Inform Upgrade v21

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Thank you for joining this webinar! We hope you found this session valuable and gained valuable insight into the new features offered.

*Included here are the answers to all of the questions posed during the session. For additional guidance, be sure to check out our vast, context-sensitive **Online Help within Inform** by pressing the F1 key, or by choosing the **Help Menu** at the top of the **Inform** Function Bar. A comprehensive knowledge base is also available to you at any time by visiting DDIUsers.com. We're here to help!*

You can also contact our Extreme Support Team by calling 203-364-1200.

Sales

When can I change between a Quote & Order?

The quick toggle is available any time before the order or quote is initially saved. Once an order number is assigned the quick toggle is no longer available.

For Drop Ship Spawns, does the order have to be classified as Drop Ship Type?

No, the PO Type on the Header section does not need to be set. Any product marked as Drop Ship will be spawned into a separate order.

Is Drop Ship Spawn compatible with POS orders?

No, our spawn options do not apply to POS.

Does the Shift key work for Multi-Line Select?

Yes, you can use Shift to select a range of items in addition to the CTRL key for individual lines.

Can Procurement options such as the Warehouse or Promise Date be changed from Multi-Line Select?

These options are not currently available with multi-line select, only the options in the Details menu (right-click) can be modified in bulk.

Can the Bill For Backorders option be restricted?

This feature is disabled by default. Once configured it is available to all users, so long as the order meets the necessary parameters.

Can the Bill For Backorders be used for POS orders?

POS orders have the payment applied directly to the order so there is no need for this functionality in POS.

Do all products need to be backordered to use Bill For Backorder?

Yes, the button is only available if the entire order is backordered and no prior invoicing or spawns exist.

How do I ship the merchandise after the initial 'bill for backorder' invoice? Can I make partial shipments?

Inventory should be shipped as normal via Ship Confirmation and your regular invoicing workflow. The initial deposit invoice is applied against future shipments.

Can I add freight to the invoice?

Freight can be added to the shipments that follow the initial deposit (which means your customer gets billed for that separately).

Is Bill For Backorders compatible with Inform WMS?

Yes. After the backorder deposit invoice is generated you can set your inventory to ship. From there it gets picked no different than any other order.

How does Bill For Backorder effect Procurement?

There shouldn't be any adverse effects on purchasing. Inventory is still committed and shipped as normal.

Will the Commitment Scheduler remind a purchaser, particularly if there is no vendor assigned to a product?

The scheduler determines when the product gets committed. Once it is committed it should appear in Projected PO, Critical Inventory, & Special Purchase Requisitions. Products unassigned to vendors are identified on these screens.

Once a requested ship date is set, will the order automatically print on that date?

No. The requested date is only used to determine the commitment date so that purchasing has enough time to procure the inventory. Alternatively you may consider using the Recurring Order – Line Item Scheduler which generates new orders on specific dates (these don't auto-print either but can automated reports can identify newly generated orders).

How does the scheduler differ from a Blanket Order?

A blanket order automatically uncommits all backordered line items. The scheduler can override that on a per product/qty basis when the commitment date is reached.

Does the scheduler work in conjunction with Company Master setting Do not commit items on a Special P/O until P/O is received?

If the scheduler is used and the commitment date is reached, then the product/qty will be committed, even if the special purchase order has yet to be received.

eCommerce Pro

Is the text message notification only for web orders?

At the moment this is an exclusive feature to eCommerce Pro, though that could change in the future.

Can we use eCommerce Pro right now? Previously we were told we had to wait as it wasn't ready yet?

Yes! We are ready for rapid site deployment. Though it takes time to craft the perfect site it is possible to be operational live in about 2 months. Please contact ecommpro@ddisys.com for more information.

Accounting

Is there security on the G/L Lock feature?

Yes, use the Access Level named G/L PERIOD LOCK to limit who can access this screen. We've also added levels for re-indexing the GL and allowing the previous year to be reopened once locked.

Once locked can a period be re-opened to make further entries?

No. The purpose of the lock is to guarantee financial accuracy and prevent any further changes. Consider using

period 13 for year-end journal entries (paired with access level ALLOW RE-OPEN G/L YEAR IF PERIOD IS LOCKED).

Purchasing & Inventory

Has a forecast parameter been added that will display Non-Stock items in Projected PO if they are committed?

Committed items always appear in Projected PO, there is no parameter or setting for that.

Can parameters by set by Product Line or by individual Product?

No, the parameters are set for the Company or now by individual Warehouse. Individual product settings can be applied on the Purchasing tab of the Product Master but they are not the same as the forecast parameters.

Inform WMS

Are there security measures for Inventory Adjustment since there is no variance report?

You can limit which users can perform a Product Count with the access level INVENTORY ADJUSTMENT. In addition reports can optionally be run using the Inventory Adjustment report.