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Introduction
This document describes the set up process for the integration of the Delivery Dispatch System on the Activant Eagle system. This guide is designed to assist the customer and the Activant representative in completing the setup procedures. The Delivery Dispatch System (DDS) Integration feature manages the scheduling, tracking, and performance of deliveries, as well as gives you the ability to manage delivery truck maintenance schedules. DDS requires a separate PC Server running Windows 2003 Server or higher, as well as an SQL database. The DDS application supports the ability for the Eagle system to automatically send order data to the DDS, thus eliminating the need to manually enter this information into the DDS.

Requirements
The following are the requirements for the Delivery Dispatch System (DDS) integration on your Eagle system.

Important
DDS and Pick Pack Ship are not designed to work together.

- Laser Printer loaded on the local machine with Enhanced Forms set up for the invoice documents
- The Eagle system must be on Eagle server level 29.2158.052 and Eagle for Windows level 17.1790.50 or higher
- Dispatch and Delivery Software
- Customer Order Management (COM)
- SQL Server loaded and running on Server
- Run SQL Security in Mixed Mode
Overview of Setup Tasks
To integrate the DDS on your Eagle system, you must complete a series of setup tasks.

- In SQL Server:
  - Create DDS Database in SQL
  - Create DDS User Login and Password (ECS4User)
  - Assign sysadmin Rights to User
  - Map DDS db to user
  - Run DB Script
  - Add login record in UserTable
    - Id – dds / accessrights - 15
- Create ODBC entry—For your DDS database on your DDS server
- Launch DDS—The Productivity Products Team will do the initial setup and configuration for you
- Configure Eagle options—Review and set up the various Eagle options that apply to the DDS integration
- Set up Invoice/Journal Number ranges by store
- Add Shipping methods—Enter the shipping methods you use in your business.
- Set up Enhanced Forms—Enhanced Forms are required for printing and sending order transactions to the DDS.
- Set default shipping method for customers—you can set the default shipping method for a customer account so that when creating an order transaction for that customer at POS it will automatically default to that method.
- Set shipping method at POS—this task is not truly a setup task, but it is included in this guide for your reference. It explains how to set or change the shipping method when completing an order transactions at POS.

The procedure steps for each task are explained in the remaining sections of this guide.

SQL Server Configuration

I. Create DDS Database
   1. Right Click on the Databases Folder in the Object Explorer screen, and select New Database.
2. On the General Tab, enter a name for the Database (the default name is DDS_DB).

II. Create DDS User Login

1. Open the Security in the Object Explorer Screen, right click on the Logins folder, and select New Login.

The New Login Window displays.
2. On the General page, do the following:
   - Create Login Name (DDSUser)
   - Change to SQL Server Authentication
   - At Create Password and Confirm Password, enter ECS4User.
     - Turn Off “Enforce password policy”
     - Assign Default Database to DDS database (DDS_DB)


4. On the User Mapping page, assign DDS Database (DDS_DB) and assign the Role as db_Owner

III. Finalize Database

1. Open the ‘New Query’ Window for the DDS Database.
2. Right click on the DDS database> Select New Query
3. From the Main Menu select File>Open>File
   Select your ‘DDS_ALL_V510.sql’ script file
4. Select Execute to run the script.
5. Repeat steps 2 and 3 with the ‘dbo.dds_POSInterface_Eagle.sql’ procedure script.

Create ODBC Entry
The third-party’s Professional Services team will help you complete the following steps.
1. From the Windows desktop, click Start and then click Control Panel.
2. From the Control Panel window, double-click Administrative Tools.
3. From the Administrative Tools window, double-click **Data Sources (ODBC)**.

4. From the ODBC dialog, click the **System DSN** tab. Then click **Add**.

5. From the Create New Data Source dialog, click to select **SQL Server**, then click **Finish**.
6. From the Create a New Data Source dialog, type a name for your DDS database (such as dds). You can leave the Description field blank. In the Server field, click the drop-down arrow and select your SQL Server. If you do not see it, type in the name of the server where DDS is loaded (for example, plugin). You may use the IP address if you so choose. Then click Next.

7. In the next dialog, click the second radio button With SQL Server.... Leave the 3rd box checked. Type in your Login ID and Password for the SQL Server that was created when you completed the database ‘Login Name’ task. Click the Client Config button to verify the TCP/IP box is selected. Click Next.

8. From the XYZ dialog, check the first box, then click the drop down arrow and select your DDS database (if the Database is not already the default selection). Leave the 2nd box unchecked. Make sure the 4th and 5th boxes are checked. Then click Next.
9. From the XYZ dialog, check only the third box *Perform translation*.... Then click *Finish*.

10. From the XYZ dialog, click **Test Data Source**. A message displays, Tests Completed Successfully.
11. Click OK, then Click OK again.

Start and Log in to the Delivery Dispatch System

This section describes how to start the Dispatch and Delivery program. The Productivity Products Team will do this for you. This section is included only for future reference, should you ever need to set up another client PC for the first time. The default settings are not set properly to communicate with the Eagle.

1. Log in to your DDS database using the ODBC name (such as “dds”) you created in the Create ODBC Entry section above.

2. On the main screen, click the Utilities button (wrench).

3. Click the Admin button.
4. Click System Preferences. This process can be done on the server and only needs to be done once.

5. In the POS Type field, click the drop-down and select EAGLE.

6. Click the checkbox to select the POS Order Notes option.

7. Click Close twice.

**Client Admin Settings**

This process needs to be completed on EACH client.
1. Log in DDS on each client, click Utilities and then click Admin as shown in the previous section.

2. Click the checkbox to select the ‘Show Colors’ option in the Color Options section on the ‘User Preferences’ tab.

Configure Eagle Options

This section describes the options that you will set in the Options Configuration window. The following table lists the options that you will set for Dispatch and Delivery on your Eagle system. After the table, you’ll find the procedures steps that you can follow when setting each option.

<table>
<thead>
<tr>
<th>ID #</th>
<th>Set the Current Value field to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>8780</td>
<td>E – Verify that this is set to E. If not, you must contact Activant to change this field before you can continue. Call Activant direct at 1-800-538-8597.</td>
</tr>
<tr>
<td>76</td>
<td>Y</td>
</tr>
<tr>
<td>79</td>
<td>Y</td>
</tr>
<tr>
<td>102</td>
<td>O (Order)</td>
</tr>
<tr>
<td>5065</td>
<td>Shipping Methods</td>
</tr>
<tr>
<td>5111</td>
<td>YES</td>
</tr>
<tr>
<td>8781</td>
<td>192.168.1.124 (dds server IP)</td>
</tr>
<tr>
<td>8782</td>
<td>DDSUser (Login)</td>
</tr>
<tr>
<td>8783</td>
<td>DDS_DB (database name)</td>
</tr>
<tr>
<td>8784</td>
<td>dds_posinterface (store procedure name)</td>
</tr>
<tr>
<td>8785</td>
<td>ECS4User (login password)</td>
</tr>
<tr>
<td>8787</td>
<td>B, I, or O - set this to the document types you want to flow over to DDS: orders, invoices or both.</td>
</tr>
<tr>
<td>8975</td>
<td>If desired, change the default load types.</td>
</tr>
<tr>
<td>8976</td>
<td>If desired, change the default delivery times.</td>
</tr>
</tbody>
</table>
Option Settings in the Options Configuration Window

1. From the Eagle Browser, in the Launch bar, type OPTIONS and press Enter.
2. On the toolbar, click the ID (Ctrl+I) button to display the Access Option by ID dialog.
3. In the Option ID field, type the ID # that you want to configure and click OK. Use the previous table for a list of all the ID numbers that you need to configure for DDS.

   Note: These settings can be set as global or by store if DDS is installed at more than one location at a customer’s site.

4. Look at the entry in the Current Value field in the Options Configuration window. If the entry doesn’t match the Value column in the previous table, you need to configure that option. To do that:
   - Click anywhere in Current Value field for that option. The field is now highlighted. Click the down-arrow at the right edge of the field.
   - The available values for that option display. Select the correct value, based on the previous table. Click OK. The dialog closes.
   - On the toolbar, click Change (F5).
   - Repeat this process for each of the ID numbers in the previous table.

   Note to multistore users: Although it is not typical or recommended, it is possible to set up multiple databases with multiple users, logins, etc. If you do, the DDS options in Options Configuration can be set up so that the interface application will log into the appropriate database based on the store.

Add Shipping Methods

Complete the following procedure steps to add shipping methods.

1. From the Eagle Browser, make these selections: System Management Menu > Options Configuration Menu > Ship Via Maintenance. The following window displays.

2. On the toolbar, click the Add (F4) button. The Add dialog displays. The following is an example:
3. Use this dialog to add shipping methods. Fill in the fields and then click OK. Repeat the process to create as many codes as you need. This will be the Delivery Type in DDS.
   - **Code**—The code you use to identify this shipping method. The pre-set shipping methods already have a code, but when you set up your own shipping methods, enter any unused number or letter for the code.
   - **Description**—The description of this shipping method. The pre-set shipping methods already have a description, but when you set up your own methods, enter a description such as "Dump Truck," "Flatbed," etc.
   - **Shipper System Code**—This field must be Set to 2. This is the code that triggers the Eagle system to process the order to DDS.
   - **Shipper Service**—Leave this field blank; it is not used for the DDS application.
   - **Shipper Factor**—If the shipping code is a flat amount you charge the customer (there's a value in the Flat Amount field), enter the appropriate percent in the shipper factor field so the system can calculate your cost for the freight.
     If the shipping code isn't a flat amount (there isn't a value in the Flat Amount field), enter the percent in the shipper factor field that the system should use to calculate freight based on the Third Party's cost (i.e. so the system can calculate the "selling price" of the freight).
   - **Flat Rate**—A flat amount you charge the customer for freight. The system uses the percentage in the Shipper Factor field to calculate the cost.
   - **Free if over**—Enter the threshold at which shipping is free to the customer. For example, if the customer's order must be over $1000 to receive free shipping, enter 1000 in this field. When a customer's order reaches the Free if Over amount, the system posts your cost (for costs of goods sold), but not a selling price to the customer.

**Set Up Enhanced Forms**

Enhanced Forms (formerly called Flex Forms) are needed for printing and sending the order transaction to the DDS. More detailed information about Enhanced Forms can be found in the online help topics. From any Eagle application window, click Help. From the Contents tab, click to open the following books: *Customer Order Management (COM) > Set Up Customer Order Management > Enhanced Forms Setup.*

**Set Up Device Configuration**

1. From the Eagle Browser window, select Utilities (from the list on the left side of the window).
2. Select Device Configuration. The Device Configuration window displays.
3. In the Device column, double click Invoice Printer. The Invoice Printer dialog displays.
4. Click Device. The Invoice Printer Configuration dialog displays.
5. From the Choose a style list, select option 6 – Print Flex-Forms from this Terminal.
6. Click OK. The dialog closes and the Device Configuration window is still open.
7. In the Device column, double click Flex-Forms Default Printer.
8. The Invoice Printer Configuration dialog displays.
9. From the Choose a style list, select option 1 – Windows printer defined on this system. The Select Windows Invoice Printer dialog displays, with a list of printers available on this machine.
10. From the list, select the laser printer that is installed on the local machine. It must be a laser printer to work properly with the Eagle DDS integration. Click OK.
Set Up Options Configuration

In this section, you will set up the following in Options Configuration for each type of Enhanced Form:

- **Form type** Select from the many pre-defined formats.
- **Sort order** Determines the order that the details lines print on the document. Select Location, Line Number, SKU, or Use Code.
- **Location option** Determines if the column on the form is assigned to Location Code or Suggested Price. Other invoicing options will then apply to this column. For example, if you select Suggested Price, then the invoicing option (MIV) "Suggested Price to Print?" determines the price that prints in this column.

1. From the Eagle Browser, click System Management Menu. From the list that displays, click Options Configuration Menu and then click Document Imaging Options. Locate the Enhanced Form ("Flex Form") options. The following is an example of the window.

```
<table>
<thead>
<tr>
<th>SubSystem</th>
<th>Description</th>
<th>Current Value</th>
<th>Kept By</th>
</tr>
</thead>
<tbody>
<tr>
<td>E4W1</td>
<td>Flex-Form for estimate documents</td>
<td>Std like Legacy X Invoice/Order System</td>
<td></td>
</tr>
<tr>
<td>E4W2</td>
<td>Flex-Form sort order for estimate documents</td>
<td>N=Line Number</td>
<td>System</td>
</tr>
<tr>
<td>E4W3</td>
<td>Flex-Form location/suggested column for estimate documents</td>
<td>Suggested Price</td>
<td>System</td>
</tr>
<tr>
<td>E4W4</td>
<td>Flex-Form for order documents</td>
<td>Std like Legacy X Invoice/Order System</td>
<td></td>
</tr>
<tr>
<td>E4W5</td>
<td>Flex-Form sort order for order documents</td>
<td>N=Line Number</td>
<td>System</td>
</tr>
<tr>
<td>E4W6</td>
<td>Flex-Form location/suggested column for order documents</td>
<td>Suggested Price</td>
<td>System</td>
</tr>
<tr>
<td>E4W7</td>
<td>Flex-Form for invoice documents</td>
<td>Std like Legacy X Invoice/Order System</td>
<td></td>
</tr>
<tr>
<td>E4W8</td>
<td>Flex-Form sort order for invoice documents</td>
<td>N=Line Number</td>
<td>System</td>
</tr>
<tr>
<td>E4W9</td>
<td>Flex-Form location/suggested column for invoice documents</td>
<td>Suggested Price</td>
<td>System</td>
</tr>
</tbody>
</table>
```

Notice that for each form type (estimate, order, etc.) there are three options—form type, sort order, and location/suggested column ("loading ticket" only has the first option: form type)—plus there is one additional option as to whether or not a barcode prints. For each of the form types, you will set these three options (only one option for "loading ticket"), plus the "barcode prints" option, if desired.

2. Select the form type for the first Flex-Form, estimates. Click the Current Value to display an arrow, click the arrow to display the following selection dialog. Click to select one of the form types and then click Open. The dialog closes.

3. Select the sort order for estimates. Click the Current Value to display an arrow, click the arrow to display the following selection dialog. Click to select one of the sort orders and then click OK.

4. Select the location/suggested column option for estimates. Click the Current Value to display an arrow, click the arrow to display the following selection dialog. Click to select one of the options and then click OK.

5. Select the barcode prints column option for estimates. Click the Current Value to display an arrow, and click the arrow to display the following selection dialog. Select Y or N, and then click OK.

6. Repeat steps 2-5 to select the options for the remaining form types.
7. (Optional) If you want to print Loading Tickets on an invoice printer using Flex-Forms (rather than printing them on a receipt printer), set up the option "Print loading ticket to invoice printer," as follows:

- Click ID, type 3119, and press Enter. The option displays.
- Click in the Current Value Column, click the arrow that displays, and select Y or L.
- To print Loading Tickets on the receipt printer, set option 160 "Print Loading Receipt" to Y or L. This option is mutually exclusive from option 3119 to print Loading Tickets on an invoice printer. You can use either option, or you can even use both if you want to print a receipt version AND an invoice version of the Loading Ticket.
- After setting the options for each of the 9 form types, click Change to save your setup selections.

**Set Default Shipping Method for Customers**

Eagle POS can set customer accounts to a default Ship Via.

1. From the Eagle Browser, in the Launch bar, type **MCR** and press Enter. The Customer Maintenance window displays.
2. Display the customer account.
3. Click the 6. Misc tab.
4. Click the Additional Flags hyperlink (located in the lower right corner of the screen). The Maintain Shipping Information dialog displays.

![Maintain Shipping Information dialog](image)

5. In the Ship Via field, select a code. The code you choose must have a Shipper System Code of 2. See the previous section, Add Shipping Methods.
6. Click OK to close the dialog.
7. On the toolbar, click Change (F5).
8. Repeat this process for any customer accounts in which you want to set a default shipping method.

**Set Shipping Method at POS**

When creating an order transaction at POS, you can set the shipping method for that transaction (or change the default that displays from the customer account).

1. At POS, start the order transaction and select the customer as you normally do. Note that a transaction type of Order is the only type that will automatically be sent to the DDS.
2. From the POS Posting screen, click Customer (F11) and then click Header (F11) to display the Header screen.
3. Click the Ship Via link to display the Shipping Options dialog.
4. Fill in the fields, using the drop-downs to make your selection where applicable.
5. Click OK to close the dialog.
6. Change the Delivery field to the date you want the order delivered (it defaults to today’s date).
7. Click Post (F11) to return to the Posting screen.
8. Post the items to the order as you normally do.
9. Total the transaction and select option 2 – Save and Print. Note: Orders must be saved and printed to pass the order to the DDS. Once the order is completed, a message displays at the bottom of the screen, “Creating Delivery Document.” The order transaction has now been transferred to the DDS.
10. On the Header Screen, enter the Requested Delivery Time and Delivery Type:
This information is passed to the Dispatch and Delivery system so that the Dispatcher knows the time frame of the requested delivery and the type of material the order includes, without having to look at the details of the order. This Process will change with Release 18 of Eagle for Windows.