What’s New in e-automate Version 8.0

e-automate 8.0 boasts several updates and new additions* including:

- Most up-to-date technology platform for windows software development
- Cutting edge functionality and usability enhancements for .NET
- Higher security and more stability than older .NET technologies
- Easier deployment – 100% managed code, registry-free, and xcopy ready

*For a high-level look at specific components that have been updated or added to this release, please see the Table of Contents on the following page. For a sample screen shot and brief description of each component, follow to the corresponding page numbers.
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e-Views

View Users by Right/Rights by User

e-info

Login by Contact Email

Profile Management

Delegation of Profile Management

Pay Invoices with Credit Card Online through e-info

Manage Payment Methods

Log Equipment Move (Change Order)

Service Call Custom Fields

Digital Barcode
Accounts Payable

Exclude Freight from the Terms Discount Option
There is now an option on the Add Purchase Order Invoice Item window to exclude freight from the terms discount when adding expense coded items to purchase order invoices.

The ability to exclude from the discount is also applicable on items that you want to identify line item freight amounts. You use the Exclude freight from terms discount checkbox, when checked, the amount in the Freight field for this item is excluded from the total when e-automate calculates a terms discount.
Print Invoices on Check Voucher in Invoice Order

When paying a vendor, you can have multiple invoices with different numbers being paid with a single check. In prior versions of e-automate the invoices were printed on the voucher in the order in which the vendor was created in e-automate. In version 8.0 based on customer feedback, invoices are now printed on the voucher in vendor invoice order.

1/4/2012   JC00
Jack C. Smith

1/4/2014   CACOPY14

<table>
<thead>
<tr>
<th>Line</th>
<th>Vchr. No.</th>
<th>Type</th>
<th>Invoice No.</th>
<th>Cchr. Date</th>
<th>Due Date</th>
<th>Voucher Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>15</td>
<td>I</td>
<td>[C1104]</td>
<td>12/09/2011</td>
<td>12/09/2011</td>
<td>$1,213.20</td>
<td>$1,213.20</td>
</tr>
<tr>
<td>2</td>
<td>11</td>
<td>I</td>
<td>[C12333]</td>
<td>01/04/2012</td>
<td>02/03/2012</td>
<td>$24,981.11</td>
<td>$24,981.11</td>
</tr>
<tr>
<td>3</td>
<td>12</td>
<td>I</td>
<td>[C12547]</td>
<td>01/04/2012</td>
<td>01/04/2012</td>
<td>$251.00</td>
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<tr>
<td>4</td>
<td>14</td>
<td>I</td>
<td>[C12742]</td>
<td>01/04/2012</td>
<td>01/04/2012</td>
<td>$354.55</td>
<td>$354.55</td>
</tr>
</tbody>
</table>

$26,799.86
GL Distribution Codes for AP Invoices
If you wanted to distribute a single vendor invoice to multiple branches and/or departments when creating vendor invoices, you were required to add each branch department combination to the vendor invoice at your defined dollar amount for each line. In version 8.0, you can create a GL Distribution code with defined percentages for each branch department combination, assign it to a vendor, and then each time you receive a vendor invoice you can use the GL distribution code to quickly distribute to your branch/department at the pre-defined percentages. Branches are only applicable for customers with branching enabled.
Accounts Receivable

Apply Customer Credit Memos to Multiple Invoices

Instead of having to use a zero dollar payment to apply credit memos to invoices, you can apply a credit memo to multiple invoices using the new Apply Customer Memos window. You can use the detail windows to partially apply or apply the entire credit memo. You can also use the Advanced add button to add multiple invoices to the window in which you are applying a credit memo.

In addition to applying credit memos, you can also use the new Apply Customer Memos window to apply unapplied payments at the same time you apply credit memos.
Refund an Unapplied Payment
In prior versions of e-automate, multiple steps were required to refund an unapplied customer payment. Version 8.0 offers a single transaction you can now use to refund an unapplied payment to the customer when they have an unapplied payment on their account.

Record Customer Payments, Credits, and Unapplied Payments Simultaneously
The Record Customer Payments window is used to record payments, partial payments, credits, and unapplied payments to a customer's account. In version 8.0 you can record a payment in conjunction with a single credit memo or multiple credit memos, unpaid invoice(s), and unapplied payment(s) in a single transaction toward a customer account.
**Fully Integrated Credit Card Processing**

e-automate version 8.0 is PCI compliant with regard to credit card storage. If you have credit cards in your database they will automatically be removed, when you update to version 8.0. The new method for storing credit cards and processing credit cards is with our PCI compliant partner, Net1/Sage. If you are storing credit cards in your system and would like to save them, you first need to create an account with Net1/Sage and then run the credit card utility. The credit card utility can securely remove credit cards from your e-automate database and upload them to the credit card vault through Net1/Sage retaining the customer to which the credit card is associated. You must first have an account with Net1/Sage to upload your credit cards. If you choose not to use Net1/Sage, credit cards are automatically removed when upgrading to version 8.0. Former partners, PayPal and Secure net have been removed from the e-automate system.
A/R Rep Added to Accounts Receivable Console

Version 8.0 introduces the A/R Rep to the Accounts Receivable Console. You can assign an employee to a customer and then filter the customers in the accounts receivable console by the A/R Rep assigned. This functionality is used to boost your accountability on customer accounts for collections and account management. You can also assign A/R Reps to tasks in the Accounts Receivable Console and elsewhere in e-automate. Additionally, you now have the ability to bulk update your customer records with an assigned A/R Rep.
Follow-up Tasks

Version 8.0 offers enhancements that make the management of tasks not completed more effective. You can now mark a task complete and identify a follow-up date. When identifying a follow-up date, e-automate creates a follow-up task and connects it to the original task. Navigating from one task to another is done using the **Previous task** and **Next task** buttons. The aging bar has been added for the customer so you can view the account aging information.
Note Function and Enhanced Note Capability
Notes have been available throughout e-automate in every section but accounts receivable payments. Therefore, note functionality has been added to accounts receivable payments whether the payment is positive or negative. Notes can also be accessed through the Accounts Receivable Console right-click menu. Customer notes can also be accessed from the Customer notes tab in the console.

Finance Charges
Finance charges have been updated to accommodate new branch balance sheet accounting, if used. Based on the accounting changes there can be additional details associated with finance charges not available in prior versions. In version 8.0, you use the Finance Charges window to right click on a customer and view the pending finance charge details, as displayed below.
Once finance charges have been created, you can view the details associated with finance charges by editing the Misc Charge Invoice (finance charge invoice) and click the More Information button, [i]. In the **Available lists** field you can select *Finance charge details*. Finance charge details are no longer available in invoice notes.

![Finance charge details](image)

<table>
<thead>
<tr>
<th>Reference</th>
<th>Type</th>
<th>Date</th>
<th>Due Date</th>
<th>Due Balance</th>
<th>Avg Daily Balance</th>
<th>Calculated Charge</th>
<th>Actual Charge</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>Contract Invoice</td>
<td>1/1/2007</td>
<td>1/31/2007</td>
<td>$965.75</td>
<td>$885.75</td>
<td>$11.72</td>
<td>$2.24</td>
</tr>
<tr>
<td>1001</td>
<td>Contract Invoice</td>
<td>1/1/2007</td>
<td>1/31/2007</td>
<td>$965.75</td>
<td>$885.75</td>
<td>$11.72</td>
<td>$2.24</td>
</tr>
<tr>
<td>1002</td>
<td>Contract Invoice</td>
<td>1/1/2007</td>
<td>1/31/2007</td>
<td>$965.75</td>
<td>$885.75</td>
<td>$11.72</td>
<td>$2.24</td>
</tr>
<tr>
<td>1003</td>
<td>Contract Invoice</td>
<td>1/1/2007</td>
<td>1/31/2007</td>
<td>$965.75</td>
<td>$885.75</td>
<td>$11.72</td>
<td>$2.24</td>
</tr>
<tr>
<td>1004</td>
<td>Contract Invoice</td>
<td>1/1/2007</td>
<td>1/31/2007</td>
<td>$965.75</td>
<td>$885.75</td>
<td>$11.72</td>
<td>$2.24</td>
</tr>
<tr>
<td>1005</td>
<td>Contract Invoice</td>
<td>1/1/2007</td>
<td>1/31/2007</td>
<td>$965.75</td>
<td>$885.75</td>
<td>$11.72</td>
<td>$2.24</td>
</tr>
</tbody>
</table>
Cashbook

Cashbook Reconcile Window Resize Capability
You can now resize or full-screen the Reconcile Cashbook Account window which allows you to see more of your deposits and payments at a glance without the need to scroll through the details window.
Cashbook Reconciliation Report Options

You can now filter your cashbook reconciliation reports to show outstanding or cleared transactions, in addition to the statement date and cashbook account. This helps to more easily identify inconsistencies between the bank account and your records.
Print Cashbook Reconciliation from the Window

In prior versions of e-automate, if you wanted to print the Cashbook Reconciliation report, you were required to finish your reconciliation later, leave the window, print the report, then return to the reconciliation to finish. In version 8.0 you can now save your information and print the report from within the Cashbook Reconciliation window. If you have made changes, you are prompted to save any changes before you generate the report. If the report meets your expectation, you can simply finalize your reconciliation and close the Reconcile Cashbook Account window.
Accounting

GL Void Confirmation and Date Control
Accounting administrators can now configure the date posting rules when voiding invoices. The default voiding behavior is utilized by e-automate to create a credit memo dated the same as the invoice being voided. You can choose from the following choices when configuring voiding behavior in version 8.0:

- Default voiding date to the date of the original transaction or the current date
- Allow the user to choose the voiding date
- Allow the user to choose between the original invoice date and the current date
- Allow the user to choose any date

Depending on your choice, users may or may not get a window like the example below.

![Void Sales Invoice Window]

The voiding transaction will post on:
Date: 1/30/2011
Period: 201111

- Use original transaction date
- Voiding date 1/30/2011

[Yes] [No]
Balance Sheet Groups

If you have enabled branching in your e-automate database, you will be allowed to create balance sheet groups to which you can assign your branches. You can assign a single branch to a group or multiple branches to group. A single balance sheet can be printed by e-automate for each group you create. The balance sheet reflects the account values for a branch or the sum of all branches assigned to the group. When creating balance sheet groups you identify appropriate inter-company To and From accounts to manage the transactions posted between branches.

When using balance sheet groups you can run your inventory valuation, aged accounts receivable, and aged accounts payable by specific balance sheet groups so you can reconcile to the groups balance sheet.
Multiple Branch Support on Service Contracts

You can now create a service contract with multiple equipment items on the contract from different physical branches. When billing the service contract, e-automate can now segregate the revenue, accounts receivable, taxes, et cetera, associated with the different equipment per different branches on the service contract.

![Edit contract equipment](image-url)
**Contract Accruals**

In e-automate 8.0 the accrual calculations are extremely accurate, down to the penny. The calculated un-earned and earned revenue amounts are designed in version 8.0 to stay consistent for the duration of the service contract. In prior versions you could perform accrual adjustments to account for rounding corrections or other circumstances. In version 8.0 these issues are resolved making the contract accrual adjustment window un-necessary. For contracts created in version 7.6 and earlier versions, the *True Up* feature was introduced. The true up feature automatically trues up unearned revenue each time the base billing cycle intersects the accrual cycle. For example, quarterly base billed contracts intersect with a monthly accrual cycle every quarter, when this occurs, e-automate makes small necessary adjustments to keep the unearned revenue and earned revenue amounts accurate. Contracts that were once left with small amounts unearned and even negative amounts are automatically handled through the accrual process. Contracts that are terminated, expired, and even inactive will automatically show up in the Contract Accrual List window and will continue to show up until the last unearned balance is resolved. In version 7.6 e-automate took into consideration the date identified in the *Terminated on* field on a service contract when accruing. Version 8.0 does not consider the terminated on date when calculating the amount to earn on a service contract. If the contract has the *Terminated on* checkbox checked e-automate automatically recognizes the remaining unearned balance on the service contract.
New Accrual Adjustments for Opening Balances window

In version 8.0 you cannot perform contract accrual adjustments. Due to the new calculations and their accuracy, it is anticipated that you will no longer need to perform accrual adjustments. The former Accrual Adjustments window has been configured to be the New Accrual Adjustment and Opening Balances window. You use this window to bring in opening unearned balances on service contracts that were created, billed and accrued in your accounting system prior to e-automate. The window handles opening unearned balances for contract level base amounts, equipment level base amounts, and meter group base amounts. You can also identify the opening balance equity transition account in the transaction.

In addition to contract accruals functionality correcting for rounding, the 8.0 contract accruals area also recognizes revenue on terminated contracts regardless of the termination date on a service contract which is different from version 7.6.
Inventory/ Purchasing

Automatic Population of the Default to/ from Warehouse

When multiple items are added to a new inventory transfer in standard entry mode, e-automate will automatically populate the default to/from warehouse locations on the Add Inventory Transfer Item window when the **Source warehouse** field and the **Destination warehouse** field are populated, eliminating the need to manually set the warehouse for each individual line item.
Availability Enhancements

Warehouse Grouping
Warehouses are grouped by warehouse type in the 8.0 version of the Inventory Availability window. This feature was intended to make it faster for companies that have many warehouses of varying types to find and view inventory.

Branch Filtering
A Branch filter was added to the Inventory Availability window. If you are using branching, you can filter by an identified branch and see warehouses and associated inventory assigned to that branch.
View Accessories

If you have equipment accessories identified on your equipment, you can view the accessory relationships in the Inventory Location window. In addition to the Inventory Location window, hosts are listed in the Physical Inventory list window followed by attached accessories. On the physical inventory report, hosts are identified and accessories are indented and listed immediately following the hosts.
Receipt Date for Available Serialized Inventory

In the Inventory Availability window, the **Serial Numbers** tab now contains a **Receipt Date** column showing the date the item was received. The receipt data can also be viewed in the Inventory Locations regions. This is only available for serialized items.
Accessory Bin Tracking

Version 8.0 has two additional default bins designed to handle equipment accessories if enabled. When you have checked the **Enable assembled bin tracking on equipment accessories** checkbox in Inventory options, e-automate displays the two new bin defaults on the warehouse profile. Instead of transferring the accessories to the same warehouse and bin as the host, e-automate now transfers the accessories to the bin identified in the **Assembled bin** field for the host equipment’s current location warehouse. The bin identified in the **Assembled bin** field is for accessories attached to hosts that are in stock, and the bin identified in the **Sales shipped/assembled bin** is for accessories that are still in stock but have been shipped using the sales order shipping functionality. Accessories in the bin identified in the **Sales shipped/assembled bin** field remain there until the sales order is fulfilled or the sales order shipment is reversed or canceled. Accessories that are located in the specified accessory bins are much easier to identify as attached accessories and less likely to get used inadvertently.
Sales/ Purchasing Kits
Kitting functionality has been added to e-automate version 8.0. You use kitting to purchase items as a kit or group, as well as to sell items as a kit. Kitting does not require you to use the assembly functionality in e-automate, it automatically breaks kits down to the individual components when the kit is received on a purchase order. If you decide to sell a kit, the system decrements inventory for the defined components of the kit, again without using the assembly functionality.
OEM Numbers
Version 8.0 now has a field specifically designed to identify the original equipment manufacturer number. This field is useful when you sell compatible items but want to be able to see the OEM number in the e-automate interface. Additional functionality has been added to allow you to track the history of the OEM numbers used for an item, as well as a checkbox to identify an item as an OEM compatible item. This number is available as a cross reference item number in the item lookups throughout e-automate.

Manufacturer’s Number on PO Invoice Receipt
When you run a Purchase Order Receiving Report, each item’s vendor item number as identified in e-automate number now appears on the report under the Mfg. Item.
People

Customer Number of Location

In prior versions of e-automate, when editing or viewing the **Location** tab on a location customer, you could not see the parent's customer number. This was a challenge because many master customers and location customers share the same name and it is difficult to distinguish between the two when you cannot see the customer number, only the customer name. In version 8.0 you can now see the customer number of the parent next to the customer name. Version 8.0 also displays the customer number when showing the customer name on service contracts on the **Equipment** tab as well as in the New, View, and Edit Contract Equipment window.
Contact Primary and Other Email Field Added

The Contact information section on the New Contact window now has a Primary email field and Other emails field. The Primary email field, along with the Web password field, is used for validation when logging into e-info, when e-info is enabled. If e-info is not in use, the Primary email field acts as just that: the primary email address for the contact. The Other emails field has been added so that multiple email addresses can be supported for a contact. The Other emails field can accommodate up to 255 characters. When an email is sent to a contact, it will go to any email address in the Primary Email field as well as any listed in the Other Emails field.
Sales

Sales Order Bin Quantity Proposal for Alternate Bins

When you are adding an item to a sales order and there is insufficient stock in the default bin for the identified warehouse but stock in other bins, a window displays proposing other available bins in which your item is located for the specified warehouse. You can either accept the proposed bin and add it to the sales order, or reject it or modify it. If you do not have sufficient quantities for the entire order, the window specifies a backorder quantity. You can view the backorder settings by checking Preview backorder detail upon clicking OK.
Roll Up Invoicing
The sales order form in e-automate version 8.0 has been modified to allow you to identify parent and child line items on sales orders. This enhancement allows the correct identification of accessories to appropriate hosts when added to a sales order or imported from Digital Quote Manager.

You can configure the line items to roll up to the prices from the accessories/children to the parent/hosts so that they are displayed as items on the customer invoices/orders but the prices are rolled into the host.

<table>
<thead>
<tr>
<th>Item No</th>
<th>Description</th>
<th>Serial No</th>
<th>Order</th>
<th>Cancelled</th>
<th>UIM</th>
<th>Price</th>
<th>Disc</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>cS160</td>
<td>ImageryRUNNER cS160</td>
<td>1,00</td>
<td>0,00</td>
<td>EACH</td>
<td></td>
<td>$5633.22</td>
<td>0,00%</td>
<td>$50,633.22</td>
</tr>
<tr>
<td>A-AR-162A1D</td>
<td>AR-161 Imaging Stand</td>
<td>1,00</td>
<td>0,00</td>
<td>EACH</td>
<td></td>
<td>$5633.22</td>
<td>0,00%</td>
<td>$50,633.22</td>
</tr>
<tr>
<td>W1 Finisher</td>
<td>Canon W1 Finisher</td>
<td>1,00</td>
<td>0,00</td>
<td>EACH</td>
<td></td>
<td>$5633.22</td>
<td>0,00%</td>
<td>$50,633.22</td>
</tr>
</tbody>
</table>
Number Printed on RMA/RTV Order

The internal version of the RMA report prints each item on the RMA and now, if the items are linked to an RTV the report prints the RTV number on the report. This functionality is meant to give visibility to items that are returning through the RTV module and have come in from a customer through an RMA.

---

![RMA Order Example](image-url)

RMA ORDER

RMA No: RMA20100001
Date: 1/17/12
Account No: M600

Bill To: Motel 6
1900 W North Temple
Salt Lake City, UT 84115

Ship To: Motel 6
1900 W North Temple
Salt Lake City, UT 84115

<table>
<thead>
<tr>
<th>SalesPerson</th>
<th>P.O. Number</th>
<th>Ship Method</th>
<th>Payment Terms</th>
<th>Date Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lenny Kosnowski</td>
<td></td>
<td>Required</td>
<td>Net 5</td>
<td>1/22/12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item No</th>
<th>Description</th>
<th>Serial No</th>
<th>Order</th>
<th>Canceled</th>
<th>UM</th>
<th>Price</th>
<th>Disc</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>L5100</td>
<td>imageRUNNER L5100 (-1) RTV #RTV2000001</td>
<td>TES3</td>
<td>1.00</td>
<td>0.00</td>
<td>QA01</td>
<td>$38,250.00</td>
<td>0.00</td>
<td>($38,250.00)</td>
</tr>
</tbody>
</table>
Line Item Shipping Contact Information

In version 8.0 a new Contact field has been added to equipment to identify a shipping contact for supply orders. Also added is a Shipping contact field on the sales order line item details so you can identify a unique shipping contact for each line item of a sales order. The shipping contact associated with each line item prints on the sales order and the packing list. You can configure the equipment location remarks to print, as well as line item remarks entered in the User remarks field.
# PACKING LIST

**S.O. Date:** 1/6/12  
**S.O. Number:** 501024  
**Printed Date:** 1/6/2012  
**Entered by:** Admin

**Bill To:** Ridge Nursery  
Attn: Aaron Persol  
170 S Main St  
Salt Lake City, UT 84101

**Ship To:** Ridge Nursery  
170 S Main St  
Salt Lake City, UT 84101

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Payment Terms</th>
<th>I.O. Number</th>
<th>Ship Method</th>
<th>Date Required</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>SN00</td>
<td>Net 10</td>
<td>US Mail - Express</td>
<td>1/11/12</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item Number</th>
<th>Description</th>
<th>Serial No</th>
<th>U/M</th>
<th>Ordered</th>
<th>Prev Shipped</th>
<th>B/O</th>
<th>Shipped</th>
</tr>
</thead>
</table>
| 549136      | Toner Cartridge  
Attn: Joe Jones - Admin Front Desk  
Contract: CT30000-01  
Equipment: ES26000  
Serial Number: 123123  
Model: 3191  
Location: Equipment is located in the Administration building  
Additional user remarks ...  
Developer | EACH | 1 | 0 | 0 | 1 |
| 168158      | Toner Cartridge  
Attn: Lanny Krausing  
Contract: CT30000-01  
Equipment: ES26000  
Serial Number: 123123  
Model: 60305  
Location: For the equipment is the sales building | EACH | 1 | 0 | 0 | 1 |
**Just in Time Order Inquiry**

Version 8.0 has simplified the access to information about an item's history, and improved the speed in which an employee can determine the item equipment usage for the item they are adding to the sales order. A user can click to see the history of a supply item that is being added to an order for a piece of equipment.

Frequently when adding supply orders in e-automate, the user needs to determine the history of the item they are adding to the order in conjunction with the equipment to which it is intended. This information was available in e-automate version 7.6, but the user had to add additional filters. Version 8.0 automatically adds the *Equipment* filter and the *Item* filter when the *More information* button is clicked from within the Edit Sales Order Item window.
Sales Order Types Control Prebilling

In the prior version of e-automate, prebilling on sales orders was enabled or disabled for all sales orders; you could not control prebilling in a granular way. Version 8.0 has moved the enable prebilling functionality to the sales order types which can be assigned to sales orders. You can now determine by sales order type which sales orders allow for prebilling or items on the order.

![New sales order type dialog box](image)

*Order type:* ET  
*Description:* Example Type  
*Category:* Standard - Standard  
*Fulfill sales order - uncheck for demo types, rental types, etc.*  
*Allow prebilling of order*  
*Active*
New Sales Fulfillments

Prior versions of e-automate did not allow you to print or void item or labor fulfillments, you had to make corrections using negative fulfillments. Version 8.0 has a new Fulfillments list window. You use the new Fulfillments window to create new fulfillments, void fulfillments, print tangible fulfillments, and add notes to fulfillments.

You can access the new Fulfillments list window from the Sales menu.
Contract Item Coverage Filters

When entering items on sales orders, you can use the filter on the Item field lookup to limit the items that a user can see and choose from. Users can configure the lookup to show only related items to the equipment, or related items to the equipment and the accessories, et cetera. Version 8.0 contains additional filters on the Item field lookup for sales transactions to filter by the associated bill code’s coverage rules. The two new filters are Filter by bill code and related items of selected host equipment and accessories and Filter by bill code or selected equipment.

![Filter Options](image-url)
Service Equipment

Call Back and Alert Calculations Considers Clicks

Prior versions of e-automate only allowed you to calculate call backs and call alerts based on the number of days between corrective maintenance calls. When second service calls occurred within the call back number of days or the call alert number of days, e-automate flagged them as call backs or alerts regardless of the number of clicks processed between the service calls. When equipment processes high volumes of clicks in short periods of time, the call back number of days and call alerts by days flags service calls as call backs or alerts that likely should not be call backs or alerts due to the volume processed on the device. Now, e-automate version 8.0 can identify the Call back number of clicks and the Within number of clicks fields so corrective maintenance service calls that occur within the call back number of days or within the call alert parameters can be entered into the database upon invoicing as regular calls based on the number of clicks parameters.
Equipment Build - Identify a Sales Order

In version 8.0 you can identify host and accessories on a sales order. With the added functionality on a sales order you can now use the relationships defined on a sales order in the Edit Accessories window to more quickly identify associated accessories on equipment. When adding accessories to equipment, you use the Edit Accessories window to select the sales order, identify the host, and the window automatically displays the configured accessories from the sales order. You can then select appropriate serial numbers as necessary. If you have allocated serial numbers on the sales order, the window automatically displays the allocated accessories with their associated serial number.
IP Address and MAC Address

Version 8.0 offers the additional fields of **IP address** and **MAC address** on the equipment record. The **MAC address** field and the **IP address** fields suggest format but do not enforce format. The **IP address** field supports IP4 and IP6 address formats.
Auto Estimate Meters in Meter Entry

When you have a meter source of **Estimated**, you can use the new **Estimate** button to allow e-automate to calculate the meter estimate based on the averages associated with the metered equipment. You can estimate a meter between two existing dates or a meter reading in the future. The **More info** button identifies more information about the calculation of the estimated.

![Image of a window showing meter entry and estimation options]
**Meter Validation Buffer Sanity Check**

In prior versions of e-automate when meter readings were entered within the 30 days of an equipment’s life the meter validation rules were too restrictive. The closer you were to zero readings, the more restrictive the rules which caused frustration due to meters that would not validate. 8.0 has updated the validation rules for meter sanity checks entered in the first 30 days making those early meters more likely to validate.
Equipment Change Orders

A change order is a new e-automate entity which you use to track equipment location changes and information associated with the changes. You can use change orders to record information about equipment changing customer locations, equipment changing locations by moving from the customer back to the dealer, equipment changing locations by moving from the dealer to the customer, equipment changing locations due to loaner placement when equipment becomes inoperable.

Move order information can even be entered by customers in e-info.
**Service Dispatch**

**Arrive Button Added to the Dispatch Console**
When a technician arrived on a service call, there was not an easy way for you to enter the arrival time in e-automate without going into the Service Invoice window. The Arrive button was added to version 8.0 to allow users to enter the arrival time. After the arrival date and time has been recorded, e-automate indicates the call has arrived by identifying the arrival in the Dispatched column in the technician region and the status, Dispatched (Arrived).

![Dispatch Console Screenshot](image)

**Advanced Bill Codes**
Bill codes have been enhanced and while they still have the Billing Account Code, they also have the following four new codes and the associated functionality:

- **Billing Labor Code**: Code used to allow you to set regular and overtime labor rates and to bill labor in increments after a minimum period.

![Billing Labor Code Screenshot](image)
• **Billing Travel Code**: Code used to allow you to set travel charges with a flat base rate, hourly charge or mileage. If billing hourly you can bill in increments as well.

![Billing Travel Code](image)

• **Parts Coverage Code**: Code used to identify which service codes that have a *Parts* service category assigned. The code also allows you to identify which parts are allowed to be displayed based on the *Item* filter in sales transactions and e-info.

![Parts Coverage Code](image)
• **Supply Coverage Code**: Code used to identify which service codes have a *Supplies* service category assigned. The code also allows you to identify which supplies are allowed to be displayed based on the **Item** filter in sales transactions and e-info. This allows you to configure specific groups of service codes for bill codes to control items that are covered and allowed on a contract. For example, you could create codes so specific that you can control which equipment on a service contract is allowed to receive compatibles and which equipment requires OEM supplies.

The four codes described above are combined by creating a new Advanced Bill code. You can check your coverage configuration either from the bill code using the **Test coverage code** button or when creating service contracts.
The upgrade with the four component codes allows more capability with bill codes than past versions of e-automate. If, however, you need to retain your simple bill codes, you can leave your upgraded bill codes in standard format. As long as your codes are simple you can use the simple standard interface to work with your bill codes.

Auto-Releasing a Service Call from Hold

In prior versions of e-automate, the receiving of inventory on a linked purchase order or the transfer of inventory on a linked transfer order could release on hold service calls that were on hold for any reason, even reasons that were not inventory related. Credit hold calls were exempt from this rule. Version 8.0 only allows the automated release of service calls that are using the system on hold code, On Hold Waiting for parts. e-automate ignores all other on hold codes, including credit hold. This prevents accidental release of service calls that are on hold for reasons other than credit.
Service Contracts

Meter Group Base Rates and Base GL Distribution by Meter Group

In prior versions of e-automate, you could identify a base charge that represented the sum of your external calculations of overage allowances for the different meter groups on a service contract, but your calculations and the amount for each meter group were not visible on the service contract. Version 8.0 allows you to identify, in a visible way, the base amount for each meter group you add to a service contract; e-automate then sums the meter group base rates when the contract is billed. Meter group base rates are calculated on the Base rate per copy and the Covered copies fields. In the process of configuring a meter group base rate you can identify a base distribution code to which you want to distribute the meter group base amount to the general ledger.

![Diagram of meter group configuration]

*Base rate per copy*

*Covered copies*

**Base distribution code:** CT_Example - Contract Type Example

Total expected monthly volume: 2,000
Total actual monthly volume: 5,792

**Base group base amount:** $25.00

**Base amount:** $25.00

**Base distribution code:** CT_Example - Contract Type Example
From the above examples, you can see that there are two meter groups each with a base meter group base rate; one rate is $25.00 and the other has a rate of $44.50. Note that the invoice has a base amount of $69.50, or the sum of the meter group base amounts. The contract is defined by individual meter groups and their associated base rates, however, the invoice to the customer displays the contract level rate. This gives you the ability to identify the details on the service contract, and bill the customer the sum amount.

Using meter group base rates can also allow you to bill a hardware portion on the service contract. You can identify the hardware portion in the contract level base field and use meter group base rates for the service portion. When billed, e-automate sums the contract level base rate with the meter group base rates into a single rate and bills the contract. If you want to expose the hardware portion you can use equipment level base rates, and the hardware portion would be identified for each equipment. In addition to the rate configuration, you can select different base distribution codes to route the contract billings to different general ledger accounts.
Base Distribution at the Equipment Level

In version 8.0, you use the **Base distribution code** field when adding equipment to a service contract so you can distribute the equipment level base revenue to your choice of general ledger accounts defined by the code.

![Add contract equipment](image)

**Contract Miscellaneous Items**

Version 8.0 introduces Contract Miscellaneous Charge Codes. These codes are now used to handle miscellaneous charges on service contracts in e-automate. When you upgrade from a prior version, e-automate automatically converts your previous miscellaneous charge configuration so that the codes continue billing how they were configured initially. When you update from a prior version, e-automate automatically adds the miscellaneous charge to the service contract but does not create the Contract Miscellaneous Charge code. If you want to create a code, you can use the 8.0 functionality to do so.

![New contract miscellaneous charge code](image)
In addition to the current functionality of miscellaneous charges, you can now add as many charges as you would like to a service contract and configure miscellaneous charges to **Bill always**, **Bill only once**, and **Bill for a specified period of time**.
Contract Equipment Miscellaneous Items

In addition to unlimited miscellaneous charges on a service contract, version 8.0 also offers unlimited miscellaneous charges in association with equipment on a service contract, as shown below on the **Miscellaneous** tab in the Edit Contract Equipment window.
Contract Billing and Accrual Cycle Consolidation

In version 8.0, if you have neglected to bill or accrue a contract for an extended period of time and you have enabled the new feature, **Cycle Consolidation**, e-automate will consolidate the cycles that you have missed and create a single invoice/accrual catching up the billing/accrual. The base amount and overage allowances for the missing cycles are summed by e-automate and a single invoice is generated, catching up the service contract to the current time.

---

**CONTRACT INVOICE**

Invoice Number: 1111
Invoice Date: 01/09/2012

Bill To: Pella Windows
111 E Broadway
#110
Salt Lake City, UT 84111

Customer: Pella Windows
111 E Broadway
#110
Salt Lake City, UT 84111

<table>
<thead>
<tr>
<th>Account No</th>
<th>Payment Terms</th>
<th>Due Date</th>
<th>Invoice Total</th>
<th>Balance Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>RW00</td>
<td>COD</td>
<td>01/09/2012</td>
<td>$33.25</td>
<td>$323.25</td>
</tr>
</tbody>
</table>

- **Contract Number**: Example-01
- **Contract Amount**: $304.40
- **P.O. Number**: 07/05/2011
- **Start Date**: 07/04/2011
- **Exp. Date**: 07/04/2012

**Summary:**
- Contract base rate charge for the 07/05/2011 to 07/04/2012 billing period
- Contract overage charge for the 07/05/2011 to 07/04/2012 overage period
- **Fuel Surcharge**: $304.40

*Sum of equipment base charges **See overage details below*
Contract Invoice Preview

Once you have created a contract or made modifications to a service contract you can Preview the next invoice by right-clicking on the service contract in the Service Contract list window. You use this functionality to assure that you have set up or modified the service contract correctly so that when the contract bills, it bills based on your previewed expectations. This functionality provides an immediate preview of what the next contract invoice would look like.

![Service Contracts Window]

Example: If you have modified a service contract, you can right-click on it to preview the next invoice.
If there is missing information on the service contract necessary for billing, e-automate displays the Preview Contract Invoice Warnings and Errors window. You can use this window to resolve any errors or warnings so you can preview the next invoice.
Custom Contract Invoice Formats

Version 8.0 offers the ability to define a custom report group on service contracts. Prior versions of e-automate only offered a single service contract invoice report for all service contracts. In version 8.0, users with the rights to create and customize crystal reports can use the Report group field on a service contract to create a specific group of reports for the service contract. The Report group is used to define a primary service contract report, as well as user-defined supplemental contract reports with customized options. These supplemental reports can be in either PDF or Excel format. You can also use the Settings button to identify an alternate accounts receivable contact for just one specific contract. You use this functionality to customize service contract reports to meet the needs of your customers and their unique requirements.

When service contracts are billed and invoices created, e-automate generates the report that is identified as the primary report in the report group. If document queuing is enabled, e-automate queues the supplemental reports to the document queue for the accounts receivable contact on the bill to customer’s account.

Customers can also request copies of contract invoices through e-info. When a customer requests a copy of a service contract invoice, e-automate determines which reports to deliver to the customer based on the report group assigned to the service contract. Invoices requested through e-info are provided using the new Send e-info requested invoices e-agent task.
Enhanced Contract Proration

Prior versions of e-automate could prorate base amounts when equipment was added or removed in the middle of a contract period. Version 8.0 has the ability for you to direct the proration of the overage allowance when equipment is added or removed in the middle of a contract overage period.
Expire Contract Early and Issue Credit
When a contract has been billed, you can change the expiration date of the service contract and e-automate will notify you that you have moved the expiration date and offer to issue and calculate a credit for base and prorate the overage allowance, if any.

Renew/ Revise Automation
The new Renew/ Revise button is used in e-automate to revise/renew a contract prior to the current contract expiration. You can expire the current contract early and create a revised contract going forward. You can also issue a prorated credit for the expiring current contract, and prorate the renewed contract based on the date you intend to begin the new contract. If you decide that you want the renewed contract to use the current contracts billing cycle dates, you can configure the renewed contract to use the prior contract billing cycle dates and automatically prorate to accommodate the dates on the renewed contract.
Base, Overage, and Accrual Schedules

Version 8.0 offers the ability to view the billing schedule for both base and overage contracts. The base and overage schedule displays the anticipated future schedule for contract billing indicating any increases and decreases that have been configured on the contract.
In addition to base and overage schedules you can also view the accrual schedule for contracts configured to accrue/defer.
Remove the Prior Period Restriction

In prior versions of e-automate, there were restrictions as to when equipment could be removed and prorated on service contracts. In many circumstances you could only remove and prorate in the last billed cycle, and could not remove equipment in a cycle prior to the most recently billed base. These restrictions have been removed making it easier for you to remove equipment from service contracts in cycles prior to the current cycle. You can now prorate bases from billings in periods prior to the most recently billed period; however, it does not prorate overage for periods prior to the current period.
System

Search/Filter Parameters
The new search and filter parameters now include Does not contain, Does not begin with, and Does not end with.

Filter Macros
You can use the new filter macros to create lists that have relative date references. Instead of modifying the dates on your saved QuickSearch, you can use the new filter macros to save dynamic date ranges. To do this, you use the date column and the is in the range operator and in the displayed fields you can right-click and access the dynamic date filtering options shown below. Additional options are available in fields other than the date field.

Note: You only have access to this function when using the is in the range operator.
System Wide – Lookup Changes

The Lookups used in e-automate have been updated to work with the new technology in which e-automate now operates. When typing in a Lookup field, e-automate now examines the values identified both in the name field and the number or code field and highlights matches as you type. Prior versions only examined the name field. You still can direct e-automate to look in secondary fields for matches using the same methods in prior versions, F4, down arrow, et cetera.
User Note Count and Primary Note

Two new columns, **Has primary note** and **User notes count** have been added to most e-automate list windows. These new columns are used to determine if the e-automate entity has an existing primary note, or how many user notes have been associated with the entity.

![Sales invoices](image)
**Customized On Hold Stamps**

When creating an on hold code in e-automate you can customize the color and the description appearing below the words “ON HOLD!”
Client Appearance Enhancements
The ability to customize your list settings has been enhanced. These settings apply to list windows such as customers or items, as well as to the list of items on a sales order. The default setting in version 8.0 is to have a row delimiter which is a light gray horizontal line separating records in your lists. You can customize the appearance by adding alternating shaded bars, removing the horizontal and as well as the ability to display vertical lines.
Reports

Custom Reports
As with every release, if you have custom reports in e-automate they could break during the upgrade. All reports available in e-automate have been updated and modified to work with the newer report tools, Crystal Libraries 12. As we have upgraded our prior version reports, our experience has shown that most of the reports created on version 11 seemed to upgrade and work well on the newer platform. While this has been our experience, we recommend that you test and assure that all of your custom reports work correctly prior to upgrading to version 8.0. If you have custom reports, whether you created them or they were created by Digital Gateway, it is your responsibility to assure that they are upgraded. If you created the report, you can complete the upgrade and check the report against 8.0. If your custom report was created by Digital Gateway, upgrading the report is not covered by the fee you paid to create the report nor your customer support plan. You should contact Digital Gateway customer care to get a quote on the cost to update your custom report to the new version of e-automate.

In version 8.0 several simple reports that could easily be generated from e-views have been removed as well as older versions of some reports have been removed and updated with new more robust versions.

Rename Overages on Contract Invoices
For users that prefer to call overage by another name, version 8.0 of e-automate offers a tool called a report definition. Report definitions are associated with a Report Group and Report groups are assigned to service contracts. By modifying the report group, you can configure your contracts to use the word “overage” on one contract, “usage” on another, et cetera. n
## Template 1

**CONTRACT INVOICE**

**Invoice Number:** 1050  
**Invoice Date:** 08/01/2011

**Bill To:** Ridge Nursery  
170 S Main St  
Salt Lake City, UT 84101

**Customer:** Ridge Nursery  
170 S Main St  
Salt Lake City, UT 84101

<table>
<thead>
<tr>
<th>Contract No</th>
<th>Payment Terms</th>
<th>Due Date</th>
<th>Invoice Total</th>
<th>Balance Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>RN000</td>
<td>Net 10</td>
<td>08/11/2011</td>
<td>$ 24.95</td>
<td>$ 24.95</td>
</tr>
</tbody>
</table>

**Contract Details:**
- Contract: Base rate charge for this billing period
- **Contract Clicks charge for the 07/01/2011 to 07/31/2011. Clicks period:** $23.40
- **Total:** $23.40
- **Remarks:** See clicks details below

### Equipment Included under this contract

<table>
<thead>
<tr>
<th>Xerox/C191</th>
<th>Serial Number</th>
<th>Base Adj</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>EQ10047</td>
<td>123133322</td>
<td>$0.00</td>
<td>Ridge Nursery, 170 S Main St, Salt Lake City, UT 84101</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Meter Type</th>
<th>Meter Group</th>
<th>Begin Meter</th>
<th>End Meter</th>
<th>Credits</th>
<th>Total Covered</th>
<th>Billable Rate</th>
<th>Clicks</th>
</tr>
</thead>
<tbody>
<tr>
<td>BW</td>
<td>bw</td>
<td>10</td>
<td>1,772</td>
<td>1,562</td>
<td>0</td>
<td>$0.015000</td>
<td>$23.40</td>
</tr>
</tbody>
</table>
Cashbook Register Report Period Filter

In the Report Console, Cashbook Register now has an option to filter the report by a specified Date/Period in addition to the Account filter.
e-admin

Users Properties Password Expiration Prompt
The User Properties window in e-admin now offers you the option to require a password change at the following times:

- At the next e-automate login
- After a designated number of days

Administrators can also require users to identify a strong password. A strong password contains three of the four following categories, uppercase letters, lowercase letters, numbers, and selected symbols.
Strong Password on Upgrade
When you upgrade from a prior version of e-automate, the system automatically sets the system to use a strong password for all users. If you do not want to force your employees to change their passwords to strong passwords, you should modify the system option prior to the first time you allow users to begin logging into e-automate 8.0.
Database Consistency Check

You can check the consistency of your e-automate database using the SQL database consistency check through e-admin. You check the consistency of your database using the Company > Maintenance menu or multifunction Maintenance button.

![Database Consistency Check](image)

You can also check the consistency when you are backing up or restoring a database. Check the option to have the database checked prior to performing the task. When you run a database consistency check, SQL checks the database catalogue, drive space allocation, and the integrity of your database tables.

![Backup database location](image)
Inventory Management Task
The Inventory Management Task has been enhanced to send a more detailed email explaining that a task has run and the actions taken by the task. The email identifies which purchase orders were affected, as well as transfer orders.

Inventory management 1/4/2012 4:49 PM

The task has been run successfully.

The following Purchase orders were affected:

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Date</th>
<th>Vendor</th>
<th>Destination warehouse</th>
<th>Ship to</th>
<th>Item</th>
<th>Quantity</th>
<th>Cost</th>
<th>Additional notes</th>
<th>Linked transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO1015-0</td>
<td>1/4/2012</td>
<td>AG00</td>
<td>DropShip</td>
<td>PS00</td>
<td>18189</td>
<td>5</td>
<td>$45.00</td>
<td>Created</td>
<td>SC1013</td>
</tr>
<tr>
<td>PO1015-0</td>
<td>1/4/2012</td>
<td>AG00</td>
<td>DropShip</td>
<td>PS00</td>
<td>PW1000</td>
<td>3</td>
<td>$54.95</td>
<td>Created</td>
<td>SC1013</td>
</tr>
<tr>
<td>PO1015-0</td>
<td>1/4/2012</td>
<td>AG00</td>
<td>Provo</td>
<td>Provo</td>
<td>549816</td>
<td>10</td>
<td>$356.00</td>
<td>Created</td>
<td>SC1012</td>
</tr>
<tr>
<td>PO1015-0</td>
<td>1/4/2012</td>
<td>AG00</td>
<td>Provo</td>
<td>Provo</td>
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<td>61</td>
<td>$356.00</td>
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<td>SC1012</td>
</tr>
<tr>
<td>PO1016-0</td>
<td>1/4/2012</td>
<td>AG00</td>
<td>Provo</td>
<td>Provo</td>
<td>A-AR-PB2</td>
<td>1</td>
<td>$1,213.20</td>
<td>Created</td>
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</tr>
<tr>
<td>PO1016-0</td>
<td>1/4/2012</td>
<td>AG00</td>
<td>Provo</td>
<td>Provo</td>
<td>A-AR-PB2</td>
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<td>$1,213.20</td>
<td>Created</td>
<td>SC1012</td>
</tr>
<tr>
<td>PO1016-0</td>
<td>1/4/2012</td>
<td>AG00</td>
<td>Provo</td>
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<td>23</td>
<td>$896.00</td>
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</tr>
</tbody>
</table>

The following Transfer orders were affected:

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<thead>
<tr>
<th>Transaction</th>
<th>Date</th>
<th>Source</th>
<th>Destination warehouse</th>
<th>Ship to</th>
<th>Item</th>
<th>Quantity</th>
<th>Additional notes</th>
<th>Linked transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>TO10001</td>
<td>1/4/2012</td>
<td>Provo</td>
<td>Lucy WH</td>
<td>A-AR-LC1</td>
<td>2</td>
<td>Created</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TO10001</td>
<td>1/4/2012</td>
<td>Provo</td>
<td>Lucy WH</td>
<td>A-AR-PB2</td>
<td>1</td>
<td>Created</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TO10001</td>
<td>1/4/2012</td>
<td>Provo</td>
<td>Lucy WH</td>
<td>CN-PR5000</td>
<td>2</td>
<td>Created</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TO10001</td>
<td>1/4/2012</td>
<td>Provo</td>
<td>Lucy WH</td>
<td>SH-TX1900</td>
<td>6</td>
<td>Created</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TO10001</td>
<td>1/4/2012</td>
<td>Provo</td>
<td>Lucy WH</td>
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<td>3</td>
<td>Created</td>
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<td></td>
</tr>
<tr>
<td>TO10002</td>
<td>1/4/2012</td>
<td>Provo</td>
<td>AnnWH</td>
<td>PW10000</td>
<td>3</td>
<td>Created</td>
<td></td>
<td>SC1026</td>
</tr>
</tbody>
</table>
Update Minimum Stocking Levels
The Update Minimum Stocking Levels task was enhanced by adding a new Test Mode and report to identify what items would be changed while in test mode, as well as what items changed when not in Test Mode. In addition to test mode, the task was also modified to ignore items created in the past three periods; this gives new items a chance to establish a normal pattern or usage before the Update Minimum Stocking Levels task changes the item stocking levels. The task now lets you control when the task is allowed to create new item stocking levels. When the Create new item warehouse restock levels checkbox is checked, the new 8.0 task only creates new stocking levels for items with the Stocking code field at the top of the Warehouses tab on the item profile populated.
**Auto Invoice Contract Task**

The Auto Invoice Contracts task was added to e-agent to automatically invoice service contracts and email you the results of which contracts were or were not invoiced. If you are using document queuing, the task can submit created invoices to the document queue for automatic delivery to the customer via email or fax. You can also configure your document queuing system to print the invoices for mail delivery.
Auto Accrue Contract Task
The Auto Accrue Contract Task was added to e-agent to automatically accrue service contracts and recognize deferred contract revenue. This alleviates accounting personnel from the need to manually accrue and recognize contract revenue every month. The task runs, recognizes revenue, and notifies the email in the Notification email field.
e-Views

View Users by Right/ Rights by User

Version 8.0 offers a new e-view that displays the effective rights of e-automate users. The view identifies all the rights in e-automate whether the user has create, read, update, or delete rights.
e-info

Login by Contact Email

In prior versions of e-info, customers used the customer number and a password assigned by the dealer to log into the e-info website. After upgrading to the new version of e-info, you will only be allowed to use the original login credentials once, and then e-info will assist you in converting the login credentials to a contact in e-automate with a web password per contact.
Profile Management

Once a user has logged into e-info, they can now manage their personal profile through e-info. Users can modify their name and address, as well as reset their password.
**Delegation of Profile Management**

If you have multiple contacts that can access e-info, an e-info user with user management rights can manage the e-info rights of other e-info users in the company, as well as add new users and set appropriate rights.

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**Pay Invoices with Credit Card Online through e-info**

In cooperation with our credit card partner, Element Payment Systems, you can use the new version of e-info to receive payment for invoices through the e-info website.
Manage Payment Methods

When using e-info, if your customer does not have a credit card on file, they can add a payment method using the Manage payment methods functionality to store a credit card on file with e-automate. With a credit card on file they can pay outstanding invoices not already scheduled for payment.

To complete your secure transaction enter credit card information below and click process transaction.

This secure payment service is provided by Element Payment Services.

Card Information

- Card Number: 
- Expiration: 04/2014

Address Information

- Billing Address:
  - Ralph Jones
  - Box 1
  - Duchesne, UT 84021
  - 8017386877

PROCESS TRANSACTION > Cancel and return to merchant
In addition to the ability to put credit cards on file, dealers with secure webservers have the additional capability to add ACH to their payment options.

Log Equipment Move (Change Order)
Version 8.0 of e-automate introduces the Change Order window that is used for tracking equipment movement. See Equipment Change Orders above. Your customers can record change order information through the Equipment move button in e-info.
Service Call Custom Fields

e-info 8.0 offers the ability to customize the service call entry window to request customizable fields of your choosing. This allows you to collect additional data on a service call not previously collectable.

Digital Barcode

The following are the new Digital Barcode features added for the release of 8.0:

- When using Digital Barcode you can, right from the handheld device, completely receive purchase orders without returning to e-automate.
- Print barcode labels prior to receiving.
- Perform ad hoc transfers from the handheld device without returning to e-automate.
- Updated to accommodate kits.
- Print barcode labels for items that are not in stock.