

RCG OSAS Virtual Meetup

Introductions

Colin Ennis
Randy Ennis

- RCG Staff Introductions
- Customer Say Hello
- Apteau

IT Updates

Colin Ennis

- Server Updates
- Java Changes
- System Reliability
- Other RCG Offerings

OSAS 8.0

Randy Ennis
Curt Ennis
Randy Wilson
Faith Ennis

- What's new with OSAS
- Cool OSAS add-ons

Wrap Up

Randy Ennis

- Prize Drawing





- Corporate Headquarters: Milford, Delaware
- Team of 12, providing business solutions since 1983
- OSI Strategic Partner & top reseller
- Experience with Point of Sale, Distribution, Field Service, Manufacturing and other specialized applications
- Software development team (six programmer/analysts, extensive experience, BBx, Pro5, BBj, C#.Net, DevExpress, SQL Server)
- IT Department/MSP - experience with Microsoft, Hyper-V, Azure, Linux, networking, VOIP, and Internet services

How much longer can I use OSAS?

We continually get asked this question, comments include:

- We're very comfortable using OSAS and don't want to change
- Do I have to switch from OSAS to TRAVERSE?
- I'm XX years old, and don't want to change software until I retire.
- What happens if I do nothing and keep using OSAS?

Is OSAS still supported?

- Yes, OSAS 8 is the current version, includes new features and continues to receive annual compliance updates for payroll, EPTR, 1099's, etc.
- Build History:
http://clientportal.osas.com/downloads/osas_help/osasbuildhistory/osasbuildhistory.htm
- Basis continues to enhance the BBJ language that powers your OSAS software.
 - Data Replication / Disaster Recovery
 - BBJ App separate from Java
 - Enhanced grid for inquiry functions
 - You'll learn more about some of these features later this morning.



Partnering with Aptean

Aptean continues to build and acquire purpose-built solutions that help our customers transform their operations, processes and technology – ultimately giving you a competitive advantage.

So you can be Ready for What's Next, Now™



\$390M+
Revenue

We are a company with strong revenue and profit growth due to our unceasing attention to customer success.



2,200+
Employees

We provide exceptional customer experiences because we create winning teams that focus on meaningful relationships.



1,000+
Cloud Customers

We have transformed into a cloud company, supporting our customers as they make the move to the cloud.



6,500+
Customers

We partner with our customers to deliver the best solutions for them.

What's new in OSAS

- Curt Ennis
- Randy Wilson
- Faith Ennis

OSAS 8 New Features and Functions

OSAS has been around for a very long time, but it shows no signs of stopping.

- The OSAS development team at Aptean continues to add new features

During this session,

- We'll show you how OSAS continues to evolve and improve
- We'll highlight some of our favorite newer OSAS 8 features
- We'll focus on OSAS 8 standard features, but keep in mind that we can do customizations to extend OSAS functionality
- In some situations, OSAS 8 features can be back-ported to older versions (i.e. OSAS 7.5), so if there is a solution with value, we can discuss how to integrate that into your environment.

Procedural Tips

Use “Information Inquiry” for lookups, “File Maintenance” for Changes
Reports – F2 Inquiry – Non-contiguous selection for Reports – Tag for Reports
Report Defaults – How to save different versions of ATB / AR Detail History

Identify Invoice Number

AP Hold/Release Invoices – On Demand Checks

GL Accounts Inquiry – Unposted/Posted, Drill down into detail

AR, AP Detail History – Filter

GL Financial Statement Verification

Lock GL Periods – Prior and Future

New Stuff: Programmer Favorites

Charts in GUI Information Inquiry (Customers and Open Invoices, Balances, History)

Report links from Inquiry Functions

Jasper Reports “Preview mode” – Search capability, Extra tabbed reports

New Roles report to show who has what access: RM > Installation > File Lists

Hot off the press: Active Grids

New Stuff: Sales Order

Return to order after printing form

Make Invoice Number and Order Number the same

Copy Order

Change Batches while Batches active (PO too)

After Online Form Return to Current Transaction

RMA allowing return of goods before crediting to customer (not so new)

Line item discounts

Additional Descriptions outside of line item screen (helps with record locking)

On-demand confirmation – new Proforma Invoice prints before verify

Dashboards – example Customer Aging, right click view ATB or Aging summary

ODBC (Open Database Connectivity)

- Pull data easily into Excel – Refreshable
- Predefined Excel Sheets – Productivity reports
- Build your own Spreadsheets (or work with RCG to develop)
- Table definitions available online:
http://clientportal.osas.com/downloads/osas80_sdk/Content/Home.htm
- More on Smart Spreadsheets
- Can also be used to link to 3rd Party Reporting platforms

Auto Update – How it works, what happens to Mods?

- If conflicts are found, do not proceed! Contact your programmer
- Check Options and Interfaces, User Preferences to activate new features

Cool OSAS add-ons – Randy Ennis

Credit Card processing

UPS/FedEX Shipping Integration

Handheld OSAS functions

Web Portals

EDI – order imports/exports



Integrated OSAS Credit Card processing

- Single step CC processing within OSAS.
- Level 3 detail / interchange rates
- secure off-site card storage (this is helpful for clients that want to keep a “card on file”), useful for deposits, or paying off statement at month end.
- OSAS reporting
- OSAS Batch settle / compare branch totals with credit card merchant total (no need to login to portal).
- OSAS void transaction, automatically using the original card from purchase.
- Lane3000 EMV
 - Contactless
 - EMV chip and swipe.



Credit Card – secure tokenized off-site storage

[illegible]

Credit Card – activity log

Response Computer Group, Inc. Activity Log Thru

Page 64 of 68

Trans ID	MID	Name	Order Amt.	Card	Brand	Expire	Auth Cd	Status	Swipe Notes
Batch ID	Cust ID	Phone	Amt Auth.	Response Text					
Order No.	Date	Time	Street Zip						
100002232	2			xxxx-	VISA	04/24	Adjust	Sale	N
POSTED			246.00	Success					
	10/19/2022	08:53							
100002233	2			xxxx-	VISA	06/23	058731	Sale	N
POSTED			195.00	Approved					
	10/19/2022	09:35		Addr. Response: 5-digit ZIP code matches, address does not match					
100002234	2			xxxx-	VISA	06/23	Adjust	Sale	N
POSTED			195.00	Success					
	10/19/2022	09:35							
100002235	2			xxxx-	MC	11/24	47567Z	Sale	N
POSTED			205.00	Approved					
	10/19/2022	13:28		Addr. Response: 5-digit ZIP code matches, address does not match					
100002236	2			xxxx-	VISA	06/24	03336B	Sale	N
POSTED			65.50	Approved					
0018719100	10/21/2022	10:44							
100002237	2			UNKN				Sale	N
POSTED			150.00	Incomplete Contactless Cardread. Please try again.: IngenicoRBA or IngenicoUPP 23. response type=23					
0018750500	10/25/2022	16:41							
100002238	2			xxxx-	VISA	11/22	04355D	Sale	N
POSTED			150.00	Approved					
0018750500	10/25/2022	16:41							
100002239	2			xxxx-	MC	11/24	30169Z	Sale	N
POSTED			78.00	Approved					
	10/31/2022	13:25		Addr. Response: 5-digit ZIP code matches, address does not match					
100002240	2			xxxx-	MC	11/24	13583Z	Sale	N
POSTED			82.00	Approved					
	10/31/2022	16:28		Addr. Response: 5-digit ZIP code matches, address does not match					

WORLDPAY FIS GROUP
213 RCG DRIVE
MILFORD DE 19963
PHONE: (302)555-1212



INVOICE

PAGE 1

Click link or scan code for payment **INVOICE DATE** 11/20/2022
<https://gocartpay.app/3V3OqEn> **INVOICE NO** 00002098

Response Computer Group

1 item	Total
Response Computer Group	\$7.46

Contact Information

Email
randy@rcgweb.com

Phone number
302-335-3400

☒ **Pay easy with GoCart**
Response Computer Group is partnered with **GoCart** to provide you with faster and more secure checkout. By signing up, you agree to the **GoCart** [Terms and Conditions](#) and [Privacy Policy](#)

Continue to Billing



UPS / FedEx integration

- OSAS integration with UPS WorldShip & FedEx PowerShip
- Sales Order information (ship via, shipping address, cod, etc.) is automatically sent to the UPS shipping PC workstation
- 3rd party freight billing
- Shipping information (tracking #, weight, charges) is stored in OSAS sales order and shipping history database – available to all OSAS users
- Tracking # printed/emailed on customer invoice.
- Option to link tracking # on RCG Internet Applications
- Tables to control markup of freight costs
- Also support real-time labels for high volume needs



Handheld OSAS functions

- Browser based, real-time updates to OSAS data
 - Requires Wi-Fi connection to server
- Sales Order – create a new order / Verify
- Purchase Order – receive goods
- Inventory Physical Count
- Inventory Stock Check – quick update



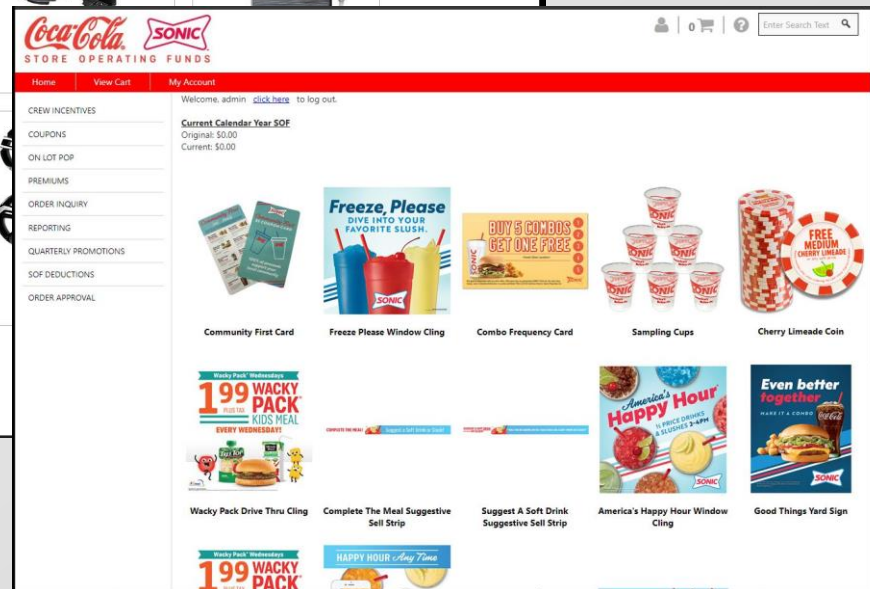
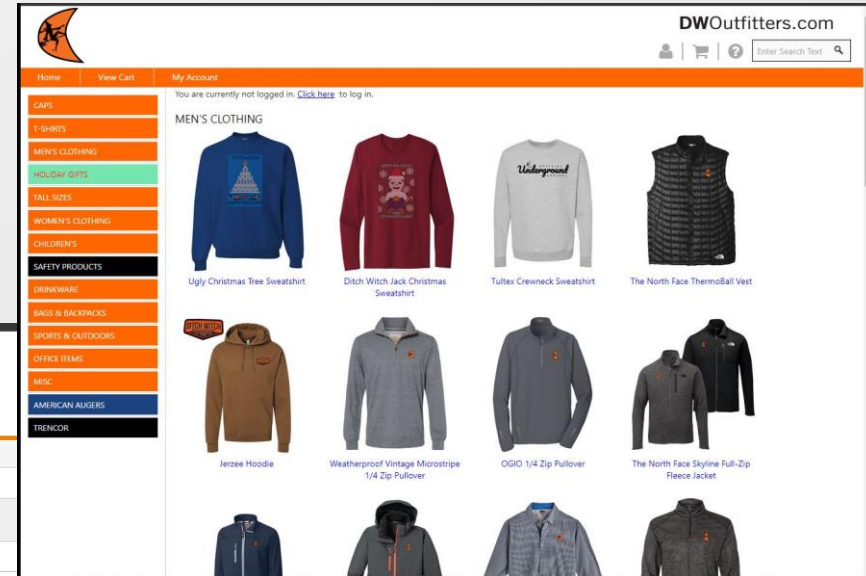
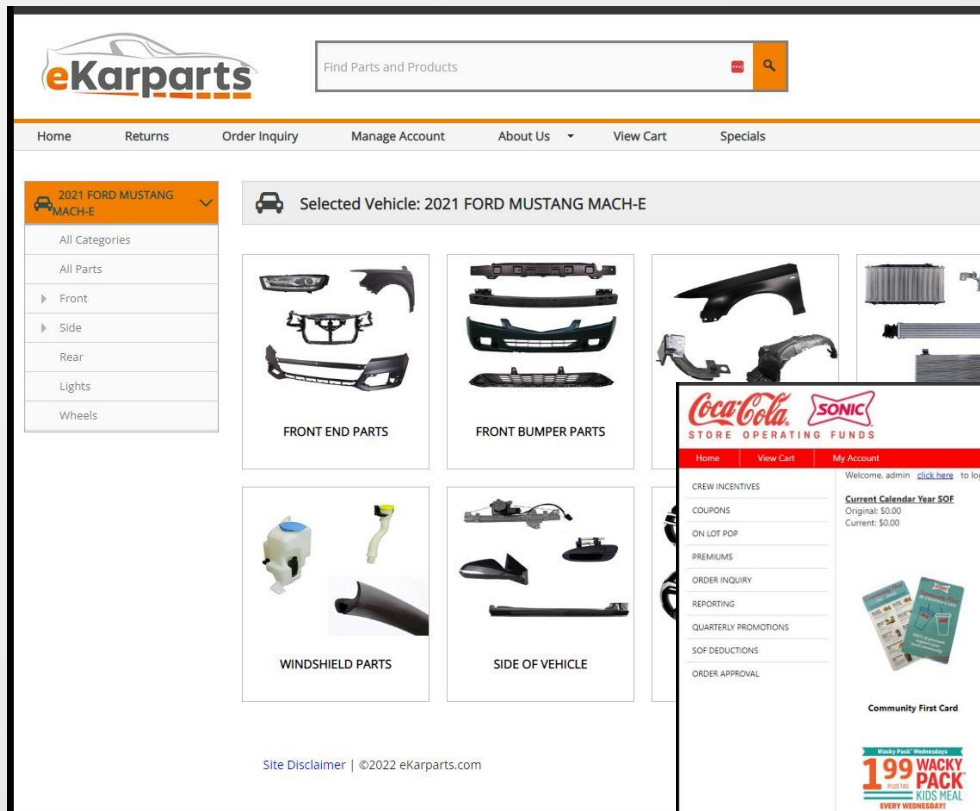
Receive Goods	
PO No.	00000005
Location	1
Vend ID	RESP01
Line No	001
Item	+00002
Desc	Air condition Filter
Receipt	20130408
Qty Ord	1 EA
Total Rcvd	0
Qty Rcvd	1
<input type="button" value="Rcvd"/>	
<input type="button" value="Next"/> <input type="button" value="Info"/> <input type="button" value="Exit"/>	

Verify Orders	
Batch	000001
Order	00000002
Location	1
Cust ID	A22600
UPC	+2
Item	+00002
Desc	Air condition Filter
Line No	003
Qty Ord	5 EA
Qty Ship	1
<input type="button" value="Ship"/>	
Last Line Scanned: 002	
<input type="button" value="Next"/> <input type="button" value="Info"/> <input type="button" value="Exit"/>	

Message from webpage	
 Warning: Order contains backorders	
<input type="button" value="OK"/>	

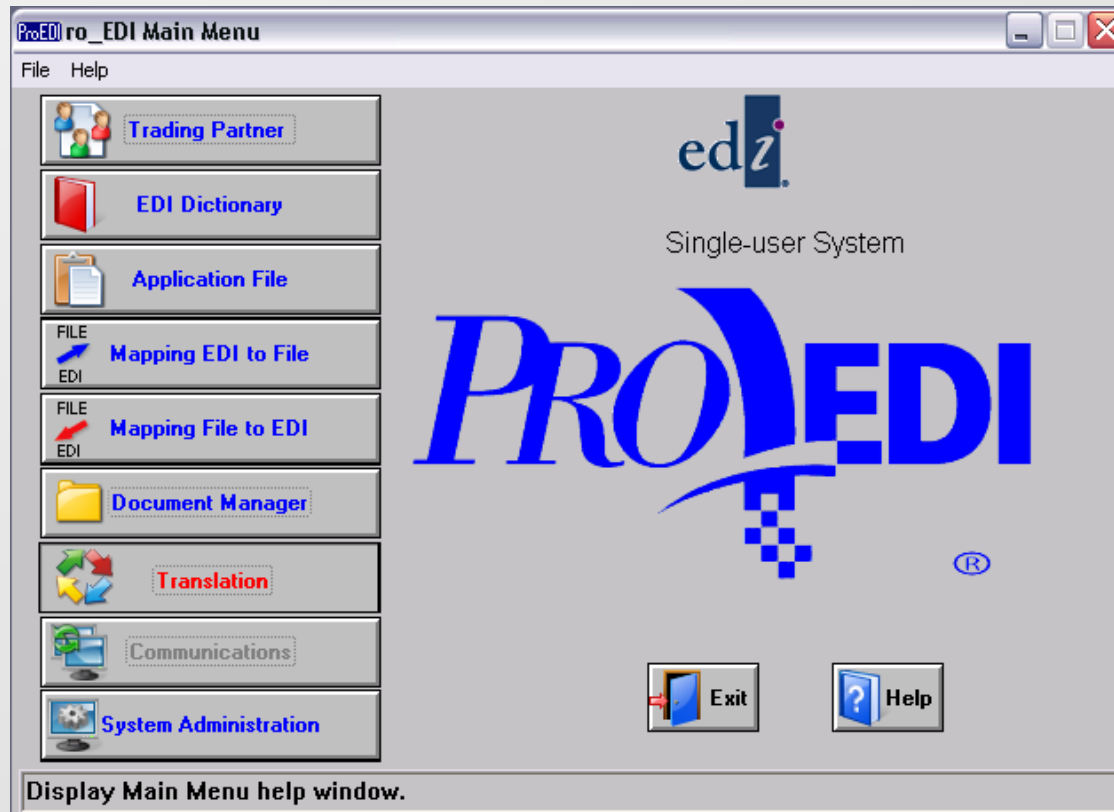
Web Portals

- Consumer Shopping Cart (B2C)
- Customer eBusiness Applications (B2B)
- Sales Rep / Management (Order Entry)
- Live, real-time integration with your data



EDI – data import/export

- Import Sales Orders from EDI 850 PO
- Create EDI 810 invoice
- Create EDI 855, 856 confirmations
- Flexible, as simple or complex as your company requires
- Integration with ProEDI software for advanced users



Microsoft Server 2012

- No longer updated after October 2023
- Can be upgraded in place, but may be time to consider upgrade (8-10 years old)
- New server, use old server as for real-time replication/backup server

Java and BBj Changes

- Java 8 is no longer secure, need to move to OpenJDK11 or OpenJDK17
- Basis License Manager requires an update by June 2023
- RCG is vetting BBj22 with Java 17 and new License Manager before starting updates

Backups and Replication

- BBj Replication offers real-time replication to other server, with Ransomware detection
- Add low-cost cloud backups with Wasabi

Cellular backup Internet

- Cradlepoint router offers cellular failover (in the case of Comcast, etc. going down)
- Device has VPN capabilities (work from home access)
- ~\$1500 for device + labor

Document Management System

- Digital filing and archiving – scan or import documents for storage
- Index and sort using OSAS reference data
- Store locally or with cloud storage
- \$100/month

Some examples:

- Signed proof-of-delivery documents aligned to invoices and order details
- Digital filing of customer signed documents
- Purchase Order details filed with payment details

Managed Service Provider – Servers, workstation monitoring/maintenance

Office 365 – Email, Teams, SharePoint/OneDrive

Phone Systems – VOIP/3CX – many customers can cut their phone bill in half

Training Classes – 2023

- Asking for feedback from today's session.
- Targeting, in-depth training
 - AR/AP Daily Work
 - GL Financial Statements
 - Month/Year End
 - Resource Manager / System Management
- What items would you like to see in detail.
- Depending on your feedback, we may need multiple sessions to cover all the content.
- Nominal fee per company



Thank you for attending – Good luck!