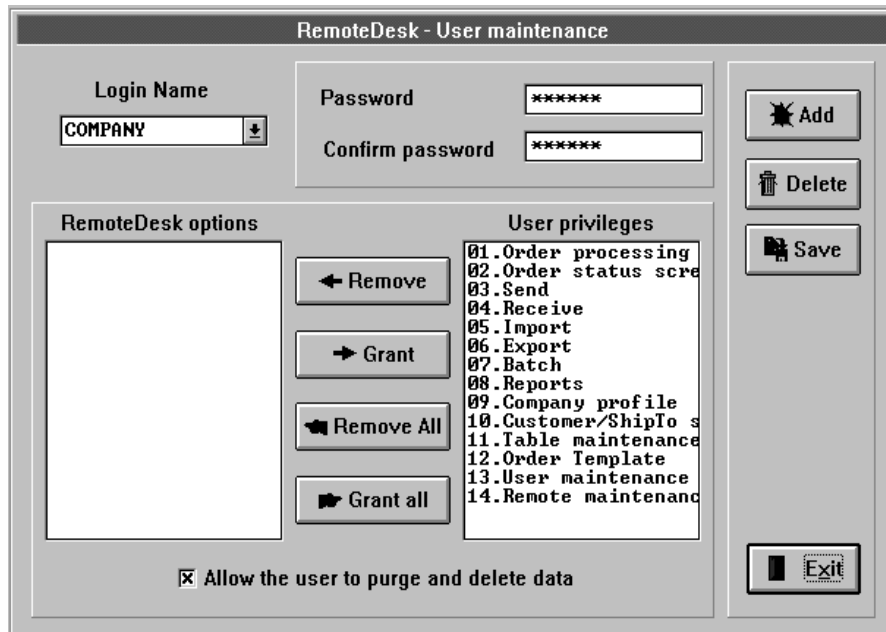


Once you have created a .BMP file, copy it to the \REMDESK directory and set the logo name in the company profile.

Profile - Users



The **Users** function is used to set Login names, passwords and user privileges for people accessing the system. If there are multiple people using RemoteDesk, you may want to give only certain access rights to some users.



Note: The client version is a single user system only, which means you can have multiple people using it, but they must access it from a single PC.

Login Name: Click on the “**Add**” button. Then enter a **login name** (capitalization is not important). This function allow you to add, modify and delete **Login names**. You can create a set of functions or RemoteDesk menu choices and associate them with each Login name. Each Login name can also have deletion and purge rights.

Password: Enter the password associated with the login name.

Confirm Password: You must re-enter the password here to make sure it was keyed in correctly in the previous field.

RemoteDesk Options: Move to the RemoteDesk Options scroll list and select the menu functions from the **User Privileges** section to be associated with this new Login name.

User Privileges: The following are the privileges available.

01. Order Processing
02. Order Status
03. Send
04. Receive
05. Import
06. Export
07. Batch
08. Reports
09. Company Profile
10. Customer/Ship to
11. Table Maintenance
12. Order Template
13. User Maintenance
14. Remote Maintenance

You can single click on each function you wish to move, or use the following buttons for global rights.



Remove the functions you do not want to give the user with the **Remove** button. You can experiment with the best way to do it for your requirements.



The **Grant** button which moves the function over to the **User Privileges** column. You can also click on a function name, hold down the mouse button and drag your mouse pointer over the functions, marking the ones you want, then click on **Grant**.



You can also click on the **Remove All** button and all rights assigned in RemoteDesk Options will be removed.



You can also click on the **Grant All** button and all functions in RemoteDesk Options list move over to the **User Privileges** column.

Allow the User to Purge and Delete Data:

Use this to determine the users purging and deleting ability.

This option, if selected, gives the user the right to delete any information or audit lists in RemoteDesk.

Once all options are selected, click on the **Save** button.

Changing Order and Quote Print Format

RemoteDesk prints orders and quotes using Crystal Reports from Seagate Software provided by RemoteDesk. The two files provided by RemoteDesk that relate to the order and quote format are RDORDERS.RPT and RDQUOTES.RPT.

You can make any changes you want to the print format of the reports if you have the full version of Crystal Reports, version 7.0 or greater. Using Crystal Reports, you can load orders and quote format files (which are found under the \REMDESK\REPORTS directory or wherever RemoteDesk was installed.)

You can load the RPT files into Crystal Reports and make any changes. In fact, any RemoteDesk report can be changed in this manner.



When making changes to any of the RPT files remember **do not save** the report with its data. This will cause problems later when the report is being accessed by RemoteDesk.

RemoteDesk Invoicer Option:

With the RemoteDesk Invoicer option, you have access to the invoice form. This format is in the \Reports directory as RDINVOIC.RPT.

Changing Order, Quote, Invoice E-mail Format

A new features has been created in the Order Entry program which allows you to **send via Email an order, quote or invoice** to anyone that has an Email address.

For details on sending the form, See Chapter 4.

You can make any changes you want to the e-mail format of the document if you have the full version of Crystal Reports, version 7.0 or greater. Using Crystal Reports, load the RPT files for orders, quotes, and invoice formats as detailed below.

The document details are as follows:

E-mail Template Name	Document being sent
ECSendOrdWW.RPT	Order sending in Windows Word
ECSendOrdTXT.RPT	Order sending in text file
ECSendInvWW.RPT	Invoice sending in Windows Word
ECSendInvTXT.RPT	Invoice sending in text file
ECSendQotWW.RPT	Quote sending in Windows Word
ECSendQotTXT.RPT	Quote sending in text file

The templates for modification can be found in the **\remotedesk\reports** folder.



When making changes to any of the RPT files remember **do not save** the report with its data. This will cause problems later when the report is being accessed by RemoteDesk.

What Next?

1. After data file setup and registration, you can begin following a daily operation pattern. See **Chapter 6, Daily Operations** in RemoteDesk.
It is a graphical menu representation of a typical daily cycle for the Remote Site.
2. You can continue on to **Chapter 4, Entering Orders**. It describes in detail all the steps involved in creating orders, archiving orders, creating quotes, and adding customer and ship-to addresses.