

Extend the Power of your Accounting Package!

# **USER'S** GUIDE

	.1
Collaboration – the Key to the Future	.4
Data Reconciliation	.4
GETTING STARTED	.7
Configuration	.7
Preferences Page	.7
Diagnostics Mode	.7
Compact Database on Close	.9
Vendor Info	.10
Credmetrix ID	.10
Default Values	.10
Data Source	.10
Plugins Page	.12
Order Source Plugins	.12
Web Plugins	.12
Accounting Package Plugins	.12
Custom Plugins	.12
Order Preferences Page	14
Enforce System Prices on Incoming Line Items	.15
Apply Special Price Levels on Order Import	.15
For Incoming New Accounts, Assign	.15
For Discrepancies on Existing Accounts	.15
Approve Orders for Existing Account,	.15
Use Sub-Rep Info	.16

Insert Unidentified Items	16
Field Mappings Page	17
Script Scheduler Page	18

# IMPORTING SYSTEM DATA ...... 19

Importing Data from Your System	19
Importing Accounts Data	19
Importing Data from Files	20

WORKING WITH INCOMING DATA	23
Importing Orders	23
Checking Credit2	25
CreditSCAN	26
Uploading to CREDMETRIX	27
Editing Accounts	27
Editing Orders	28
Data Reconciliation	29
Reconciling Terms	30
Reconciling Sales Sources	31
Reconciling Agencies	32
Reconciling Accounts	33
Reconciling Items	35
Exporting Accounts to Your System	37
Exporting Orders to Your System	38
Deleting an Order	38

MAINTAINING YOUR DATA	.39
Maintaining Account Data	.39
Maintaining SKU Data	. 40
Bar Codes	. 40
Label Config	.41
Price List	.41
Price List Config	.41
Exporting to a Text File	. 42
Editing an Item	. 42
Categories and Keywords	. 43

PUBLISHING YOUR DATA	
Transmitting Invoices	

APPENDIX	Α	.47
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### **COLLABORATION – THE KEY TO THE FUTURE**

Collaboration is the key to success in the high-tech marketplace of the future. Companies that are able to share intelligence efficiently and securely with accounts, reps, and colleague vendors will always have a leg up on the competition.

When a vendor introduces a new product, for example, how quickly is he able to share that data with his reps and accounts? If the sharing is instantaneous, sales will begin climbing that very day. If the sharing is dependent upon printing sell sheets, mailing them to the field, and follow-up calls, it will be weeks before sales are affected. For most vendors, the information required to "make things happen" resides in their accounting software. XTROVERT's mission is to get that essential data to where it needs to go, and to retrieve vital data from the field that can enhance decision-making in the back office.

XTROVERT, through its open "plugin" architecture, allows vendors to utilize one common gateway to connect to an unlimited number of external entities.

### DATA RECONCILIATION

When a vendor import orders from field reps or from a trade show, for example, there are numerous "checkpoints" that the orders need to pass through before they are ready to be pulled into the vendor's accounting package. Is the order for an existing account or a new account? If a new account, what terms should be assigned? Should the suggested terms be accepted? Should the suggested discount be accepted? And many more. Executed manually, all of these "reconciliations" can take quite a bit of time. Even if the orders themselves are transmitted electronically, a good deal of manual "massaging" is required before the orders are ready for import into a typical accounting package. XTROVERT, by automating all of these processes, reduces this reconciliation time to a minimum.

# INTRODUCTION

Here's an example of XTROVERT's "learning curve" when applied to the import of new accounts.

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When you import a batch of orders, XTROVERT searches for accounts that do not appear in your accounting package. It uses a sophisticated algorithm to compare names, addresses and zip codes for matches. Often, an account will differ only slightly from an existing account in your system. Is it really a new account or is it a variant of an existing account?

There are many possible reasons for such "variants": a slight difference in spelling, one digit could be off on the zip code, or this could truly be a new account. If this is actually an existing account, XTROVERT allows you to "bind" the incoming version of the account to the version that you have in your accounting package. This insures that any future incoming orders for this account will be assigned to the

# INTRODUCTION

proper account in your package automatically.

XTROVERT thus learns as it goes, binding by binding, becoming smarter with each "correction". Likewise with reps, SKUs, terms, and other classes of data – all of these incoming classes of data need to be compared to values in your system. XTROVERT does what it can automatically, and asks you for help where there is doubt. The more time goes by, the less XTROVERT asks you.

### CONFIGURATION

The first thing you should do after installing XTROVERT is to configure your company settings. Choose File→Configure, or click the "Configure" button. You will be presented with the Preferences page (tab) of the Configure screen.

### **PREFERENCES PAGE**

XTROVERT uses its own database to store data. If you want to access an archived batch of sent orders, you use this setting to access that batch.

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**DIAGNOSTICS MODE:** when troubleshooting, switch into Diagnostic mode. This

will help SYNQWARE tech support diagnose the problem.

Compact Database on Close: If not compacted regularly, Access databases

can grow quickly in size and ultimately become corrupted. Compacting the database at the end of every XTROVERT session is good preventive maintenancy.

### **VENDOR INFO**

**Credmetrix ID:** This allows you to interact with the CREDMETRIX credit-checking web service. CREDMETRIX enables you to perform one-click credit checks on new accounts, as well as to upload your credit data to the cooperative. Every vendor in the cooperative has a CREDMETRIX ID Number.

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**VENDOR INFO** 

Default Terms, Shipping Method, Rep, Order Class, Account Class: If incoming new accounts are missing data for any of these categories, XTROVERT will use these defaults if you so choose (see "For Incoming New Accounts" on the Order Preferences page).

### **PLUGINS PAGE**

"Plugins" allow XTROVERT to connect to external entities with no custom integration. To add a new plugin to XTROVERT, enter the plugin name and click "DOWNLOAD". To request to register a new plugin on your account, please visit http://www.websynq.com/plugins *Fig.4 Plugins Page* 

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#### **Order Source Plugins**

These plugins allow you to pull orders from a variety of sources: Rep Software Packages, EDI Networks, Web Sites, and the like.

#### **Web Plugins**

These plugins allow you to publish your product catalog directly to web libraries, as well as to transmit electronic invoices and orders to rep groups, accounts, and warehouses. Retailers and reps use these libraries to keep up to date with your product catalog.

#### Accounting Package Plugins

This plugin connects XTROVERT to your accounting software. Plugins exist for most major packages.

#### **Custom Plugins**

Custom plugins can perform any sort of data transformation on the data stored in XTROVERT. To load a custom plugin, choose File→Configure→Plugins, and set the plugin type to Custom Plugin. Click "Add" and select your plugin. It is now loaded. Now you can "schedule" your plugin on the "Plugin Scheduler" page.

For example, one client created a "FreightAssign" plugin. This plugin assigns the freight value as a line item in an order based upon the total of the order. Orders over a certain value have free freight, orders that value have a certain preset freight.

The author of this plugin, a Vitamin company that sells to Health Food stores, scheduled this plugin to run after every import. Once the orders come in, the "Shipping" line item is added and they are ready to be exported to the Accounting system.

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AFTER ORDER IMPORT	FreightAssign	

Plugins. Click on the plugin of your choice and click "Run."

# **ORDER PREFERENCES PAGE**

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**Enforce System Prices on Incoming Line Items** – If an incoming order has items priced differently than the prices in the system, which prices apply?

**Apply Special Price Levels on Order Import** – Many accounting packages have multiple price levels depending on volume or other factors, such as the "class" or "profile" of the account. The price levels may even apply only to a single account.

For Incoming New Accounts, Assign (Default Values or Incoming Values) – When orders come in for accounts not yet in the system, we'll need to decide how to assign the Rep, Terms, Shipping Method and other values for this account.

**For Discrepancies on Existing Accounts** – when you import an order for an existing account, the values on the order may not conform to the values for that account in the system. The Rep may be different, or special terms may be requested. If you choose "ALWAYS APPLY INCOMING VALUES", the requested values will be imported for this order. If you choose "ALWAYS APPLY SYSTEM VALUES", the system values will be applied blindly, regardless of the requested values. If you choose "PROMPT FOR RESOLUTION", XTROVERT will ask you in the case of each conflict which value is to be applied.

Approve Orders for Existing Account, No Conflicts – If an order comes in for an existing account, and contains no discrepancies, do you want to automatically export it to your accounting system? Clicking this box precludes the need to manually approve such orders.

**Use Sub-Rep Info** – some vendors use both the Agency and Sub-Rep information on incoming orders. Others collapse these two categories into one.

**Insert Unidentified Items –** If you click this option, XTROVERT will insert unidentified SKUs into its SKU table.

### FIELD MAPPINGS PAGE

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rom To	Add	Remove

Many accounting systems allow you to define custom fields. Field Mappings establish a "pairing" between a field in XTROVERT's internal table—or a string value — and a custom field in one of your accounting system's tables. Let's say you have created a custom field in the Items List of your accounting system which you want to map to XTROVERT's UPC field when you import SKUs into XTROVERT. To do so, select "Import Items" in the "Function" combo box, add the source field (field from your accounting system) and the target field (field in XTROVERT). When the data is imported, it will now populate the proper fields in XTROVERT.

### SCRIPT SCHEDULER PAGE

This page is very powerful. It allows you to run SQL scripts linked to any XTROVERT event.

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### IMPORTING DATA FROM YOUR ACCOUNTING SYSTEM

When you first begin using XTROVERT, it's important to import data from your accounting system. By comparing this data to incoming data, XTROVERT can determine if an account is new or existing, if a value needs to be transformed, and the like.

Make sure that you have configured your Accounting Package plugin for performing these imports.

First, choose Import→Accounts. Next, Import→Items. Next, Import→Lists. This will import everything you need to process orders.

#### Importing Accounts Data

If you have defined custom fields in your accounting system, you can map them to the appropriate XTROVERT fields in the Field Mappings section of the Configuration screen.

### Importing Data from Files

To import data from a file (not from your accounting package) choose Import $\rightarrow$ Import Data From File. Cases where this may be necessary: rep zip code ranges, account lists, etc.

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Here is how you would import an account list. After selecting "ACCOUNTS" as the import mode, click "Import" and choose the file to import. When the data is first imported, the column headings will be blank, as follows:

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You can now click on each column header to assign that column to the proper field in XTROVERT. As you assign each column, the field names will appear in the column headers, as follows: When you have assigned all of necessary fields to their respective columns, click "Save" and that data will be saved in XTROVERT's Accounts table.

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Importing Orders

To import orders, click the "Imp Ords" button in the upper left hand corner of the main screen. You will see the following dialog box:

These are the plugins that have been designated as "Order Sources" in File $\rightarrow$ Configure $\rightarrow$ Plugins. If this is your first time pulling from an order source, you'll first need to click "Configure" in order to configure the Order Source. To pull from an Order Source, simply select the plugin for that source and click "Process".

Once the new batch of orders has been imported, they will appear in XTROVERT's main grid. Accounts that do not yet exist in your accounting package are marked "NEW" in the ACC STATUS column. Press the Reconcile button to display the Reconciliation screen. This screen will allow you to create bindings for the incoming data.



# WORKING WITH INCOMING DATA

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Note that in the ORD STATUS field, there may be "conflicts" that are present on the orders. "Conflicts" mean that the values on the order are not identical to the values for that account in the accounting system.

### Checking Credit

For vendors who participate in the CREDMETRIX Credit Cooperative, XTROVERT seamlessly incorporates credit-checking into the order import process. This allows you to import orders and check credit without ever having to "step outside" the program. Click on an order in the main grid, and click on the "Cred Check" button above. You'll see a grid that looks like this :

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(%)         100         0         0         0         0         0         0           3.981788         1005-10.27         1113.36         154.13         0.00         0.00         0.00           1005-10.27         1113.36         154.13         0.00         0.00         5.00           1005-10.27         1175.56         0.00         0.00         5.00           1005-10.27         934.48         296.40         0.00         5.00           1005-12.75         934.48         296.40         0.00         5.00           1005-12.75         934.48         296.40         0.00         5.00           1005-12.75         934.48         296.40         0.00         5.00           1005-12.75         934.48         296.40         0.00         5.00           1005-12.75         934.48         296.40         0.00         5.00           1005-12.75         934.48         296.40         94.18         9.00         5.00           1005-12.75         13.90         113.19         114.19         114.19         10.18           (%)         199.76         139.36         0.00         0.00         5.00           1005-10.11         193.82		LINCERE!	2009-60-38	475.24	0.00	0,08	0.00	- K00	
J. Matter         1000-10-27         144 84         0.00         0.26         0.20         0.20         0.00           1000-10-27         1118.36         134.13         0.00         0.00         5.00           1005-10-27         1175.55         0.00         0.00         5.00           1005-10-27         934.48         296.40         0.00         5.00           1005-12-13         80.11         1017.38         866.21         0.00         6.00           1006-02-17         436.57         936.19         124.37         014.16         0.00           1006-02-16         19.07         816.21         0.00         6.00         0.00           1006-02-06         19.07         816.21         0.00         6.00         0.00           1006-02-17         436.57         936.19         124.37         014.16         0.00           1006-02-06         19.07         816.21         0.10         10.01         10.02           (%)         35         26         20         13         7         10.01           (%)         19.07         198.36         0.00         0.00         5.00         10.00           (%)         1005-12-05         201.40		· (~)		100		•		0	_
1000-40-27         1128.36         154.13         0.08         0.00         0.08           1005-40-27         1275.55         0.00         0.08         0.00         0.08           1005-10-27         934.48         298.40         0.00         0.00         0.08           1005-12-15         80.11         1017.18         866.21         0.00         0.08           1005-12-15         80.11         1017.18         866.21         0.00         0.08           1005-01-05         19.87         934.38         934.38         0.08         0.08           1005-01-05         19.87         818.18         114.18         0.08         0.08           (%)         7         35         26         20         13         7           1005-10-11         193.32         0.00         0.00         0.00         0.00           1005-10-11         193.32         0.00         0.00         3.06         0.00           1005-10-12         193.38         0.01         0.00         3.06         1.00           1005-10-14         201.40         65.00         0.02         0.00         1.01           1005-10-16         201.40         65.00         0.00 <t< td=""><td>9</td><td>2,94258</td><td>1005-10-22</td><td>246.841</td><td>9.89</td><td>0.00</td><td>11,00</td><td>3.00</td><td></td></t<>	9	2,94258	1005-10-22	246.841	9.89	0.00	11,00	3.00	
2005-45.27         1275.55         0.00         0.00         0.00           2005-45.27         934.48         296.40         0.00         0.00           2005-12.75         934.48         296.40         0.00         0.00           2006-01.17         936.57         936.38         934.38         614.30         0.00           2008-01.17         936.57         936.38         934.38         614.30         0.00           2008-01.17         936.57         936.38         934.38         614.30         0.00           (%a)         2008-01.17         936.57         936.38         934.38         614.30         0.00           (%a)         2008-01.17         936.57         936.38         70         10.00         0.00           (%a)         2008-01.11         193.30         0.00         0.00         0.00         0.00           2008-01.04         201.40         65.00         0.00         0.00         0.00         0.00           2008-01.06         201.40         65.00         0.00         0.00         0.00         0.00           2008-01.06         201.40         65.00         0.00         0.00         0.00         0.00           2008-01.06			2005-10-27	3118.36	154.13	9.08	0.00	8.08	
1000-10-27         934.48         298.40         0.00         0.00           1005-12-35         80.11         1017.38         866.21         0.00         6.00           1005-01-17         936.37         936.18         938.38         934.38         0.00           1000-01-17         936.37         936.18         938.38         934.38         0.00           (%)         35         26         20         43         7           1000-10-10         193.90         0.00         0.00         0.00         0.00           (%)         7         35         26         20         43         7           1000-10-11         193.90         0.00         0.00         0.00         0.00           1000-10-11         193.90         0.00         0.00         0.00         0.00           1000-10-11         193.91         0.00         0.00         0.00         0.00           1000-10-14         196.34         0.00         0.00         0.00         0.00           1000-10-16         201.40         65.00         0.00         0.00         0.00           1000-10-16         201.40         65.00         0.00         0.00         0.00			2005-20-27	3475.55	0.00	0.00	0.00	2.05	
1005-12-35       80.11       1017.38       866.21       0.00       0.00         1000-01-17       90.6.37       936.18       10.8.18       0.00         1000-01-17       90.6.37       936.18       10.8.18       0.00         1000-01-06       19.80       818.18       818.18       016.18         (%)       35       26       20       83       7         1000-10-11       193.80       0.00       0.00       0.00       0.00         1000-10-11       193.80       0.00       0.00       0.00       0.00         1000-10-11       193.80       0.00       0.00       0.00       0.00         1000-10-11       193.80       0.00       0.00       0.00       0.00         1000-10-12       193.80       0.00       0.00       0.00       0.00         1000-10-14       196.34       0.00       0.00       0.00       0.00         1000-10-16       201.40       65.00       0.00       0.00       0.00         1000-10-06       201.80       65.00       0.00       0.00       0.00         (%)       76       24       8       8       8       8         (%)			1005-10-27	974-48	296.60	0.081	00.01	0.06	
1000-01-17     936.37     936.18     938.38     936.18     936.18       2000-02-06     19.80     918.18     818.18     818.18     818.18       (%a)     35     26     20     83     7       3.800455     2005-02-06     198.76     215.49     6.00     6.00       10.01-10-11     193.80     0.00     0.00     0.00       2005-11-14     198.76     215.49     6.00     0.00       2005-11-14     198.76     0.00     0.00     0.00       2005-11-14     198.76     0.00     0.00     0.00       2005-11-14     198.76     0.00     0.00     0.00       2005-11-14     198.76     0.00     0.00     0.00       2005-11-14     198.76     0.00     0.00     0.00       2005-11-14     198.76     0.00     0.00     0.00       2005-11-15     198.80     0.00     0.00     0.00       2005-11-14     198.76     0.00     0.00     0.00       2005-11-15     201.40     65.00     0.00     0.00       2005-11-16     201.40     65.00     0.00     0.00       4			2015-12-15	80.11	1017.38	866.21	(1)00	ac.00	
1000-42-06     19.80     92.8.19     82.8.19     81.8.19       (%a)     35     26     20     43     7       3.80435     2.005-020     2.98.76     2.13.49     8.60     8.60     8.60       1003-10-11     193.81     0.00     0.00     0.00     3.00       2008-81-06     201.40     66.00     0.00     0.00     3.00       1003-10-14     198.74     8.00     0.00     3.00       2008-81-06     201.40     66.00     0.00     0.00       1003-10-19     201.81     65.00     0.00     0.00       1003-81-06     201.40     65.00     0.00     0.00       1003-81-06     201.40     65.00     0.00     0.00       1003-81-06     201.40     65.00     0.00     0.00       1003-81-06     201.40     65.00     0.00     0.00       1003-81-06     201.40     65.00     0.00     0.00       1003-81-06     101.81     60.00     0.00     0.00       1003-81-06     101.81     60.00     0.00     0.00       1003-81-06     101.81     60.00     0.00     0.00       1003-81-06     101.81     60.00     0.00     0.00			2008-01-17	\$16.57	106.10	114.11	414.18	3.00	
(%a)         35         26         20         13         7           3. 00455         2005-0-01         200-01         200-01         200-01         0.00         0.00         0.00           2005-12-11         193.80         0.00         0.00         0.00         0.00         0.00           2005-12-14         296.76         201.40         85.00         0.00         0.00         0.00           2005-12-04         291.40         85.00         0.00         0.00         0.00         0.00           2005-12-04         291.40         85.00         0.00         0.00         0.00         0.00           2005-12-04         291.40         85.00         0.00         0.00         0.00         0.00           2005-12-04         291.40         85.00         0.00         0.00         0.00         0.00           2005-12-04         291.40         85.00         0.00         0.00         0.00         0.00           (%a)         76         24         8         8         8         8           4			2008-82-04	19,85	828.38	124.37	826.19	828.38	
3. H0455         2005-00-02         288.76         215.49         8.65         8.00         8.66           2005-10-11         193.80         0.00         0.00         0.00         0.00         0.00           2005-11-14         196.76         0.00         0.00         0.00         3.00           2005-11-14         196.76         0.00         0.00         3.00           2005-11-14         196.76         0.00         0.00         3.00           2005-11-14         196.76         0.00         0.00         3.00           2005-11-14         196.76         0.00         0.00         3.00           2005-11-14         196.76         0.00         0.00         3.00           2008-11-05         201.40         65.00         0.00         10.00           2008-11-05         201.40         65.00         0.00         10.00           (%a)         76         24         8         8         8           4. (W208         2008-10-06         191.76         0.00         0.00         0.00           7000-10-06         191.76         0.00         0.00         0.00         0.00		(~)		35	26	20	13	7	
1005-10-11       193.80       0.00       0.00       0.00       0.00         2005-11-14       196.74       0.00       0.00       0.00       3.00         2005-11-14       196.74       0.00       0.00       0.00       3.00         2005-11-14       196.74       0.00       0.00       0.00       3.00         2005-11-05       201.40       65.00       0.00       10.00       10.00         2005-01-05       201.80       65.00       0.00       10.00       10.00         (%a)       76       24       8       8       9         4. M9209       2006-02-66       191.80       0.00       0.00       0.00         7006-02-66       191.80       0.00       0.00       0.00	1	s. milass :	2005-09-02.	298.75	215.49	6.00	8.00	10.00	
2005-11-14     196.76     0.06     0.00     0.00     0.00       2008-01-05     201.40     65.00     0.00     0.00     0.00       2008-01-06     201.80     65.00     0.00     0.00     0.00       (%a)     76     24     8     8     8       4. M9200     2006-02-06     101.80     0.00     0.00     0.00			1005-10-11	193.80	0.00	0:00	0.00	0.00	
D008-81-06         D01.40         66.00         0.00         D.00           D008-81-06         D01.40         65.00         0.00         0.00           D008-81-06         D01.40         65.00         0.00         0.00           (%a)         76         24         8         8         8           4.09200         D008-82-06         D1.00         0.00         0.00         0.00           Tessile (%a)         62         73         62         8         8			2008-11-14	196.76	0.00	0.00	U:00	3.00	
D009-02-02*         D01.01         #5.00         0.00         10.00           (%a)         Z6         Z4         B         B         B           4.199200         D008-02-06         D01.00         0.00         0.00         0.00           D008-02-06         D01.00         0.00         0.00         0.00         0.00			2008-81-06-	201.40	65:00	0.00	0.00	2.05	
(%)         76         24         8         8         8           4. WYDEE         DOD-02-66         DELEN         0.00         0.00         0.00           Table PAL:         62         125         13         62         8			1003-01-09	221.00	05.00	0.081	11.00	10.06	
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Tende (24) (27 (24) (27 (27) (27) (27) (27) (27) (27) (27)	16	4, 19200	1008-62-66	271.74	6.00	0.06	0.00	1.04	
		Consta Chait			100	- 10	100		
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This grid, pulled directly from the CREDMETRIX database, shows the payment history that other vendors have experienced with this retailer. To assign terms to this account, select an option from the "Assign Terms" combo box. If there is not enough data to support a decision at present, choose "Pending".

#### CreditSCAN

Have you wanted to cycle through your accounts and see if the terms are "out of line" for any of them? What if there's an account to whom you've assigned Net 60 terms but with whom other vendors have experienced collection difficulties. That's a red flag that you need to be aware of. CreditScan shows which of your accounts have negative payment histories with other vendors. Select Credmetrix→ CreditSCAN to bring up the following screen:



In the "FILTER" combo box, select the conditions that you want CREDMETRIX to search for. For example, you may only be interested in seeing which of your accounts are shown by other vendors to have an Average Pay Time of over sixty days. You could thus select "Avg Pay Time >" and set the value to 60. The accounts that are displayed in the grid will be accounts of yours that meet those conditions. You can then see what terms you have allocated to those accounts, and decide which cases merit further investigation.

#### Uploading to CREDMETRIX

To participate in a data cooperative, you must be a "data provider" as well as a "data consumer". Uploading your AR data to CREDMETRIX is a one click affair. Select Credmetrix→Upload AR data, and your AR data will be uploaded to the cooperative.

#### **Editing Accounts**

When you click on the "Edit" button from the main screen, or when you doubleclick on an order in the order grid, you will see the following "Review" screen: The first page in this screen (the left-most tab) allows you to edit Account data before exporting the account to your accounting system.

XTROUPPLO         ACCTS BUL TO 10         ACCTS (NIP TO 10)           10         [1+000: 10/054]         [1	F. Low starger to all orders for the normal for Laws an IMeg the T <sup>2</sup> Administration of an investment in orders on the advectant
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In cases where the values on the incoming order are different from value in the accounting system for this account, the text above the edit box for that value will appear in red. If you change the value to the one in the system, the text will revert to text.

#### **Editing Orders**

To set values for an incoming order, click on the "Order Information" tab at the top

of the Account Review screen. This will bring up the Order Information screen.

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The values that you set in this screen will determine what values will be set for this order when it is exported to your accounting system. Text that appears in red means that the values are either not recognized by the accounting system or are different from those in the system for this account.

## DATA RECONCILIATION

All vendors agree that the most time-consuming aspect of importing orders is data reconciliation. Do the reps on the orders match the reps in the system? Do the items on the orders match the items in the system? Numerous categories of data need to be reconciled. The beauty of XTROVERT is not only its ability to automate this process, but its ability to learn from import to import through the technique of "data binding".

In Configure—Preferences, you have the option of calling the data reconciliation screen to be displayed automatically when you import orders:

Desception			
NET 30 W/ WPROVE	Red	Coll         Connection           50006         12:10 Met 30           40006         23:10 Met 30           20005         Due on recept           20006         Net 15           10006         Net 30           80006         20:00           00005         Net 50	

If you wish to reconcile certain values independent of importing an

order batch, click the "Reconcile" button on the main screen.

As you can see, there are nine categories of data that need to be reconciled: Terms, Sales Sources, Agencies, Sub-Reps, Accounts, Product Lines, Shipping Methods, Ship To Information, and Items.

#### **Reconciling Terms**

Certain accounting packages are very unforgiving when the terms on an incoming order do not match the terms in the system. For example, the terms on an order may read "N30" but your accounting package may only recognize "Net 30". Once you create a binding, XTROVERT performs the necessary translations to allow your accounting package to parse all incoming orders in its own language.

UNDERTITIES FERMI		TERMO RESYSTER	
Decoption CREDIT CARD NET 30 W/APPROVIS	Red	Code         Centraphon           50006         15.10 Mel 30           40006         20:10 Mel 30           30000         Due on tensept           20000         Nel 15           10000         Nel 30           80000         Nel 30           800000         Nel 60	
	trant		

To create such a "binding", click on the incoming term, click on the existing term to which it needs to be bound, and click "Bind". XTROVERT will now retain this pairing going forward.

### **Reconciling Sales Sources**

Many accounting packages keep track of the origin of orders. XTROVERT allows you to reconcile incoming Sales Source values with existing values through the following screen:

Sales Scores		Code Sales Soles	
ROAD DHOWDOOM SHOW JUNE DHLLAS SUPER MARKET	8HD	DAL DAL FER FER RUP RUP RDA ROA SAL SAL SAM SUM SAM SUM SAM SUM SAM SUM SAM SUM SAM SHO SAM SHO SAM SHO SHO SHO SHO SHO SHO SHO SHO SHO SHO	

As with the other reconciliations, simply click on the incoming and existing values, and click "Bind". The incoming values are always on the left, the existing values on the right.

### **Reconciling Agencies**

If orders come over from an agency not currently in your system, you can match the unidentified agency with an existing entry in your system. To create a "binding" with an existing entry, click on the unidentified agency on the left, and then click on the version of this name that is in your system on the right. Click "Bind", and your system will know going forward that these two entries are identical

Independent of a state of a state of the		-PORIOUS NUCLEUM			
Roga Milamar	Bead .	Rap Hare	Gate		
ONTRY HOLD INC ONTRY SCOL, INC FONGLEFERY'S CONTRACT SOUTHWART OFT	literi	OBE DASIS FACTOR MOTATLANTIA SUL ASTATLANTIA SUL ASTATLANTIA SUL ASTATLANTIA SUL ASTATLANTIA SAN ASTATLANTIA SAN ASTATLANTIA SAN ASTATLANTIA SAN ASTATLANTIA SAN ASTATLANTIA SUL ASTATLANTIA SUL ASTATLANTIA SUL ASTATLANTIA SUL	LEM 000 (95, A07 TOM, A08 T4, A13 85, A18 A17 A18 CH, A35 CH, A36 CH, A36 A17 A66 (1) A77 T17 A1A	1 201	

#### **Reconciling Accounts**

When orders come over for accounts not currently in the system, these new

accounts will show up in upper grid in the Account Reconciliation screen.

Account DADS GIT EXPRES RELIACTRON INTE CASTLE HELS ACE CELEBRATIONS NU CONTINE DARKE HOUSEF SWEET A MYS CERPS 3 SE *]	Addmin           5         2119 NCDCPL           RDRS LLC         27762 VIETAG           HANDWARE         2261 NW MEL           LUMARY, ANAME         8261 S MOL           IDMARY, ANAME         8261 S MOL           IDMARY, ANAME         8261 S MOL           IDMARY, ANAME         1005 AND CL.           ID         1055 AND CL.           ID         125 S MOL	Authen ELLAGO SUITE TANY MAY AUAY ANYON FD AUAY DUVO DUAME REET	ALL CR MESCALAND MISSION VELO UM ANTONIO ANAHEM HE ADARES ISLAND HOOVER REFUNCTION	Street         Dis           1%         57627           GA         58502           Dir         70217           GA         58502           Dir         70217           GA         58502           SC         20451           AL         51231           MI         16301	2000 E - 21 3 10 11 21 12 13 14 20 11 21 15 15 15 15 15 15 15 15 15 1	
PRD	1000	SUBHEST BATCH	2 Provid	The all same	1 8H6	
INVESTIGATION	IS FORT THIS ASSOUNT					
Access	Address	Addenal	De:	5144 TE	1110 20	

It often happens that an incoming account is not identified due to a small difference between it and an existing account. It may be one digit in the zip code, or an insignificant word such as "A" or "THE". XTROVERT allows you to prevent the insertion of duplicate accounts into your accounting system in such cases.

When you click on an account in the upper screen, all existing accounts in that account's "vicinity" appear in the grid below. The exact "zip range" of the vicinity is determined by the ZIP RANGE setting. This is very important, because it was found that often times zip codes for existing accounts may differ by a few digits from the zip code of the incoming account. In the example above, XTROVERT will search for a zip code "plus or minus" sixteen. Thus, if the zip code in question is 77627, XTROVERT will search all zip codes between 77611 and 77643.

In cases where an incoming account either has no zip code or the zip code is deemed unreliable, one can search by account name. Place a fragment of the account in question into the FIND edit box, and click "FIND". All accounts that contain that name fragment will appear in the lower grid.

When "CURRENT BATCH" is selected in the Batch combo box, only unidentified accounts in the current incoming batch appear above. ALL BATCHES cause all unidentified accounts to appear.

If you have located a match, click on the upper and lower values and click "Bind". Not only does this create a binding between the two accounts, but it transforms all affected orders (changes the unidentified account to the existing account).

#### **Reconciling Items**

If orders come over with items not currently in your product catalog, the "Item Match" screen appears (shown below). This screen allows you to create a binding between an unidentified item and an existing item in your system, or to insert a new item entry into the system.

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10001	M.R.I	71/854002/49	53 9.00	
1,004	66.04	718540249	50 1250 1350	
1000	AUTO	21/54/02/19	4 12.50	
1 1007	MOCE.	7195400249	kt 1210	
10008	4405.L	7105400246	07 15.00	
80001	M-SL	/135400246	14 6:00	
10010	M.S.	7185400336	5.00	
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010 IUNGLASIETL 0015 0017 0030 0035 0040 0042 0041 0044 0040	Focativenia elemento 4 SUNACLASSIES AMERIO 1500 150 TABLETS AMERIO 1500 150 TABLETS AMERIO 1500 ng 100 CAPSULES AREMINE 500 ng 100 CAPSULES AREMINE 500 ng 100 CAPSULES AREMINE 70 MAITHINE 100 CAPSU HERMINE 70 MAITHINE 100 CAPSU MICHANIK 70 MAITHINE 100 CAPSU MICHANIK 70 MAITHINE 100 CAPSU MICHANIK 70 MAITHINE 100 CAPSU AMES 3500 NEW 130 TABLETS CAMARTINE 750 ng 30 CAPSULES CAMARTINE 750 ng 30 CAPSULES	208 0 30 5 39 10 39 4 49 3 45 8 30 L / 49 L / 49 L / 49 L / 49 L / 49 L / 49 L / 49 27 39 250 7 44		
010 JUNGLASSET 0015 0017 0030 0031 0036 0040 0042 0042 0042 0044 0044 0044 004	Forst-web-on-secret: 4 SUNDCASSES AMMO 1500 150 TABLETS AMMO 1500 150 TABLETS AMMON 1500 150 TABLETS AMMONIE 500 mg 100 CAPSULES AMMONIE 500 mg 200 CAPSULES AMMONIE 70 Mg 110 CAPSULES AMMONIE 70 MM 14ME 100 CAPSU MCCA-CHARTNE 71 MAP PACK 100 AMXCA-CHARTNE 71 MJP PACK 100 AMXC	208 0 10 5.88 10.39 4 45 5 45 5 45 5 45 10 39 4 45 5 45 10 39 1 45 5 45 1 0 39 1 249 1 2 29 1 2 49 1 2 29		
010 IUNGLASSET 0015 0017 0030 0031 0035 0041 0042 0042 0042 0042 0044 0044 0044	Food wells of even (12.4 SUNDCASSIES AMMON 1500 150 TABLETS AMMON 1500 150 TABLETS AMMON 1500 150 TABLETS AMMON 1500 reg 100 CAPSULES APRENNIE 500 reg 100 CAPSULES APRENNIE 7000 reg 120 TABLETS BERNITE 700 reg 120 TABLETS CAPACITAL CHARTINE THUS POCK 100 AMCI - CHARTINE THUS POCK 100 CAPACITINE 250 reg 30 CAPSULES CAPACITINE 250 reg 30 CAPSULES CAPACITINE 250 reg 30 CAPSULES CAPACITINE LIQUED THUS ROT	208 0 109 5.58 10 29 4 40 5 45 10 29 5 45 10 29 14 40 14 5 10 29 14 80 27 89 27 49 27 49 47 49 47 49 49 49 49 49 49 49 49 49 49 49 49 49		

To create a binding, simply click on the unidentified item on the right, click on the existing item on the left, and click "Bind". All future occurrences of the unidentified item will be properly paired with the existing item.

Binding items can be complex, because there may be entire batches of items affected. For example, items may be coming over with a zero prefixed to them when in the accounting system there is no such prefix ("0998" vs. "998"). For such cases where entire batches of data need to be bound, we have the "AutoBind" button.

In the case above, we would select "Remove Prefix" in the "Choose Rule" combo box. We would set the value to the right to "0". Now, all values of the form "0XXX" would be converted to "XXX". If we have any cases of "overkill" – cases where the transformation should not have taken place – we can simply click "UNBIND", which brings up the Bindings Screen.

Old Item	New Item
10005	0042

Now we can click on the errant binding and click "Delete".

# **EXPORTING ACCOUNTS TO YOUR ACCOUNTING SYSTEM**

To export a new account into your accounting system, click "EXPORT TO ACCTG

SYSTEM" at the bottom of the Account Edit Screen:

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1 autors	NEG	1 SHIPPING IN	FD IFOR THIS ORDERL
Collady References Full		Contact	
allareas.		BM/4737333	
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107-273-7339	futa	6372737928	fusa
	daw.	1	1 march 1
Enal	Chain	SHERVIN ON DEEP Shepper	Account No. 57 Deer DC
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ALTERNATE SHIPPING ALSHESSES	Address	Attau 2 Ca	
HOUSE OF SHALIMAR	142E STATE ST	THE C ITHACA N	( 14250
The second se			2.00 P.79998

XTROVERT will retrieve your system's id number for this new account and display it in the ACCTG BILLTO ID at the top of the screen. For accounting systems that house Ship To addresses in a separate table, the Ship To ID will be returned as well. Once the account has been exported to the system, its status will be "APPROVED" unless you set it to "REJECTED". You can now approve all orders for this account for export to your system.

#### Exporting Orders to your Accounting System

Once an account has been approved, you can approve and export orders for that account. To do so from the main screen, click on the order, click Approve, and then click "Export".

If you attempt to approve an order for an account that has not yet been approved,

you will receive the following message:



#### Fig. 26 Trying to Approve an Order Premature

Once an order is exported, the accounting system order numbers will be retrieved and displayed in the SYS ORDER ID column.

Orders for approved accounts can be approved singly or in batches. To approve a batch of orders, select the range on the order grid and click "APPROVE" above.

#### Deleting an Order

It may happen that you wish to delete an order from the system. For example, a rep could call up to say that the store cancelled the order. Click on the "Delete" button on the main screen. A warning will appear asking if you really wish to delete the order.

	SynqLink 🛛 🔀
and for the second seco	Are you sure you want to delete this order range?
	Fig. 27 Deleting an Order

Orders can be deleted singly or in a batch.

# MAINTAINING ACCOUNT DATA

Accounts.

101	R	contransi	( orget	#03ett:	ADDetto2	1.244
12345878910112111151617101021222333522	NULL HULL HULL HULL HULL HULL E300001 E300001 E300001 B300001 B4000 HULL HULL B300001 HULL HULL E300001 HULL B300001 HULL B300001 HULL B300001 HULL B300001 HULL HULL HULL HULL HULL HULL HULL HUL	RECOMMENT DREAMS CITLEFOLATIONS MALLMARK ANALY BELLACERCA INTERNIES ALL ST IVES ET ARDIN WARGEN TAIL CAPE & BARKERY MARSHALL BETAK GROUP. THE DANCORAND SPLOS BOTHWELL HOSP BAT SHOP OPSTARS BOUTIONE OPSTARS BOUTINE OPSTARS BOUTINE TAKE TWO COMMENTS TAKE TWO COMMENTS TAKE TWO COMMENTS DON THE OPARLESTIM SUITHERS TO COM BANK AVENUE MALINY CASTLE HILLS ACE NAMEDWARD HOOVER SWEET AND SASSY CHEEKSIDE COLLECTORS MY SISTER'S CLOSET "" MUSKOGEE RESIDNAL MEDICAL RUSKOGEE RESIDNAL MEDICAL RUSKOGEE RESIDNAL MEDICAL RUSKOGE PROVED OF PRARMEVILLES BARS BET EXPRESS NULL	63867 450703 450703 450703 450703 450703 450704 77515 450704 259506 113229 125463 400705 400705 400705 400705 400705 400705 400705 400705 111670 53003 400705 400705 111670 53003 400705 111670 53003 400705 111670 53003 400715 111675 53003 400715 111675 53003 400715 53005 53075 5	R2NET, PACTIC COAST HIS, INTER SANTA ANA, CANYI 2752 VISTA DEL LAGO 6755 QUAL HILL PARKWAN 722MARSH STREET 9385 WYNH ROAD 7732 E CENTRAL 801 E 141H ST 902 MAIN ST 15455 CLAYTON RD 113 SOUTH & THEET 1735 MIDDIAL (PRING AN) HOUTE 7 & KOCHER DRIVI 1605 MIDDIAL PENDO 165 THE DHIRLD DRIVI 1655 MIDDIAL BLIFF RUYD 1655 MIDDIAL BLIFF RUYD 1655 MICH ST 7231 WEST SAND RIDAD 1951 NW MILITARY HWY 175 RECWIDDD LANE 1855 BICKFORD 1655 BICKFORD 1655 BICKFORD 1655 HWY, 73 SUITE 62 2113 HEDERLAND NULL	NULL NGRI SUTTE & RE NULL NULL NULL NULL NULL NULL NULL NUL	LONG BEACH ANAME IN HE MISSIDN VIE IRVINE SAN LUIS O. LAS VEGAS WICHTA SEDALIA JOPLIN BALWIN REDAVING TON REDAVING TON REDAVING TON BUILT OFF JOHOS BLA JOHNS TILA FERNANDING HOOVER MANSFELD EL REND MUSKIGEE GEISNAR REDEPLAND NULL

From this screen, you can perform a CREDMETRIX credit check on an account, or report an NSF situation on this account to CREDMETRIX. You can also search for accounts by City, State, Name fragment, or zip.

# MAINTAINING SKU DATA

To view your SKU data, choose Browse $\rightarrow$ Items from the main screen. When you

choose a line from the combo box, the items for that line will appear in the grid.

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1064	FORMALA	IFWE DIX NO DES	GMER	4.50	140536010843	1.1	129657.	204		FORMAL AREAR
1985	POULTHAN	BULES 244 RD 10	SON	6.50	MIX MOUSE		12965			BHATHDA & FLUES
1066	PERSIMI	DRIFT IN HERE	\$94	1.00	1406,3601.0687		12065	20		SESTIVE LEWIST
1067	SOUTHEN	VELINEHINE SOLF	READ	8.50	140538010614	1	129051	201.		SCUTHERN SUNSHITE
5.840	D.F TIME	DESIGNAS BOLD	0.009	100	MOX BUT OUT		109051	20		CUT THE OPPESTMEN
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541 C	<b>EUCTION</b>	SHIET NOT DETA	CONC	100	140030101005		114257			DUST IN S DI LES
1174	OCT DAYS	UNCT 1 340 00 DE	ont	1.00	141610200747	1.4	15680	- 30		PCTOLAN SURVEY
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1206	ALTESION	TTH SNALL ITA	NRIS	18	18/6/16/01/21/8		106282	Think:		AFTERSORY ITE Minuths
1771	ACCESSOR	IT TEN HEDS, MO	VIL FL	12.00	140536013715	1	124057	HEDA		ACCESSORY (TE Marshine
1212	ACCESSOR	IN TEM LANKE DW	AL:101	16.50	1405/8072722	1	129(6)	18/15		ACCESSORY ITE Milerative
1273	ACCESSOR	IT TEH SMALL OV	N.BES.	1.25	140636012739	1	124682	1000		ACCESSORY ITE Hugh-
1254	ACCESSOR	IT IT FM HEDRUM C	VAL P.	12.00	040108013245	1	124601	MED		ACCESSORY ITE HIMMING
1229	ACCENSION	IN TENDANSE OV	AL PS	15.90	940536017753		126651	14/10		ACCESSORY (TE-Mwatty)
1276	ACCESSION	IV TEN SAVAL OV	N. BUS	1.25	1406360413468		124657	Shik.		ACCESSORY (TEMinally)
1217	ALLESSOF	IT ITEM PROVINC	VALE	-12.00	940536012777	1	12865	MED		ACCESSORY (TEMhealts
(27)	ACCEPSO	IN LEW PAUER ON	AL P(2	16.90	F40536012798		129857	LANS_		ACCESSION (TEHNAND)
190	ALLESSO	IT IT IN COPPER II	LECTN.	11.75	140538001504	-	12962	COPP		ACCESSORY/IE Haudra
182	ALLESSO	IV FEM SOFT GOLD	DELEC.	14.75	14.5.38001931		12965	50FT		ALLESSORY (TEHBeatra

The item screen has numerous options and capabilities.

Bar Codes - prints sheets of bar code labels.

# MAINTAINING YOUR DATA

Label Config – This will configure the appearance of bar code labels and text that will be printed when you click "Bar Codes", as show in Fig. 17. The "AutoHeight" setting sets the height of the bar code itself.

lar Code Label	Configuration		×	
Part lines N	uniber with Label		0KC	
F Prest Price.	Core Size with Lat	æl		
AutoHeight	Label Height	Label Width 475		
DarHeight 330	Barlviden D	Ford Size		
Top Margn 100	Leti Margn [50	Ficeni Colii		
ilem Tag FLS	Ellar Indentiation			

**Price List** – Prints price list with bar codes. You can configure whether or not you want.

Price List Config – This configures the appearance of the bar coded-price list, as per Fig. 18:

	Contraction in the second second	
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	Top Harps Laft Harps Bar 1 200 201 201 201 201	Nega
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	<u>ත</u>	
	OK.	

**Exporting to a text file** – you can export a selected range of items to a text file by clicking on "Export to File". A file named "itemfile.txt" is created on the C drive. You can then import that file into other software packages or email it to retailers or reps.

#### Editing an Item

You can edit the values for an item by clicking on the item and clicking "Edit", or by double-clicking on an item. The following Edit Screen will appear:

Description	1		End Special	9/11/2006	-
MSRP	0	WHSL	Avail		
JPC	ſ	Style	Spec. Buy		
Casepack	0	Weight	Spec. More	Γ	
Color		Size	Spec. Disc		
Discontinue	-	C Out of Stock		T Mark as 'Change	ed' today
<eywords< td=""><td></td><td>C Active</td><td></td><td>C Special</td><td></td></eywords<>		C Active		C Special	
w					

Using this screen, you can create a new SKU or "special promotion" and upload it to your web library, or you can change the information on an existing item prior to uploading. Once you have uploaded new or modified items to your web library, retailers or reps can immediately download the items for ordering.

# MAINTAINING YOUR DATA

#### Categories and Keywords

XTROVERT makes it very easy to batch-assign categories or keywords to your items via the Items screen. First, you need to create these values, by choosing Maintain→ Categories and Keywords in the main menu. The following screen will appear:

Categories	
Category and Keywords scre	

The items that you have created here will now be visible in the combo box in the Items screen. You can batch assign a category to an item range that you have selected by selecting the category in the combo box, selecting the item range, and clicking "Assign Category". In the example given on the next page, the category "healthy vegetables" has been assigned to an item range:

# MAINTAINING YOUR DATA

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the second	Total cash: of size (1) a	- 89	11212122200484	0	17/06/77	19.000			Rantin
0.00 SEING	DUNGLASSED	31		-0					
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00:5	AMENIA THUR AN TAKATA	10.97		-2-					
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0006	ASCREE 1000 and 100 TABLETT	8.03	10020032022						PROFESSO
0040	MEGINE/OFINITINE IGELAPSIE	176	Serestations	0					health map and
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1.59 \$1.94	\$21NB4LAS5815	1.23	AVA11070.82	-8	100 B.1		a state		00080000000000000
1060	OLE THE CHRG INAL 24 PO DER	4.50	140836010608		12487		20		OLE THRE CHRISTIANS
1063	COMMINGINE APRILES SHAPO DESI.	1.00	1405080106/2		129000		204		CHANNAGINE ENOISS
3000	CHIEFE OF CASHAGE BO DO DE	6.00	LINE DOMESTICS		126001		30		THURST OF CALLACTE
1184	FORMAL ARRAN DO DESCRIPTION	4.93	MEN INCOME.		12000		20		FORMAL APPLIER
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To add a keyword to the keywords already assigned to an item, choose the keyword in the combo box to the left of the "Add Keyword" button. Click on the item or item range, and then click "Add Keyword". The selected Keyword will be added to the list of existing keywords for that item range.

You can publish your product catalog to any web library that has provided you with their plugin. Retailers and reps will then be able to pull your product data into their software systems. When you select Upload→Product Catalog, you will see the following screen:

	Web Libraries	X
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	orderdog	
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<u>ة</u> بر	(OK)	

These are the plugins that you have designated as Web Plugins in  $File \rightarrow Configure \rightarrow Plugins$ . When you click on a plugin and click "Publish", your catalog will be uploaded to that plugin. You may need to configure the plugin if this is the first time that you are uploading to it.

#### Transmitting Invoices

Invoices can be sent electronically to reps or retailers. For example, vendors in the Health Food industry use XTROVERT to transmit invoices via the web to various supermarket chains. Other vendors use XTROVERT to transmit invoices to rep groups and independent retailers.

To transmit invoices, select Upload→Invoices from the main menu. The following screen will appear:



Once you have set the criteria for the invoices that you want to appear in the grid, you can click on the plugin through which you wish to transmit, and click "Upload All" to send all of the invoices in the grid, or "Upload Selected" to only transmit those invoices that you have highlighted.

# **APPENDIX A – PLUGINS AVAILABLE FOR XTROVERT**

#### **GIFT INDUSTRY**

**BrandWise** – Brandwise is the leading order transmission network in the Gift Industry. Reps transmit orders to vendors through the BrandWise OrderNet network. Vendors are then able to import these orders directly into their accounting system, automating the new account creation process as well. Vendors can also transmit electronic invoices back to rep groups through the BrandWise's InvoiceXChange system.

**OmegaNet** – OmegaNet offers B2B web sites primarily to Gift Industry vendors. With the OmegaNet plugin, vendors can import orders, download registrations (retailers who have registered but not ordered), and upload their product catalog to the web site.

Youngson, Design Home – Plugins exist to pull orders from these two leading Canadian distributors.

**Ideation** – the Ideation plugin allows vendors to receive orders electronically from this Retail Buying Group of over 500 retailers.

#### NATURAL PRODUCTS INDUSTRY

**OrderDog** – With the OrderDog plugin, vendors can receive orders, transmit invoices, download accounts, and upload their product catalog to OrderDog's web hub.

**DVO (WholeFoods)** – Receive orders from WholeFoods market and transmit electronic invoices directly from your accounting package.

#### GENERAL

**EDI** – Utilizing XTROVERT's EDI plugin, vendors can receive and transmit all documents on the Inovis network, fully integrated into their accounting package. Automatically sends FAs.

**NetPick** – This warehouse module transmits all post-fill EDI documents (856, 810) and prints UCC128 labels. Add mappings for new EDI partners as you go.

**Shopping Carts (MIVA, OSCOMMERCE, AMERICART)** – receive orders and upload product catalogs and customers to most popular shopping cart platforms.

Spreadsheets - Often, reps submit orders for retail chains in spreadsheets. Plugins can be builts for all

spreadsheet formats.

More plugins are being added daily! For new additions, visit www.synqware.com/download





Product of Synqware Inc. 2001 W Main Street, Ste .205A Stanford, CT 06902 Tel: 203 975 7092 | info@synqware.com | www.synqware.com