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***SOFTWARE RELEASE
NOTIFICATION***

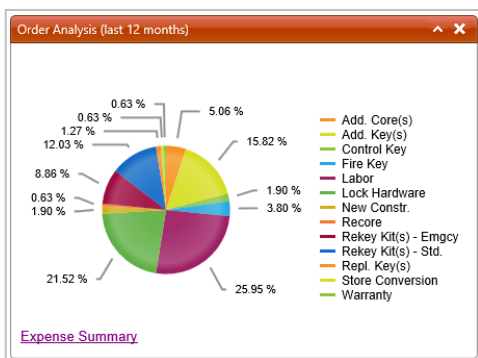
**Making
KeyControl[™]
Simple.**

Order Analysis – Expense Summary

The **Order Analysis** chart now reflects associated cost and spending for the various order types represented in the report. To receive a detailed report of the specific order costs by type, click on the **Expense Summary** link and use the popup filter to set the appropriate query (Date range, Bill To, Order Type) that corresponds to your inquiry. By clicking Show Report the User will be provided with an expense summary report reflecting the various costs associated with the spend (Freight, products, packaging, services, etc.). Further filtering can be done on the report itself by clicking on the modify links in each header.

The **Order Analysis Report** also lists the **Invoice Amount** within the report (by order) for an accounting of cost associated with each individual order. The report still maintains the existing functionalities and reflects a detailed list of order numbers with the customer PO, order type, requested by, date, ship to, and cylinder/key/hardware quantities. Additional filtering for date range and order types can also be utilized to create a custom exportable listing in Excel.

Example:



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Expense Summary
Demo Retail Specialty

Date Range: 7/1/2018 to 7/31/2018

Bill To: (all)

Order Type: (all)

Show Report

Expense Summary Demo Retail Specialty

Export to PDF Print

INSTAKEY Security System

Date Range: 7/1/2018 to 7/31/2018 Bill To: (all) Order Type: (all)

Expense Category	Expense
Freight	\$102.50
Other	\$10.54
Products	\$994.28
Services	\$1,376.35
Total	\$2,483.67

Total Locations: 259
InstaKey Locations: 140 (54.1%)
Avg. Expense per Location: \$17.74

Product Group	Product Type	Qty	Expense	% of Total
Freight	Freight	5	\$102.50	4.1 %
Other	Other	1	\$10.54	0.4 %
Products	Cylinders	15	\$790.50	31.8 %
Products	Keys	23	\$118.15	4.8 %
Products	Packaging	3	\$8.13	0.3 %
Products	Padlocks	2	\$59.50	2.4 %
Products	Tailpieces	5	\$18.00	0.7 %
Services	Labor	4	\$1,152.50	46.4 %
Services	Miscellaneous	2	\$223.85	9.0 %
Total			\$2,483.67	

Order Analysis Demo Retail Specialty

Start Date: 7/1/2017 End Date: 7/31/2018 Set Date Range

Filter Order Type: Add. Core(s) Apply Filter

Page size: All 7 items in 1 pages

Order Number	Customer PO	Order Type	Requested By	Close Date	Send To	Invoice Amount	Key Qty	Cyl Qty	Hw Qty
1180	29002	Add. Core(s)	WORK OASIS	7/11/2018	Demo Retail Specialty 0169 - Bel Air	\$151.44	0	2	1
1170	28503	Add. Core(s)	KEN BROUGH	6/5/2018	Demo Retail Specialty 0016 - Latham	\$69.30	1	1	1
1122	27564	Add. Core(s)	WORK OASIS	2/23/2018	Demo Retail Specialty 0125 - York	\$99.27	0	1	2
1119	26957	Add. Core(s)	CHERYL Z. MULLEN	2/16/2018	Demo Retail Specialty 0122 - Matthews	\$422.08	1	1	1
1115	27425	Add. Core(s)	WORK OASIS	2/8/2018	Demo Retail Specialty 0127 - Manahawkin	\$95.97	0	1	1
1085	26922	Add. Core(s)	CHERYL MULLEN	1/5/2018	Demo Retail Specialty 0163 - Henrico (Pump)	\$66.80	1	1	0
1078	26789	Add. Core(s)	CHERYL Z. MULLIN	12/25/2017	Demo Retail Specialty 0094 - Bowie	\$61.70	0	1	0

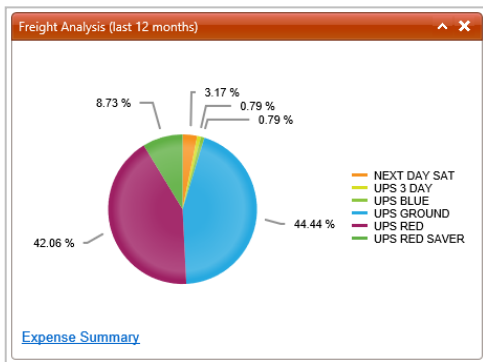
Page size: All 7 items in 1 pages

Freight Analysis – Expense Summary

The **Freight Analysis** chart now reflects associated cost and spending for the various shipping types represented in the report. To receive a detailed report of the specific order costs by type, click on the **Expense Summary** link and use the popup filter to set the appropriate query (Date range, Bill To, Ship Type) that corresponds to your inquiry. By clicking Show Report the User will be provided with an expense summary report reflecting the various costs associated with the spend (UPS Red, Blue, Ground, etc.). Further filtering can be done on the report itself by clicking on the modify links in each header.

The **Freight Analysis Report** also lists the **Freight Expense** within the report (by order) for an accounting of costs associated with each individual order. The report still maintains the existing functionalities and reflects a detailed list of order numbers with the date, ship to, order type, and ship method. Additional filtering for date range and order types can also be utilized to create a custom exportable listing in Excel.

Example:



Freight Expense Summary

Demo Retail Specialty

[Export to PDF](#)
[Print](#)

Date Range	Bill To	Order Type
7/1/2018 to 7/31/2018	(all)	(all)

Freight Type	Qty	Expense	% of Total
UPS GROUND	3	\$28.50	27.8 %
UPS RED	1	\$38.50	37.6 %
UPS RED SAVER	1	\$35.50	34.6 %
Total		\$102.50	

Shipping Type	Percentage
UPS RED	37.6 %
UPS GROUND	27.8 %
UPS RED SAVER	34.6 %

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 File Edit View Favorites Tools Help
Freight Expense Summary
 Demo Retail Specialty
 Date Range: 7/1/2018 to 7/31/2018
 Bill To: (all)
 Order Type: (all)
 Show Report

Freight Analysis

Demo Retail Specialty

Start Month: July, 2018
 End Month: July, 2018
 Show Report

Filter Order Type: All items checked

Filter Ship Method: All items checked

Order Number	Close Date	Send To	Expense	Order Type	Ship Method
1182	07-27-2018	Demo Retail Specialty 0043 - Concord	\$8.50	Add. Key(s)	UPS GROUND
1181	07-20-2018	Demo Retail Specialty 0004 - Berlin	\$38.50	Add. Key(s)	UPS RED
1177	07-13-2018	Demo Retail Specialty 0128 - Auburn		Labor	UPS GROUND
1164	07-12-2018	Demo Retail Specialty 0173 - Foxboro, MA	\$11.50	New Constr.	UPS GROUND
1180	07-11-2018	Demo Retail Specialty 0169 - Bel Air	\$35.50	Add. Core(s)	UPS RED SAVER
1179	07-02-2018	Demo Retail Specialty 0127 - Manahawkin	\$8.50	Add. Key(s)	UPS GROUND

Order Detail - UPS Notification Emails

A new **UPS Notification Email** tool has been added to the Order Detail page to provide a quick way for the User to identify individuals (by email) and provide automatic notification of the shipment progress for a placed order. This field is located on the Order Detail screen at time of order creation or during modification.

To use the **UPS Notification Email** feature, the User simply enters the appropriate email(s) into the field and the UPS shipment notifications (Shipped, transit, delays, delivered, etc.) will be sent to the identified individuals.

Example:

Modify Order Date Created: 08/13/2018

Order Number: 1192	Due Date: 8/18/2018
Batch Order: <input type="radio"/> Yes <input checked="" type="radio"/> No	
Customer PO: 12345	Attention: Store Manager
Requested By: Loss Prevention	Credit Cards: --New-- <input type="button" value="Add / Edit"/>
Order Type: Add. Key(s)	Request Type: Email
Bill To: Demo Retail Specialty Arts & Crafts Inc.	Ship To: Demo Retail Specialty 0001 - Moorestown
Shipping Method: UPS GROUND	Shipping Confirmation Email:
<input type="checkbox"/> No Charge Shipping <input type="checkbox"/> No Charge Order <input type="checkbox"/> Waive Expedite Fee	
Instructions Accounting Notes Customer Service Notes Production Notes	Add Notes from Template:
Reference: Demo Retail Specialty 0001 - Moorestown (1) Store Operating Key	--- Select Template ---
	New Template...

Add Keys / Cylinders – Pinning Adjustment

A new **Pinning Adjustment** feature has been added to the **Add Keys / Cylinders** page to allow the User to specifically select the appropriate operating key step for the pinning of the new cylinder. Using the drop-down arrows associated with the key access type (Grand Master, Master, User, etc.) the User can tell the system how to generate the cylinder pinning for production of the cylinder and operation with the correct keys in circulation.

Note: *The system will continue to default to active steps unless the user specifies otherwise.*

This additional **Pinning Adjustment** tool can be used when adding new cylinders for a specific purpose and step, such as a new core to accompany a Step Change Rekey Kit on a future step. Please contact Customer Support if you would like additional assistance in understanding how this tool can work for your system or procedures.

Example:

Add Keys / Cylinders

Order By:
Door DHI Key Holder Key Name

Select Door:

Door Selected:
0001: Front Doors

Door Headquarters:
[Demo Retail Specialty 0001 - Moorestown](#)
 1180 Nixon Dr.
 Moorestown, NJ 08054

Active Cylinders: 4 (this Door) ▶ Select from Active Cylinder(s) below, or choose alternate Cylinder DHI here:

System:

Cylinder DHI:

DHI - Used - Keyway (flagged)

Order Cylinders

Order Cylinders	Cylinder DHI	Keyway	# Cylinders Active	# Cylinders to Order
<input checked="" type="checkbox"/>	SKD100	F06	18	<input type="text" value="1"/>

Part ID:

Unlisted Part:

Cyl. Marking:

Service Notes: Keyway: F06

Include Hardware Kit(s): (Qty)

Order Keys

Step:

GGMK GHK MK UK

1
2
3
4
5
6
7
8
9

Steps: Current + Next Key Steps Fire Dept. Key

Key DHI	Keyway	Order Keys	Key Step:	1	2	3	4	5	6	7	8	9	Key Stamping
SKD100	F06	<input type="checkbox"/> User Keys	Qty:	<input type="text"/>	<input type="text"/>								
		<input type="checkbox"/> Step Keys	Qty:	<input type="text"/>	<input type="text"/>								
SKD100	F06	<input type="checkbox"/> Control (CTRL) Keys	Qty:	<input type="text"/>	<input type="text"/>								

for cylinder removal ONLY

Order Detail – Batch Printing

A new **Batch Order** tool has been added to the **Order Detail** page to allow the User to identify multiple orders to be processed or shipped together by production (orders shipping together, associated projects, etc.) linked together in batches. To use this tool the User simply identifies the orders with a commonality and clicks the radio button for Yes / No on the **Order Detail** screen. Once the order is identified as part of a batch the system will allow the User to identify if it will be added to an existing or new batch. The batches are then tracked by number within the database.

The user can also view associated batch orders using the **View Batch Orders** link found on the **Order Detail** page of orders currently listed in a batch. This will display all order associated with the specific order batch number.

Example:

View Orders

Open
 Closed
 All

Print: 0 Orders Selected (20 Order Max.) to

Page size: 50 2 items in 1 pages

Order #	Send To	Create Date	Due Date	Close Date	Keys	Cylinders	Hardware	Print
1192	Demo Retail Specialty 0001 - Moorestown	8/13/2018 1:21:08 PM	8/17/2018 Friday		11	9	5	1192 <input type="checkbox"/>
1191	Demo Retail Specialty 0001 - Moorestown	8/13/2018 9:40:08 AM	8/17/2018 Friday		1	1	0	1191 <input type="checkbox"/>

Page size: 50 2 items in 1 pages

Modify Order Date Created: 08/14/2018

Order Number: 1191 Due Date: 8/18/2018

Batch Order: Yes No Batch Number: 845-1

Customer PO: 123 Attention: Store Manager

Requested By: Loss Prevention Credit Cards: --New--

Order Type: Add. Key(s) Request Type: Email

Bill To: Demo Retail Specialty Arts & Crafts Inc. Ship To: Demo Retail Specialty 0001 - Moorestown

Shipping Method: UPS GROUND Shipping Confirmation Email:

No Charge Shipping
 No Charge Order
 Waive Expedite Fee

[Instructions](#) |
 [Accounting Notes](#) |
 [Customer Service Notes](#) |
 [Production Notes](#)

Add Notes from Template:

Reference: Demo Retail Specialty 0001 - Moorestown

(1) Store Operating Key
(1) Store Core

Order Items

[Keys \(1\)](#)
[Cylinders \(1\)](#)
[Hardware \(0\)](#)

Order Actions

[Modify Order](#)
[Create Estimate](#)
[Submit to Production](#)
[Close Order](#)

Other Functions

[Key Level Status](#)
[Bulk Order Keys](#)
[Attachments \(0\)](#)
[Shipment Tracking](#)
[Clone Order](#)
[Preview Reports](#)
[View Batch Orders](#)

View Orders

Open
 Closed
 All

Print: 0 Orders Selected (20 Order Max.) to

Page size: 50 2 items in 1 pages

Order #	Batch Number	Send To	Create Date	Due Date	Close Date	Keys	Cylinders	Hardware	Print
1192	845 - 1	Demo Retail Specialty 0001 - Moorestown	8/13/2018 1:21:08 PM	8/17/2018 Friday		11	9	5	1192 <input type="checkbox"/>
1191	845 - 1	Demo Retail Specialty 0001 - Moorestown	8/13/2018 9:40:08 AM	8/17/2018 Friday		1	1	0	1191 <input type="checkbox"/>

Page size: 50 2 items in 1 pages