



## TakeStock Data Sheet: System Management

**System Management provides distributors with a variety of tools and functions that enables them to operate much more efficiently.**

System Management solution provides the user with remarkable control over menus, security access and peripheral devices such as workstations and printers. Job streams are particularly valuable for automatic processing of scheduled reports and updates, allowing distributors to operate more efficiently. System Management also provides internal communication tools such as an electronic phone book and entry of free form notes related to customers, vendors, items and warehouses. Multiple levels of security ensure that employees have access to the data needed to do their jobs, while protecting access to sensitive data.

Management Alerts is a powerful System Management application that sends user-defined e-mail notifications of important events and potential issues, allowing the distributor to react more quickly, thereby improving customer service levels. Summary Management Inquiry gives distributors an instant snapshot of current and recent business activity. This inquiry can be configured to present a wide variety of financial ratios such as current ratio, debt to equity, sales per employee and net return on total assets, providing management with a quick and easy tool to monitor business performance.

### **System Controls**

- Provides online help throughout the system that can provide tutorial flexibility
- Facilitates branch, warehouse, department and cost center posting
- Manages unlimited printers using flexible operational controls
- Allows international currency controls
- Allows customization of menus, icons and quick codes
- Accommodates virtually any number of companies

➔ KEY REPORTS:

Tax  
Bank Reconciliation  
Bank Activity  
Currency Variance  
Field Audit History  
Job Stream Results

➔ INQUIRIES:

Summary Audits  
Bank  
Phone Book Query  
Database Status

**Communication Tools**

- Management Alerts monitors activity and sends messages to inform recipients of important events and exceptions
- Centralizes contact information into an electronic telephone book combining numbers for general company usage, customers, vendors and individual users
- Maintains up to five phone numbers for each contact including voice, fax, data and pager numbers, as well as contact e-mail address
- Contact information can be used on various documents, such as Bill of Lading, Certificate of Analysis and Price Change Letters
- Provides free-form notes to be associated with all major entities (i.e. customers, vendors, items, warehouses)
- Displays urgent notes automatically upon access of the entity in order entry, ensuring that critical information is not missed
- Stores personal notes and allows a "mailbox" for sending of messages between users
- Contact e-mail addresses can be used by Management Alerts to send messages
- Organizes notes by user-defined topics
- Allows notes to be exported for use in transactions

**Job Stream**

- Allows the distributor to define groups of reports, prints and/or update programs that are scheduled to run automatically in the Background Processor
- Streamlines operations by running reports and updates in the correct sequence according to schedule without operator intervention
- Manages multiple job streams with ability to select run time and frequency

**Personalization**

- Provides streamlined data entry with defaults for branch, department, warehouse and salesperson within each user's profile
- Stores user-defined record selection criteria, targeting what to include in a lookup list or report (i.e. select items located in a warehouse or vendor)
- Defines and saves the contents of lookup lists by user, displaying the information each employee needs
- Allows the distributor to tailor user-defined fields in various tables for use in maintenances, transaction processing, lookups and filters, saves user-definable report options as templates

**Security**

- Organizes or defines users as members of various user groups for efficient security setup
- Offers multiple security levels to control access to data and functions by group

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