![db distributor logo]

dbd System Navigation

In this class, learn how to log into and out of the software, navigate the menu, manage your favorites, use queries and sorting functions.

Logging In

1. Double Click on the DBD Icon on your desktop.
   see custom login instructions.
2. The 'Proprietary Software Agreement' screen appears, click Accept.
3. The Welcome screen appears, click Continue.
4. The System Date and Time screen appears, verify, and click Continue. The main Menu screen appears.
5. To Exit, click the X in the upper right corner of the screen.
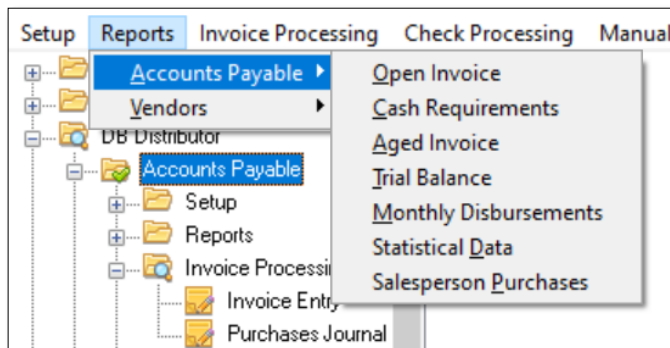
DB Distributor Main Menu Screen

The DB Distributor menus can be navigated via the Tree, as well as from the menu bar at the top.

Use the "Tree" to navigate to the desired module by clicking the + sign.
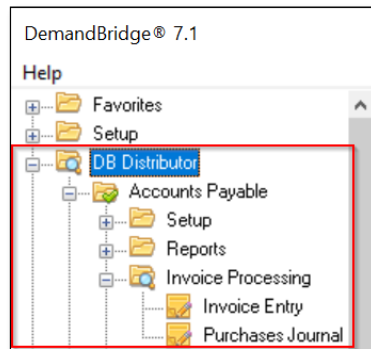
Once inside a module, a menu bar appears at the top to access modules via the dropdown method. Submenus are shown by the ► symbol.

Standard Icons

These Icons are used to denote information in the DB Distributor software:

Program Accessible

Program Locked

Within the licensed module:

Program or process.

Submenu within a module.

Streamline Menus with Favorites

The menu can be streamlined by using Favorites. A User clicks on the Favorites folder to display their accessible programs.

Setting Up Favorites

Favorites are set up by each DBD User. They can be pre-configured for the user by the System Administration during the user setup process.

Note: At first, the Favorites folder appears as the last option in the tree. After relogging in it appears at the top.
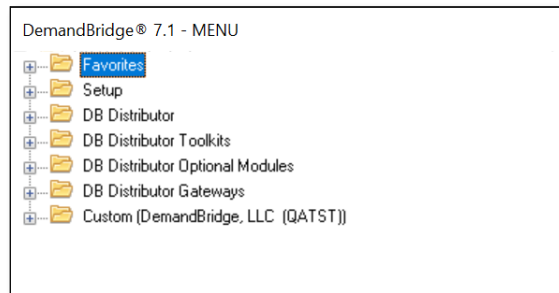
Users with setup rights to Favorites, can add to their own folder by 'Right Clicking' on the desired menu option.
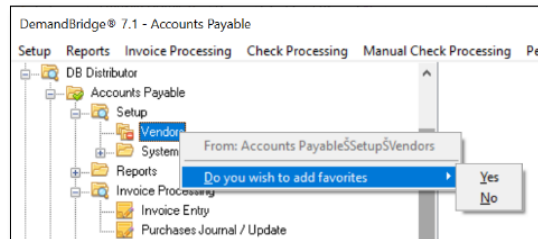
After setup, a User can be restricted to only their Favorite folders by the System Administrator. This Best Practice speeds up navigation and efficiency by restricting the User to their job functions in the system.

DBD Query Options

The Query (lookup tool) is identified by the magnifying glass icon 🔍. Screens sort using two sorting types, depending on which data field is being viewed. These include: Presorts and Column Sorts. Best practice is to type the first few letters of data then click on the query icon to narrow to search.

Presorts

Presorts are preset sort options displayed in the dropdown window, labeled '**Sort By:**' The default presort is **Lookup + Division + Customer.** Use dropdown to select different sort option.

1. **Division + Customer:** sorts by 2-digit division code then customer number.
2. **Lookup + Division + Customer:** sorts by Customer Lookup field, Division then Customer number.
3. **Salesperson + Division + Customer:** sorts by Salesperson, Division then Customer number.
4. **Phone Number + Division + Customer:** sorts by Phone Number, Division then Customer Number.
5. **Alternate Customer Code + Division + Customer:** sorts by Alternate Customer Code, Division then Customer number.
6. **Zip Code + Division + Customer:** sorts by Zip Code, Division then Customer number.
7. **Category + Division + Customer:** sorts by Category, Division then Customer number.
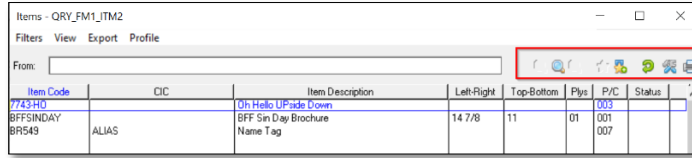

Column Sorts

Query screens without the presort dropdown window, sort by clicking the column header. The column header font color changes to blue when this option is used. The sorting direction is indicated by the arrow 🔽. This example displays an item query.
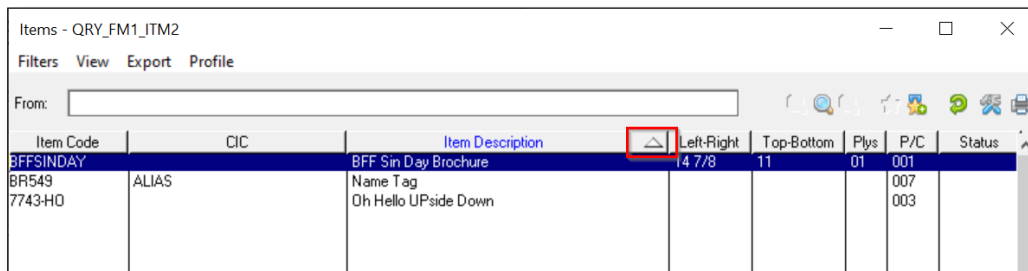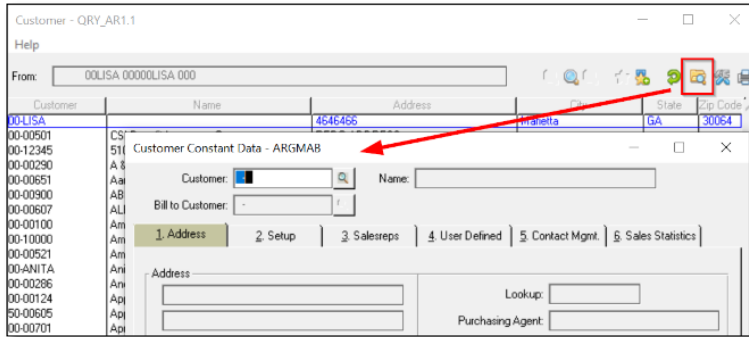
Icons within the Query Screen

The query display screen (tool bar) has additional icons to access functions:

1. Search 🔍 – searches the highlighted column.
2. Favorites 🌟 - not available inside the query screen.
3. Refresh 🔄 - refreshes the displayed data.
4. Tools 🔧 - accesses Export to Excel Options
5. Printer 🖨 - to print the displayed query.

File Maintenance icon

Once inside the Query screen, the File Maintenance icon is available. This allows for information to be added 'on the fly'. In this example. A Customer can be added through the File Maintenance icon.

Printer icon

To print the Query screen contents, click the printer icon 🖨 in the upper right corner. The example below shows the Salesperson Code file. The printout would contain all the salesperson codes and the associated data.
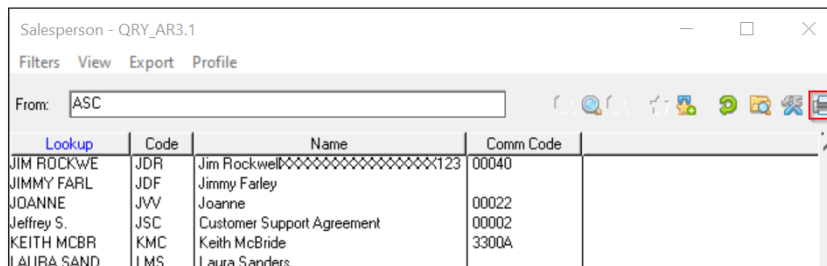
A printer option screen allows selection of the printer, orientation, fonts and # of copies.

![db distributor logo]

Export data to Excel icon

Click the tool icon ![tool icon] to export the queried data displayed into an Excel file.

Display Screen Options
Additional menu options are available from the main screen.

Dates
Two dates display at the bottom of the screen. These are the same dates that were set when you first logged in.

| Accounting Date: Tuesday, June 29, 2021 | 500-DemandBridge, LLC (QATST) | Today's Date: Tuesday, June 29, 2021 - User:dab |

1. Accounting Date – double click on this date to view/change the accounting date. This is commonly used at month end to default the date to the previous month.
2. Today's Date – double click on this date to view today's transaction date used in Order Processing activity. *Best Practice:* Do Not Change! Let this date default to the actual date.

Right Click the right side
Right clicking on the right side of the home screen displays additional options. These menu options are available based on security access. The details of each option are not covered in this course, however it's common practice to use the right click to exit the program.
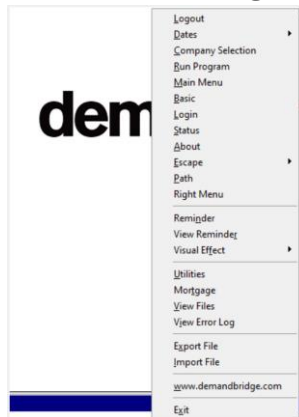
Hot Keys
Hot keys are a fast-easy way to perform a function and are identified by an underlined letter. Use the ALT key plus the underlined letter to perform that function. *Note:* Not all *Hot Keys* are not available in all screens.

Examples:

![Add New Order button] - ALT+A adds a new order.

![Exit button] - ALT+x exits the screen.