



The Uniform Solution

What's New

4:00 pm to 5:00 pm

[Session II](#)

What's New



- ▶ New Features
 - v6.01
 - v6.05
- ▶ Pending Features
- ▶ Coming Features

New Features v6.01



▶ Sales Entry

- ▶ Emailing receipts
 - ▶ Setup > System Options > Email
 - ▶ Setup > This Computer > Sales Entry > Ask customer ifemail receipt
- ▶ No stock warning (Need to Special Order?)
 - ▶ Setup > This Computer > Sales Entry > Show warning if stock level...
- ▶ User vs Clerk

Email Receipt?

Email: david@dds.com

☒ Create a customer record with this email address

Customer Name

First: David

Last or Company: Johnson

Yes

No

► New Features v6.01



► Sales Table Enhancements

- Sort by Most Recent or Oldest
- Limit by Credit Card Number (last 4 with integrated processing)
- Limit by PO and Original Order Number
- “All Tab”

Ref No.	Date	Sold To	Balance	Total
127	9/15/16	Complete Dental Care	352.36	352.36
126	9/15/16	Baylor Medical Center	960.18	960.18
125	9/15/16	Armando Chavez (Baylor Medical Center) - Pickup	67.12	67.12
124	9/15/16	Glen Estes (Baylor Medical Center)	33.56	33.56
8123	9/15/16	Renee Culbreath - Pickup	4.87	29.77
122	9/15/16	Renee Culbreath	0.00	101.76
8121	9/15/16	Armando Chavez - Pickup	0.00	75.78
120	9/15/16	Armando Chavez (po 6523)	0.00	45.47
8119	9/15/16	Armando Chavez (po 6522) - Pickup	31.39	31.39
118	9/15/16	Armando Chavez	0.00	45.47
8117	9/15/16	Baylor Medical Center - Pickup	19.49	19.49

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New Features v6.01



- ▶ User Activity Logging
 - Log Tab – Sales, PO, Inventory
 - Setup > Users > Activity log

Changing Customer (Baylor Plano) Acct No. 57

1. General 2. Notes 3. Billing Information 4. Sales & Taxes 5. Ship To 6. Credit Card & Contact 7. We

Transaction Log

Date	Time	User	Action
9/15/16	5:24:09PM	Owner	Edit

Original Name: Baylor Medical Center New Name: Baylor Plano

User List


1. Name 2. Null Testing


ws	Name	Type	Location
	Clerk (2)	Clerk	Plano
	Owner (1)	Clerk	Dallas

Activity Log

User Name:

☒ Show image ☒ Show inactive



 Select Image

☐ Set inactive

New Features v6.01



► Memorized Reporting

- How to Memorize Reports (and even copy them)
- Using Report Groups
- Multi-Stores and Memorized Reports

Memorized/Completed Reports

Show: By Group

1. Memorized 2. Completed 3. Saved

Report Group	Report Description	Dates		Memorized	
		Period	Next Run Date	Date	User
Monthly Reports	Cash Flow Summary	Last Month	8/01/16 to 8/31/16	9/17/16	Owner
Monthly Reports	Max-Min Sales Analysis - Top 3	Last Month	8/01/16 to 8/31/16	9/17/16	Owner
Monthly Reports	Top 40 Items by Type - My Top 3 Vendors	Last Month	8/01/16 to 8/31/16	9/17/16	Owner
Monthly Reports	Vendor Comparison with Turns	This Year to Date	1/01/16 to 9/17/16	9/17/16	Owner
Payroll	Time Clock Summary	NA	9/17/16	9/17/16	Owner
Salesperson Reports	Contract Sales Prev Year Comparison	Last Month	8/01/16 to 8/31/16	9/17/16	Owner
Salesperson Reports	Sales By Clerk Summary	Last Month	8/01/16 to 8/31/16	9/17/16	Owner
Salesperson Reports	Sales By Salesperson Summary	Last Month	8/01/16 to 8/31/16	9/17/16	Owner

Memorized Reports Group:

F2-Remove
F8-Save Report
F9-Run Report
F10-Process Group

New Features v6.01



- ▶ Notes, Notes, Notes
 - ▶ Unlimited secondary notes
 - ▶ Use the F6 Notes button as usual – then add more
 - ▶ Sales, PO, Rec, Customer

All Special Orders

Show: By Number

Limit List

Card 4: ☐ Past due date

P.O. No. ☒ Delivery required ☐ Items with a balance

Order No:

1 Sales 2 Special Orders 3 Layaways 4 Gift Cert 5 Quotes 6 WebStore 7 All

Order No.	Date	Sold To	Balance
123	9/17/16	Renee Culbreath - Pickup	4.87
121	9/17/16	Armando Chavez - Pickup	0.00
119	9/17/16	Armando Chavez (po 6522) - Pickup	31.39
116	9/17/16	Beth Allen - Pickup	26.85
114	9/17/16	Brian Abbey - Pickup	30.31
112	9/11/16	Cade Johnson - Pickup	126.43
111	9/11/16	Glen Estes (Baylor Plano) - Pickup	98.19
110	9/11/16	Blake Burger - Pickup	81.35
109	9/11/16	Renee Culbreath - Pickup	56.57
106	9/05/16	Armando Chavez (Baylor Plano) - Pickup	62.79
101	9/03/16	Blake Burger - Pickup	23.27

Order Ref No.

☐ Show deleted ☐ Show quantities

Notes for (Invoice No. 112)

1. Notes

Primary:

The order has a special embroidery and hemming request

Secondary:

Date	Time	Note	User
9/17/16	9:32AM	Sent to hemming	Owner
9/15/16	9:32AM	Received back from embroidery	Owner
9/14/16	9:31AM	Sent to embroidery	Owner

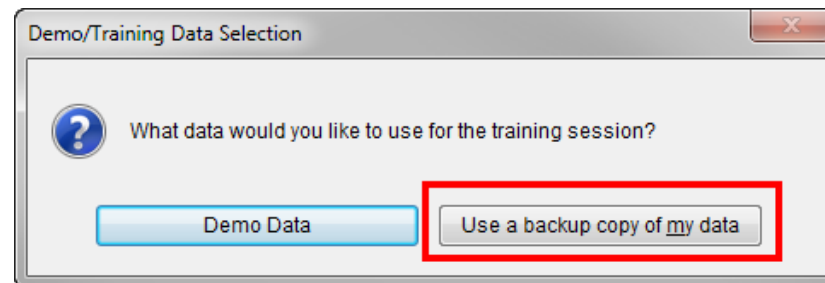
Note

☐ Show deleted

New Features v6.01



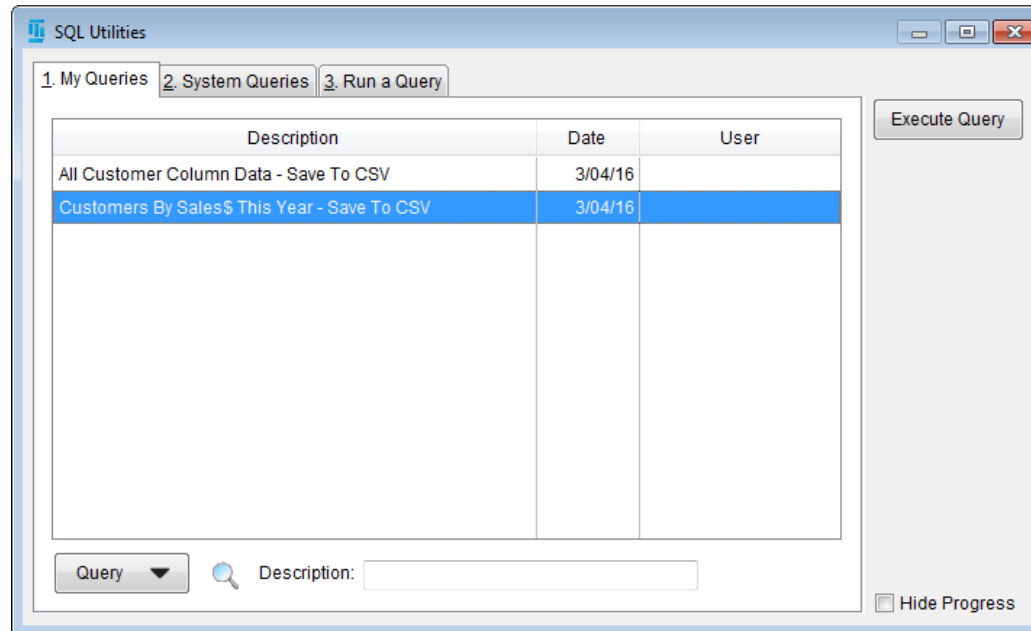
- ▶ **Training Mode** (Activities > Enter Training/Demo Mode)
 - Use your data for more realistic training
 - Security is Active with Your Data
 - User security settings are used
 - Cannot print receipts
 - Sales Entry limited to 2 line items



New Features v6.01



- ▶ User SQL Queries
 - Maintenance > SQL Queries



New Features v6.01



- ▶ Catalog Standardization
 - [One Style Number for Regular, Petite, and Tall](#)
 - [Improved Detailed Descriptions](#)
- ▶ Catalog Utility Enhancements
 - Descriptions (short and detailed)

Changing Style (1066)

1. General 2. More 3. Images 4. WebStore

Style (All Colors)

Vendor: CHE

Style: 1066

Desc: Pant

Depart:

☒ All colors are the same price

☐ All sizes are the same price

Cost:

Retail: Level 1

Current Color and Code

Color: CARV 3 Color(s)

Code: REORD

☒ Include in WebStore

Detailed Description or Notes for Style

Drawstring Pant

Sizes for the Color shown with all possible Sizes for the Style

Size	Sort	Cost	Retail
XXS	0	14.50	29.00
XXSP	0	14.50	29.00
XS	1	14.50	29.00
XSP	1	14.50	29.00
XST	1	15.50	31.00
S	2	14.50	29.00
SP	2	14.50	29.00

An 'X' indicates the size is NOT available in the color

OK Cancel

Color Size

Vendor Provided

New Features v6.01



- ▶ **Style Comparison Report**
 - ▶ Reports > Sales > Style Comparison Report
- ▶ **Invoice Receipt Totals**
- ▶ **Contracts**
 - ▶ Assign Contracts to Salesperson
 - ▶ Contract Performance Reports
 - ▶ Contract Sales Previous Year Comparison
 - ▶ Sales by Contract Report
 - ▶ Any Date Range
 - ▶ Group by Salesperson

New Features v6.01



▶ EMV Credit/Debit Card Processing

- ▶ Full EMV Compliance
- ▶ Signature Capture (no signed receipt to keep and track)
- ▶ Customer Can Choose Credit/Debit
- ▶ Integrated Processors
 - ▶ Open Edge (X-Charge)
www.openedgepayment.com
 - ▶ ChargeItPro Credit Card Processing
<http://info.chargeitpro.com/TheUniformSolution>

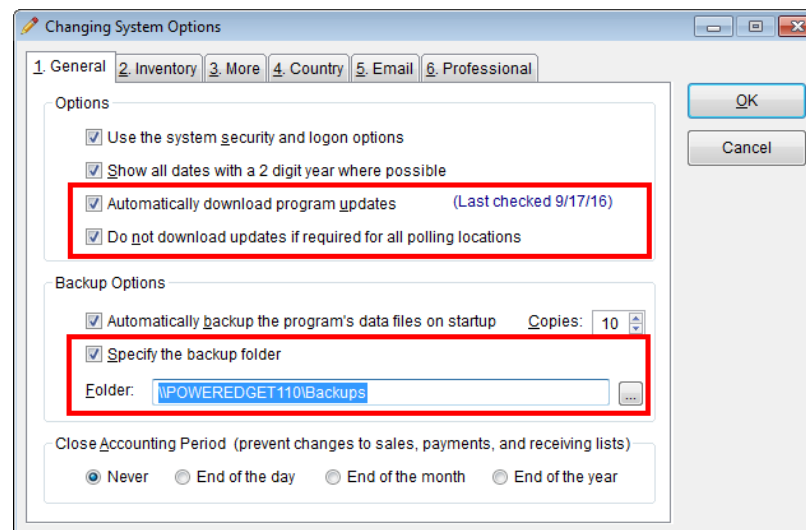


New Features v6.01



► Maintenance Features

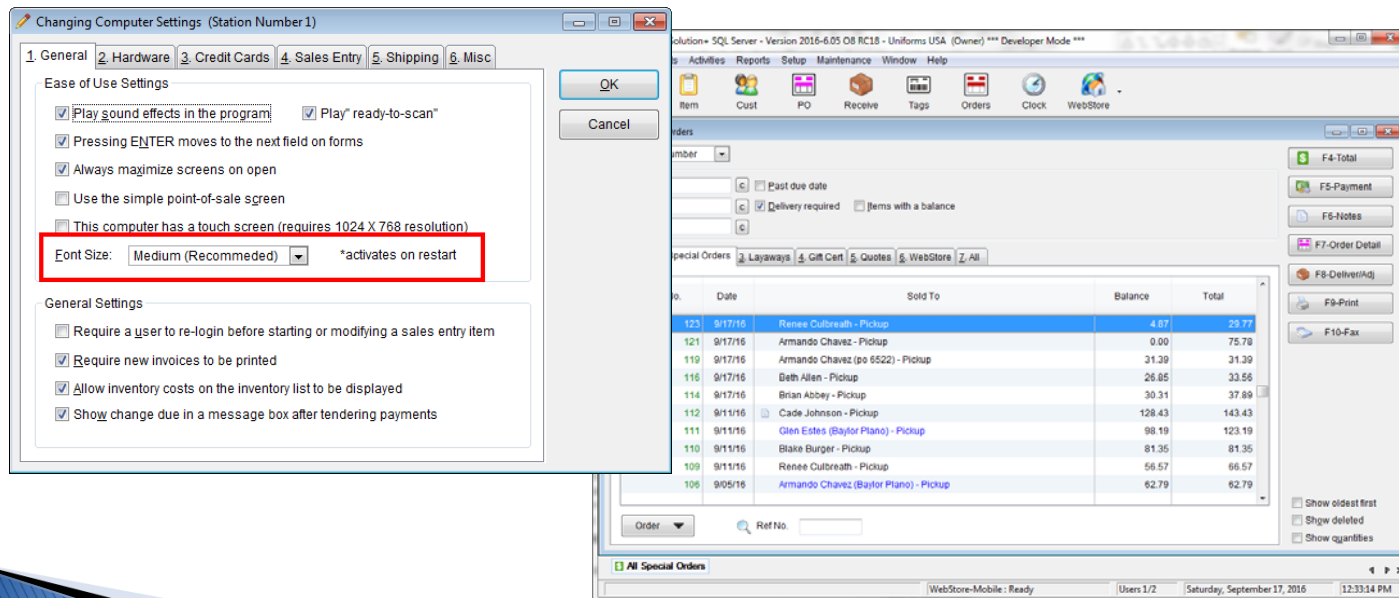
- Automatic Program Downloads (Setup > System Options)
- Backup Folder Location (same path from all stations)
- Required Program Updates (Catalog, EDI, etc..)



New Features v6.05



- ▶ Following Directions [Prison Break in Guardians of the Galaxy](#)
- ▶ Enhanced UI – Font Size Options (Setup > This Computer)



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New Features v6.05



▶ Rollup Billing

- ▶ Setup a single “Billed” account to receive invoices from multiple store accounts
- ▶ Activate on Customer Form Billing Tab
- ▶ Reports
 - ▶ Account Statements for “All Customers” are only created for the Rollup Account
 - ▶ Account Statement for a single Rollup Account can be run individually
 - ▶ A Summary Invoice includes all store accounts

Changing Customer (Baylor Plano) Acct No. 57 Billed To: (Baylor Texas)

1. General 2. Notes 3. Billing Information 4. Sales & Taxes 5. Ship To 6. Credit Card & Contact 7. WebStore 8. Log

☐ Always keep sales entry transactions with sales and ordered items together (i.e. do not split sales with special order items)

Billing Options

☐ None ☒ Allow sales on account ☐ Bill invoices to a store account customer

☒ Create account statements and summary invoices in a "rollup account"

Rollup Account: Baylor Texas (LastFirst)

Terms:

All Agt No: Default PO No:

☒ Allow sub-accounts to be added to this customer

Credit Restrictions

☐ None ☒ Credit Limit ☐ Allowance ☐ No Credit Amount: 2,500.00 Terms Limit: 90

Select Image

Set Inactive

New Features v6.05



- ▶ Receiving Payments on Account
 - ▶ Specify a Rollup Account
 - ▶ Consolidate or rollup sub-account invoices into a single amount due line item (Rollup Transactions checkbox)

Adding Payment (New) - Acct No. 65

Payment Action: ☒ Payment ☐ Paid Out ☐ Apply Credits

Customer: Baylor Texas

☒ Only loopup billed accounts

Notes:

Date: 9/17/16

Amount:

Paid By: Cash

Ref No:

Transactions with Balances to Show

☒ Sales ☐ Special Orders ☐ Layaways ☐ Gift Certificates ☐ All Items

(Payment to apply to the selected transaction)

Date	Type	Ref No.	Sold To	Total	Amt Due	Payment
8/28/16	Invoice	Multiple	Chavez, Armando (Baylor Plano)	486.66	486.66	0.00
9/17/16	Invoice	Multiple	Baylor Plano	979.67	979.67	0.00
9/17/16	Invoice	124	Estes, Glen (Baylor Plano)	33.56	33.56	0.00
Totals				1,499.89	0.00	

Item: Search By: Date:

☒ Rollup transactions for sub-accounts

Unapplied Amount: 0.00

Print receipt

New Features v6.05



► Sales Entry Search and Receipt Barcodes

Setup > Store > Messages > Receipt Options >
Print a barcode for the reference number on receipt

► Auto-Start Polling

Sales Entry Search

1. Search

Search
Ref No: 0123

Options
Search By: Ref No.

Results

Ref No.	Date	Sold To	Balance	Total
S123	9/15/16	Renee Culbreath - Pickup	4.87	29.77

☐ Show quantities

F3-Edit F8-Deliver/Adj F9-Print F10-Clear

09/15/2016 Ref No. 123
02:27PM Station 1

Uniforms USA
2100 Republic Drive
Dallas, TX 75081
(972)235-2800
www.uniformsusa.com

Transaction Special Order
Clerk Clerk
Est Delivery 09/23/2016

Sold To Acct No. 58

Renee Culbreath
1405 Timberline Dr
Richardson, TX 75080
(972)422-9168

Qty/Shp	Item	Amount
1/0	00119883	27.50
S	PCH-8705-CRBL-M * Pant	
Sub Total		27.50
Tax 8.25%		2.27
Total		29.77
Received		24.90
Balance		4.87

Date	Payment	Amount
09/15/16	Cash	24.90

Special Orders must be picked up within
10 days of receipt

0123

New Features v6.05



► WebStore

- ChargeItPro Secure Credit Card Processing
- X-Gift Cards from OpenEdge (ChargeItPro Gift Cards Coming)



DIAMOND DATA SYSTEMS
ONLINE STORE

Uniforms for Dallas / Fort Worth

Search for...

Sign Out bmc@gmail.com | Group Sign In | My Cart (1 Items, \$29.00)

Home Shop Best Sellers My Account Contact Us

Checkout Step 2 of 3 - Billing Information

Order Total: \$31.39

Gift Card: [Redeem a Gift Card](#)

Billing Options:
☒ Bill Me
☐ Pay for the entire order now

Billing PO Number:

Billing Terms: Credit Limit: 2,500.00 Available: 2,500.00 (Max \$2,500.00)

Amount to Bill: (Max \$2,500.00)

☒ My Billing Address is the same as my Shipping Address

Cart Summary [Show Details](#)

1 Item	\$29.00
In-Store Pickup	\$0.00
Tax 8.25%	\$2.39
Total Cost of this Order	\$31.39

Payments to Submit

Bill Me	\$0.00
Credit Card	\$31.39

Pickup Address

Uniforms USA
2100 Republic Drive
Dallas, TX 75081

New Features v6.05



- ▶ **WebStore**
 - ▶ Specify Order Type (Sale or Special Order)
 - ▶ Customer Order Type Override
(Customer Form > WebStore > Billing Tab)

Changing Customer (Baylor Plano) Acct No. 57 Billed To (Baylor Texas)

1. General 2. Notes 3. Billing Information 4. Sales & Taxes 5. Ship To 6. Credit Card & Contact 7. WebStore 8. Log

Access Logs Billing

Override WebStore Order Type

WebStore Order Type: Use Default ▼

WebStore Billing Options

☒ Allow WebStore purchases to be billed

Start: 1/01/15

End: 1/01/17 (not required)

☒ Allow sub-accounts to Bill from the WebStore

Start: 1/01/15

End: 1/01/17 (not required)

☐ Sub-accounts can bill invoices as a store charge

☒ Sub-accounts can bill invoices as payroll deduct

Min Periods: 1 Max Periods: 4

WebStore Linking Options

☒ Allow customers to link to this account

Expires: 1/01/17

Group Name: baylor

Password: 1233

☐ Require email approval of sub-accounts (most secure)

Billing Limits (added to the profile of new sub-accounts)

Type: Credit Limit

Amount: 250.00

OK Cancel

Select Image

Set inactive

Pending Features



- ▶ Desktop
 - Multi-Tender Returns

Payment Screen (Refunding by a Single Payment)

Total Due	Paid Out	Due
-43.30	43.30	0.00

Refund

Paid By: Cash Amount: 43.30

OK
Cancel

F10-Multi-Refund

Pending Features



- ▶ Desktop
 - Texting with Twilio
 - Individual Texts
 - Order is Ready
 - Tagged customers

Send Text Messages

Select criteria for customer list

- Tagged customers
- Special Orders ready for delivery**

Send Text Messages (Special Orders ready for delivery)

Text message to send

Your order is ready. Please come to Uniforms USA to pick it up.

Customer send list

Tagged: 3

T	Customer	Phone Number
✓	Burger, Blake	(972)385-3257
✓	Duckett, Paul	(972)391-3688
✓	Plano Surgery Center	(972)423-8594

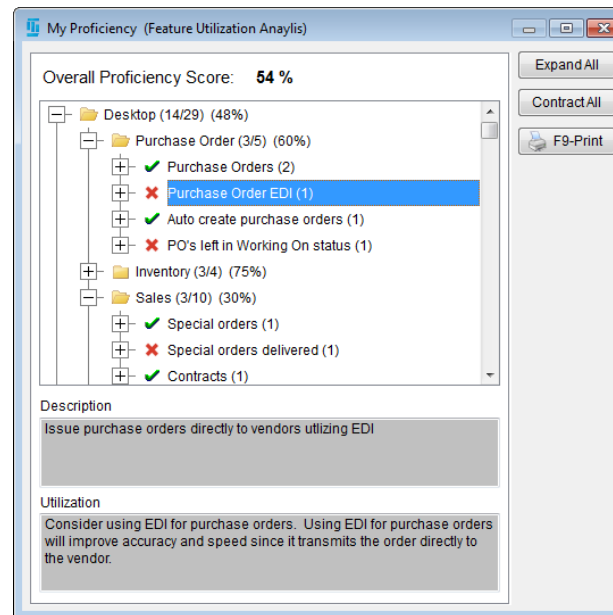
Buttons: Send Text, Previous, Tag Options, Tag-UnTag, F9-Print List

Pending Features



► Desktop

- Your Proficiency (Feature Utilization Analysis)
- File > My Proficiency

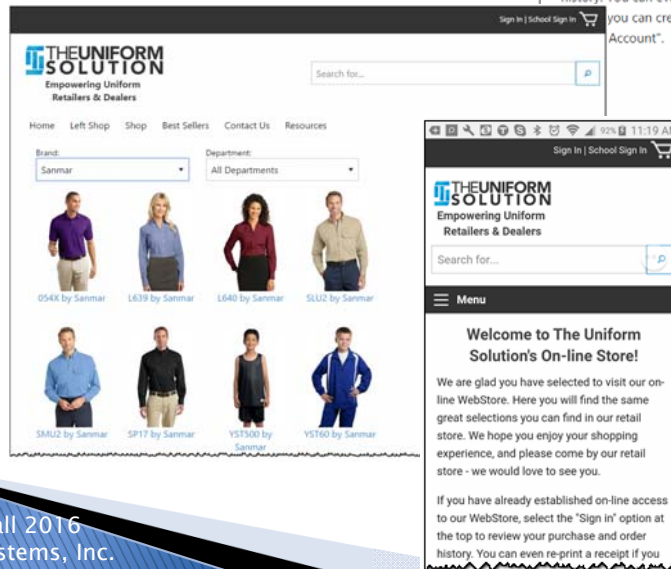


Pending Features



► WebStore

- Modern Look and Feel
- Responsive Design
 - Works on Desktop
 - Works on Mobile Devices



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Coming Features

- ▶ Signature Capture for Sales Entry
- ▶ Brands for Inventory Items
- ▶ Reward Program



Changing Reward Program

Settings

☒ Reward program is active **Reward Program is Active Today**

Start Date: 1/01/16

End Date:

Enrollment

☒ Automatically enroll new customers in rewards program

☒ Prompt to enroll customers not in the rewards program in sales entry

Earnings

Issue a Reward each time total net sales reaches: \$100.00

Reward Type: Fixed Amount

Amount: \$5.00

Reward is Active in how many Days: 14

Reward Expires: 1 year

☒ Inform clerk in sales entry when rewards are earned

OK Cancel

Programming Team



- **Larry Sand**
 - Loves assembly code, writing classes, and a prolific reader on new technology
 - 29 years of development experience
- **Eddie Sizemore**
 - The coonhound of programmers, interface guru, installer developer, etc..
 - 27 years of development experience
- **Paul Sink**
 - 27 years of development experience
 - Honey Baked Ham key developer of their Corporate POS System for 15 years
- **Dave Harms**
 - CoveComm Consulting, Clarion Magazine (Editor, Creator, and Contributor)
 - 24 years of professional development experience
- **Mike Hansen**
 - Boxsoft Development and Consulting – 28 year Developer of programming tools with an emphasis in UI design and user productivity – 32 years total development experience
- **David Johnson**
 - UI, workflow, and architecture expertise with 23 Years in POS development
 - 26 years of professional development experience starting with Andersen Consulting in 1990

Diamond Data Systems Investing in Your Tomorrow



- ▶ 1992 – The Uniform Solution for DOS
- ▶ 2001 – The Uniform Solution for Windows
- ▶ 2003 to 2014 – EDI, ASN Receiving, VStock, Vendor Images
- ▶ 2011 – The WebStore and Web Server Technology
- ▶ 2014 – SQL Server
- ▶ 2014 to 2015 – iOS and Android apps for employees
- ▶ 2016 to 2017 – 6.01 to 6.05 Features, Responsive WebStore, etc.

Total Annual R&D Budget (Programming and Training > \$1M/year)

What's New

Question and Answer
[Guardians of the Galaxy Post Credits](#)