ACTIVANT®

Eclipse Signature Capture Suite

Release 8.6.4 (Eterm)

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Activant® Eclipse™ 8.6.4 Online Help System

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Signature Capture Suite Overview

Use the Signature Capture suite of Eclipse companion products to electronically capture delivery-confirmation signatures. Although the method of capturing signatures differs with each application, they each attach signatures to transactions stored on the system. From transactions, you can view, print, email, fax, or copy the attached signatures.

The suite contains the following products:

- EManifest.
- EPad.
- Manifest Processor.

EManifest

EManifest is used with Palm devices to collect and upload electronic signatures for storage on the Eclipse system. After downloading manifests to a Palm device, drivers can collect signatures for each delivery right on the Palm. When the Palm device is synchronized with the system, the application attaches the collected signatures to their invoices and manifests.

EPad

EPad is a point-of-sale (POS) signature capture device used at sales counters. When customers make purchases at sales counters, they sign electronic copies of the invoices using EPad. Sales counter personnel then approve the signatures, and the application immediately attaches the signatures to their invoices.

Manifest Processor

Manifest Processor is used with paper-based, bar coded manifests and scanning software technology to capture signatures. When making deliveries, print out manifest tickets with bar codes assigned to each order or stop. Drivers collect signatures for each order or stop on the printed manifest tickets. After all signatures are collected, scan the signed manifest tickets. The application attaches the scanned signatures to their invoices using the bar codes printed on the tickets.

See Also:

EManifest Overview

EPad Overview

Manifest Processor Overview

Signature Capture and Document Imaging Guidelines

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Signature Capture and Document Imaging Guidelines

In order to attach signatures to transactions using the Signature Capture Suite companion products, you need to define signature storage locations on the network host. Use the Document Imaging companion product to define these storage locations by setting up storage IDs and indexing profiles.

Storage IDs define where certain file types, such as signatures, are stored. Indexing profiles define how storage IDs are organized. In short, storage IDs and indexing profiles are electronic filing cabinets.

For example:

You currently have a filing cabinet in your office holding all signed manifests. Each drawer is designated for a different customer. Within each customer's drawer are files for every month of the year, holding the signed manifests for the respective month. With the Document Imaging and Signature Capture Suite companion products, the network host replaces your filing cabinet, the indexing profiles replace each customer's drawer, and the storage IDs replace the files for each month of the year.

For information on how to define storage IDs and indexing profiles, see Defining Document Storage Locations.

Additional Document Imaging Settings for EPad

In addition to setting up storage IDs and indexing profiles on the network host, you can set up temporary storage locations for signatures captured with EPad.

When you capture signatures using EPad, you commonly do so from counter terminals at your warehouse branches. If you capture large amounts of signatures at a branch, set the system to temporarily store these signatures on the counter terminals until you can copy them to the network host for permanent storage. You must define the temporary signature storage locations on each terminal used for EPad.

> **Note:** Set up temporary storage locations only for terminals that collect a large volume of signatures on a daily basis. If you do not capture a large volume of signatures at a terminal on a daily basis, you can copy signatures directly to the host without temporarily storing them.

Copy signatures from the terminals to the network host by running a replication. After defining both host and temporary storage locations, set up a replication schedule to indicate how often stored signatures are copied. For example, schedule a replication to run nightly in order to copy all collected signatures from the day.

In addition to storing and replicating signatures, you need to maintain your warehouse terminals. To keep each terminal from becoming overloaded with the temporarily stored signatures, define how long to keep the signatures stored on the terminals before the system deletes them. For each temporary storage location, you can define the number of days to keep signatures before deleting them, as well as schedule a routine purge of the signatures. Just make sure to replicate the

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signatures to the host often enough so that signatures are permanently stored before being deleted.

See Document Replication Overview for information on how to:

- Set up temporary storage locations.
- Schedule replications.
- Clean out temporary storage locations.

See Also:

Document Imaging Overview

Purging Images

Signature Capture Suite Overview

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EManifest Overview

The EManifest companion product simplifies the collection of delivery-confirmation signatures by replacing a paper-based environment with an electronic one. EManifest is used with Palm devices to collect electronic signatures and upload them for storage on the Eclipse system.

The EManifest process is simple:

- Build manifests as you do for paper-signature deliveries. Instead of printing the manifests to collect signatures, download the manifests to defined Palm devices.
- When delivering, collect all signatures right on the Palm device holding the downloaded manifests. The Palm saves all delivery-confirmation signatures, and any attached comments entered on the Palm.
- At the end of the day, upload the saved signatures and comments to the Eclipse system. The application automatically attaches signatures to the appropriate invoices and comments to the appropriate manifests.
- In the Eclipse system, access all signatures directly from their invoices and all comments directly from their manifests. From the invoice, print, fax, e-mail, or copy the signatures, as needed.

EManifest leaves you with a paper-free environment so you no longer need to spend time filing or searching for shipping tickets, or run the risk of losing paper-based confirmation signatures.

Before using EManifest, make sure to complete all setup tasks.

See Also:

EManifest Setup Overview

Downloading EManifests to Palm Devices

Collecting Electronic Signatures with EManifest

Uploading EManifest Signatures

Using Signatures Attached with EManifest

Signature Capture and Document Imaging Guidelines

Signature Capture Suite Overview

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Downloading EManifests to Palm Devices

Before using the EManifest application, build the manifest for which to collect electronic signatures. In building your manifest, we recommend that you first invoice all orders that you are adding to the manifest. If you do not invoice an order, the signature collected could be attached to all generations for the order. We also recommend that you create new orders for returns using EManifest so that confirmation signatures on returns are not mistakenly attached to the original sales order instead of the return.

After building the manifest, queue it to be downloaded to the Palm device of the delivery person who will be collecting the signatures. Remember that this user's Palm ID must be defined in the Valid E-Manifest Palm IDs control maintenance record in order to receive the manifest.

When the manifest is queued, perform a HotSync between the Palm device and terminal. The HotSync places the manifest on the defined Palm. The delivery person can now make deliveries and collect all confirmation signatures on the Palm device.

Note: To perform a HotSync, the Palm device's cradle must be connected to the terminal through a USB cable or local serial connection.

To queue an electronic manifest:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. Build the manifest for which you are collecting electronic signatures.
3. After building the manifest, use the **Lock** hot key to lock the manifest and prevent other orders from being added to it.
4. Use the **Print** hot key to display the Print Options screen.
5. In the **Report Type** field, press **F10** and select **Palm Pilot EManifest Download** from the displayed list.
6. In the **Show Address** and **Show Shipping Instructions** fields, indicate whether the shipping address and instructions should be displayed on the Palm with each delivery stop.
7. Use the **Print** hot key.

   The system prompts you to "Enter ID of Palm for Download."
8. At the prompt, enter the ID of the Palm to which you want to send the manifest.

   Note: All Palm IDs for use with EManifest must be defined in the Valid E-Manifest Palm IDs control maintenance record. These IDs do not need to be Eclipse user IDs.

   The system prompts you that the manifest is ready to be synced to the defined Palm.

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9. Press **Enter** to return to the Shipping Manifest Queue screen, and press **Esc** to save the manifest and exit the screen.
10. Perform a HotSync.

To download the electronic manifest to a Palm device:

1. Queue the electronic manifest.
2. Place the Palm device to which you are sending the electronic manifest in its cradle, which is connected to the terminal sending data through a USB cable or local serial connection.
3. On the Palm device, tap the **HotSync** icon to display the HotSync screen.
4. Tap the **HotSync** icon to begin the synchronization process.
5. Once the HotSync is complete, the electronic manifest displays on the Palm's Shipping Manifest screen.
6. You can now collect EManifest signatures for the downloaded manifest.

See Also:

Collecting Electronic Signatures with EManifest

Uploading EManifest Signatures

Using Signatures Attached with EManifest

EManifest Overview

Shipping Manifest Queue Overview

Sales Management Overview

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Collecting Electronic Signatures with EManifest

As soon as a manifest has been downloaded to your Palm device, you can begin collecting signatures for all deliveries on the manifest. Depending on settings in the Number of Signatures/Barcodes Required On A Manifest control maintenance record, the manifest lists individual orders or entire stops on the Palm device. You need to collect delivery-confirmation signatures for each listed item.

On the Palm device:

- Display order information for all stops.
- Collect signatures to confirm delivery.
- Enter comments for deliveries when needed.

The Palm device saves all signatures and comments, which will be attached electronically to the respective invoices and manifests upon upload.

If you cannot make all deliveries for the manifest, you can clear the undelivered stops from your Palm. These stops can then be added to another manifest and downloaded to a Palm device.

For example:

You were unable to make all deliveries on the manifest today, and you do not work tomorrow. Remove all unsigned stops and HotSync your Palm device with the Eclipse system to upload any signed stops. The warehouse manager can add the undelivered stops to tomorrow's manifest, which will be downloaded to the Palm device of tomorrow's delivery person.

To collect an electronic signature for a downloaded manifest:

1. On the Palm device, tap the **Manifest** icon to display the Shipping Manifest screen.

   All downloaded manifest stops display.

   Note: Tap the **Single-Line**/**Multi-Line** button to toggle between displaying one line only for each manifest stop, or the stop number, delivery time, company name, and address for each manifest stop.

2. Select the manifest stop that you need signed.

   Note: If the Record current time as your time-in? dialog box displays, tap **Yes** to select the stop. If you tap **No**, the system returns you to the Shipping Manifest screen and you will need to re-select a stop.

   The Order View screen displays with the delivery information.

   - Tap the **Details** button to view a list of the orders and items on the delivery.
   - Tap the **Order** button to return to the delivery stop information.

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3. Tap the **Sign** button to display the Approval screen, with the following information:
   - Stop number, projected delivery time, and the customer receiving the delivery.
   - Manifest number for the stop.
   - The current date and time to indicate when the manifest stop was signed.
4. In the **Print Name** field, enter the authorizing customer's name.
5. Hand the Palm device to the authorizing customer.
6. Ask the customer to sign in the signature box and verify that the name you entered in the **Print Name** field is correct.
7. Tap the **Approve** button to accept and save the signature.

   Note: If you approve a signature a second time, the system prompts whether you want to override the stored signature and approval date with the new information. Tap **Yes** to override the original signature and date with the new signature – if there is one – and date.

   The system returns you to the Shipping Manifest screen.
8. Repeat the process for all manifest stops on your Palm device.
9. At the end of the day, upload the collected signatures to the Eclipse system.

More Options from the Shipping Manifest Screen

The Shipping Manifest screen also offers these options:

Menu Options	Function
Clear Stops > Remove Unsigned Stops	Removes any unsigned stops from the Palm device. These stops can either be: • Downloaded to another Palm device. • Added to another manifest and downloaded to a Palm device.
Purge > Purge All Records	Deletes all manifest stops and attached records from your Palm device.

More Options from the Order View Screen

The Order View screen also offers these options:

Button	Function
Done	Returns you to the Shipping Manifest screen.
Comments	Displays the Additional Comments screen, which you can use to enter any comments that you need to attach to the manifest. After entering comments, tap the **Done** button to save the comments and return to the Order View screen.

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More Options from the Approval Screen

The Approval screen also offers these options:

Button	Function
Back	Returns you to the Order View screen. If the authorizing customer has signed the Palm and you tap the **Back** button before tapping the **Approve** button to save a signature, the system deletes the signature. The authorizing customer needs to re-sign for the delivery.
Comment	Displays the Additional Comments screen, which you can use to enter any comments that you need to attach to the manifest. After entering comments, tap the **Done** button to save the comments and return to the Approval screen.

See Also:

Downloading EManifests to Palm Devices

Uploading EManifest Signatures

Using Signatures Attached with EManifest

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Setting Up Palm Devices for EManifest

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Uploading EManifest Signatures

After deliveries are made and signatures collected, upload all signatures and any additional comments to the Eclipse system by performing a HotSync. The system saves the uploaded information in the defined storage ID, and attaches all signatures to their respective invoices and all comments to their respective manifests. In addition, the system changes the order generation's print status to the setting defined in the Print Status Override On Palm E-Manifest Signature Upload control record.

To upload collected electronic signatures to their invoices:

1. Place the Palm device holding the signatures in its cradle, which is connected to the terminal receiving data through a USB cable or local serial connection.
2. On the Palm device, tap the **HotSync** icon to display the HotSync screen.
3. Tap the **HotSync** icon to being the synchronization process.
4. Once the HotSync is complete, all signatures are attached to their respective invoices.

See Also:

Collecting Electronic Signatures with EManifest

Using Signatures Attached with EManifest

Downloading EManifests to Palm Devices

EManifest Overview

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Using Signatures Attached with EManifest

You can view attached EManifest signature images from their invoices and manifests on the Eclipse system. In addition, you can also print, fax, or e-mail the invoices with the attached signatures.

> **Note:** You must have additional code installed with Document Imaging to print or fax invoices with attached signatures. You must have VSI-FAX to e-mail invoices with attached signatures. Contact Eclipse Advance Technical support for more information.

To view an attached signature and comment:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Display the invoice you want to view.
3. Double click on the ***i*** – displayed in the upper right corner of the screen – to display the Attachments screen.
4. Select the imaged signature from the list and press **Enter** to display the following:
   - Stop number, projected delivery time, and the customer receiving the delivery.
   - Manifest number for the stop.
   - The authorizing customer's signature and printed name.
   - The date and time when the manifest stop was signed.
5. After viewing the attached signature, click **OK** to return to the Sales Order Entry screen.
6. Press **Esc** to display the Sales Order Entry Status screen.
7. Use the **Manifest Q** hot key to display the manifest on which the order was placed.
8. Select the order for which to view attached comments.
9. In the **Customer Name/Address** field, review the comment underneath the shipping information.
10. Close the manifest, if needed.
11. Press **Esc** to save all updates and exit the screen.

To print, fax, or e-mail an invoice with its attached signature:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Display the invoice you want to view.
3. Press **Esc** to display the Sales Order Status screen.
4. For the generation to which the signature is attached, place the cursor in the **Prt** field.

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5. In the **Prt** field, press **F10** and select one of the following:

Selection	Function
Y – Yes Print	Prints the invoice with the attached signature. Press **Esc** to print the invoice and return to the Sales Order Entry screen.
F – Fax	Faxes the invoice with the attached signature. • Press **Esc** to display the Fax Memo screen. • Populate the screen, as necessary. • Press **Esc** to send the fax and return to the Sales Order Entry screen.
A – E-mail	E-mails the invoice with the attached signature. • Press **Esc** to display the e-mail format prompt. • At the prompt, enter the format in which to send the e-mail and display the Send E-mail screen. • Populate the screen, as necessary. • Press **Esc** to send the e-mail and return to the Sales Order Entry screen.

6. Press **F12** to exit the Sales Order Entry screen.

See Also:

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Downloading EManifests to Palm Devices

EManifest Overview

Opening File Attachments

Using Indexer Menus

Using Image Tools

Closing Shipping Manifests

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EManifest Setup Overview

Before using EManifest:

- Install the EManifest application onto all Palm devices that will be used to collect signatures.
- If you do not already have the Document Imaging companion product, obtain and install it.
- If you want to print or fax invoices with attached signatures, install the required code with Document Imaging.
- If you want to e-mail or fax invoices with attached signatures, obtain Outbound E-mail and VSI-FAX, if necessary.

  Note: Your Eclipse installer should perform the above setup tasks. If these setup tasks were not completed with your initial installation, contact Eclipse Advance Technical support.

After installing the EManifest application, you must set up your Eclipse system, along with the Palm devices that will be used for collecting signatures. Define the following:

- Control and authorization parameters on the Eclipse system.
- Storage IDs and indexing profiles on the Eclipse system.
- HotSync preferences for EManifest.
- EManifest preferences on the Palm device.

See Also:

EManifest Overview

Setup Requirements for EManifest

Setting Up EManifest HotSync Preferences

Setting Up Palm Devices for EManifest

Signature Capture and Document Imaging Guidelines

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Setup Requirements for EManifest

Following are the control maintenance records and authorization keys used for EManifest.

Control Maintenance Records

Set the following control maintenance records:

Palm Applications

- Palm Manifest Administrator Settings
- Valid E-Manifest Palm IDs

E-Manifest

- E-Manifest Signature Document Profile

Manifest Maintenance

- Manifest COD Message
- Manifest Queue Enabled
- Number Of Signatures/Barcodes Required On A Manifest
- Print Shipping Instructions On Manifest
- Print Status Override On Manifest Close
- Print Status Override On Palm E-Manifest Signature Upload
- Set Print Status When Order Placed On Manifest
- Valid Package Types
- Verify Ship Date/Ship Via For Ready To Manifest

Authorization Key

Assign the following authorization key:

- IMG.EDIT.ALLOWED

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Setting Up EManifest HotSync Preferences

Before using EManifest, set up HotSync preferences specific to EManifest. Do the following:

- Enter an Eclipse serial number to activate the EManifest application.
- Identify you as the Palm device user so that manifests are sent to the correct Palm device.
- Ensure that the Palm device can communicate with the Eclipse server.

To set up EManifest HotSync preferences:

1. On the Palm device, tap the **Manifest** icon to display the Shipping Manifest screen.
2. Tap the **Menu** screen button to display the EManifest menu bar.
3. From the **Options** men, tap **HotSync Preferences** to display the HotSync Preferences screen.
4. In the **User ID** field, enter the Eclipse ID of the person who will be using this Palm device.
5. In the **Host Name** field, enter the name of the Eclipse server.

   Note: You must use a Domain Name Server (DNS) name. You cannot use IP addresses. If you do not know the name of the Eclipse server, contact Eclipse Advance Technical support.

6. Tap the **Enter Serial No.** box to display the Eclipse Serial Number screen.
7. Enter a serial number assigned for the Palm device and tap **OK** to return to the HotSync Preferences screen.

   Note: This serial number is required for EManifest to synchronize with Eclipse. The serial number assigned to one Palm device cannot be used with any other device, and sharing serial numbers violates your licensing agreement. If you do not know what the correct serial number is, contact Eclipse Advance Technical support.

8. Select the following options, as needed:

Option	Function
Sync with Eclipse	Uploads signatures to the Eclipse server. If you need to HotSync the Palm device to the Eclipse server but do not want to upload stored signatures, de-select this option before running the HotSync. For example, you need to HotSync the Palm device to update information for another application and you do not want to upload the signatures at this time.

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Option	Function
Auto Generate Paths	Uses automatically generated synchronization paths when running a HotSync. De-select to display the **Set Paths** button displays, which you can use to define your own synchronization paths: • Tap the **Set Paths** button to display the Sync Paths screen. • In the **Path to load manifest files from** field, enter the pathway of the file from which to download manifests to Palm devices. • In the **Path to save deliveries in** field, enter the pathway of the file to which to upload collected signatures. • Tap **OK** to save the settings and return to the HotSync Preferences screen. **Note:** We recommend that you select **Auto Generate Paths**. If you want to set your own paths, contact Eclipse Advance Technical support.

9. Tap **OK** to save settings and exit the screen.

See Also:

EManifest Setup Overview

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Setting Up Palm Devices for EManifest

Set up EManifest preferences on all Palm devices that will be used to collect delivery-confirmation signatures. Preferences determine how information displays for each listed manifest both before and after signatures are collected.

To set up a Palm device for EManifest:

1. On the Palm device, tap the **Manifest** icon to display the Shipping Manifest screen.
2. Tap the **Show** button to display the Manifest Preferences screen.
3. Select the following preferences, as needed:

Option	Function
Show Completed Stops	Keeps stops displayed on the Palm after they have been signed. De-select to remove signed stops from the displayed list.
Multi-Line Display	Displays the stop number, delivery time, company name, and address for each stop. De-select to display one line only for each stop. **Note:** You can also tap the **Single-Line**/**Multi-Line** button on the bottom of the screen to toggle between views.
Show Approval Dates	Displays the date a manifest stop is signed next to each listed item. De-select to display the manifest stop's shipping information only.
Show Checkboxes	Displays check boxes next to each listed manifest stop. When a manifest stop is signed and the **Show Completed Stops** preference is selected, the check boxes display with checkmarks. De-select to display the listed manifest stops without check boxes.
Show Time-In Prompt	Prompts you with the actual time at which you are having the manifest signed. De-select to *not* be prompted with the actual time at which you are having the manifest signed. **Note:** The actual time at which you have a manifest stop signed is recorded with the signature, whether or not this option is selected.

4. After defining preferences, tap the **OK** button to apply the preferences and return to the Shipping Manifest screen.

See Also:

EManifest Setup Overview

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EPad Overview

The EPad companion product captures point-of-sale (POS) signatures electronically and attaches them to the appropriate invoices. EPad consists of EPad Signature Capture devices attached to your sales counter terminals and Eclipse Electronic Signature Capture application installed on those same terminals.

The EPad process for capturing signatures at your sales counters is simple:

- Capture signatures on an EPad Signature Capture device.
- Attach signatures to their appropriate invoices through a click of a button on the Eclipse Electronic Signature Capture window.
- View, print, fax, or e-mail signatures from their invoices on the Eclipse system.
- Replicate signatures from the sales counter terminal to the network host, which permanently stores the signatures, as needed.
- Maintain your EPad system by deleting old signatures from their temporary storage locations to keep sales counter terminals from becoming overloaded, as needed.

EPad leaves you with a paper-free environment so you no longer need to spend time filing or searching for signed invoices, or run the risk of losing paper-based sales order signatures.

Before using EPad, make sure to complete all setup tasks.

See Also:

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Signature Capture and Document Imaging Guidelines

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Capturing Signatures with EPad

Signatures captured with EPad are automatically attached to their invoices on the Eclipse system.

Capturing signatures with EPad is simple:

- As soon as order generations are entered and invoiced, display the invoice on the Eclipse Electronic Signature Capture window.
- Customers sign for the transaction on the EPad Signature Capture device connected to the sales counter terminal.
- Signatures are then transmitted from the EPad Signature Capture device to the Eclipse Electronic Signature Capture window.
- Once you accept the signature, the system attaches the signature to the invoice on the Eclipse system.

  Note: The settings defined in EPad Settings Maintenance or Eclipse Signature Capture Settings determine how you can use the Eclipse Electronic Signature Capture window. Define all settings before using EPad to capture signatures.

To capture a customer signature with EPad:

1. Enter the customer order.
2. At the terminal attached to the EPad Signature Capture device, display the Eclipse Electronic Signature Capture window.
3. Do one of the following to display the customer's invoice:
   - Click the **Get Recent Invoices** button.
     - If defined, the system prompts you to enter the user ID of the order writer for the invoice. Edit the user ID, as needed, and click **OK**.
     - The system displays the most recent invoices for the customer.
     - Select the invoice from the displayed list and click **OK**.
   - In the **Customer** field, enter either the customer name or the order writer name.
     - The system displays the most recent invoices for the customer or order writer, as appropriate.
     - Select the invoice from the displayed list and click **OK**.
   - In the **Invoice Number** field, enter the invoice number.

   The system populates the **Customer** and **Invoice Number** fields, as needed.
4. In the **Signature Name** field, enter the name of the customer who is signing for the transaction, as needed.

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5. Ask the customer to sign on the EPad Signature Capture device.

   The customer's signature displays on the Eclipse Electronic Signature Capture window just as it does on the EPad Signature Capture device.

6. Click the **Accept** button to accept the signature, attach it to the invoice, and minimize the window if defined.

More Options from the Eclipse Electronic Signature Capture Window

The Eclipse Electronic Signature Capture window also offers these options:

Button	Function
Clear Signature	Clears the customer's signature. The customer must re-sign for the invoice. At the displayed dialog box, click **Yes** to clear the signature.
Clear All	Clears all information from the Eclipse Electronic Signature Capture window, along with the signature. The information must be re-entered, and the customer must re-sign for the invoice. At the displayed dialog box, click **Yes** to clear the window display.

See Also:

EPad Preferences

Setting Up Host EPad Preferences

Setting Up EPad Preferences by Branch

Setting Up EPad Preferences by POS Location

Using Signatures Attached with EPad

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Using Signatures Attached with EPad

After a customer signs for a transaction on the EPad Signature Capture device and you accept the signature, the system attaches the signature to the invoice on the Eclipse system. View the attached signature from the invoice on the Eclipse system.

In addition to viewing signatures, you can print, fax, or e-mail the invoices with the attached signature.

> **Note:** You must have additional code installed with Document Imaging to print or fax invoices with attached signatures. You must have VSI-FAX to e-mail invoices with attached signatures. Contact Eclipse Advance Technical support for more information.

To view an attached signature:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Display the invoice you want to view.
3. Double click on the ***i*** – displayed in the upper right corner of the screen – to display the Attachments screen.
4. Select the imaged signature from the list to display the following:
   - The authorizing customer's signature and printed name.
   - The invoice number.
   - The date and time on which the customer signed for the invoice.
5. After viewing the attached signature, click **OK** to return to the Sales Order Entry screen.
6. Press **Esc** and then **F12** to exit all screens.

To print, fax, or e-mail an invoice with its attached signature:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Display the invoice you want to view.
3. Press **Esc** to display the Sales Order Status screen.
4. For the generation to which the signature is attached, place the cursor in the **Prt** field.
5. In the **Prt** field, press **F10** and select one of the following:

Selection	Function
Y – Yes Print	Prints the invoice with the attached signature. Press **Esc** to print the invoice and return to the Sales Order Entry screen.

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Selection	Function
F – Fax	Faxes the invoice with the attached signature. • Press **Esc** to display the Fax Memo screen. • Populate the screen, as necessary. • Press **Esc** to send the fax and return to the Sales Order Entry screen.
A – E-mail	E-mails the invoice with the attached signature. • Press **Esc** to display the e-mail format prompt. • At the prompt, enter the format in which to send the e-mail and display the Send E-mail screen. • Populate the screen, as necessary. • Press **Esc** to send the e-mail and return to the Sales Order Entry screen.

6. Press **F12** to exit the Sales Order Entry screen.

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Using Indexer Menus

Using Image Tools

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Troubleshooting EPad

If signatures are not attaching to their invoices, use the following two functions to help troubleshoot the issue:

- Imaging Invoice Exception Report – Use to determine which invoices have signatures attached. This is useful in sorting out which transactions, if any, are missing signature attachments.
- Reprocess Msg-Ack Utility – Use to reprocesses any images that are stuck in the msg-in directory by moving them to the msg-ack directory. From the msg-ack directory, the system can attach the signature images to their invoices.

See Also:

EPad Overview

Running the Imaging Invoice Exception Report

Running Additional Imaging Reports

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EPad Setup Overview

Before using EPad:

- Connect the EPad Signature Capture device to the terminal at your sales counter.
- Install the Eclipse Electronic Signature Capture application.
- If you do not already have the Document Imaging companion product, obtain and install it.
- If you want to print or fax invoices with attached signatures, install the required code with Document Imaging.
- If you want to e-mail or fax invoices with attached signatures, obtain Outbound E-mail and VSI-FAX, if necessary.

  Note: Your Eclipse installer should perform the above setup tasks. If these setup tasks were not completed with your initial installation, contact Eclipse Advance Technical support.

After all components are installed, you must set up your Eclipse system, along with the EPad Signature Capture devices that will be used for collecting signatures. Define the following:

- Control and authorization parameters on the Eclipse system.
- Document Imaging parameters on the Eclipse system.
- EPad preferences.

See Also:

EPad Overview

Setup Requirements for EPad

EPad Preferences

Setting Up Host EPad Preferences

Setting Up EPad Preferences by Branch

Setting Up EPad Preferences by POS Location

Signature Capture and Document Imaging Guidelines

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Setup Requirements for EPad

Following are the control maintenance records and authorization keys used for EPad.

Control Maintenance Records

Set up the following control maintenance records:

EPad

- EPad Signature Document Profile
- Print Status Override On EPad Signature Upload
- Prompt For COD Payment During EPad Signature Capture

Imaging

- Valid Imaging Auth Keys

Authorization Key

Assign the following authorization key:

- IMG.EDIT.ALLOWED

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EPad Preferences

Before using EPad Signature Capture devices and Eclipse Electronic Signature Capture application, set up the device and application preferences.

You can set these preferences at three different levels:

- Host – Setting preferences at this level determines all branch and point-of-sales (POS) location preferences. These settings can be overridden at the branch and POS level if defined.
- Branch – Setting preferences at this level determines a single branch's preferences, along with all POS locations within the branch. Branch settings can be overridden at the POS level if defined.
- Individual POS devices – Setting preferences at this level determines a single POS location's settings only, and overrides both host and branch settings if defined.

EPad preferences are grouped into three areas – Validation, General, and Communication Preferences. They are the same whether defined in EPad Settings Maintenance or Eclipse Signature Capture Settings.

Validation Preferences

Set up validation preferences to define the following entry requirements on the Eclipse Electronic Signature Capture window.

- Requirement Preferences:
  - Define which fields must be populated before a customer can sign for a transaction.
  - Define whether counter personnel can display an invoice by manually entering it or whether they must select it from a list of the customer's or order writer's most recent transactions.
  - Define whether the EPad system prompts counter personnel to enter the order writer's ID when selecting invoices from the system.

    For example:

    If the order writer is the same user as the counter person and the only one to use the terminal with EPad, you do not need to activate this preference. If the order writer and counter person are different users or more than one person uses EPad on the terminal, then activate this preference so the correct order writer can be identified.

  Note: The system defaults the order writer to the last person who used EPad on the terminal.

- Invoice Validation Number Preferences – Define whether invoice numbers must be validated against a defined format, and if so, what the format is. For example, define whether generation numbers are required when counter personnel enter or select invoices.

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Note: The order ID and generation number lengths are pre-defined for the entire Eclipse system and cannot be edited when defining validation formats.

General Preferences

Set up general preferences to define how and when the Eclipse Electronic Signature Capture window displays, along with the following:

- The document imaging profile in which to store signatures if you do not want to use the profile defined for the network host in the EPad Signature Document Profile control maintenance record. If you temporarily store signatures on the terminal before replicating to the network host, enter the temporary storage location for this preference.
- The description prefix to identify signature attachments from invoices.

  For example:

  Enter **Sig:** as the description prefix. When a user displays the Attachments screen from an invoice, the attached signature is displayed in the attachments list as **Sig: Customer Name**.
- Whether to use the information entered by the counter person or the information from the system.

  For example:

  The counter person enters the customer as **John Jones**. In the system, the customer is identified as John H. Jones. When the counter person selects the invoice, the system replaces **John Jones** with **John H. Jones** if this preference is selected.
- The amount of pressure needing to be applied to the EPad Signature Capture device when signing.

Communications Preferences

Set up communication preferences to define the host to which to replicate signatures and the terminal with which the EPad Signature Capture device is being used.

In addition, define the following:

- The maximum number of most recent invoices from which the counter person can choose when selecting invoices from the system.

  For example:

  If you enter 10 as the maximum number and the customer has 20 transactions on record, only the most recent 10 transactions display for the counter person. If the customer has only five transactions on record, all five display.
- The number of seconds the EPad device tries to contact the host before timing out.

See Also:

Setting Up Host EPad Preferences

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Setting Up Host EPad Preferences

Before using EPad to collect signatures for invoices, define host preferences. These preferences determine the settings for EPad Signature Capture devices and the Eclipse Electronic Signature Capture application at all of your branches and point-of-sale (POS) locations. Host preferences can be overridden at each branch and POS location if you define the host settings as editable.

For example:

You set the host communication time out preference to 30 seconds. If the EPad application cannot communicate with the host in the 30 second time frame, it stops communication. One of your POS locations has a slower connection, however, and normally takes up to a minute for the EPad application to contact the host. So you define the communication time out preference as editable in order for the POS location to increase the preference to a minute.

For definitions of each preference, see EPad Preferences.

To set up host EPad preferences:

1. From the **System > System Files** menu, select **ePad Settings Maintenance** to display the ePad Settings Maintenance screen.
2. In the **Branch/DFLT** field, enter **default** to create host EPad preferences for all branches and POS locations.

   The **Order ID Length** and **Gen Length** fields display the system-wide order ID lengths and generation number lengths respectively.
3. Set host preferences for the following items by entering a preference value:

Item	Value
Sensitivity (1-100)	A numeric value from 1 to 100 to define the pressure threshold for all EPad devices. We recommend entering **1** as the pressure threshold.
Communication timeout (sec)	The number of seconds that all EPad applications will try to contact the host before timing out.
Require user ID for requests	Whether the EPad system prompts for the order writer's ID when using the **Get Recent Invoices** button on the Signature Capture window.
Max items returned on requests	The maximum quantity of invoices from which the counter person can select.
Signature description prefix	How a signature attachment is identified when selected from the Attachments screen of an invoice.
Signature attachment profile	The document imaging profile in which signatures are stored. The profile entered in this field overrides the profile defined in the EPad Signature Document Profile control maintenance record.
Always replace with host data	Whether to replace any information populated into the Signature Capture window with information from the selected invoice.

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Item	Value
Require account name	Whether to require the **Customer** field on the Signature Capture window to be populated before the counter person can accept the customer's signature.
Require signature name	Whether to require the **Signature Name** field on the Signature Capture window to be populated before the counter person can accept the customer's signature.
Require invoice number	Whether to require the **Invoice Number** field on the Signature Capture window to be populated before the counter person can accept the customer's signature.
Allow manual invoice number entry	Whether to allow the counter person to display an invoice by manually entering the invoice number on the Signature Capture window. Enter **No** to black out the **Invoice Number** field so that manual entry is not allowed. Counter personnel must use a different method to display the invoice.
Require 'S' as first character	Whether to require the invoice number to have an **S** as its first character.
Require gen on invoice numbers	Whether to require a generation number as part of the invoice number. If set to **Yes**, this preference requires the counter person to select the order generation for which the customer signs.
Validate order ID length	Whether to require the invoice number to meet the order ID length requirement as displayed in the **Order ID Length** field. For example, if the system-defined order ID length is 10, then all invoice number entries must have 10 characters to be valid entries. **Note:** The invoice number length includes the **S** but not the generation number.
Validate generation number length	Whether to require the generation number to meet the generation number length requirements as displayed in the **Gen Length** field. For example, if the system-defined generation number length is three, then all generation numbers must have three characters for be valid entries. **Note:** The generation number length includes all characters after the dot (**.**) in the invoice number. **Note:** You cannot activate this preference if you did not enter **Yes** in the **Validate order ID length** field.

4. In the **Editable** field for each item, enter **Yes** or **No** to indicate if the item is editable at your branches and POS locations.
5. Press **Esc** to save your updates and exit the screen.

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Setting Up EPad Preferences by Branch

After defining host EPad preferences, you can define unique preferences for individual branches or territories. These preferences apply to all point-of-sale (POS) locations within the branch or territory, but they can be overridden at each POS location if you define the host settings as editable.

To define unique preferences for a branch or territory, we recommend that you copy the host preferences to the branch or territory. By copying the host preferences, you do not need to re-define each preference. Instead, you only need to edit those values that are unique to the branch or territory. If you want to define completely new preferences for a branch or territory, you can skip copying the host preferences and define all new preferences.

For definitions of each preference, see EPad Preferences.

To set up unique EPad preferences for a branch or territory:

1. From the **System > System Files** menu, select **ePad Settings Maintenance** to display the ePad Settings Maintenance screen.
2. In the **Branch/DFLT** field, enter **default** to display the host EPad preferences for all branches and POS locations.

   Note: If you do not want to base the branch's or territory's EPad preferences off the host preferences, skip to step 7.

3. Use the **Copy** hot key to display the Copy To screen.
4. In the **Br/Terr/All** field, enter the branch or territory for which to define preferences based on the host settings. Enter **All** to copy the host preferences to all branches and territories.
5. Press **Esc** to copy the host preferences to the indicated branch or territory, and to re-display the host EPad settings.
6. Press **Esc** to clear the ePad Settings Maintenance screen of the host values.
7. In the **Branch/DFLT** field, enter the branch or territory for which you are defining unique preferences.

   The system displays the host preferences if you copied the preferences. Otherwise the preference values are not populated.

8. For each item, edit or enter the value as needed.
9. In the **Editable** field for each item, enter **Yes** or **No** to indicate if the item is editable at your POS locations for the branch or territory.
10. Press **Esc** to save your updates and exit the screen.

See Also:

EPad Preferences

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Setting Up EPad Preferences by POS Location

If the host and branch EPad preferences are editable and you need to set up unique preferences at your point-of-sales (POS) locations, use the following windows to define these unique preferences.

For definitions of each preference, see EPad Preferences.

Validation Preferences

Set up validation preferences to define the entry requirements on the Eclipse Electronic Signature Capture window.

To set up EPad validation preferences for a single POS location:

1. Display the Eclipse Electronic Signature Capture window on your terminal.
2. From the **File** menu, select **Settings** to display the Eclipse Signature Capture Settings window.
3. Click the **Validation** tab to display the Validation section of the window.
4. In the **Requirement Preferences** area of the window, select the following preferences, as needed:

Preference	Function
Require Customer	Requires the **Customer** field to be populated before the counter person can accept the customer's signature.
Require Signature Name	Requires the **Signature Name** field to be populated before the counter person can accept the customer's signature.
Require Invoice Number	Requires the **Invoice Number** field to be populated before the counter person can accept the customer's signature.
Manual Invoice Number Entry	Allows the counter person to display the invoice by manually entering the invoice number. De-select this preference to black out the **Invoice Number** field so that manual entry is not allowed. Counter personnel must use a different method to display the invoice.
Prompt for User ID for Eclipse Requests	Prompts for the order writer's ID when using the **Get Recent Invoices** button.

5. In the **Invoice Number Validation** area of the window, select the following preferences, as needed:

Preference	Function
Require 'S' for First Character	Requires the invoice number to have an **S** as its first character.
Require Generation Number on Entered Invoice Numbers	Requires a generation number as part of the invoice number. This setting requires the counter person to select the order generation for which the customer signs.

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Preference	Function
Validate Order ID Length	Requires the invoice number to meet the order ID length requirement as displayed in the **Order ID Length (including 'S')** field. For example, if the system-defined order ID length is 10, then all invoice number entries must have 10 characters to be valid entries. **Note:** The invoice number length includes the **S** but not the generation number.
Validate Generation Number Length	Requires the generation number to meet the generation number length requirement as displayed in the **Generation Number Length** field. For example, if the system-defined generation number length is three, then all generation number entries must have three characters to be valid entries. **Note:** The generation number length includes all characters after the dot (**.**) in the invoice number. **Note:** You cannot select this preference if you did not select the **Require Generation Number on Entered Invoice Numbers** preference.

6. In the **Example Invoice Number** field, verify that the example correctly defines the way all invoices need to be entered.
7. Click the **OK** button to save the settings and exit the window.

General Preferences

Set up general preferences to define how and when the Eclipse Electronic Signature Capture window displays, along with other miscellaneous settings.

To set up general EPad preferences for a single POS location:

1. Display the Eclipse Electronic Signature Capture window on your terminal.
2. From the **File** menu, select **Settings** to display the Eclipse Signature Capture Settings window.
3. Click the **General** tab to display the General section of the window.
4. In the **Attachment Settings** area of the window, set the following preferences, as needed.

Preference	Function
Signature Profile	Defines the document imaging profile in which signatures are stored. The profile entered in this field overrides the profile defined for the host in the EPad Signature Document Profile control maintenance record.

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Preference	Function
Description Prefix	Defines how a signature attachment is identified when selected from the Attachments screen of an invoice. The **Example Description** field shows how signature attachment will display in the Attachments screen.
Minimize after accepting a signature	Minimizes the window on the terminal after a customer sings and the counter personnel accepts the signature.
Always replace entered data with information from Eclipse	Replaces any information populated into the window with information from the selected invoice.
Starting Cursor Location	Defines the field to which the cursor defaults when the window is opened: • **Customer** field. • **Signature Name** field. • **Invoice Number** field.

5. In the **Pressure Threshold** field, drag the button to set the threshold to **10**.
6. Click the **OK** button to save the settings and exit the window.

Communications Preferences

Set up communication preferences to define the host to which to replicate signatures and the terminal with which the EPad Signature Capture device is being used, along with additional communication preferences.

To set up EPad communication preferences for a single POS location:

1. Display the Eclipse Electronic Signature Capture window on your terminal.
2. From the **File** menu, select **Settings** to display the Eclipse Signature Capture Settings window.
3. Click the **Communications** tab to display the Communications section of the window.
4. In the **Terminal ID** field, enter the ID of the Eterm terminal to which the EPad device is connected.

   Note: To access the Eterm terminal ID, from Eterm select the **Configure > Communications** menu to display the Configure Communications window. The ID is displayed in the **ID** field.

5. In the **Eclipse Host Information** area of the window, set the following two preferences:

Preference	Function
Host IP Address	The network host to which you are replicating signatures. **Note:** We recommend that you enter the host name as opposed to the host IP address. To access the host name, from Eterm select the **Configure > Communications** menu to display the Configure Communications window. The host name is displayed in the **Host** field.

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Preference	Function
Host Port	The network host port. To find the host port, display the Phantom Status screen. The port number is displayed in the **Status** field and consists of five alphanumeric characters, such as **zzzzz**.

6. Click the **Test Communications** button to make sure that the EPad device is communicating correctly with the host.
   - If you set up communications correctly, the system prompts you with "You have successfully communicated with the host!". Click the **OK** button to continue.
   - If you set up communications incorrectly, the system prompts you with "The connection to the host could not be established! Check your settings and try again!". Click the **OK** button to return to the Eclipse Signature Capture Settings window and re-enter the Eclipse host information.
7. In the **Maximum Number of Items to Retrieve from Host on Each Communication** field, drag the button to define the maximum quantity of invoices from which the counter person can select.
8. In the **Eclipse Communication Timeout Length** field, drag the button to define the number of seconds that the EPad device will try to contact the host before timing out.
9. Click the **OK** button to save the settings and exit the window.

See Also:

EPad Preferences

Setting Up Host EPad Preferences

Setting Up EPad Preferences by Branch

Signature Capture and Document Imaging Guidelines

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Manifest Processor Overview

Use the Manifest Processor companion product to electronically attach delivery-confirmation signatures to their invoices in the Eclipse system. The application works with conventional paper-based manifests that you scan after signatures are collected. Using the scanned manifest images, the application electronically attaches signatures by reading barcodes printed with each signature line on a manifest, and using the barcodes to identify to which invoices signatures need to be attached.

Using Manifest Processor is simple:

- Create paper-based manifests for deliveries. When printing the manifests, use the barcode format to print barcodes for each order or stop on the manifest.
- When delivering, collect all signatures on the paper-based manifests.
- At the end of the day, scan each manifest and save the images in a special manifest processor directory.
- Use the Manifest Processor application to crop out each signature on a manifest and attach the signature to the appropriate invoice on the Eclipse system. You can process a single manifest image separately or all manifest images in the Manifest Processor directory simultaneously.
- In the Eclipse system, access the signature directly from its invoice. From the invoice, print, fax, e-mail, or copy the signature, as needed.
- If the application cannot process a manifest signature, it prompts you that a misread error occurred. Following the application's directions, identify the reason why the signature could not be processed and manually select the signature to attach it to its invoice.

Manifest Processor electronically files all manifest signatures with their appropriate invoices. You no longer need to spend time filing or searching for signed manifests, or run the risk of losing paper-based confirmation signatures.

Before using Manifest Processor, make sure to complete all setup tasks.

See Also:

Creating Manifests for Manifest Processor

Collecting Signatures for Manifest Processor

Processing Signatures with Manifest Processor

Auto-Processing Signatures with Manifest Processor

Handling Misreads in Manifest Processor

Using Signatures Attached with Manifest Processor

Manifest Processor Setup Overview

Signature Capture and Document Imaging Guidelines

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Creating Manifests for Manifest Processor

Before using the Manifest Processor application, build the manifests for which to collect the signatures. In building your manifests, we recommend that you first invoice all orders that you are adding to the manifests. If you do not invoice an order, the signatures collected could be attached to all generations for the order.

When printing the manifests, select a format to include barcodes and signature lines for all orders or stops as defined in the Number of Signatures/Barcodes Required On A Manifest control maintenance record. You can define a printing format to which to default in the Default Manifest Report Type control maintenance record.

To create a manifest to use with Manifest Processor:

1. From the **Whse Mgt > Warehouse Queues** menu, select **Shipping Manifest Queue** to display the Shipping Manifest Queue screen.
2. Build the manifest for which you are collecting signatures.
3. After building the manifest, use the **Lock** hot key to lock the manifest and prevent other orders from being added to it.
4. Use the **Print** hot key to display the Print Options screen.
5. In the **Report Type** field, press **F10** and select one of the following:

Report Type	Description
Full Manifest w/ BC & Ship Tickets	Prints the manifest with barcodes and signature lines for each order or stop, as defined in the Number of Signatures/Barcodes Required On A Manifest control maintenance record. This option also prints shipping tickets for each order on the manifest.
Full Manifest w/ BC	Prints the manifest with barcodes and signature lines for each order or stop, as defined in the Number of Signatures/Barcodes Required On A Manifest control maintenance record.

6. In the **Show Address** and **Show Shipping Instructions** fields, indicate whether the shipping address and instructions should be printed on the manifest with each delivery stop.
7. Use the **Print** hot key to print the manifest and return you to the Shipping Manifest Queue screen.
8. Press **Esc** to save the manifest and exit the screen.

See Also:

Collecting Signatures for Manifest Processor

Processing Signatures with Manifest Processor

Auto-Processing Signatures with Manifest Processor

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Collecting Signatures for Manifest Processor

Collect signatures for each order or stop on a manifest, as defined in the Number of Signatures/Barcodes Required On A Manifest control maintenance record.

Before collecting each signature, make sure to count and record the number of items delivered to the customer. When the customer signs for the delivery, he or she is acknowledging the number of items delivered.

To collect a signature for Manifest Processor:

1. Deliver the stop on the manifest.
2. With the authorizing customer, count the number of items being delivered for the order or stop.
3. On the manifest, enter the number of items on the order's or stop's **# Items** line.
4. On the manifest, have the authorizing customer sign and print his or her name, and enter the current date.
5. After making all deliveries and returning to the warehouse, give all signed manifests to the warehouse personnel in charge of processing the manifest signatures.

See Also:

Creating Manifests for Manifest Processor

Processing Signatures with Manifest Processor

Auto-Processing Signatures with Manifest Processor

Manifest Processor Overview

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Processing Signatures with Manifest Processor

Use the Manifest Processor application to automatically attach manifest signatures to their invoices.

After scanning a manifest, select it from the Manifest Processor application and process it. The application electronically attaches the manifest's signatures by reading barcodes printed with each signature line on a manifest, and using the barcodes to identify to which invoices signatures need to be attached. If the system cannot successfully process a signature, use the Misread function to identify and resolve the error.

Before processing signed manifests, do the following:

- Create the Manifest Processor directory either on the terminal being used with Manifest Processor or on your network. Use this directory to store all scanned manifest images.
- Set up your scanner to scan images at 600 x 600 dots-per-inch (dpi) resolution. This resolution is needed to accurately capture barcodes and their corresponding signatures on the manifests, and then attach signatures to their invoices.

To process signatures with Manifest Processor:

1. Scan each signed manifest at 600 x 600 dpi resolution, and store the scanned manifests in the Manifest Processor directory on your terminal or network.

   Note: If you have the **Use faster (but less accurate) barcode scanning** option selected, you can scan manifests at a lower dpi resolution. We do not recommend selecting this option.

2. Display the Eclipse - Manifest Processor window on your terminal.
3. In the Eclipse - Manifest Processor window, display the Manifest Processor directory by doing one of the following:
   - In the **Directory** field, enter the pathway for the Manifest Processor directory. The system displays the directory in the body of the window.
   - Click on the **Browse For Folder** icon – located to the right of the **Directory** field – to display the Browse For Folder window. Browse to the Manifest Processor directory and click **OK** to return to the Eclipse - Manifest Processor window with the directory displayed in the body of the window.
4. In the body of the window, locate and click on the scanned manifest image that you want to process.
5. Click the **Process** button to process the manifest and its signatures.
   - After successfully processing the manifest signatures, the system deletes the manifest from the Manifest Processor directory if you have the **Delete successfully processed files** option selected.

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- If the system could not process any of the signatures on the manifest, it displays the Misreads for directory dialog box. Click the **OK** button and handle the misread error, as needed.

6. Exit the window.

See Also:

Handling Misreads in Manifest Processor

Auto-Processing Signatures with Manifest Processor

Using Signatures Attached with Manifest Processor

Creating Manifests for Manifest Processor

Collecting Signatures for Manifest Processor

Manifest Processor Setup Overview

Manifest Processor Overview

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Auto-Processing Signatures with Manifest Processor

Use auto-processing to automatically process all manifests in the Manifest Processor directory simultaneously, instead of selecting one manifest to process separately.

Upon opening the Manifest Processor application, browsing to the Manifest Processor directory, and selecting the auto-processing option, the system processes all manifests in the directory. It then continues to process all scanned manifests placed into the directory until the application is closed or the auto-processing option is de-selected. If the system cannot successfully process a signature, use the Misread function to identify and resolve the error.

Before using auto-processing, set up you Manifest Processor directory and scanner.

To auto-process signatures with Manifest Processor:

1. Scan each signed manifest at 600 x 600 dots-per-inch (dpi) resolution, and store the scanned manifests in the Manifest Processor directory on your terminal or network.

   Note: If you have the **Use faster (but less accurate) barcode scanning** option selected, you can scan manifests at a lower dpi resolution. We do not recommend selecting this option.

2. Display the Eclipse - Manifest Processor window on your terminal.
3. In the Eclipse - Manifest Processor window, display the Manifest Processor directory by doing one of the following:
   - In the **Directory** field, enter the pathway for the Manifest Processor directory. The system displays the directory in the body of the window.
   - Click on the **Browse For Folder** icon – located to the right of the **Directory** field – to display the Browse For Folder window. Browse to the Manifest Processor directory and click **OK** to return to the Eclipse - Manifest Processor window with the directory displayed in the body of the window.
4. Click the **AutoProc** button to display the Auto-Process dialog box.
5. Click **Yes** to process all signed manifests in the Manifest Processor directory.
   - After successfully processing the manifest signatures, the system deletes the manifests from the Manifest Processor directory.
   - If the system could not process any of the manifests, the manifests remain in the Manifest Processor directory. Handle the misreads, as needed.

   Note: Once you select the Auto-Process option, the application continues to process manifests as soon as they are placed in the Manifest Processor directory. To discontinue auto-processing manifests, either click on the **Process** button or close the application.

6. Exit the window.

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Handling Misreads in Manifest Processor

If the Manifest Processor cannot successfully read and process signatures on a manifest, you must identify the misread errors and manually process the signatures.

Misread errors can occur when the Manifest Processor application cannot read a signature's barcode or cannot find a signature on a manifest. The application identifies the reason for the misread along with the file that it could not process.

The application directs you in processing misread signatures:

- Open the manifest file in the Misread function.
- Select each misread signature.
- Enter the invoice number to which the signature should be attached
- Enter the cropping profile to use in capturing the signature.

To handle misreads in Manifest Processor:

1. Display the Eclipse - Manifest Processor window on your terminal.
2. Click the **Misreads** button to display the Manifest Processor - Misreads window.

   The window displays the following information:

Field	Description
Date	The date and time on which the misread error occurred.
File	The file that was misread.
Page	The page number of the manifest on which the misread error occurred.
Description	The description of the misread error, such as **Control barcode not found**.

View Only

3. Select the misread error that you want to resolve, and click the **Review** button to display the Misread Correction Form window.

   If the system prompts you with the Inverted Image dialog box, do one of the following:

   - Click **Yes** if the image is upside down.
   - Click **No** if the image is correctly displayed.

   The system displays the image right-side up, with the barcodes for the misread signatures highlighted in green.
4. Select the misread signature by clicking near the upper-left corner of the signature area and dragging the mouse to the lower-right corner of the signature area.
   - The system highlights the selected area in yellow, and displays the selection in the Current Selection area of the window.

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- To re-select the signature area, repeat step 4. The system deletes any previous selection.

5. In the **Sales Order Number** field, enter the sales order number for the selected signature.
6. In the **Type of Selection** field, enter the name of the cropping profile to define the area coordinates to capture.
7. Click the **Capture This Selection** button to capture the signature.

   The system highlights the captured signature in blue.
8. Repeat steps 4-7 for each misread signature on the manifest.

   The system displays the number of attachments captured and the total number of attachments for the misread manifest in the lower right side of the window.
9. Click the **Send Attachments** button to process the misread signatures.

   The system displays the Transmitted Corrections dialog box when the signatures have been successfully processed.
10. Click **OK** to close the Misread Correction Form window and return to the Manifest Processor - Misreads window.

    The misread manifest displays with a green check mark next to it to indicate that it was successfully processed.
11. Select the processed manifest and click the **Clear** button to delete if from the Manifest Processor - Misreads window.

    Click the **Clear All** button to delete all misread manifests from the Manifest Processor - Misreads window.
12. Click the **Close** button to save changes and exit the window.

See Also:

Processing Signatures with Manifest Processor

Auto-Processing Signatures with Manifest Processor

Manifest Processor Overview

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Using Signatures Attached with Manifest Processor

You can view attached Manifest Processor signature images from their invoices on the Eclipse system. In addition, you can also print, fax, or e-mail the invoices with the attached signatures.

> **Note:** You must have additional code installed with Document Imaging to print or fax invoices with attached signatures. You must have Outbound E-mail and VSI-FAX to e-mail and fax invoices with attached signatures. Contact Eclipse Advance Technical support for more information.

To view an attached signature:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Display the invoice you want to view.
3. Double click on the ***i*** – displayed in the upper right corner of the screen – to display the Attachments screen.
4. Select the imaged signature from the list and press **Enter** to display the following:
   - The authorizing customer's signature and printed name.
   - Date signed.
   - Number of items delivered to the customer.
5. After viewing the attached signature, click **OK** to return to the Sales Order Entry screen.
6. Press **F12** to exit the Sales Order Entry screen.

To print, fax, or e-mail an invoice with its attached signature:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Display the invoice you want to view.
3. Press **Esc** to display the Sales Order Status screen.
4. For the generation to which the signature is attached, place the cursor in the **Prt** field.
5. In the **Prt** field, press **F10** and select one of the following:

Selection	Function
Y – Yes Print	Prints the invoice with the attached signature. Press **Esc** to print the invoice and return to the Sales Order Entry screen.
F – Fax	Faxes the invoice with the attached signature. • Press **Esc** to display the Fax Memo screen. • Populate the screen, as necessary. • Press **Esc** to send the fax and return to the Sales Order Entry screen.

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Selection	Function
A – E-mail	E-mails the invoice with the attached signature. • Press **Esc** to display the e-mail format prompt. • At the prompt, enter the format in which to send the e-mail and display the Send E-mail screen. • Populate the screen, as necessary. • Press **Esc** to send the e-mail and return to the Sales Order Entry screen.

6. Press **F12** to exit the Sales Order Entry screen.

See Also:

Processing Signatures with Manifest Processor

Auto-Processing Signatures with Manifest Processor

Manifest Processor Overview

Opening File Attachments

Using Indexer Menus

Using Image Tools

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Manifest Processor Setup Overview

Before using Manifest Processor:

- Install the Manifest Processor application onto all terminals that will be used to process and attach signatures.
- If you do not already have the Document Imaging companion product, obtain and install it.
- If you want to print or fax invoices with attached signatures, install the required code with Document Imaging.
- If you want to e-mail or fax invoices with attached signatures, obtain Outbound E-mail and VSI-FAX, if necessary.

  Note: Your Eclipse installer should perform the above setup tasks. If these setup tasks were not completed with your initial installation, contact Eclipse Advance Technical support.

After installing Manifest Processor, you must set up your Eclipse system, along with the Manifest Processor application. Define the following:

- Control and authorization parameters on the Eclipse system.
- Storage IDs and indexing profiles on the Eclipse system.
- Manifest Processor options on the Manifest Processor application.
- Manifest Processor cropping coordinates on the Eclipse system.

See Also:

Setup Requirements for Manifest Processor

Setting Up Manifest Processor Options

Setting Up Cropping Coordinates for Manifest Processor

Manifest Processor Overview

Signature Capture and Document Imaging Guidelines

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Setup Requirements for Manifest Processor

Following are the control maintenance records and authorization keys used for Manifest Processor.

Control Maintenance Records

Set up the following control maintenance records:

Manifest Maintenance

- Default Manifest Report Type
- Manifest COD Message
- Manifest Queue Enabled
- Number Of Signatures/Barcodes Required On A Manifest
- Print Shipping Instructions On Manifest
- Print Status Override On Manifest Close
- Print Status Override On Manifest Processor Signature Upload
- Set Print Status When Order Placed On Manifest
- Valid Package Types
- Verify Ship Date/Ship Via For Ready To Manifest

Authorization Key

Assign the following authorization key:

- IMG.EDIT.ALLOWED

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Setting Up Manifest Processor Options

Set up Manifest Processor options to define the network host and Eterm terminal to which Manifest Processor needs to communicate, along with the amount of time it tries to contact the host before timing out.

In addition, define scanning resolution requirements of manifests, as well as storage options for manifest signature files.

To set up Manifest Processor Options:

1. Display the Eclipse - Manifest Processor window on your terminal.
2. From the **Tools** menu, select **Options** to display the Manifest Processor - Options window.
3. In the **Eclipse Host** area of the window, populate the following fields:

Field	Description
Eclipse Host	The network host to which you are uploading signatures. To access the host name, from Eterm select the **Configure > Communications** menu to display the Configure Communications window. The host name is displayed in the **Host** field.
Service Port	The network host port. To find the host port, display the Phantom Status screen. The port number is displayed in the **Status** field.
Terminal ID	The ID of the Eterm terminal on which the Manifest Processor application is installed. To access the Eterm terminal ID, from Eterm select the **Configure > Communications** menu to display the Configure Communications window. The ID is displayed in the **ID** field.

4. Click the **Test Connection** button to make sure that the Manifest Processor is communicating correctly with the host.
   - If you set up communications correctly, the system prompts you with "Got reply, connection OK for processing." Click the **OK** button to continue.
   - If you set up communications incorrectly, the system prompts you with "Test connection attempt unsuccessful: Could not connect to xxx." Click the **OK** button to return to the Manifest Processor - Options window and re-enter the Eclipse host information.
5. In the **Misc Options** area of the window, select the following as needed:

Option	Description
Delete successfully processed files	After a signature file has been processed and attached to its invoice, deletes it from the Manifest Processor directory in which it was stored.

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Option	Description
Use faster (but less accurate) barcode scanning	Allows you to scan in manifests at a resolution lower than 600 x 600 dots-per-inch (dpi) resolution in order to process signature files more quickly. **Note:** If you select this option, signature files may not be processed or attached to invoices as accurately as if they had been scanned at a 600 x 600 dpi resolution.
Use persistent socket services	Uses socket communications to connect to the host. **Note:** We recommend that you select this option.

6. In the **Network Timeout** field, drag the button to define the number of seconds that the Manifest Processor application will try to contact the host before timing out.
7. Click the **OK** button to save the settings and exit the window.

See Also:

Manifest Processor Setup Overview

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Setting Up Cropping Coordinates for Manifest Processor

Set up Manifest Processor cropping coordinates to define to the system the area on signed manifests that needs captured and attached to invoices.

There are two steps in setting up cropping coordinates:

- Calculating – To calculate cropping coordinates, you need to create, print, and scan a sample manifest with barcodes and signatures. Using the Manifest Processor application and this sample, select the area on manifests to crop and to calculate that area's coordinates.
- Defining – In Barcode Manifest Maintenance, define the cropping coordinates to the Eclipse system based on the Manifest Processor's calculations. The system uses these coordinates to capture all Manifest Processor signatures, unless the settings are de-activated.

To calculate cropping coordinates for Manifest Processor:

1. Create and scan a sample signed manifest with barcode.
2. Display the Eclipse - Manifest Processor window on your terminal.
3. In the Eclipse - Manifest Processor window, display the Manifest Processor directory by doing one of the following:
   - In the **Directory** field, enter the pathway for the Manifest Processor directory. The system displays the directory in the body of the window.
   - Click on the **Browse For Folder** icon – located to the right of the **Directory** field – to display the Browse For Folder window. Browse to the Manifest Processor directory and click **OK** to return to the Eclipse - Manifest Processor window with the directory displayed in the body of the window.
4. In the body of the window, locate and click on the sample manifest image.
5. From the **Tools** menu, select **Cropping Location Tool** to display the Locating Form – Control File Settings window.
6. Click near the upper-left corner of the signature area and drag the mouse to the lower-right corner of the signature area.
   - The system highlights the selected area in yellow and the corresponding barcode in green. This is the area that the system will crop for all signatures.
   - To re-select the signature area, repeat step 6. The system deletes any previous selection.

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7. When you have the area selected, click on the **Calculate** button to display the Control File Settings window.

   This window displays the coordinates for the selected area.

8. Keep this window open, as you will use it to populate the cropping coordinates in the Eclipse system.

To define cropping coordinates in the Eclipse system:

1. Calculate the cropping coordinates.
2. Display Eterm on your terminal.
3. From the **System > System Files** menu, select **Manifest Settings** to display the Barcode Manifest Maintenance screen.
4. In the **Profile/New** field, enter **new** to display a list of current profiles.
5. In the list, select **New** and press **Enter**.
6. In the **Profile/New** field, enter a name for the cropping profile, such as **Manifest Sigs**.
7. Populate the following fields with the information provided in the Control File Settings window:

Field	Description
Offset X	From the Control File Settings window, copy the value for **X** into this field.
Offset Y	From the Control File Settings window, copy the value for **Y** into this field.
Width	From the Control File Settings window, copy the value for **Width** into this field.
Height	From the Control File Settings window, copy the value for **Height** into this field.
Character Count	From the Control File Settings window, copy the value for **Character Count** into this field.
Document Storage Profile	Enter the document storage profile in which manifest signatures will be stored.
Enabled	Enter **Yes** to enable this cropping profile. If you want to use another cropping profile, enter **No** for the current profile and enable the other profile.

8. On the Control File Settings window, click the **OK** button to close the window.
9. Close the Locating Form – Control File Settings window, and delete the sample manifest from the Manifest Processor directory.
10. From Eterm, press **Esc** to save changes and exit the Barcode Manifest Maintenance screen.

See Also:

Setting Up Manifest Processor Options

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