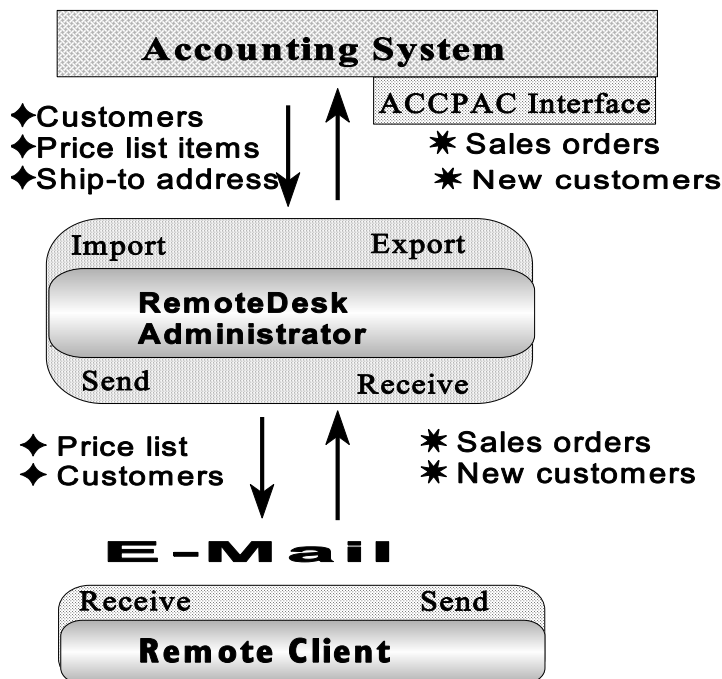


6 Daily Operations in RemoteDesk



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 pickup 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 to load any new order status or item pricing information sent overnight. This will 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.



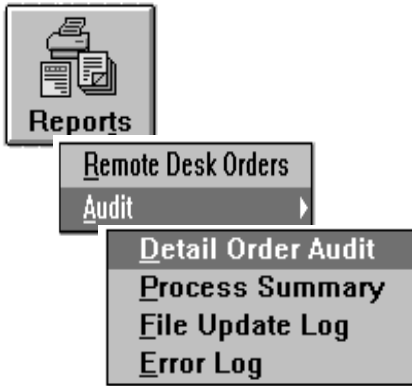
③ **Enter New Orders**, quotes and if applicable, customers. These are all saved and then sent as a complete batch during the Send process. It is here that the majority of your time will be spent.



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

Daily Operation at a Glance

Remote Client Site



⑤ You can use the **Audit** reports to provide a 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. This function is optional and can be accessed at any time.