

# General Introduction

## Overview

- Login Choices
- Starting with Conveyorware

## Glossary

## Key to the Manual

## WebAccess Login

- Start Menu

## Conveyorware's Main Menu

- Layout, Main Menu

## Navigating in Conveyorware

- Making Selections
- Multiple Companies

## Navigating within a Screen

- Using Keys to Navigate
- List Options
  - [Prompt] (F4) Fields
  - "Position To" Field
- Clearing a Locked Screen
- Scrolling Through a List
- Active Buttons/F-Keys
- [Jump] (F7)

## Printing Options

- Select/Change Printer
- Print to Email
- Direct Printing

## Other Information

- Multiple Logins
- Transaction Number Assignment
- Delete/Deactivate/Void
- Comments and Remarks
- Displaying New Data
- Importing Data

## Logout

# General Introduction

## Welcome to the Power of Conveyorware.

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Conveyorware is comprehensive online business software. Your company's sales, order fulfillment, and inventory status are seamlessly integrated with financial records. The system can be used by the simplest of startups, yet can handle exponential growth—without growing pains. There are no additional “modules” to buy: Conveyorware is an all-in-one software solution.

Conveyorware tackles the entire workflow of a distributing business: Purchasing, Inbound/Receiving, Inventory and Warehouse Management, Pricing, Point-of-Sale, Order Processing, Billing, and Shipping. Retail or wholesale—or both—Conveyorware fits your business today, and will keep your business fit for tomorrow.

## Conveyorware is adaptable:

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Conveyorware was developed by a **warehouse distribution** company, and the Main Menu's standard Customer Account, Order entry, Stock allocation, Pick List/Order Sheet, packing and shipping processes are an efficient structure for that business model. Importing pre-paid orders from a **webstore** takes advantage of Conveyorware's inventory management, order fulfillment and shipping strengths.

A separate Order Management login has versatile tables-based displays for orders, inventory, and history records.

The Warehouse Scanner Menu can be used with a mobile hand-held scanning computer to perform order fulfillment, receiving and warehouse management, freight shipping, and more.

The Point-of-Sale system accommodates **cash-and-carry** transactions with a cashier and register process (Main Menu 600).

For ALL sales, fulfillment, and shipping processes, Conveyorware has comprehensive, integrated accounting functions. Accounts Receivable, Accounts Payable, Purchasing and General Ledger are always included.

## Conveyorware has two login choices:

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**WebAccess Client Login:** The **Full-Features** Menus in **Click-to-Navigate** GUI screen displays.

Use this login for:

- [Main Menu](#),
- [Admin Menu](#) (use the separate Admin User ID), and
- [Warehouse Scanner/Full Screen Gun Menu](#).

**Order Management Client Login:** An easy-to-use Java program with versatile access to:

- Orders,
- Customer Accounts,
- Inventory Records, and
- Sales History.

(Use the **WebAccess** Login for all Financials, Stock Receipts, Order Fulfillment, and Shipping.)

## Starting with Conveyorware

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Conveyorware's basic start-up includes four **Standard User IDs** and one **Administration Menu-User**. The Admin ID controls the functional abilities and access of the User IDs within the system.

A user **logs-in** to the system, through any standard browser program; the user's login is a **"display" interface** with the Conveyorware system. This system, additionally, requires that any **printer** that will receive documents from the system is **also logged-in**. through the IBMi ACS Client Login. This printer login is needed for specialized printing (barcode and mailing labels) and/or point-of-sale (receipt printer/cash drawer) terminals. Standard paper documents can directly print from any system-installed printer, or can be "printed" to email as pdf files.

Conveyorware has standardized and customizable codes for customer, inventory, accounting, and shipping functions. Documents include: order sheets (pick tickets), packing slips, receipts and invoices, purchase orders, Bill of Lading, customer statements, financial statements, and various labels.

There are **default records** to make **start-up easy**: each new company is linked to a Warehouse, has Counter Sale and Point-of-Sale Accounts, with a default Sales Territory, Sales Rep, and Sales Tax. The default warehouse can be used for any or all of the user's companies, and additional warehouses/sites can be added as needed. The system allows the creation of many companies (up to a thousand) within one environment.

Daily business reports generate automatically, and print from an outqueue as desired. You control settings that automatically print packing slips and invoices. Dozens of reports can be printed with thousands of variables.

Key ideas and terms are described in this introduction section; you can apply them to every part of the software. Once you are familiar with these concepts, you'll rarely need to refer to the manual. Most of the information in this manual is also found within the software, in the **[Help]** (F1) and **[Extended Help]** (F2) screens.

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## Glossary

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**Conveyorware Distribution System:** refers to the complete software package that manages your entire business cycle. **Fully integrated** modules administer selling, purchasing, accounting, inventory and shipping/distribution.

**Menus:** have groups of actions for different facets of your business. Individual menus in Conveyorware include Accounts Receivable, Inventory, and Orders. The Main Menu lists the primary functions in Conveyorware. There is also a small-screen, **RF Scanner “Gun” Menu**, designed for zero-error distribution and fulfillment work in the warehouse. The **Admin Menu** contains company setup and settings, and is secured from daily business functions with a separate User ID and Password. The Mobile Menu suits smaller-screen browser devices, with simple functions for off-site sales.

**Options:** Each numbered Menu selection is called a **Menu Option**. Each record on a list screen has a **List Option** field.

Major Menus are grouped by **activity type**. Each **Menu Option** is one of three kinds:

- **“Work with”** screens: to add, edit, display, or delete records,
- **Display**, to **view** information without editing, or.
- **Report:** to create **printed** documents. Labels, invoices, and customer statements are reports. All reports are sent to a printer, or to an email address; they can be directly printed, or can be saved in a printing queue with defaults that are pre-set.

**List Options** appear as drop-down selections next to each entry in a list of records. These options are commonly Change, Display, and Delete, but can also include complex detail screens (for inventory, and sales history) and order management functions.

**Command:** Conveyorware has a **three-digit number command code** for each Main Menu option. These codes can be used to navigate the software. As you become familiar with Conveyorware, you might use command codes to save time and to work more efficiently.

**Key:** There's no such thing as a *standard* computer keyboard; many browser-equipped devices have limited keys. Conveyorware screens contain buttons that may—or may not—exist on your own keyboard. Use keyboard keys if you like, or click on the Conveyorware screen's **Active Buttons** and **links**.

**Save [Enter]:** When doing any work, whether posting entries, editing, printing reports, or making an inquiry, You **MUST** press [Enter] to save new data into the system. There are many ways to navigate in Conveyorware, but only the [Enter] key saves any data.

Key to the Manual:

Symbol	Meaning
[Key]	A name [in brackets] refers to an active screen [button], or to a specific keyboard [key]. For example: “move through the list using [Next] and [Previous].”
*	Indicates the beginning of a task or process.
→	Indicates a step in a process.
“text”	Quotation marks are used to indicate the <i>exact</i> text you should type (don’t type the quotation marks).
<b>Field Names</b>	Names of data fields are usually in bold type.
<u>Screen Titles</u>	Titles of screens and windows are underlined. For example: “The <u>Work with Territories</u> screen appears.”
<span style="border: 1px solid black; padding: 2px;">Text in a Box:</span>	Important notes are set off in text boxes.

WebAccess Login:

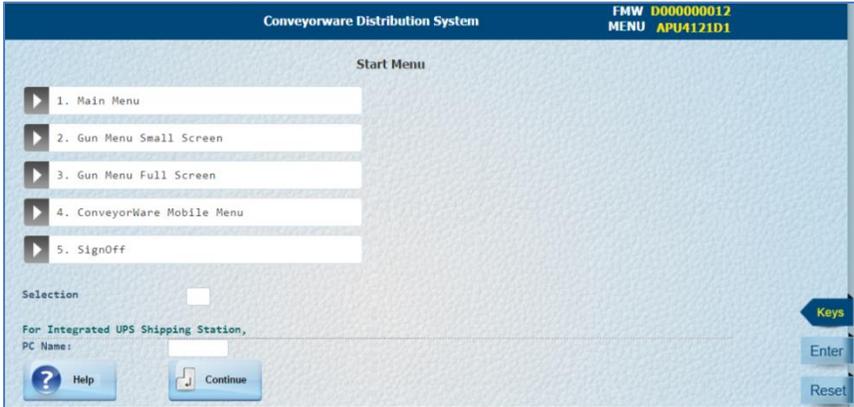
The Conveyorware **WebAccess** Sign-On Screen asks for your **Username** and **Password**.



WebAccess Sign-On screen

- \* **To Sign In:**
  - Key **User Name**, [Tab],
  - Key **Password**, [Enter].

The Start Menu screen appears.



Start Menu screen

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## Conveyorware's Start Menu:

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- Main Menu contains the full-featured functions of Conveyorware. Inventory, Customers, Orders and Fulfillment, Point-of-Sale, Returns/Repairs, Purchasing, and all financials are located here.
- Gun (Scanner) Menu is an order fulfillment and warehousing menu designed for the small screens of hand-held (wireless) computer scanners. The Main Menu and Gun Menu have many functions in common, but some important functions – notably warehouse **inventory management** with **dynamic locations**, receiving logs, and **FIFO** fulfillment --do require using the Gun Menu.

The Gun (Scanner) Menu is presented in **Small Screen** and **Full Screen** versions.

- The **Small Screen** works with the system's hand-held scanner computers; this version has many **abbreviations** and **limited Help** functions.
- The **Full Screen** version is **easier** to learn; it has full text labels and detailed field and screen Help.

Note the **PC Name** field on the Start Menu screen. If your company has an integrated **UPS Account**, and a registered **PC Shipping Station** (with a system-configured UPS label printer, and, possibly, a connected scale), key the station computer's name. Conveyorware can then register **parcel weight** for UPS shipping, and can print your UPS shipping labels for completed orders.

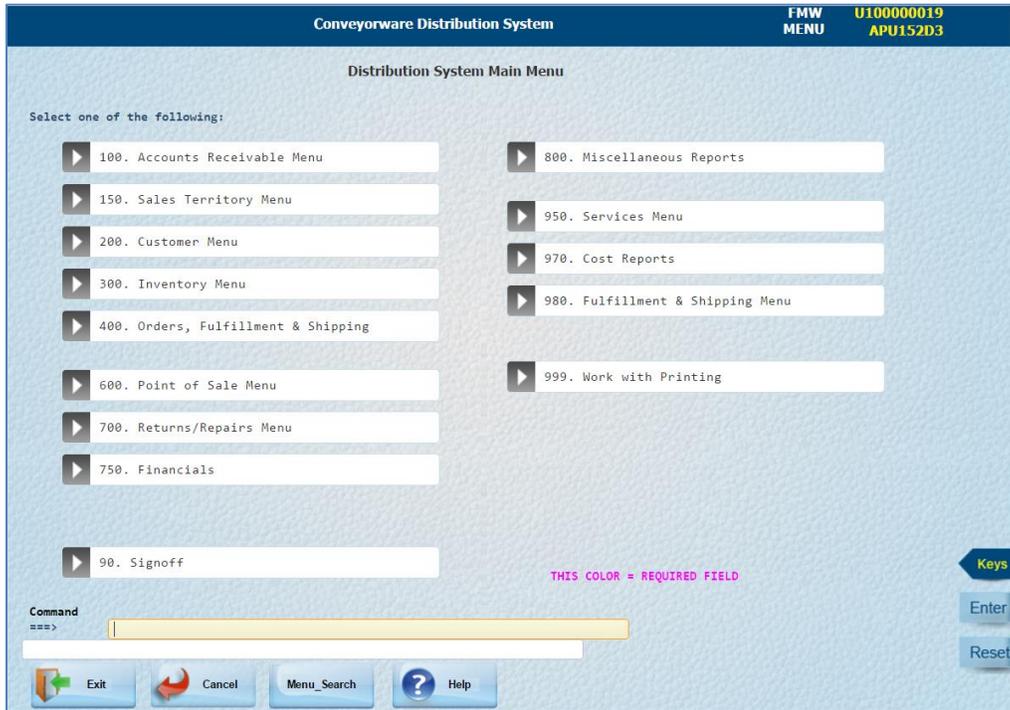
➔ Click on **1. Main Menu**.

<OR>

➔ Press **[Enter]**.

Main Menu is the default selection on this screen, so **[Enter]** also navigates to the Main Menu screen.

The Conveyorware Main Menu screen appears:



Conveyorware Main Menu screen

**Layout, Conveyorware Main Menu:**

Header : **Screen Title**, **User ID**, and **Screen ID** Code.

**Numbered, Click-On Menu Options**,

**Command Field**, where Menu Option Numbers can be keyed.

**Active [Buttons]**: Use these buttons to navigate, or to perform actions. On any screen, click on the dark **View Keys** flag at lower right to display the keyboard F-keys that correspond to the screen’s Action Buttons. See Active Buttons/F-Keys, following.

**[Exit]** (F3): (Inactive on this screen)

**[Cancel]** (F12): (Inactive on this screen)

**[Menu\_Search]** (F8): to Select a Menu Option screen. Lists all Options (“programs”) and Menus for the Main Menu. Search for Titles containing specified words or partial words. The Admin Menu and Financials Menu can be searched separately.

**[Help]** (F1): Displays the Menu Help window with a general description of each of the Main Menu options.

## Navigating in Menus:

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To make a selection:

- **Click on** any label that highlights with your cursor;
- **Click on** an active **[Button]** (F-Key), either: on the screen, *or* on your keyboard;
- Press the designated key on *your keyboard*; or
- **Key** a three-digit code in the **Command Line** and press **[Enter]**.

Each major **Menu** presents choices for possible actions: **Data Entry** functions, **Display** functions, and **Reporting** and **Printing** functions.

From the **Main Menu**, for example, you can **select a menu** you wish to work in by

- clicking on the **Menu Name**, or
- Keying its **number** on the **Command Line** and then **[Enter]**. For example, key **“400” [Enter]** to go to the **Order Menu** screen.

**Subscribers with more than one company:** For single-company subscribers, Company ID Number is auto-filled for the **Company Number** field on ANY action screen. For multi-company subscribers, **[Prompt]** brings a dropdown list for choosing the Company Number of the active company.

## Navigating Within a Screen

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There are several ways to move around each screen and select information to display:

**Use Keys to Navigate**

- Use the **[Tab]** key to **move forward** from field to field.
- Press **[Shift]** and **[Tab]** together to **move backward** from field to field.
- The **[Continue]** (Enter) key moves to the next screen in a series (as in the 201 **Customer** Record and the 401 **Order** Record), or moves the cursor forward from line-to-line **in text**. **[Continue]** (Enter) saves new or edited records, but **only** after progressing through the entire series of the new record's screens.

**List Option Column:**

List screens present **dropdown Option-list** choices. **Click on the Opt box**, next to the record you wish to work with, then **click on your choice**.

Typical options include:

<b>2=Change/Edit</b>	To make changes; remember to [Enter] to save.
<b>3=Copy</b>	To copy an entire record; the new record then appears in the record list, and can be edited.
<b>4=Delete</b>	To <b>deactivate</b> or <b>void</b> a record. In a few functions, some records <u>will</u> actually be deleted. Check with the screen's [Help].
<b>5=Display</b>	To display a record.
<b>10=Comments</b>	To add or edit <u>local</u> comments for a record.

The **GUI** (Graphical User Interface) navigates differently than the Command Line. A **click** on a screen choice automatically **includes the [Enter]** command. To select an option, just click on it.

### **Prompt Fields (F4):**

**Field Names** followed by a  symbol can be filled from a selection list, using the **[Prompt]** button (F4 key). Select by clicking, or exit the list (click on [Cancel]) and key the chosen code in the field. **Only a choice from the list is allowed in a  field.**

Some **Date** fields have a **Calendar**  icon. Click on this icon to bring up a navigable calendar; and click to select any date.

### **“Position To” Field:**

If there is a field labeled **Pos:** (Position-To), you can quickly move to a specific section of the list:

- If the list is **alpha**-sorted, enter any letter in the **Pos** field to bring the list to that letter (enter “G” and the list will begin with G entries, followed by H through Z). Number entries are listed after Letters.
- If the list is **numeric**, any number in the **Pos** field brings up a list that starts with that number (enter “4000” and the listing will include all entries starting with 4000 and higher).
- Entering an “A” in a **Pos** field will bring up all entries in the file, alpha first, then numeric.

### **Clearing a locked screen: Read-error and program-status messages**

If you enter a command or key combination that the system doesn’t allow, a **RED** “**error message**” appears, in the lower-left of the screen.

First, **clear the message:** click on the **[Reset]** button at bottom of the screen, or press both **[Ctrl]** and **R** keys.

Then, **correct the entry** in the field that prompted the message.

### **Scrolling through a list**

When a list has more entries than will display on one screen, the **[Next]** button appears in the lower right side of the list window. Scroll/Page through the list by clicking on **[Next]** and **[Previous]**.

Alternatively, the keyboard keys **[Page Up]** and **[Page Down]** work, too.

## Active Buttons / F-Keys

Conveyorware screens have one or two rows of **Active Buttons** arranged across the lower screen (See the [Main Menu](#), above). Each of these **click-on** buttons also corresponds to a **standard keyboard** key.

Many buttons have the same function throughout the software (Help, Exit, Print, etc.).

**[F Keys]**, located at the top of many keyboards, perform **pre-defined actions**. Few keyboards have 24 [F] (Command) keys; 12 keys are common. Many **browsers** (notably Chrome) have **browser-specific [F key]** functions: pressing a *keyboard* [F-key] doesn't perform the displayed *Conveyorware* action, it performs a *browser* action.

If your keyboard has the [F-keys], use them, if your browser allows. If you encounter a problem, click on the Conveyorware screen's [Active Button] instead of using the keyboard.

To use a keyboard for **[F13]** through **[F24]**, press [Shift] plus an [F-key]. **Subtract 12** from the number, and press [Shift] + the resulting number.

For example: **[F20]** = [Shift] + [F(20 - 12)] = **[Shift]+[F8]**.

The **[F-keys]** have actions that can vary from screen to screen. Screen space limits the display of ALL active buttons on some screens.

Here are Conveyorware's **most common [Button]** (F-Key) functions:

<b>[Button]</b> (F-Key):	<b>Action:</b>
<b>[Help]</b> (F1):	On a <b>MENU screen:</b> <b>[Help]</b> displays a window with general overviews of each menu option.  On an <b>OPTON screen:</b> <b>[Help]</b> brings up a window with information about the cursor's <b>field</b> .
<div style="border: 1px solid black; padding: 5px;"> <p>Note: From any <b>Field Help</b> (F1) Window, press <b>[Extended Help]</b> (F2) for both an <b>Overview and Detailed</b> information about the <b>ENTIRE</b> working screen or report.</p> </div>	
<b>[Exit]</b> (F3):	Cancels the current screen and takes you back to the Menu (or to the previous screen).
<b>[Prompt]</b> (F4):	For fields with a  symbol in the <b>field name:</b> [Prompt] lists <u>all</u> data choices for the field. Note that the <b>&gt;</b> ( <b>greater-than</b> ) symbol appears in a few field names; [Prompt] also works for these fields.
<b>[Refresh]</b> (F5):	In a <b>list</b> screen, press <b>[Refresh]</b> to update the list with current and recent actions, or to re-sort.
<b>[Add]</b> (F6):	Brings up a screen to add a <b>new</b> record or transaction. An error message will advise if selection fields must be filled before adding a record.
<b>[Jump]</b> (F7):	Go to other display screens, keeping the <b>Customer</b>

**Account** you are currently working with, in your choice of other Menus. See [Jump] section, following.

**Note:** Using [Jump] (F7) from a new (unsaved) record, or one in change-mode, **will lose any unsaved data.**

**[Comments]** (F10): Displays a **local Comment** window for a **current or specific** record. All Comments are **internal** to the software; they **do not print** on customer documents.

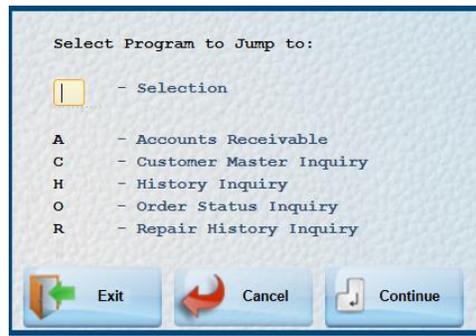
**[Cancel]** (F12): Cancels activity and returns to the previous screen.

**[Acct Cmt]** (F19): Displays a **Customer Account Comment** window for the specific Customer. This “Global” Comment can be displayed throughout the system in screens that work with Customers. All Comments are **internal** to the software; they do not print on customer documents.

**Note:** **Remarks** fields are different from **Comments** windows. Remarks fields originate on order and payment screens. They eventually **print on documents** (Packing Slips, Invoices, etc.) that are **sent to customers.**

### [Jump] (F7)

Several screens allow the [Jump] function. When you click on [Jump], (F7), a selection window appears. Choose a **display screen** to jump to, keeping the current Customer Account:



To jump to a different screen for the current Customer Account,

➔ Key [Letter], [Enter].

The current Customer Account will be displayed on the chosen screen.

To return to the original menu option:

➔ Repeat [Jump].

**Beware** of using [Jump] while **adding** or **editing** a record: [Jump] **does not save any changes**, so any data added to a record will be lost.

To return to the *original* menu:

➔ Press [Exit] (F3).

## Printing Options:

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Printer selections determine **where** and **when** reports and forms print. There are **three** choices for the reports and documents generated by Conveyorware:

- **Store** the output (document, or report) within the system in an **outqueue**,
- **Email** the output, retrieving and then printing (and/or saving) it, or
- Directly **Print** the output with a system-installed printer.

All documents and reports go through a two-step process: the system creates the document file and attaches it to an **outqueue**. An outqueue may or may not be connected to a printer. The outqueue forms a list of documents that can be displayed, printed, or manipulated (now or later). This process helps to manage documents that:

- may involve confidential or sensitive information,
- may not be needed as paper documents, and/or
- require dedicated paper stock (such as labels, or checks).

There is also an **Email** option: reports are sent as email attachments in either pdf (Portable Document Format) or csv (Comma Separated Values) format. Email is **indirect printing**. The attachment files can be opened with Adobe Reader®, MS Excel®, or another program. Any of the documents can then be saved in your files and/or sent to your local /network /cloud printer.

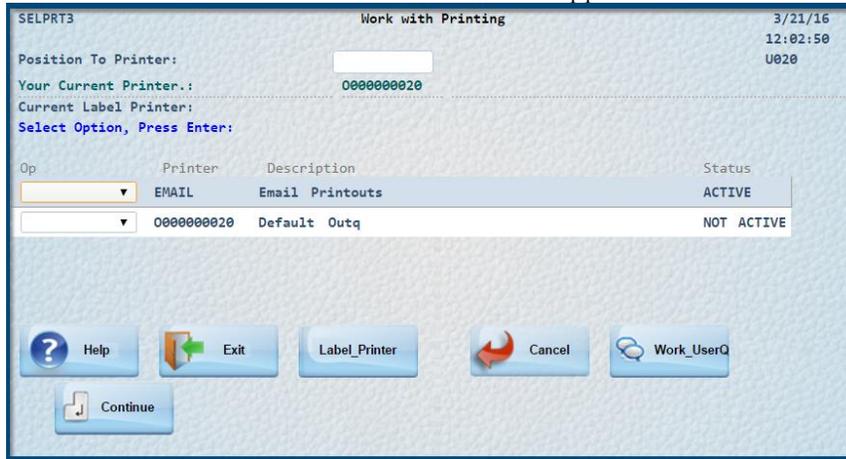
Because Conveyorware is an **internet-accessed** program, work activity takes place in the **system's** computer. The user's computer (whether a pc, smart phone, or other device) logs on to receive **display output** from the system. Printing documents directly requires **printing output** from the system, and a remote printer must be specially setup with an active electronic connection to the Conveyorware system. Each printer (office printer, label printer, or Point-of-Sale register/printer) must have its own **active sign-on session** that enables it to receive and print documents.

For more information, see the Chapter Printing in Conveyorware, **Direct Printing**.

Menu pages contain the click-on link **999. Work with Printing** so that users can conveniently designate printing choices. Each entry in the printer list has two options, **1=Select**, and **5= Work With/Queue**.

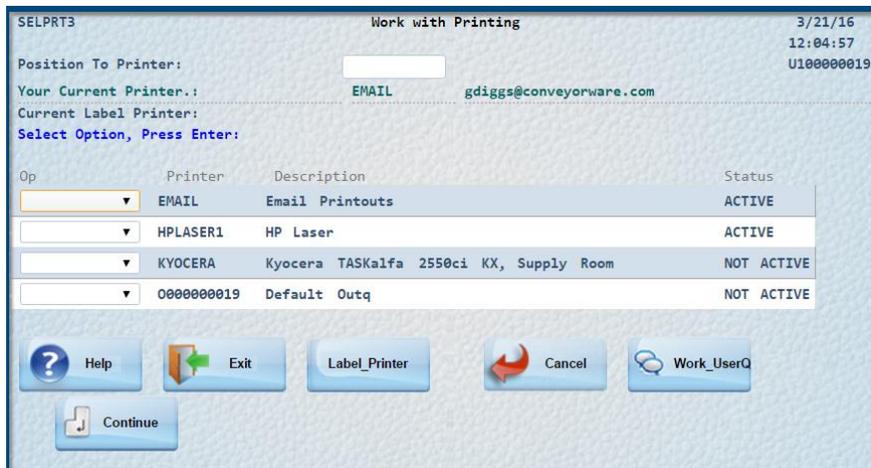
- \* **To Select or Change a Printer:**
  - From any Menu screen,
  - ➔ Click on **999. Work with Printing**, or
  - ➔ Key command **999, [Enter]**.

The Printer Selection window appears.



New subscriber Work with Printing window

The new subscriber Work with Printing screen is shown above. For a new subscriber, system documents are sent to an Outqueue. An outqueue holds documents that were generated without a user-specified printer.



Work with Printing window

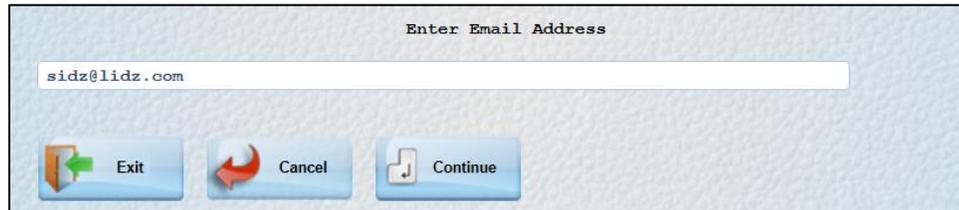
**\* To Send Reports and Printing to an E-Mail Address:**

In the **Op** box, on the **Email Printouts** line,

➔ Click on, or key **1=Select**.

*1 digit.* (Ignore the *5=Work with* option. It applies to working with printer outqueues; the email selection doesn't have an outqueue).

The Enter E-Mail Address window appears.



➔ Key **E-mail Address, [Enter]**.

The system returns to the previous screen. **ALL documents** and **reports** for this user will be sent to the e-mail address. Label printing is not affected.

**\* To Send Reports to a System-Installed Printer:**

Bring up the Printer Selection window from any Menu screen. In the **Op** column, next to the desired printer,

➔ Click on, or key **1=Select**.

The system returns to the previous Menu screen. **All output** will be spooled to the designated printer. Remember that this function applies only to printers with **active sign-on sessions** in Conveyorware.

**Note:** Certain parts of the system will send **specialized output** to **restricted** printers:

- Warehouse Order Sheets can go to a pre-determined printer.
- Warehouse Labels can print to a user-selected printer, as well.
- The Financials Menu can print to a specified printer,
- Day-End Reports can go to any outqueue, printer, or email address.
- The Point-of-Sale system has a specific Receipt Printer/Cash Drawer for each Sales Register.

For more information, see the Chapter Printing in Conveyorware.

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## Other Information

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### Multiple Logins

Conveyorware has **two Client Login** choices; each has its own versatile uses and exclusive functions. A single user can sign-on through both Client Logins concurrently.

To work with Conveyorware **WebAccess** in **two different windows**, use two browser SESSIONS (see the dropdown File Menu in Explorer) with different User IDs, or two browser PROGRAMs, such as Explorer and Firefox. Trying to run **two sign-on tabs** using one browser program creates a problem. The Conveyorware system will recognize two different User sessions, but the browser program only “sees” the Conveyorware URL, and will synchronize the two sessions, dropping one of them.

### Transaction and Record Number Assignment

Conveyorware assigns a **number** to each **record**, or **transaction**, based on its type and its entry sequence, usually starting with 1. A **System Number** is important in locating an original order or credit document, as the record filing system is based on date, and transaction order within the date. Other records (Customer Accounts, Buyers, Vendors, Return/Repair Orders, etc.) are also assigned number s in sequence.

### Delete/Deactivate/Void

Several Conveyorware functions offer the option of deactivating a record or voiding an action. Usually, these records are not actually deleted, but are maintained in the system in an **inactive** form. You will still see them in lists, with the D (deactivated) icon, but the items will disappear from active record choices in data fields with  [Prompt] lists. Deactivations or Voids can be reversed with options in lists, or with active **[Buttons]** (F-keys) at the bottom of many screens.

### Comments and Remarks

**Text** in the **Comments** [Local Comments] (F10) and [Account Comments] (F19) windows is **internal** to the software; it never prints on customer documents.

Text in the **Remarks** fields (and windows) of records (Orders, Credit Memos, etc.) is both internal and **external**; it **prints on the final documents** that your customer will receive.

### Displaying New Data

When creating or editing a record, or adding data to a screen, the new information or calculation may not appear immediately.

- On a **Financials** screen (100. AR, and 750. Financials Menu functions), press **[Enter]** to **save** data; press **[Enter]** again to **display** the **new data** on the screen.
- On any **List** screen (such as 201 Customer Account, 301 Inventory, 401 Order, etc.), press [Refresh] or [Reset].

## **Importing Data to Conveyorware**

Data (commonly in the form of **Orders** from a **Webstore**) can be imported using our API.

Electronic Data Interchange (EDI) can also be accommodated. For HTTP web services or FTP with XML and/or CSV files, data mapping and testing services are needed for setup. Professional customizing programming is required.

## **Logout**

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Protect your business, when away from your browser/device, by logging out. When you are ready to log out of Conveyorware, at the bottom left of any Menu screen,

- ➔ Click on **“90. Signoff”**, or
- On the Command Line,
- ➔ Key command **“90”, [Enter]**.

When the Sign On screen appears, you have been logged out.