

PRODUCT INFORMATION

BSD

Enhancements for Version 8.5

2nd updated version

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1 Introduction

This document describes the new features in version 8.5 of the Book Sales and Distribution System (BSD).

All enhancements described in this upgrade manual are available free of charge to BSD customers as stipulated in the update terms of the service agreement.

Please note:

- Version 8.5 of the Klopotek applications has been released exclusively for **Oracle10g™**. For further information, please see the EN_WP_CS_Oracle_10g_settings.pdf whitepaper.
- You may use either **FUZZY! Post™ V5.4** or FUZZY! Post™ V3.9 for version 8.5. You can set the data types to determine which FUZZY! Post™ should be used.
- **FUZZY! Double® 2.x** will also be switched to the current version 5.4, because FUZZY!™ version 2.x is no longer maintained. You can set the FUZZY! Double® version that you will be using in the data types.

2 BSD Customer

2.1 Filtering representatives in the customer pool (110187)

To make it easier to assign representatives to a customer, a defined company group affiliation now restricts which representatives can be selected.

The positions of the "Publisher" drop-down menu and the "Representative" input box have been switched so that it is easier to select a publisher on the "Notes/Rep." record in the customer pool.

2.1.1 Filtering at proprietor level

As long as you do not select a publisher, the display in the representative selection window is not automatically filtered. If you select a publisher, the display of the representative selection window is automatically filtered by the company group that is set implicitly when you select a publisher.

2.1.2 Filtering at company group level

The publishers in the "Publisher" drop-down menu and the representatives displayed in the modal representative selection window are automatically filtered by means of the company group selection.

2.2 Publisher-wide consolidation options (111968)

The "Use Proprietor Data" check box has been added to the consolidation model on the "Invoice Terms" record. The system only displays the "Use Proprietor Data" check box if you are at company group level and if you have not set a shipping association for the customer.

If the "Use Proprietor Data" check box is selected, the invoicing batch procedure uses the consolidation model at proprietor level for the order lines of the company group. The system does not calculate the amounts and weights separately for each company group but adds the values of all company groups and compares the values with the terms of the consolidation model at proprietor level. If the system determines the terms of the customer using a central account, the system uses the values of the central account.

2.3 Notifications on documents (112133)

A "Sep.Notification" check box has been added to the "Invoice Terms" record which enhances the previous available drop-down menu "Notification to". You can only modify this box at proprietor level.

If you select the "Sep.Notification" check box, this system does not create any notification items on invoices and/or delivery notes but separate notification documents when invoicing orders for this customer depending on the selection in the drop-down menu. If the system determines the terms of the customer using a central account, the system uses the value of the central account.

2.4 One shipping type per shipping model¹ (120371)

The multi-select list for the "Shipping Type" box on the "Shipment" record in the customer pool has been replaced by a normal drop-down menu. This way, it is no longer possible to unintentionally select several shipping types for one shipping model.

¹ This function is already part of version 8.0.

3 Orders

3.1 Delivery note number and invoice number on order lists (111047)

The delivery note number and the invoice number for invoiced lines are now displayed in the search results for orders. The system displays the delivery note number and the invoice number without the year next to the quantity of an order line instead of the processing status. The "Invoiced" processing status has thus been eliminated.

3.2 Copying the tracking number ² (125190)

The "Tracking Details" option opens the window of the same name on the invoice and delivery documents. The "Tracking Details" window displays the tracking numbers³ per shipping unit if these numbers have been entered by an external system.

You can now copy the tracking number from the "Tracking Details" box to the clipboard, for example, to query the status of the shipping unit from your transport company using this number.

² This functionality is already available in version 8.4.

³ Depending on the transport company, the tracking number may have a different name, e.g. shipping unit number, package number, reference number, control number, etc.

4 Standing Orders

4.1 End date before start date (123092)⁴

It may be necessary for you to be able to enter an end date that is before the start date for a standing order in some individual business models.

For example, you could make it possible for your customer to cancel the standing order within 30 days even though the first volume was already delivered. The customer should see the date of his/her cancellation as the end date of the standing order for legal reasons.

⁴ The functionality already exists starting in version 8.3.

5 Proof Copies

5.1 Delivery note number and invoice number on order lists (111047)

The delivery note number and the invoice number for invoiced lines are now displayed in the search results for proof copies. The system displays the delivery note number and the invoice number without the year next to the quantity of an order line instead of the processing status. The "Invoiced" processing status has thus been eliminated.

6 Credit Notes

6.1 Marketing activity order entry for credit notes (110805)

A marketing activity order entry for credit notes which functions like the marketing activity order entry for orders has been added to the "Credit Notes" record bundle.

If you open a credit note in activity mode, a new credit note order is automatically created. This new credit note order is a copy of the order selected in the credit note window. The values in the order header and the order lines are automatically transferred to this new credit note order. Only the customer is not copied and left open.

Each time a new entry is created in the open record bundle, the order and lines are copied as long as the bundle is in activity mode.

6.2 Delivery note number and invoice number on order lists (111047)

Credit note numbers for invoiced lines are now displayed in the search results for credit notes. The system displays the credit note number without the year next to the quantity of an order line instead of the processing status. The "Invoiced" processing status has thus been eliminated.

7 BSD Invoicing

7.1 Publisher-wide consolidation options (111968)

The "BSD invoicing (FAB)" batch procedure takes into account the "Sep.Notification" check box from the "Invoice Terms." record in the customer pool when determining the terms of the consolidation model.

If the "Use Proprietor Data" check box is selected, the invoicing batch procedure uses the consolidation model at proprietor level for the order lines of the company group. The system does not calculate the amounts and weights separately for each company group but adds the values of all company groups and compares the values with the terms of the consolidation model at proprietor level. If the system determines the terms of the customer using a central account, the system uses the values of the central account.

7.2 Notifications on documents (112133)

The "BSD invoicing" (FAB) batch procedure takes into account the "Sep.Notification" property from the "Invoice Terms." record in the customer pool when creating the documents.

If you select the "Sep.Notification" check box, the system does not create any notification items on invoices and/or delivery notes but separate notification documents when invoicing orders for this customer depending on the selection in the drop-down menu. If the system determines the terms of the customer using a central account, the system uses the value of the central account.

7.3 Credit card authorization (120091)

Apart from credit card authorization via Bibit Global Payment Services and VeriSign, Inc., the Web Service now also supports the Moneris Solutions Corporation service provider.

7.4 Notification or pro forma for "planned" products or products "in production"⁵ (120695/122680)

You can define per company group whether the "BSD Invoicing (FAB)" batch procedure is to generate pro formas or notifications for products that have the "planned" and "in production" status using a system setting.

⁵ This function is already part of version 8.0.

8 Pro forma

8.1 Delete released pro forma lines⁶ (125102)

You are now able to remove order lines from a pro forma that has been released. This modification needs to be confirmed before you can save.

⁶ This function is already part of version 8.0.

9 BSD Batch Procedures

9.1 Processing marketing activity numbers during order import⁷ (116711)

You can make a setting to validate marketing activity numbers for the order import carried out by the "BSD Order import (from standard interface) (ord_tra)" batch procedure.

You can define the following settings:

9.2 Shared number range for various document types (122830/115833)⁸

You can now set that the document numbers may be created from a shared number range for all document types (offers, credit notes, delivery notes, notifications, pro formas, invoices, return confirmations, reverse postings and reversed posting invoices).

9.3 Customer import – new fields in the interface (121695)

The following fields have been added to the import interface of the "FCB BSD Import customer for migration (CTM_MIG)" batch procedure:

- "Order qty rounding",
"Order Qty Rounding" box from the "Medium T." record in the customer pool
- "Cancel pending order"
"Cancel Pend.Order" box from the "Invoice Terms" record in the customer pool
- "Company group specific document"
"Comp. Gr-Specific Doc." box from the "Invoice Terms" record in the customer pool
- "Separate notification"
"Sep.Notification" checkbox from the "Invoice Terms" record in the customer pool
- "Use proprietor data for consolidation method"
"Use Proprietor Data" checkbox at company group level for the consolidation method from the "Invoice Terms" record in the customer pool

If these new fields are empty in the interface, they are automatically preset with values from the preset table during import from the interface.

The import interface enhancements mentioned for the "FCB BSD Import customer for migration (CTM_MIG)" batch procedure can also be found in the import interface of the "FCB JSD Import customer for migration (CTMJ_MIG)" batch procedure. The enhancement does not, however, affect the import interface of the "FCB JSD Import customer for migration (CTMJ_MIG)" batch procedure.

⁷ This function is already part of version 8.3.

9.4 Timeout for PDF creation (125356/125168)⁹

PDF files are created with PDF Factory but not at the same time as the batch run. It is therefore possible for the batch procedure to end normally even though the PDF file is not finished. If an automatic copy script is run after the batch procedure, the PDF file is not found

You can now delay the end of the batch procedure with an adjustable timeout.

⁸ The functionality already exists starting in version 8.2.

⁹ The functionality already exists starting in version 8.2.

10 Warehouse Management

10.1 Bundle stock movements¹⁰ (116662)

You can bundle several stock entries that have the same stock movement during import from the interface. A new system setting has been introduced for this purpose.

If you are working with a warehouse managed at reprint level, you have to deactivate the setting for bundling stock entries that have the same stock movement.

If you are using the new setting, one stock entry is automatically generated with, for example, 3,750 copies for a goods in posting consisting of 10 pallets with 375 copies each, instead of 10 stock entries with 375 copies each.

10.2 Exporting stock type and finishing state (126727)

In the last processing step, the "FCB Stock entries to SAP (STM_EXP)" batch procedure exports the stock entry data to a file that can then be transferred to SAP. Information about the stock type and finishing state has been added to this fixed-length format export file.

¹⁰ This function is already part of version 8.0.