

Agility Beta Program

DMSi's Agility Beta Program allows users, like yourself, to directly impact the direction of our products. When you use a beta feature or function, you are able to provide detailed feedback on what works and what can be improved. As themes emerge in the feedback, DMSi is able to address them in a future release cycle.

All Beta programs utilize a module license record to control access to the program. DMSi provides two types of Beta Programs.

- **Open Access** – The software feature is a widely used function available for all users to provide feedback. Upon installing the Agility release, the module license defaults granted so you can access the program. Normal menu and/or action security options allow the system administrator to limit or turn off user access to the new feature.
- **Limited Access** – The software feature is expected to be utilized by a limited number of users at a company during the beta stage. Based on the beta feature, access to the program may be targeted to a specific set of customers or available with permission. Upon installing the Agility release, the module license defaults revoked and access to the program is denied. Related menu and/or action security records may exist for the feature, but without access to the module license users are unable to access the new feature.

Available Beta Programs

The following Beta Programs are available with this release. Refer to the specific topic within Agility Online Help for details on each program.

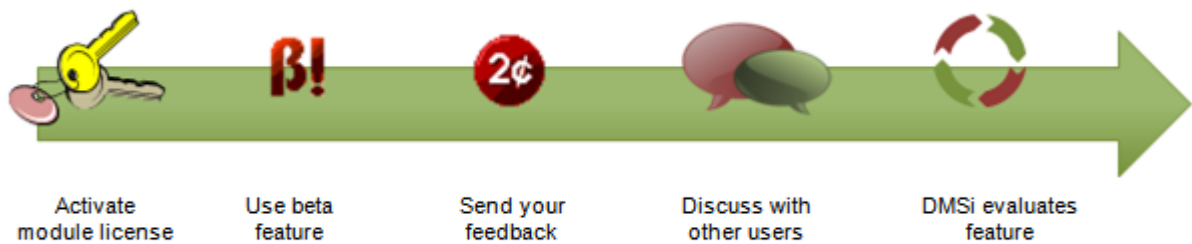
Beta Program	Description	Access Type
Agility Mobile Apps	Review customer information and item quantities and pricing through your Android device	Open Access
Cloud Printing	Print document forms using cloud printers that are not defined on a network or utilize existing network printers through the internet Available forms: <ul style="list-style-type: none"> • Credit Memos • Delivery Tickets • Finance Charge Invoices • Invoices • Pick Reports • Pick Tickets • RMA 	Limited Access
Image Gallery	Store and maintain images used in Agility and additional products such as PartnerView in a web based repository	Limited Access




Beta Program	Description	Access Type
OrderPad	Easily enter items to quote pricing and confirm availability for a customer when they are not ready to submit an official order using the new OrderPad function. With the OrderPad, multiple users can then review previously quoted items prior to creating the official Quote or Sales Order for items directly from the OrderPad.	Open Access
Visual CAFE in the PartnerView application	Configure bill of materials items on sales orders and sales work orders created in Agility	Limited Access

New features released in beta mode are deployed as part of a general Agility version release. Beta Programs are not normally introduced in an update release. Refer to the *Agility Release Notes* for details about each program. Refer to the FAQ within the customer portal site for commonly asked questions about the program.

Components of the Beta Program

Each feature within the Beta Program generally goes through the following process.



- Activate license – For each program, you must request permission to use the feature. DMSi reviews whether you qualify for the program and grants approval to the module license, if appropriate. The feature may also include menu and/or action security.
- Use feature – A special beta image has been appended onto the standard menu, toolbar, or product feature identifying the function is part of a beta program, e.g. .
- Send feedback – On each screen within the beta program, use the  icon in the title bar to provide feedback about the beta feature.
- Discuss – Within the customer portal site, you can participate in a Discussion with other customers and DMSi about the beta program and review the feedback gathered from the  function.
- DMSi evaluates – At the end of a program, DMSi reviews feedback and incorporates the appropriate feature(s) into the core Agility system as a fully functional feature.

How to Participate in a Beta Program

To participate in a Beta Program, you have several options to request access to the program and/or contribute to the program feedback. Each request is reviewed, and you must qualify for the program before permission is granted.

Option	Details
<p>You have access to the software version containing the beta feature.</p>	<p>Access is based on program type.</p> <ul style="list-style-type: none"> • Open Access programs – Simply begin using the new feature. • Limited Access programs – Submit a 'License Access' request to DMSi Support which includes your company name, phone number, Beta Program name, and which environment to enable for the program. Your request is reviewed to determine whether you qualify for the program. Upon approval, your Agility system will be granted access to the program. A customer portal account will also be created for you to contribute to the discussion boards (if applicable). <p>You can also submit the request using the Beta Program option within the Resources tab of the Ribbon on the main Agility screen. When submitting the request for license access, select the Beta Program and the Environment that you want enabled to utilize the program.</p>
<p>You do not yet have access to the software version containing the beta feature but you want access to test the feature and provide feedback.</p>	<p>If the beta program is not restricted to a limited set of customers, submit a request to DMSi Support to access the 'DMSi Testing Demo Site'. Include your company name, phone number, and Beta Program name. You will receive logon instructions to the DMSi Testing Demo Site. A customer portal account will also be created for you to contribute to the discussion boards (if applicable).</p>
<p>You do not yet have access to the software version containing the beta feature but would like to contribute to discussions about the feature.</p>	<p>The only requirement to contribute to any beta program is a customer portal account. Submit a 'Customer Portal Account' request to DMSi Support which includes your company name and phone number. DMSi Support will notify you within 3 business days that your account is set up and how to log on.</p>