BrokerForce -- Getting Started

Getting Started Included Topics

We welcome your feedback

Let us know how BrokerForce has allowed you to improve efficiency, increase business, gain market share, and make more money. If you provide contact information, we will respond to your inquiry. You can reach us in any of the following ways:

Internet: http://www.brokerforce.com

E-mail: info@brokerforce.com

Fax: 303-666-5956 Phone: 303-665-2344

While we cannot incorporate every suggestion, we do attempt to include most widely applicable suggestions.

Requirements

Required: Intel Pentium® 350 MHz or equivalent, SVGA 800x600 2MB display, 64MB RAM, 100MB* available hard disk space, CDROM drive, Microsoft Mouse or compatible pointing device, Microsoft Windows® 9x, NT 4 or greater.

Note: Versions of Internet Explorer before 5.0 will be updated to 5.0.

Recommended: Pentium 700mhz, 128MB RAM, 100MB available hard disk space, 28.8kbs fax modem, Internet Explorer® 6, Netscape® 5.0 or greater, Internet access, Microsoft Office 2000 for Small Business or Professional ®, a page printer such as a laser jet or ink jet for printing most reports.

150 MB is required if neither Internet Explorer nor Access 2000 is installed (one or both). These are included on the installation disk.

Setup

- If a version of Microsoft Access that is earlier than 2000 is already installed, see "Can I use BrokerForce II with my copy of Access 97?" at http://www.dataforces.com/faq.htm before continuing.
- After you view and agree to the license agreement, LICENSE.TXT located on disk 1 (and in the front of this pamphlet), you may continue with setup.
- Review and confirm all software and hardware requirements, and close all open applications.
- BrokerForce II setup will run when the CD is inserted into the drive. If the auto run does not initiate, click <Start>, <Run>, and enter the path to your CD-ROM drive e.g. "D:\Setup", then press Enter. If you do not have Microsoft Access 2000 installed, you will be prompted to install the Microsoft Access 2000 Runtime component. Follow the prompts and reboot if prompted to do so.
- After Microsoft Access 2000 is installed, continue with the BrokerForce II setup. When prompted, select the folder where BrokerForce II is to be installed. The default path will be "C:\Program Files\DF BrokerForce."
- Installation includes two primary components, the application and the data, because BrokerForce II is designed for sharing data across a network and data integrity. These components are also commonly referred to as the front end and the back end.
- By default, the setup program suggests that the installation path include the first available drive, typically C:\Program Files\DF BrokerForce. You may choose any folder for the installation.
- If you have moved or renamed the DfBf Data.mdb file, you may be prompted to point to the data when you open the program. The Windows file dialog will open for you to select the folder and file where your BrokerForce data is stored. After you select the file, click on <Open>. BrokerForce will display a progress bar in the lower left-hand corner as the tables are re-linked.
- Click <OK> to place a shortcut on your desktop.
- Enter your agency's information. This information can later be edited using the Setup form that is accessed from the menu ribbon <Tools>, <Setup>.
- Change the agency's company information or password: enter the current password using the <Lock View> button on the tool bar, then select <Setup>, and make any necessary revisions. To change the password, the new password will have to be entered twice, once for the change and a second time for verification. The default password is "Password". Do not enter the quote marks. Passwords are not case sensitive.
- "DF BrokerForce" will be installed as a program group in your list of programs. Short cuts will be added for this readme file, help, and BrokerForce. If a file is moved or renamed, the respective shortcut properties must be edited accordingly. See the Windows help file for shortcuts, properties.

A full version of the BrokerForce documentation in Microsoft Word 2000 format is included on the installation disk. It will be copied to the folder where BrokerForce is installed.

Year 2000 Date Formats

BrokerForce is designed to recognize two digit entries for the year of a date. A two-digit year between 00 and 29 (such as 17) is interpreted as 2017 while a two-digit year between 30 and 99 (such as 72) is interpreted as 1972. To clarify years outside of these ranges, enter the year in the four-digit format. To test that both your hardware and operating system are Y2K compliant, enter the date "02/29/00" as the 29th of February 2000. February of 1900 was not a leap year, so this date would not be recognized if your hardware or operating system are not Y2K compliant.

Getting Help in BrokerForce II

BrokerForce has context sensitive help throughout. To view these help files, select the control or form and then press F-1 on your keyboard or click the <What's This> button on the tool bar and then click on the button, control, or form you would like information for. To view reports, click the <Lock View> button on the toolbar. You will be prompted to enter the agency's password. The default password is "Password". For additional information see the password topic in the BrokerForce help file.

Entering Information

The printed documentation included with BrokerForce includes a summary of database terms and procedures as well as detailed instructions for each form. If you are familiar with spreadsheets or database terms and procedures, you are ready to begin entering information. To get you started, here are some of the basics:

Tabstrips, Forms, Controls, and Help

- BrokerForce uses convenient and intuitively designed tabstrips for accessing forms and their subforms.
- New records are created by clicking the 4* (new record) navigation button at the bottom of a form or on the tool bar. You can move between records using the other navigation buttons at the bottom of a form. These buttons are similar to the appearance and function of the buttons on a VCR or tape recorder.
- When a record is being edited, a pencil icon appears on the record handle (gray bar to the left of the record). Pressing the escape key on your keyboard one time will remove the last change within a control. Pressing the escape key a second time will remove all of the current record's changes. Click on the pencil to save any edits. A move to another record or form will also save the changes to the edited record.
- A combination box (drop list) is a control that is a list box and a text box combined. A combination box provides the user with a quick and easy way to select a value. The user can select a value by typing the first few characters of a value or by clicking on the drop arrow to provide a list of values to make a selection from.
- A tool tip describing what a control does appears when the cursor is hovered over a control.
- The status bar at the bottom of the screen displays further information about the control that currently has the focus.
- Press <F-1> on your keyboard to get context sensitive information. Clicking the record handle of a form and pressing <F-1> will display the help topic for that form.
- The tab key is the fastest way to move between controls on forms.
- In BrokerForce URLink controls are used to store hyperlinks. These controls can be used to link to a document on your local drive, network, or a site on the Internet. After selecting an URLink control, use the <Insert Hyperlink> button on the toolbar to edit/insert a hyperlink.

Entry Sequence

Prior to placing orders, some preliminary information is required. After Agency information has been entered into the Setup Dialog box, the sequence of events for entering this information is:

Add The Agency's Representatives' Contact Records First!

- Enter contact information for your agency's account representatives into the Contact form.
- On this form, select a previously saved rep's contact record, select your agency from the Add drop list, select a position, i.e. 'Account Representative', and click the <Add> button. You will be prompted to verify that you want to add that contact/company association. Click <OK>.

Representatives

- After contact information has been entered, and the reps have been associated with the agency, click on the <Representative> tab.
- On the Representative form, complete the account representative's agency information such as their commission split . This percentage will be used as the default commission split percentage when orders are placed for this representative's accounts. See BrokerForce Help.

Vendors

- Enter vendor records into the Vendor form.
- Set up the vendor's price list(s) preferences using the Price Lists tab on the Vendor form. Select a price list, one through six, assign a descriptive name such as "Wholesale", "Distributor", or "Volume 1" as appropriate, and place a check mark in the Quantity check box if the list is dependent on volume. Price list 7 is reserved for "Contract" pricing and a separate column is provided for SRP. Use the Setup tab to set additional vendor preferences.
- Add contacts for a vendor by selecting the Contact List tab on the Vendor form and clicking the <Add a Contact> button. Phone and address informa- tion for contacts added this way will default to the company's information.
- Add vendor categories if appropriate using the <Categories> tab.

- available price list options. A note up to 255 characters in width may be added for this record. The note will appear anytime that an order is begun for this customer/vendor relationship.

Orders

- After account representative, vendor, product, contact, and customer information have been entered, a new order may be added. Select a vendor on the Order form, then select a customer from the Bill To: drop list. Only customers that have been assigned account numbers for this vendor will appear in the list. Pricing will default to the price list assigned to the customer's account number, and address and contact information will be auto-filled. Complete or edit the order header as needed.
- Add line item details to the order by selecting from either the ItemNo or ProductName drop lists. When you add an item to an order, BrokerForce checks to see if volume pricing or promotional pricing applies. If the product is ordered in one unit (i.e. case) but priced in another (i.e. pound), the BillQty control is used for this adjustment. The line item's extended amount is then calculated based on the quantity, billing quantity (BillQty), line item discount, and price list chosen. Commissions are calculated based on the extended

amount adjusted for commission factors such as rate and the account representative's split.

Performance Issues

There are several ways to increase the application's running speed. Many of the methods described below are general tips that will improve the performance of any Windows application. For more information about performance, consult your Windows documentation.

This application uses your computer's random access memory (RAM) to display illustrations and access your data. If this title runs too slow, or if you get error messages saying that you are out of memory, you may not have enough available RAM. Following are some tips to make the best use of your computer's available memory:

- Close all open applications that are not being used.
- Add more RAM (memory) to your computer. You can determine how much memory is available by starting MS-DOS, typing mem and pressing ENTER. You need at least 64MB of RAM (128 MB is recommended).
- If you are using more than 256 colors in your video display, you may want to lower the colors to 256. For information about how to change your Windows display, consult your Windows documentation.
- Disable the Microsoft Office Find Fast utility. This indexing utility can dramatically slow data access across networks. To see if it is installed, click <Start>, <Settings>, <Control Panel>, and see if the Find Fast icon appears. From the menu ribbon, select <Index>, <Close and Stop>. See the Find Fast help file about removing find fast indexes.
- Use the repair and compact feature that becomes available when you choose File and Exit to leave the program. All users must close the application in order to compact the data. Compacting removes excess space created by deletions and the moving of data.

The sequence of movement between forms can also affect performance. This application swaps forms other than the Order form into and out-of memory. The Order form is always loaded into memory while other forms are alternatively loaded into memory when they are selected from the tab strip. Therefore, a movement from the Order form to the Customer form will load the Customer form into memory the first time that it is selected.

Moving from the Customer form back to the Order form will be quite fast and the Customer form will not have to be reloaded if the user returns to it from the Order form. Movement to another form, such as the Vendor form, will require waiting for that form's information to load.

If your data is located on a network server, talk to your systems administrator about increasing throughput. One option is to replicate the database and move a replica to your local machine. This usually results in significant performance improvements and reduced network traffic. This improvement must be balanced by any needs for real-time data updates and maintenance issues. Changes made by one replica user are not seen by other users until the replicas are synchronized.

For more information about improving performance, consult the BrokerForce documentation or your Windows documentation.

Troubleshooting

Can't register file - If all applications are closed before you began to run the BrokerForce setup and the error message states that the files are open and can not be replaced, click <Ignore> to continue with the setup. In most cases, these files are the same version and do not need to be reinstalled. BrokerForce should open normally.

Can't find data - If you have moved or renamed the DfBf Data.mdb file, you may be prompted to point to the data when you open the program. The Windows file dialogue will open. Select the folder and the file where your BrokerForce data is stored, click on <Open>, and look for a progress bar in the lower left corner of the BrokerForce window which will show as the tables to your data are re-linked. To find a file or folder see Windows Help in Exploring.

Documentation

Although a bound copy of the documentation is available for the Team and Enterprise versions, after the program is installed; BrokerForce users may use the 'Documentation' shortcut in the DF BrokerForce programs group to view and print the documentation in Microsoft Word format. If you do not have a copy of Microsoft Word, you may install the Microsoft Word Viewer 97 included on the CD-ROM and installed into the DF BrokerForce program folder. The viewer may be installed by running the wd97vwr32.exe file. This will allow you to view and print the documentation.

Synchronization and Backup

If you are using the Solo version of the program, you will be creating a backup of your data. If you are using the Enterprise version of the program, you will be synchronizing to another replica of the data set in which your replica is a member.

To synchronize or backup your data: Choose <File> on the menu, then <Exit> from the drop list, and the utility screen will appear that recognizes whether your version of the program is Solo or Enterprise. The process sequence for either backup or synchronization walks a user through the necessary steps. For more information, e-mail support@brokerforce.com with your questions.