



Enterprise
THE COMPLETE SOFTWARE SOLUTION

July 21st, 2008 30th Anniversary Newsletter !!!

Yes, it was 1978 when the first release of PASS (Product And Service System) was implemented. R&D had been working on the PASS system for a few years but now it was finally in the hands of a client and that client is still with us today! Johnstone's Barbeque Products. Although at that time they were called Johnstone's Appliance Service. As their business changed over the years, so have we. Today we are called ePASS and although none of the original staff are with us any more, both Nick and Randy have been here since the 80's. P.S. R&D does not stand for Research and Development; it is Ron Ward & Doug Loughran, the founders of R&D.

Even though ePASS is into its 30th year, it seems like the more we add to the system, the more requests we get for new features. In the beginning the system was a very basic Inventory Control / Order Entry / Accounting system. I cannot even call it a POS system at that time. The customers did not expect any more, nor could the computers handle doing much more, and nobody really knew what to expect of these machines. They were far too expensive to have on every desk, and so everything was entered into the computer after the fact. Everything was still hand written. Can you imagine running your business like that today?

This year we released two of our newest Mobile packages. The ePASS Mobile allows a Salesperson on the floor to write up a sale or answer customers' Inventory or Delivery questions without going back to his desk, all from his Palm Pilot or similar mobile PC device. The Mobile Technician lets a technician in the customer's house receive and complete service calls right from his Phone or Blackberry. We have more potential with the new phones or mobile PC's than we had 30 years ago with a computer.

At the upcoming User Group Meeting we will be covering the features listed below along with all other modules in ePASS. This is a great way to learn how others are using ePASS along with seeing all the new features and modules in action. This is a full hands-on meeting, so you will be able to practice as we go through the system. Make sure to register early as we will have a limited number of hotel rooms available.

New Features

These are not in any specific order, and are only a handful of the recent enhancements. Please read your updates log sent to you as part of support and maintenance to see all changes.

The following features have been added to **Wireless Inventory**:

Swapping - During Shipping, if you scan a Serial that was reserved for another Invoice, but the one reserved for the current Invoice is in the same location and is available, the system will now swap them so the Invoice that had theirs 'stolen' still has

one. This way you can continue to reserve serial numbers, but the shippers are not expected to actually pull that exact serial number.

Auto Number Models - If you have designated a Model as an Auto Number Model, then during Receiving you will no longer have to enter the number 1 when scanning that Model. The system will automatically receive it for you as an Auto Number, and then just prompt you for the next piece.

Ship Any Serial - If you designate a Model as Ship Any Serial, then you will not get the 'Serial Spoken For' messages for that Model during shipping. It is still added to the Stolen Orders Report though, unless it was able to be swapped.

PO Locked - If you try to receive a PO that is locked, you will now get an error message after the 5-10 second timeout. Previously, there was just the timeout period with no error message.

ePASS Enterprise Online Help:

The first version of ePASS Enterprise Online Help is now available! This is an online service that we will be updating regularly, so be sure to check it often. It includes New Features, Help Guides, Documentation, and more. Go to the Help menu in ePASS and click on ePASS Enterprise Online Help to try it out! The link is <http://www.rdbusiness.com/help/Help.htm>

Serial Inventory Price Tags:

A new Price Tag printing program has been added to ePASS! It is only in its infancy, and has a limited number of price tags customized to current customers, but the foundation has been built. Give yourself security (in Serial Inventory security) and take a look at some of the styles we have created... we will be adding additional styles as requested.

* Note: The icon for the 'Print Serial Labels' button on the toolbar has changed, and the old icon used for Serial Labels is now the Price Tags button. The new icons fit the current functions more appropriately.

Dispatching Departments:

Are you tired of seeing all your Sales/Service/Installation calls all grouped together in Dispatching? Or all of your different stores' Deliveries/Service Calls grouped together? Then the new Dispatching Departments are for you! You can now create your own Departments and filter your Dispatching/Mapping by Invoice Type, Route, Map Zone, and Salesperson. There are even new security levels if you only want certain employees to be able to dispatch their own Department.

* There is a fair amount of setup involved in creating and assigning Departments. Please review the on-line help.

ePASS Messaging System:

The ePASS Messaging/Reminder system has been re-vamped! Many bugs and requests have been taken care of, and several new features have been added. It is much easier to send messages to multiple people and much clearer to see who you're sending it to. There are many new functions in your Inbox, the Reference feature now works on several more forms, and more.

Package Warranties:

ePASS now supports selling Package Warranties! Previously you could only sell one piece warranties (for one Model/Serial) but now your warranties can cover multiple pieces. Also, we have introduced Warranty Types which allow you to restrict which Models can be covered by which Extended Warranties. The automatic updating of Model and Serial Number covered by warranty has been enhanced, new security options have been added, and more!

* Please review the on-line help for setting up Package Warranties.

OE-37 Technician Labor Analysis:

Are you looking for First Trip Complete percentage, or number of trips per job by Technician? The OE-37 Technician Labor Analysis is now complete! It has very similar information that the OE-36 has, but will group by Technicians instead of Brand or Product.

SN-39 Product Catalogue:

If you are using pictures for your Models in ePASS, then this report is for you. It is intended to show you the pictures grouped by Brand or Product line so you can visually see what you carry and decide if you need another color, style, etc.

SN-40 Projected Sales Analysis:

In an effort to provide you with more detailed sales and ordering information, we have created the SN-40 Projected Sales Analysis. Not only does it combine information from about four other reports into one, it also gives you project sales information based on your last years sales.

Purchasing Freight Allocation:

We have added a new Freight Allocation feature to Purchasing to help you apply freight costs to product. The new program will allow you to choose Supplier Invoice numbers, then enter a Freight amount to be distributed to all costed Serial Numbers on those Invoices. The system will apply a weighted amount based on the Serial cost. Additionally, Freight is now a separate field on the Serial Number so you can track or adjust Freight amounts per serial number. The new Freight Allocation function can be found under the Purchasing menu.

Auto Payment Transfer:

Tired of manually adding Payment Transfers to your Invoices after doing a Split? The Auto Payment Transfer function will help! You can now turn on the Auto Payment Transfer function by Invoice Type and it will automatically launch a new screen after doing a Split Invoice. It will default the maximum payment amount that it can transfer (up to the total of the new Invoice) and all you have to do is click OK.

* You need to set up the new Payment Transfer Payment Type in Invoice Variables, Sign Out/In, then turn on Auto Payment Transfer for each Invoice Type you want it to happen on. The user signed in must also have security to add a Payment before it will happen.

Customer Mailing Address:

There is now a new tab in Customer Maintenance for the Mailing Address. By default, the system assumes that the physical address is the same as the Mailing Address, but when different you can go to the new tab and store it separately. If a Customer has a Mailing Address different than their Physical Address, then it will be used as their Bill To address on Invoices, as well as in Customer Labels, Customer Statements, and the A/R Aged Trial Balance.

ePASS User Meeting

We have booked the next ePASS User Group Meeting for September 24 through 27 2008.

This will be a hands-on four day training seminar covering all the new modules of ePASS along with the major enhancements. A lot of clients have been overwhelmed by the amount of programming that has been released over the last couple of years, and are finding it difficult to keep on-top of all these new features. This is your opportunity to see all the new Modules and all the cool palm pilot, and other mobile systems for both the Sales and Service departments! We will be demonstrating not only the Wireless Barcoding, but also both ePASS Mobile systems. You will all have an opportunity to try out the mobile systems at the meeting.

At the hands-on meetings you have a computer in front of you to use for the full four day seminar. You can practice all the new features and get very familiar with them. As we did last year, those of you who want to bring your notebooks are welcome to.

If you wish to use your own notebook:

- 1) It must be XP or Vista, no 98 will be supported.
 - 2) It MUST be Virus free and have a current / active anti-virus subscription. R&D will not be responsible nor have the time to assist if any viruses are found. If it does not have anti-virus, it CANNOT be used.
 - 3) Have an operational wireless network connection.
 - 4) Have Remote Desktop installed and operational. We will provide the settings to connect to our server at the meeting.
- Call us if you have any questions about your notebook.

Try to bring your notebook in early so we can have you setup before the meeting starts. We cannot disrupt the meeting to setup systems that arrive late.

This year we are moving the meetings up the street to the Residence Inn by Marriott in Downtown Vancouver. This is a very nice, new hotel with many amenities in the same beautiful west end of Vancouver. You are still only a few minutes from the beach or shopping districts of downtown Vancouver.

We have booked a limited number of rooms at the Residence Inn by Marriott (\$169.00/night sgl or dbl) so please send in your registration forms as soon as possible. The User Meeting fees (\$195.00/day/person) include breakfast, morning and afternoon coffee breaks, and lunch.

Please note: The course schedule for Friday and Saturday have been reversed from what was shown on the earlier announcement.

The schedule is subject to change: Breakfast at 8:30 and Meetings are from 9am to 5pm.

<u>Wednesday</u>	<u>Thursday</u>	<u>Friday</u>	<u>Saturday</u>
Introductions	General Ledger	Sales Forum	Service Forum
Customer Maint / History	Sales & Svc Dispatching	ePASS Mobile - Salesperson	ePASS Mobile - Technician
Accounts Receivable		Purchasing / Backordering	Purchasing / Warranty Claims
		Invoicing	Invoicing
Lunch Break	Lunch Break	Lunch Break	Lunch Break
Accounts Payable	Wireless Barcoding	Invoicing Continued	Invoicing Continued
Crystal Reports - Basic	Crystal Reports - Advanced		

You will notice quite a change from previous years in that we are no longer teaching System Maintenance, Tables, Variables and Security as a separate course. Instead as part of each course we will focus on the Variables, Tables and Security that are relevant to that course. This should help keep all the pieces together. I am sure you have all noticed that on a fairly regular basis new tables are appearing, it is important for you to read the updates literature we send out with each update to keep on top of these enhancements. You also need to give yourself security to use these new features, or they will not even appear on your menu.

This is your opportunity to learn how to maximize your ePASS system. ePASS is just like any other machine or tool, if you do not use it to it's potential, you are loosing out on so much and spending countless hours doing what the system can do for you.

We look forward to seeing you in September!

ePASS User Meeting Registration September 24 - 27, 2008

Residence Inn by Marriott
1234 Hornby Street
Vancouver, BC, V6Z 1W2

Company _____

Wednesday September 24th

Names _____
\$195.00 per person X _____ person/s \$ _____

Thursday September 25th

Names _____
\$195.00 per person X _____ person/s \$ _____

Friday September 26th

Names _____
\$195.00 per person X _____ person/s \$ _____

Saturday September 27th

Names _____
\$195.00 per person X _____ person/s \$ _____

Note: \$50.00 surcharge per person per day if not on ePASS support \$ _____

Canadian companies add 5% GST \$ _____

British Columbia companies add 7% PST \$ _____

Total Amount Enclosed \$ _____

Date _____

Signature _____

HOTEL RESERVATIONS

Residence Inn by Marriott
1234 Hornby Street, Vancouver, BC V6Z 1W2
\$169.00 cdn single or double per night

Guest Name	Arr	Dep	Smoke/Non	Sgl/Dbf	Credit Card for Room Guarantee
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Please return/fax before August 25th, 2008

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