

Excellence Series Tools

With Extended Data you've got the ability to add new and specialized information to your SouthWare Excellence Series™ business system. It's very simple to use so you don't have to be a programmer. And best of all you won't affect your ability to add future updates to your system.

Benefits

- Add needed information to the major master files
- Add extra data fields to the major transactions - print selected fields on invoices, POs, picking tickets, and service orders
- Smoothly integrate custom fields so they appear to be part of the standard system
- Define the sales period history that is automatically maintained as you process invoices
- Create prompts and defaults for custom data
- Add new ways to search through master files
- Create custom databases

Sample XD Entry Screen from the Service Order Portal

Extended Data is an add-on module that lets you add new data fields to your standard Excellence Series files. These new fields can become part of the normal entry and reporting for your system. Extended Data makes all your other modules more valuable by blending your unique information needs into the standard system information.

You can also use Extended Data to create simple stand-alone databases. For example, if you need a database of the locations of all your office equipment you can set up a custom database file in Extended Data.

FEATURES & FUNCTIONALITY

FIELDS

- Add fields to over 20 different master files - up to 26 fields per file
- Can link up to 20 additional screens for a maximum of 546 new fields per file
- Add fields to over 20 different transaction files - up to 15 fields per file
- Can link up to 20 additional screens for a maximum of 315 new fields per file
- Optional or automatic entry user-defined names, prompts, defaults
- Data for a field may be validated against an optional file of valid values
- Hot key for quick access

NEW MASTER FILE SEARCH FIELDS

- Up to 8 new search fields per file
- New fields automatically integrated into standard search feature

STAND-ALONE DATABASES

- Up to 26 fields per database
- Up to 8 search fields per database
- Special entry program
- Option to add to standard menus
- Accessible with ReportMate™

CREATE YOUR OWN SALES PERIOD HISTORY

- Create your own period history records that are automatically updated by invoicing
- Up to 10 types of records for invoice header information
- Up to 10 types of records for invoice line item information
- Up to five key fields per type
- Up to 15 fields per type

TOTAL INTEGRATION WITH SOUTHWARE EXCELLENCE SERIES™

- Master file fields print on master file listings
- Transaction fields print on edit listings
- All fields accessible with ImportMate II™ and ReportMate™ and WorkFlow
- Transaction data may be printed on invoices and other forms

Example uses for Extended Data:

MASTER FILES

- Add several alternate phone numbers to the customer file
- Add additional description fields to the stock file
- Add more shipping and credit information about your vendors
- Add more reference dates to customer equipment records
- Add a job header “Internal Type” field for special reporting
- Add a “Date Inactivated” and “Reason” to G/L Accounts

TRANSACTION FILES

- Add a long alternate invoice number field to A/P transactions
- Add additional checkpoint dates to each order line item
- Add special PO line item fields to be printed on POs
- Add a validated “Source” field to cash receipts transactions
- Add a “Date Resolved” to each service order line item
- Add an “Internal Status” field to sales order headers