



Eclipse Remote Order Entry

Release 8.6.4 (Eterm)

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Activant® Eclipse™ 8.6.4 (Eterm) Online Help System

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Remote Order Entry Overview

Customers who have dial-in access may use Remote Order Entry (ROE) to do the following things:

- check the availability of your inventory
- enter bids
- enter direct shipments or
- enter standard orders.

These ROE activities occur in real time.

Depending on the permissions you want to give your customers, you may restrict certain activities by changing your customers' access parameters.

Once a customer has connected to your system, ROE is just like using conventional Sales Order Entry. Every time the customer logs in, places an order, or changes an order, the system notifies one of your employees.

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Setup Requirements for Remote Order Entry

Only a system administrator is authorized to set control maintenance records and authorization keys. The additional setup listed below is also required.

Control Maintenance Records

- Default Remote Order Entry (ROE) Messaging
- Remote Order Review Queue Branch
- ROE Discount Applicable Order Types

Authorization Keys

- POE.REMOTE.REVIEW
- SOE.ALLOWED
- SOE.OPEN.ORDER.EDIT
- SOE.OPEN.QTY.EDIT
- WOE.MAINT

Additional Tasks for Setting Up ROE

The following additional tasks are required to set up Remote Order Entry:

Customize the user's logon screen

Customize the logon screen that users see when they first connect to your system. Make the screen inviting and informative, and include a telephone number for technical support.

Edit the default Eclipse Remote Order Entry screen (**System > System Files > User Control > Remote Logon Screen Maintenance**). You can change any text except the screen's title and the prompt for users to enter a password.

Create a remote UNIX user

Create a UNIX user with a UNIX login name of **Remote**. Every remote user will use the same login name to log into the UNIX operating system.

Because UNIX passwords are rarely assigned, contact Eclipse Support if you need assistance.

Create a remote user

Create a user ID for each customer who will order remotely on the User Maintenance screen. For more information, see *Creating Users for Remote Order Entry*.

Set up a terminal for each remote user

Enter a pricing branch and shipping branch for each remote user using the **Prc Brch** and **Shp Brch** fields on the Terminal Setup screen (**System > System Files > Terminal Setup**).

Set the remote order entry parameters

Each Remote Order Entry customer can have unique settings, which determine how the customer interacts with the system during ROE, how orders are handled, and which of your employees are responsible for the orders. For more information, see [Setting Remote Order Entry Parameters for Customers](#).

Provide the software

Install the latest version of Eterm software on each computer that will require remote access. Review the Eterm online help documentation for configuration and connection instructions.

Other Remote Order Entry companion products, such as Sales Force Automation, come with their own software and documentation.

Assign employees to monitor remote orders

Specify which of your employees the system will notify when a remote user logs on or edits an order. Typically, someone like a sales manager receives notification. Set up the notification on the Customer Remote Message Maintenance screen (Files > Customer > Remote hot key > Remote Messaging hot key). You will also use this screen to assign employees to monitor the Remote Order Entry Review Queue and approve orders for processing.

For more information, see [Assigning Employees to Monitor Remote Orders](#).

Setting Remote Order Entry Parameters for Customers

Use the Remote Order Entry Parameters screen to establish customer settings for remote order entry applications, including Remote Order Entry (ROE), Web Commerce, B2B Commerce (B2B), E-mail Order Entry (EOE), Palm Order Entry (POE), Remote Data Collection (RDC), and Sales Force Automation (SFA). Only users with the WOE.MAINT authorization key can access this screen. Some fields on this screen only apply to certain types of remote order activity.

To make different employees responsible for monitoring different types of remote orders, assign the employees in Customer Remote Message Maintenance.

► To enter a customer's Remote Order Entry parameters:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer name and press **Enter** to display the customer's record.
3. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
4. Complete the following fields, as needed:

Field	Definition
Log Bids For Review	<p>Determines whether, and in what circumstances, bids display in the Remote Order Entry Review Queue.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • New Order – Displays all orders the customer enters. • Changes – Displays new orders and ones that have been edited. • Disable – None of this customer's remote orders will be reviewed. <p>This field applies to ROE, Web Commerce, Business Connect XML, and RDC.</p>
Log Orders For Review	<p>Determines whether, and in what circumstances, orders display in the Remote Order Entry Review Queue.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • New Order – Displays all orders the customer enters. • Changes – Displays new orders and ones that have been edited. • Disable – None of this customer's remote orders will be reviewed. <p>This field applies to ROE, Web Commerce, Business Connect XML, and RDC.</p>
Only Log Orders With Errors	<p>Indicates whether only orders with errors display in the Remote Order Entry Review Queue.</p>

Field	Definition
Allowed Pricing Variance%	<p>The dollar amount or percentage by which this customer's price can vary from the LIST price.</p> <p>This field applies to ROE, RDC, and Business Connect XML.</p> <p>Note: If you are defining allowed pricing variances for Business Connect XML customers, use the WOE Info hot key, and then the IDMS hot key, and set the Use Partner Pricing field to Yes.</p>
Default User Messaged Upon Log In	<p>User ID or message group notified whenever a remote user logs in to any order entry application, such as ROE or Web Commerce. Use the Multi hot key to assign multiple users.</p> <p>Note: This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications used by this customer. It can be overridden for individual applications using the Remote Messaging hot key on this screen.</p>
Default User Messaged With New Order #	<p>User ID or Message Group notified whenever any type of remote order is entered. Use the Multi hot key to assign multiple users.</p> <p>This field applies to ROE, RDC, Business Connect XML, and Web Commerce.</p> <p>Note: This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications used by this customer. It can be overridden for individual applications using the Remote Messaging hot key on this screen.</p>
Default User Messaged With Order Changes	<p>User ID or Message Group notified whenever any type of remote order is edited. Use the Multi hot key to assign multiple users.</p> <p>This field applies to ROE, RDC, Business Connect XML, and Web Commerce.</p> <p>Note: This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications used by this customer. It can be overridden for individual applications using the Remote Messaging hot key on this screen.</p>
Default User Messaged With Errors	<p>User ID or Message Group responsible for monitoring remote orders with errors.</p>

Field	Definition
Remote Order Queue Users	<p>User ID or Message Group responsible for monitoring this customer's orders in the Remote Order Entry Review Queue and clearing the orders for processing. Use the Multi hot key to assign multiple users.</p> <p>This field applies to ROE, RDC, Business Connect XML, and Web Commerce.</p> <p>Note: This parameter overrides the value entered in the Default Remote Order Entry (ROE) Messaging control maintenance record and applies to all remote applications used by this customer. It can be overridden for individual applications using the Remote Messaging hot key on this screen. If you do not identify a value in this field, the system uses the user identified in the Default User Messaged With New Order # field, or the customer's inside salesperson, in that order.</p>
RDC and Pocket OE Default Order Status	The default order status for Remote Data Collection (RDC) and Palm Order Entry (POE) orders.
Round to Sell Pack Qty on Remote Orders	<p>Indicates whether the system rounds remote order quantities up to the standard package quantities.</p> <ul style="list-style-type: none"> • No - Allows the user to order any quantity. • Warn - Sends the user a message when placing a remote order indicating that the quantity selected is not an even multiple of the package quantity for the product. The user still has the option to order below the package minimum. • Force - Sends the user a message when placing a remote order indicating that the quantity selected is not an even multiple of the package quantity for the product, and changes the quantity to the standard package quantity with no option to change it. • This field applies to ROE, RDC, Business Connect XML, and Web Commerce. <p>Note: Setting this parameter overrides the Round To Minimum Package Quantity In WOE control maintenance record for the customer.</p>
Slave Printer (Blank=No ROE Printing)	The printer used for remote orders and bids. Valid values are user-defined. Leave this field blank for no printing.

Field	Definition
Display Product Availability	<p>Indicates whether B2B, ROE, and Web Commerce customers can view the available quantity of a product entered on a bid or order. Select from one of the following options:</p> <ul style="list-style-type: none"> • Hide - Product availability information does not display. • Show w/ Qty - The quantity available displays for each product. • Show w/o Qty -The availability displays as In Stock or Out of Stock. <p>Setting this parameter overrides the settings in the Display Availability On Product Return Page In WOE and Display Availability On Checkout Page In WOE control maintenance records for this customer. If the Display Availability On Product Return Page In WOE record is set to Show Info Icon, the Product Return page displays the more information icon if you select the Show w/ Qty or Show w/o Qty options in this field. If the above records are not set, the system uses the setting in the Display Product Availability In WOE control maintenance record. For more information, see Defining Web Commerce Product Availability Display Settings.</p>
Show Availability For Branches	<p>The product availability detail that Web Commerce and B2B customers see on the product return list or after clicking a product description link.</p> <ul style="list-style-type: none"> • Ship Branch - Only the customer's designated shipping branch. • Home Territory - All branches within the customer's territory. • Authorized Branches - Only the branches the customer is authorized to access. • All Branches - All branches in your warehouse system. <p>If this field is left blank, the system uses the setting in the Show Availability For Branches In WOE control maintenance record. If the control maintenance record is also blank, the system displays availability for only the ship branch. For more information, see Defining Web Commerce Product Availability Display Settings.</p>
Remote/WOE Order Entry Discount%	<p>The discount percentage (in the format XX.X) that the customer receives for using Remote Order Entry or Web Commerce to place orders.</p> <p>Note: A Web discount needs a unique account for general ledger purposes.</p>

Field	Definition
Check Availability on Remote Orders	<p>Indicates whether the system verifies the availability of products on orders from a remote order source when they reach the Eclipse system.</p> <ul style="list-style-type: none"> • Y – The system places remote orders from the customer that have order quantities greater than the current availability for one or more products in the Remote Order Entry Review Queue, and changes the order status to Bid. • N – The system does not verify the availability of products on remote orders. <p>Note: If this field is left blank, the system uses the setting in the bill-to entity of the remote order. If both the ship-to and bill-to entities are blank, the system uses the global setting in the Check Product Availability On Remote Orders control maintenance record.</p>

5. Use the following hot keys, as needed.

To...	Use this hot key...
specify the order status settings the customer can use	<p>Valid Stats The Valid Statuses screen displays. Enter all applicable shipping status codes and press Esc.</p>
set the customer up for Remote Order Entry	<p>User Maint The User Maintenance screen displays.</p>
limit the user to one or more specific methods for shipping product to their site	<p>Ship Vias The Valid Ship Vias screen displays. Enter all applicable ship vias and press Esc.</p>
enter additional B2B and WOE settings	<p>WOE Info The B2B/WOE Remote Order Entry Parameters screen displays (not applicable for ROE).</p>
add additional default users to message for various remote order events	<p>Multi A screen with the same title as the field from which it was accessed displays. Enter all applicable users and press Esc.</p>
notify different users about different remote order types	<p>Remote Messaging A list of remote order entry methods displays. Select Remote Order Entry to display the Customer Remote Message Maintenance screen.</p>
prevent certain percentages of your inventory from showing in B2B inquiries	<p>B2B Inventory Control The B2B Inventory control maintenance screen displays (not applicable for ROE).</p>
identify and route incoming Ariba B2B orders or BCXML orders	<p>ECommerce IDs The Customer Unique E-Commerce IDs screen displays (not applicable for ROE).</p>

6. Press **Esc** to save your changes and exit the screen.

Assigning Employees to Monitor Remote Orders

Use the Customer Remote Messaging Maintenance screen to identify which employees are notified about various types of remote orders. For example, the system can send messages about e-mail orders to one person, and messages about Web orders to another.

Any settings for the individual order types override the **Default User Messaged** fields on the Remote Order Entry Parameters screen.

Before you begin, verify that a customer maintenance record exists for this customer.

► To identify employees for remote order entry notification:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer name.
3. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
4. Use the **Remote Messaging** hot key to display a list of Remote Order Entry selections.
5. Select **Remote Order Entry** from the list to display the Customer Remote Message Maintenance screen.
6. Identify the users who will monitor remote orders using the following fields:

Note: To assign multiple users to one field, either assign a message group or use the **Multi** hot key to assign several users.

Field	Description
User to be Messaged Upon Log In	User ID or Message Group notified whenever the remote user logs in.
User to be Messaged With New Order #	User ID or Message Group notified whenever the remote user enters a new remote order.
User to be Messaged With Order Changes	User ID or Message Group notified whenever the remote user changes the order.
User to be Messaged With Errors	User ID or Message Group notified whenever a remote order has one or more errors.
Remote Order Queue User	User ID or Message Group responsible for monitoring orders in the Remote Order Entry Review Queue and clearing the orders for processing.

7. Press **Esc** to save your changes and exit the screen.

Creating Users for Remote Order Entry

Before customers or sales representatives can enter sales orders remotely, you must create unique user IDs for them and assign those IDs the Remote Order Entry attributes in User Maintenance. You can create a record for individual users or for a group of users.

Before you begin, create the customer's maintenance record, if needed, and then follow the two instructions below.

► To create a remote order entry user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, do this:
 - Enter **New**. The system prompts you to enter a new user ID.
 - Enter up to eight characters (no spaces) that will identify the user. In the screen example, notice that **SMITHPLU** is used to identify Smith Plumbing.
3. In the **Full Name** field, enter the customer's legal name (**Smith Plumbing Company**, for example).
4. In the **Root Menu** field, enter **REMOTE.MAIN**. This restricts the customer to only those menus required to perform remote order entry.
5. In the **Remote Cus** field, enter the customer's name and press **F10** to select the customer's address. This gives the customer permission to dial into your system to view information related to its account.
6. In the **Options** column, enter any character next to an option to select it. Use only the following options:
 - **No Messaging** – Prevents the customer from seeing company messages.
 - **Remote Logon OK** – Allows the user to log on from a remote location.
 - **No Schedule Prompting** – Removes the customer from the Schedule list.

Note: The system changes your character to an asterisk (*) when you exit the field.
7. Assign attributes to the remote user, as described below.
8. Press **Esc** to save your changes and exit the screen.

► To assign attributes to the remote user:

1. Create a remote entry user, as described above.
2. Use the **Accts** hot key to display the Accounts screen.
3. Enter **Eclipse** and press **Esc** to return to the User Maintenance screen.

4. Use the **Location** hot key to display the Locations screen.
5. Enter **Remote** and press **Esc** to return to the User Maintenance screen.
6. Use the **Brchs** hot key to display the Accessible Branches screen.
7. Assign branches to which the customer will require access and press **Esc** to return to the User Maintenance screen.
8. Use the Auth Keys hot key to display the Authorization Key/Template Maintenance screen.
9. Assign the following authorization keys and press **Esc** to return to the User Maintenance screen:
 - SOE.ALLOWED
 - SOE.OPEN.ORDER.EDIT
 - SOE.OPEN.QTY.EDIT
10. Use the **Sls Src** hot key to display the Sales Sources screen.
11. Enter the sales source that will receive credit for the sale (remote sales, for example) and press **Esc** to return to the User Maintenance screen.

Note: If "Remote Sales" does not exist, use "Other," or see your system administrator about adding it to the list.
12. Press **Esc** to display the Password Maintenance screen.
13. Enter a password and press **Esc**. When prompted, re-type your password and press **Enter** to return to the User Maintenance screen. The screen clears for the next entry.

Reviewing Remote Order Entries

Use the Remote Order Entry Review Queue to track the orders your customers have placed remotely via telephone modem, portable device, e-mail, or Web browser.

When a customer is set up for ROE, your company can designate employees who will be notified whenever a customer logs in, or submits or edits a sales order. The orders are then reviewed in this queue, where they are cleared for processing.

► To review remote order entries:

1. From the **Orders > Queues** menu, select **Remote Order Entry Review** to display the Remote Order Entry Review Queue screen.
2. In the **Branch/Territory** field, enter the branch or territory you want to review remote orders for. Enter **ALL** to review orders for all branches and territories.
3. In the **User ID** field, enter the user ID of the employee who is assigned to monitor the orders, or leave the field blank to list all orders.
4. In the **Src** field, enter the type of remote order you want to see (for example, enter ROE for Remote Order Entry).
5. Review the following fields:

Field	Description
Order#	A letter followed by a series of unique numbers that identifies the order.
Customer (Bill-to)	The name of the individual or company that pays for the order. Use the Ship-To hot key to view the customer to which the order is shipped.
Sta	The current shipment status of the order.
Order Value	The total price of the items on the order.
Src	The method used to enter the order; for example, ROE.
Error	Identifies any errors that occurred.

6. Use the following hot keys, depending on what actions you want to take.

To...	Use this hot key...
open a selected order for viewing	View The Order Entry Body screen displays in view-only mode.
open a selected order for editing	Edit The Order Entry Body screen displays in Edit mode.
remove an order from the queue	Clear The order is cleared from the queue.
further narrow your search	Slt The ROE Review Queue Selection screen displays. You can enter an additional branch, user ID, order source (EDI, WOE, Palm, etc.), customer, and order status.

To...	Use this hot key...
correct processing errors for a selected order	<p>Error Detail The Error Detail screen displays. The system lists each error separately. Select an error and do one of the following things:</p> <ul style="list-style-type: none"> • Use the View hot key to view the error. (The order opens in view-only mode.) • Use the Edit hot key to edit the error. (The order opens in edit mode.) • Use the Clear hot key to remove the order from the list.
view the customers to which the orders in the queue ship	<p>Ship-To The Customer field changes to display the ship-to customer.</p>
remove all orders that do not have associated errors from the queue	<p>Clear Orders W/O Errs All error-free orders are cleared from the screen. When prompted, confirm that you want to clear all the orders that do not have errors.</p>

7. Press **Esc** to clear the screen.

Remote Order Entry Error Codes

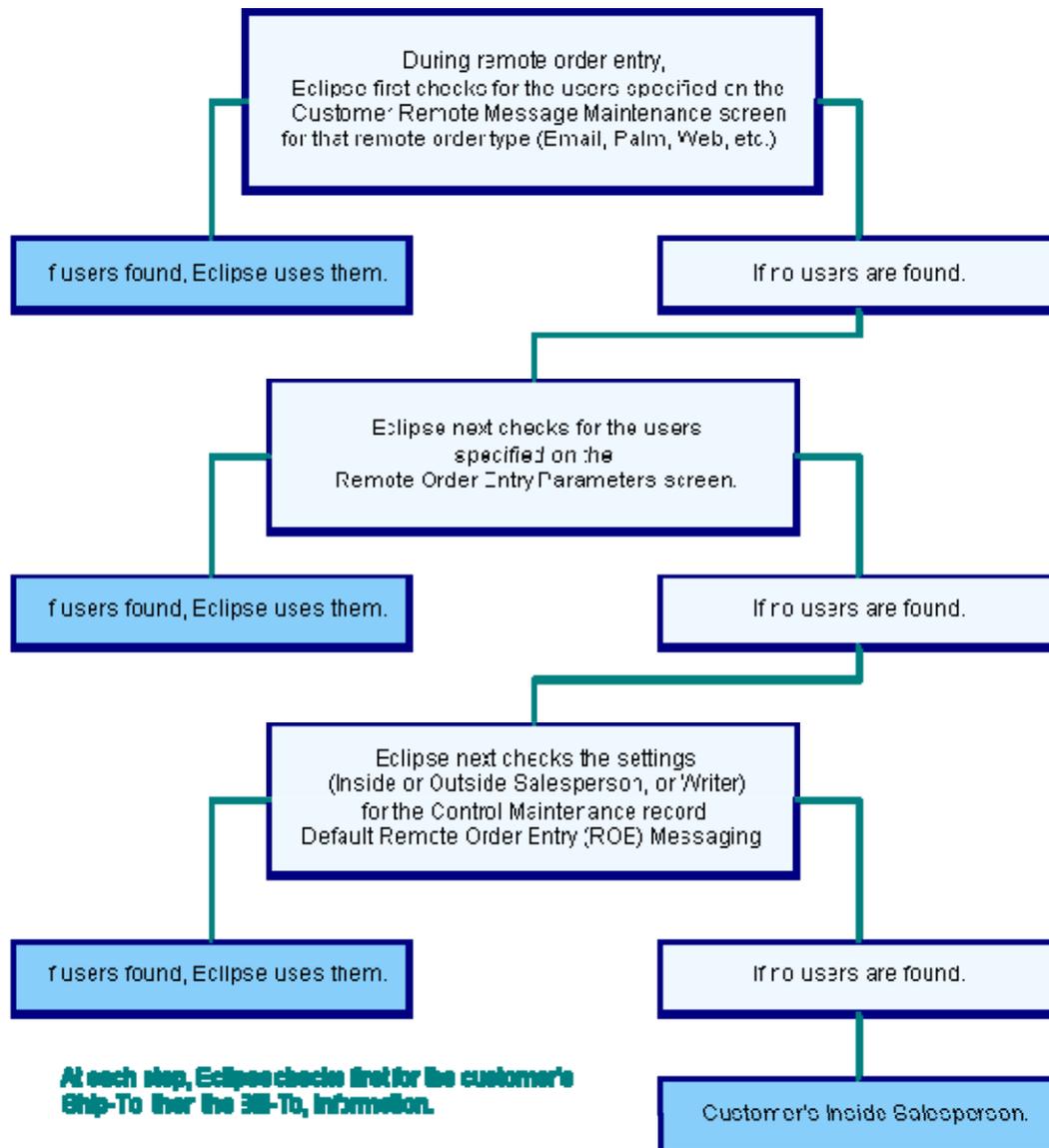
The **Error** field on the Remote Order Entry Review Queue screen displays the following error codes:

Code	Description
BkOrd	An item on the order is back-ordered.
None	No errors occurred.
Price	Pricing error, such as expired pricing.
Prd NF	Product not found.
Cus NF	Customer not found.
Avail	One or more items on the order is not available.
Multi	Multiple errors. For example, two products not found.

To fix errors, use the **Error Detail** hot key to drill down into the orders, and correct the problems there. For example, if a product was not found, specify the correct product on the order.

How the System Determines Employees for Remote Order Entry

If you are viewing this topic online, you can click the three largest boxes to learn more about the features described.



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