

Order Entry

User Guide Addendum

Version 5.20

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Modifiable Financial & Distribution Software

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About this Fourth Generation Documentation Addendum:

This Fourth Generation Documentation Addendum is provided to bring the associated 'base' document up to date with the very latest changes and additions to the software product. The 'base' document is listed on the title page of this addendum.

Addendum Date:

All software patches and supplements that have an impact on the base document are also covered by this addendum. Software patches and supplements are posted on the Fourth Generation web site in the customer area and on the Fourth Generation ftp site (see web/ftp access below). Patches and feature supplements are listed by the date posted. All patches and supplements posted by the Addendum Date are covered by this addendum. Each time a new patch or supplemental feature is released, this addendum will be updated if a documentation change is required. At that time, the Addendum date will be updated to the latest patch or supplement date.

Information not covered by this addendum:

This addendum covers only the subject area of the base document. For additional information and technical details on the new features or patches, please consult the product release notes and patch/supplements indexes found in the customer area of the Fourth Generation Web site or FTP site. (see web/ftp access below)

Web/FTP Access:

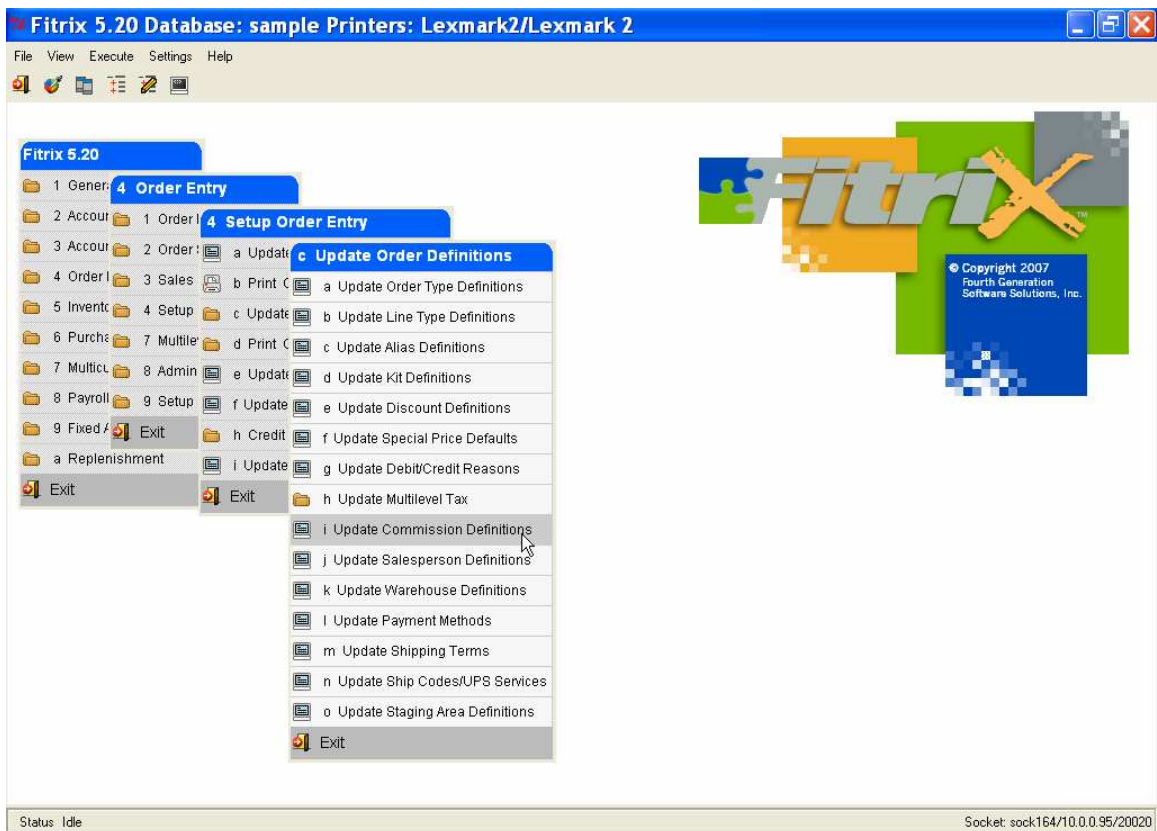
All new features and patches are maintained on the Fourth Generation web site, in the customer area: www.fourthgeneration.com and also on the Fourth Generation FTP site: [ftp.fourthgeneration.com](ftp://ftp.fourthgeneration.com). Updated versions of this Addendum will be posted there as well. Most of the files and information in these areas is restricted to customers with current software maintenance contracts. To receive a current password to access these areas, please contact the Fourth Generation help desk: 770-432-7623, 1-800-374-6157, support@fourthgeneration.com

Feature Listing

Feature Number	Description
1238	Commission Reporting
1248	New Navigation Events
1253	Lot Selection in Order Entry
1297	Creating Multiple Sales Orders
1298	Shipment Tracking Screen
1299	Export Shipping Forms
1300	Assignment of Shipping Units
1304	Unlinking Direct Purchase Orders and Customer Orders
1305	Ability to Change REG Sales Orders to DIR Sales Orders.
1307	Ability to Change DIR Sales Orders to REG Sales Orders
1363	Ability to Post Specific Orders
1397	Expansion of Order Number
1537	Check Box to Select Multiple Part Numbers
1538	Create Purchase Orders for Backorders

Feature 1238 Commission Reporting:

1. Enter commission codes





2. For stock items, enter the commission code with the item code. Go into Update Inventory information, find the item code, go into Update mode, Ctrl TAB to detail, select a warehouse, and then click on the Whse Dtl icon on the toolbar.

Extension locau

File Edit Help

Item Warehouse Detail

Item: 12104 SCM A SERIES MULSTRIKE

Warehouse: SEATTLE SEATTLE DISTRIBUTION CENTER

Cost and Price Information

Purchase Cost: 5.458 Last Cost: 61.000 Qty.: 15.000

Average Cost: Last Date: 02/08/2008

Price: 8.655 Sold Date: 01/31/2008

Location and Count Information

Location Aisle: SCM Row: 12 Bin: AB

Count Cycle Code: A Last Count: On Hand: 1966.000

Vendor Information

Vendor: SCM SMITH-CORONA CORP.

Vendor Item: SCM12104

Selling Information

Minimum Sell Qty.: 1.00 Allow Backorder: Y Taxable: N

Subject To Terms Disc.: N Subject To Trade Disc.: N Req Profit %: 15.00

Commission Code: STD STANDARD COMMISSION RATE

OK Cancel

Enter the commission code for this item.

OVR

- For non stock items, a new field has been added so that a commission code can be entered.

Update Non-Inventory Items

File Edit View Navigation Tools Actions Help

Find Prev Next Add Update Delete Browse

Item Code:

Vendor Code:

Commodity Code:

Description:

Purchasing Unit:

Weight: Unit:

Ledger Account:

Item Type:

Commission Code:

1 of 20

OVR

The commission report is option (I) on the Sales History Reports menu in Order Entry.

Commission by Salesperson

File Navigate Help

Date: 02/11/2008
Time: 13:34:03

Commission Report
SAMPLE COMPANY
Between 01/01/2008 and 01/31/2008

Invoice	Date	Item Code	Sales	Comm.	% Comm.	Amount	Date Paid
Salesperson: WM							
Customer: 1 - ACTION SUPPLY							
56	04/04/2007	12104	7.85	STD	8.00	0.63	01/03/2008
56	04/04/2007	ALP3566	300.00	STD	8.00	24.00	01/03/2008
Total Salesperson: WM			307.85			24.63	
Grand Total			307.85			24.63	

Feature 1248 New Navigation Events

The following programs have new navigation events:

Update Customer Orders - access to:

- Update customer information
- Update ship-to information
- Update special pricing
- Sales history report
- Update inventory information (item codes)
- Update customer invoices

Feature 1253 Lot Selection In Order Entry

User now has the ability to select the lots they want to ship when entering a customer order. When a lot controlled item code is entered this screen will display:

Lot No.	Qty Avail	Qty To Order	Expiry Date	Landed Cost
648	1000.000	200.00	03/15/2008	0.150
5006	7.000		03/31/2008	0.250
2222	20.000		03/31/2008	0.500

The quantity to order will default to the lots with the oldest expiration date but the user has the option to change.

If you accept the lots as they are assigned by the system but then want to change them you can by clicking on the new lot screen icon on the order entry screen.

Ln	Type	Stg	Item Code	UM	Quantity	Price	Net Amount
1	STK	NEW	APPLE	EA	200.000	0.500	100.00

The lot numbers selected will print on the picking ticket, packing list, and invoice.

Modifications were also made to the following programs:

- Update Picked Quantities
- Update Shipped Quantities
- Update Invoices

In previous versions, these programs were used to select the lot numbers being shipped. Since this is now done when the order is entered the Add Lot Number screen no longer displays. Instead this screen displays so that you may change lot numbers and quantities as needed.

Add on detail lot

File Edit Navigation Help

Qty This Order: On PO:

Lot No.	Qty Avail	Qty To Order	Expiry Date	Landed Cost
648	1000.000	200.00	03/15/2008	0.150
5006	7.000		03/31/2008	0.250
2222	20.000		03/31/2008	0.500

Enter the quantity to order - Zoom to PO Detail.

OVR

Feature 1297 Creating multiple Sales Orders

There is new field on the Update Customer Order screen labeled “Multiple Orders” and this defaults to N. If you want to create multiple orders, change this value to Y. For the initial order you enter, enter the total quantity for all orders you want to create from this order. In the example below, 4 orders with a quantity of 250 each will be created.

Prompt received when the initial order is saved:

There is also a new contract field on the order entry screen. This will automatically be set to the range of sales order numbers created (ie- sales order 1000, 1001, 1002, 1003, 1004, and 1005 will have contract number 1000-1005 assigned to them). You can use this contract number to find all sales order associated with it on the new Shipment Tracking screen (see write up for Feature 1298).

Please note that if the order type you use is DIR (direct shipment from your vendor to your customer), there will be a vendor PO created for each sales order.

Feature 1298 Shipment Tracking Screen (option p on the Order Maintenance menu)

Every time a customer order is entered in the database an entry is in the Shipment Tracking table. The screen program enables you to enter information relevant to your shipment that will aid you in tracking its progress.

Shipment Tracking

File Edit View Navigation Tools Actions Options Help

Accounting Screen

Find Prev Next Update Browse

Sales Contract Info

Contract # 1314
SD 1314 Status ACT
Customer GIDEON ALL AROUND AUTO SUPPLY
Consignee Name GIDEON SUPPLY
Consignee Address SUITE 100
1000 MARIGOLD LANE
HONG KONG
CHINA
Notify Party Name JOHN BROWN
Notify Party Info 770-432-7623
Terms CIF CARGO, INS, FREIGHT
Destination HOUSTON
Product #2 COPPER/BIRCH CLIFF
Price 3.00

Logistics Info

Forwarder Name TRANSWORLD
Forwarder # 123456789
Booking # BK HOU29482361
Carrier ABF
Container Size 1200
Container Number MSCU1234567
Seal Number SL2005
Load Location CARMEL IN
Loading Date 02/25/2008
Port of Exit HOUSTON
Vessel SIN TONG
Voyage PT193T
Trucking BOL # 129
Ocean BOL BOL 1234567
Proof BOL Received 02/26/2008
Send Original Docs
Docs send to customer 02/25/2008
Release Requested 02/25/2008
Release Received 02/25/2008
Cut Off Date 02/25/2008
ETD 02/25/2008
ETA 03/10/2008

Purchase Contract Info

Vendor CHAMPION INC
PD 571
Buyer/Trader
Gross 11009.00 Lbs 4.99 MT
Net 11000.00 Lbs 4.99 MT
Tare 9.00 Lbs 0.00 MT

Transshipment Info

Port	Trans No	Vessel	Voyage	ETA	ETD
PORT 1	TRANS NO 1	VESSEL 1	VOYAGE 1	02/25/2008	02/25/2008
PORT 2	TRANS NO 2	VESSEL 2	VOYAGE 2	02/26/2008	02/26/2008
PORT 3	TRANS NO 3	VESSEL 3	VOYAGE 3	02/27/2008	02/27/2008
PORT 4	TRANS NO 4	VESSEL 4	VOYAGE 4	02/28/2008	02/28/2008
PORT 5	TRANS NO 5	VESSEL 5	VOYAGE 5	02/29/2008	02/29/2008

Monday, February 25, 2008

Please note that if the order has a DIR order type and the product is being purchased from multiple vendors there will a record inserted into the tracking table for each sales order/purchase order combination.

The information that displays on this screen come from the following sources.

Sales Contact Info:

Contract # - this is a display only field that displays the contract number assigned to the sales order when it was entered.

SO – customer sales order number.

Status- display only sales order status. Possible values are:

ACT – active
PST – posted
CAN - cancelled

Customer – display only field for the customer's business name.

Consignee and Notify Information – this information is entered on the order summary screen when you enter the sales order but it can be modified here.

Order Summary Screen:

The screenshot shows a software window titled "Extension summ" with a menu bar (File, Edit, Help) and a toolbar. The window is divided into several sections:

- Payment Method:** A dropdown menu showing "AR" and a text field containing "ACCOUNTS RECEIVABLE".
- Terms:** A dropdown menu showing "D" and a text field containing "NET 45 DAYS".
- Credit Card Information:** Fields for Credit Card No., Auth. Code, Auth. Date, Auth. Amount, Decline Code, Messg., Email, and Ship Complete (set to "N").
- Shipping Information:** Fields for Ship Via (set to "OCEAN"), Residential? (set to "N"), Ship Terms (set to "CIF"), FOB Point (set to "HONG KONG"), Weight (set to "10000.000"), and UPS Account.
- Shipment Tracking Data:** Fields for Deposit Amount Required (set to "15000.00"), Documents Sent (set to "02/25/2008"), Destination (set to "HOUSTON"), Consignee Name (set to "GIDEON SUPPLY"), Consignee Address (set to "SUITE 100", "1000 MARIGOLD LANE", "HONG KONG", "CHINA"), Notify Party Name (set to "JOHN BROWN"), Notify Party Info (set to "770-432-7623"), and Truck BDL No. (set to "129").
- Order Amounts:** Fields for Sub-Total (set to "30000.00"), Discount (set to "0.00"), Freight Amount (set to "0.00"), Freight Tax Code (set to "NOTAX"), Total Tax (set to "0.00"), and Total Order (set to "30000.00").

At the bottom left are "OK" and "Cancel" buttons. At the bottom right is an "OVR" button. A status bar at the very bottom says "Enter the method of payment."

There has also been a field to the summary screen where you can enter the deposit amount required from your customer before the order will ship. This amount displays on the Shipment Tracking screen accounting screen discussed below.

Any modifications made here automatically transfer to the sales order summary screen.

Terms- customer payment terms on the sales order.

Destination – from the sales order summary screen.

Product – if the sales order has only one item code, the item code will display here. If there are multiple item codes, the word “multiple” will display here.

Price - if the sales order has only one item code, the item code’s price will display here. If there are multiple item codes, the word “multiple” will display here.

Purchase Contract Information:

If the sales order has an order type of DIR meaning it is shipping directly from your vendor to your customer, a vendor PO is automatically created when the sales order is stored. The vendor business name, vendor purchase order number, and buyer/trader code will display in this section of the screen.

The weights that display here are the weights entered when the Vendor purchase order was received or prior to the Packing List being printed if this is an out of warehouse shipment . See the discussion on Feature # 1300 in this document and also the Purchasing Addendum.

Logistics Information:

All the information in this section is entered using the Shipment Tracking screen program with the following exceptions:

Trucking BOL # - this is a display only field and this number is automatically assigned when the sales order is entered. The beginning truck bill of lading number you want to use for your company should be entered in the Update Order Entry Defaults screen program (option (a) on the Order Entry Set Up submenu):

Update Order Entry Defaults

File Edit View Navigation Tools Actions Help

Quit Print OK Cancel Cut Copy Paste Zoom Notes U Fields To Do Technical status Help

Find Prev Next Add Update Delete Browse

Warehouse: SEATTLE Credit Reason: RET Debit Reason: QVP
Order Type: REG Line Type: STK Inv Stage: ORD Req. Profit%: 15.00
Terms Code: A Due Days: 30 Use Department: N Payment: AR
FOB Point: SHIP POINT Ship Via: BEST WAY Ship Terms:

Account Numbers
Sales: 400000000 A/R: 110000000 Inventory: 120000000
Trade Disc.: 100000000 Cash: 100000000 Cost of Goods: 500000000
Freight: 422000000 Credit Card: 110000000 Scrap: 590000000

Taxes: Freight - Compute Tax: N Discount: N

Document Printing Defaults
Pick: Y Ship: Y Inv.: Y
Pick: Y Ship: Y Inv.: Y

System Numbers/Batching
Invoice No: 218 Post No: 236
Require Approval to post?: N Approval Code:

Doc/Order No.: 1322
Batch Invoices?: N
Truck BOL No: 137

1 of 1

OVR

This bill of lading number prints on the Export Packing List.

Docs Send to Customer – this is a display only field and displays the date entered in the Order Entry summary screen.

Container # - if this is a DIR sales order and therefore has a vendor purchase order associated with it, the container number entered with the purchase order displays here. A field for the container number has been added to the Update Purchase Orders header screen. The number entered must be 4 alpha characters followed by 7 numeric.

Update Purchase Orders

File Edit View Navigation Tools Actions Options Help

Find Prev Next Add Update Delete Browse Options

Quit Print OK Cancel Cut Copy Paste Zoom Notes U Fields To Do View Detail Next Page Previous Page Insert Row Delete Row Technical status Help

Type: DIR Vendor: 123457 CHAMPION INC
 PayTo: PAYTO Stat: ACT PO: PO.No.: 571 Doc.No.: 571
 Stag: REC PO.Date: 02/25/2008 Req.Date: 02/25/2008 Terms Code: B
 Buyer: Ship Via: BEST WAY Order Total: 10000.00
 Warehouse: SEATTLE FOB: SHIP POINT
 Confirmed To: Refer: Currency: USD
 Cust Doc No.: 1314 Orig Cust Doc No.:
 Confirm Date: On Board Date: Multiple Orders: ☐
 Contract: 1314 Container: MSCU1234567

N	Ln	Typ	Stg	Item Code	PU	Quantity	Cost	Net Amount
	1	STN	REC	CBF2	LB	10000.000	1.000	10000.00

Description: #2 COPPER/BIRCH CLIFF
 G/L Account: 500000000 000

1 of 1

OK Cancel Detail

Details Status Summary Defaults Vendor Payto Print Landed Cost

Enter The Shipment Container Number

OVR

Transshipment Information:

All the information in this section is entered using the Shipment Tracking screen

Accounting Screen:

There is an icon on the Shipment Tracking screen labeled “Accounting Screen”.

Deposit Required- this is a display only field that displays what was entered on the Order Entry summary screen.

Deposit Amount Paid – this is a display only field that displays the deposit received form the customer posted through Update AR Cash Receipts.

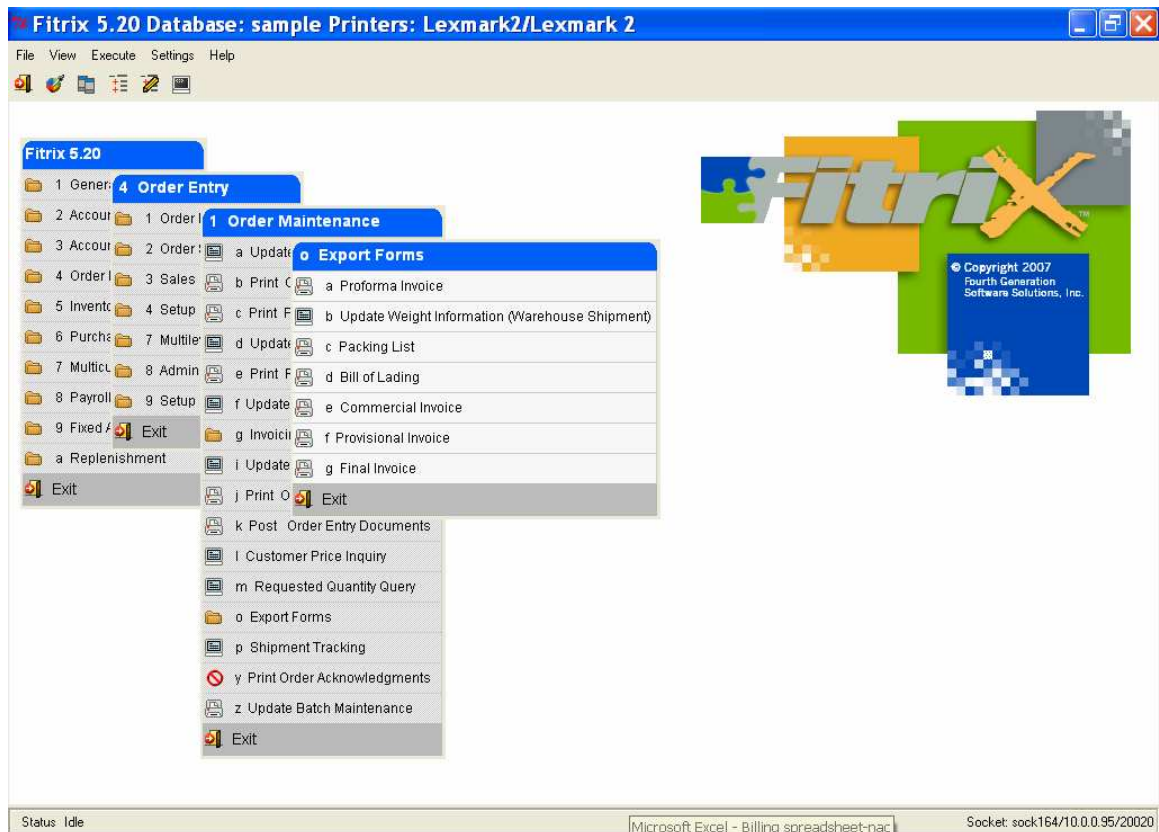
Ocean Marine Insurance - this is a calculation. A field has been added to the Update Purchasing Defaults program (option (a) on the Set Up Purchasing submenu) where you need to enter you ocean marine insurance (rate per \$):

The calculation is:

(total cost of merchandise on the order) /100 x ocean marine insurance rate.

Feature 1299 Export Shipping Forms

A suite of export forms has been added to order entry. Though the submenu these programs reside on is labeled Export Forms, these forms can also be used shipments out of your warehouse.



Note:

For REG or out of warehouse shipments you must run both the Print Picking Ticket and Update Picked Quantities programs before you can print:

Packing List
Bill of Lading
Commercial Invoice

Provisional Invoice

For DIR shipments from your vendor to your customer you must first receive the vendor purchase order using the Update Receipts program before you can print:

Packing List
Bill of Lading
Commercial Invoice
Provisional Invoice

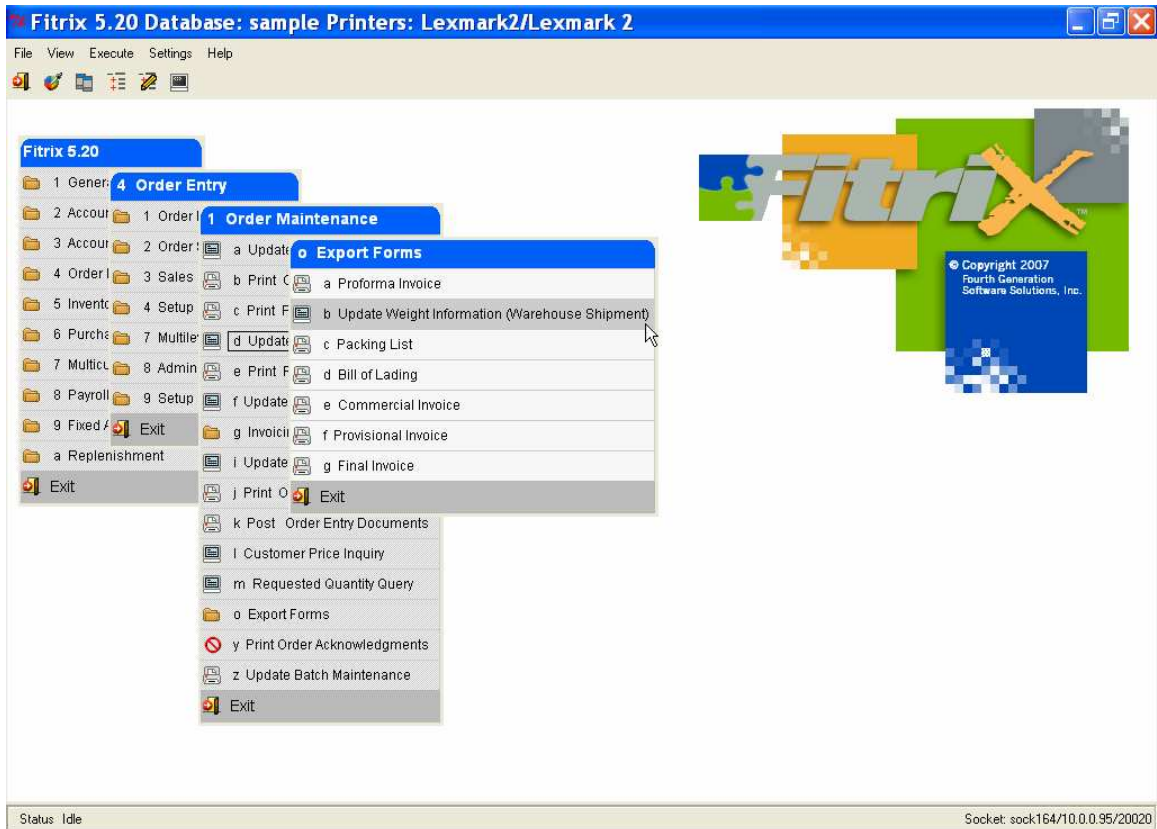
For both REG and DIR shipments you must enter shipment weights before printing the Packing List. See Feature 1300 in this Order Entry Addendum and the Purchasing Addendum on how shipment weights are entered.

For both REG and DIR shipments you must run the Update Invoices/Memos program before printing the Final Invoice.

Feature 1300 Assignment of Shipping Units

A new screen program has been added where you can assign shipping units and weights to your shipments. This information will then print on the various export/shipping documents (see Feature 1299).

This program is found on the Export Forms submenu:



Prior to running this program you must first print a picking ticket and then run Update Picked Quantities program to update the quantities that were picked for the outgoing shipment. Once you've done this, select Update Weight Information program, do a (F)ind and enter the customer order number. Then go into (U)pdate mode and click on the Weight Screen icon on the toolbar to enter the shipping units and weights for each item on the order.

In this example, the customer order is for 100 lbs of copper and it is shipping in two boxes; one weighing 60 lbs and the other weighing 40 lbs.

Add on detail weight

File Edit Navigation Help

PO No:
 Line No:
 Ship No:
 Total Units:

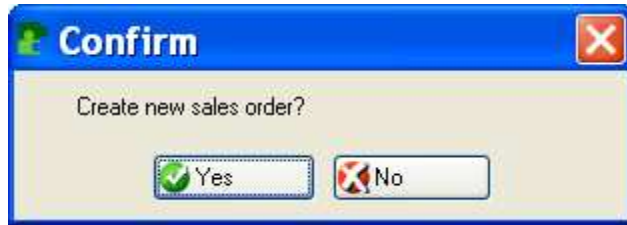
Unit	UOM	Gross	Tare	Net
1	BX	62.00	2.00	60.00
1	BX	41.00	1.00	40.00

Enter number of units. OVR

Feature 1304 Unlinking Direct Purchase Orders and Customer Orders

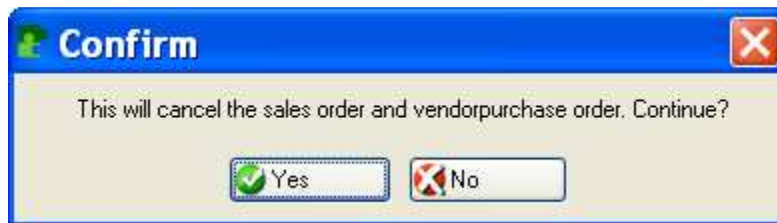
We've added the ability to unlink the purchase order from the sales order so it can be linked to another sales order. This is needed in the event the original customer cancels their order.

If you delete a customer sales order that has an order type of DIR you will receive the following prompt:



If you select yes the program will null out the customer code, ship to code, order number and document number and put you in update mode. You will then enter new customer and ship-to codes. When the order is saved, a new order number, document number, and contract number will be assigned; the vendor PO will be updated with the new order information; the shipment tracking table will be updated with the new information; and the original sales order will be cancelled. The field labeled Orig Cust Doc No on the Update Vendor Purchase Orders screen will be set to the order number that was cancelled as an audit trail.

If you select no, you will receive this prompt:



If you then select yes, the sales order and vendor purchase will both be cancelled and the record for the sales order will be removed from the Shipment Tracking screen program. If you select no, there are no changes made and the original sales order and purchase order are retained intact.

Feature 1305 Ability to Change REG Orders to DIR Orders

The sales order is initially created with a REG order type (ship out of the warehouse order) and it not linked to a purchase order. You later determine that you want to ship the order directly from your vendor to your customer.

The Order Entry logic has been change so that you can now change the order type from REG to DIR. When you do this you will be prompted as follows:



If you select yes:

A vendor purchase order will be created for the primary vendor for every item on the sales order.

The sales order's order type will be set to DIR (the behind the scenes table stages will also be reset) and it will be linked to the purchase orders created.

The purchase order information for each purchase order created will display in the tracking screen for this sales order.

Feature 1307 Ability to Change DIR Sales Orders to REG Sales Orders

If you initially enter the sales order with a DIR order type but then decide you want to ship it from your warehouse you now have the ability to change the order type from DIR to REG. When you do this you will be prompted for the warehouse you are going to ship the merchandise from:



Once you click on OK or press Enter to continue, the following updates will take place:

1. For any items where there is not sufficient quantity on hand to fill the order the back order screen will display so that you may then either reduce the quantity on the order or decide to backorder the item.

2. The order type will be changed to REG (and all the behind the scenes stages in the order tables updated accordingly).
3. The vendor purchase order that was linked to the sales order will be cancelled.
4. The vendor information on the Shipment Tracking screen will be updated accordingly.

Feature 1363 Ability to Post Specific Orders

In previous versions of the software when the Print Order Entry Edit List and Post Order Entry Documents programs were run, these programs would process all orders ready to be posted. A new selection criteria screen has been added so that the user can select which sales orders/ customer invoices they want to post.



Feature 1397 Expansion of Order Number

The customer sales order number has been expanded to twenty characters
On all screens and reports.

Feature 1537 Check box to select multiple part numbers

We added the ability for the user to select multiple items from the item code zoom screen when entering customer orders. Simply check the new check box to select the item you want. When you click on OJ all items selected will display in the detail section of the sales order. You then enter the quantities the customer wants to order.

Include	Item Code	Class	Description	Description2	Control
<input checked="" type="checkbox"/>	12138	NON	SCM A SERIES CORR (PK/2)		
<input type="checkbox"/>	12195	NON	SCM A SERIES NYLON		
<input checked="" type="checkbox"/>	16345	NON	SCM CORONAMATIC LIFT-OFF		
<input checked="" type="checkbox"/>	16352	NON	CORONAMATIC CORRECTABLE		
<input type="checkbox"/>	17558	NON	SCM CORONAMATIC BLK FILM		
<input checked="" type="checkbox"/>	17616	NON	CORONAMATIC COVER-UP		
<input checked="" type="checkbox"/>	17657	NON	SCM CORONAMATIC NYLON		
<input type="checkbox"/>	20700	NON	SCM REGENCY 10 P/W		
<input type="checkbox"/>	20702	NON	SCM REGENCY 12 P/W		

Control: "L" = Lot Control "S" = Serial Control
"B" = Lot and Serial Control "" = Not Controlled

Check if you want to include this item ☐

File Edit View Navigation Tools Actions Options Help

Find Prev Next Add Update Delete Browse Options

Quit Print OK Cancel Cut Copy Paste Zoom Notes U Fields To Do View Detail Next Page Previous Page Insert Row Delete Row Technical status

Type: REG Customer: 2 PERFORMANCE AUTO PARTS

Curr: USD Ship To: SHIPTO Ship Via: BEST WAY Disc Code:

Stat: ACT P.O. No.: Order No.: Document No.:

Stag: NEW Ord Date: 11/11/2008 Ship Date: 11/11/2008 Order Total: 0.00

Ship Complete: N Multiple Orders: N Contract:

Ln	Type	Stg	Item Code	UM	Quantity	Price	Net Amount
1	STK	NEW	12138	BX	0.000	8.230	0.00
2	STK	NEW	16345	EA	0.000	4.480	0.00
3	STK	NEW	16352	EA	0.000	4.480	0.00
4	STK	NEW	17616	EA	0.000	4.150	0.00
5	STK	NEW	17657	EA	0.000	4.480	0.00

SCM A SERIES CORR (PK/2) Whse.: SEATTLE Committed:

Salesperson: WM Backorder Qty:

Tax: Backorder Ref:

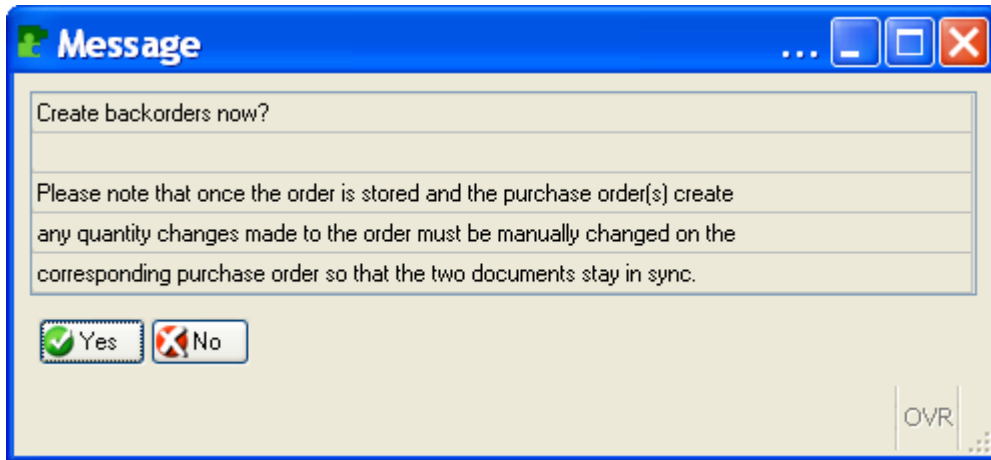
Ship Dtl Nonstock Details Lines Alias Summary Defaults Credit Check Recalc Customer Ship To Price Sales Invoice Item Master Lot Screen

Enter the line type.

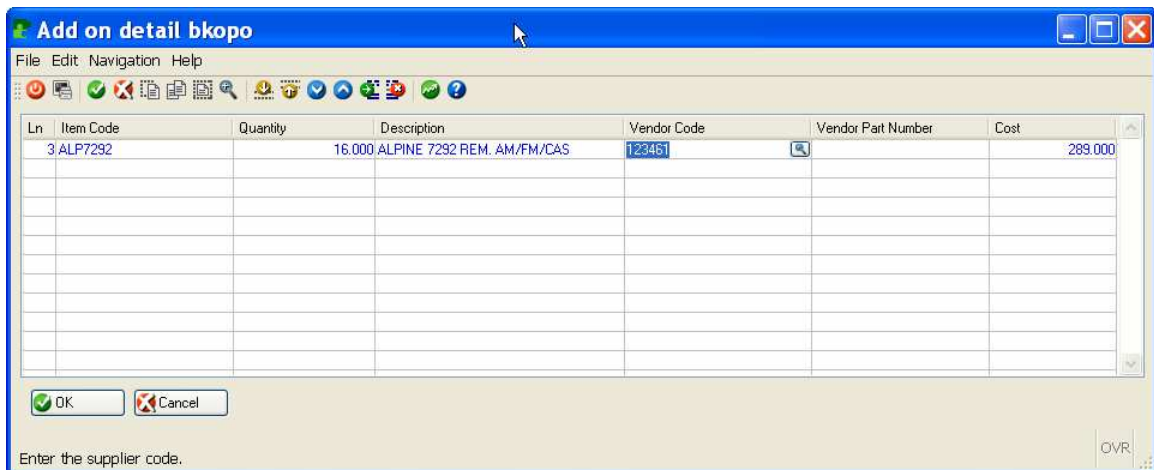
Feature 1538 Create Purchase Orders for Backorders

Functionality has been added so that the user can now create purchase orders while in the order entry program for all items that are backordered on an order instead of using the Purchasing Requisition program.

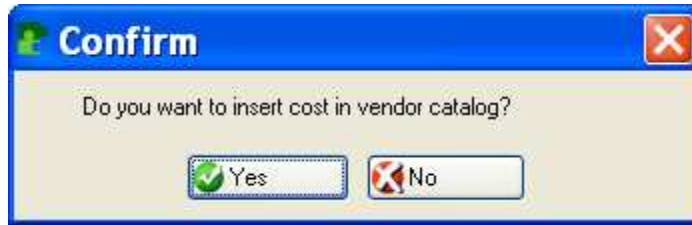
When the order is stored this prompt will display if there are any part numbers with a line stage of BKO:



Select Yes if you want to create purchase orders. When you select Yes this screen will display:



The vendor selected is the primary vendor found in the item catalog (if one exists). To change the vendor and cost simply enter a new vendor code and cost. You will then be prompted as follows if you change the vendor code and this vendor is not in the item catalog:



If you will be purchasing this item from this vendor again select Yes. Store the transaction by clicking OK and purchase orders will be created for each vendor. You can view the PO number created for each item in the backorder reference field on the order entry screen.

 The "Update Customer Orders" window displays various order fields and a table of items. The fields include:

- Type: REG, Customer: 2, PERFORMANCE AUTO PARTS
- Curr: USD, ShipTo: SHIPTO, Ship Via: BEST WAY, Disc.Code:
- Stat: ACT, P.O. No.: 213212, OrderNo.: 2300, Document No.: 2300
- Stag: BKO, OrdDate: 11/14/2008, ShipDate: 11/14/2008, OrderTotal: 11479.29
- Ship Complete: N, Multiple Orders: N, Contract: 2300

 The table below has columns: Ln, Type, Stg, Item Code, UM, Quantity, Price, and Net Amount.

Ln	Type	Stg	Item Code	UM	Quantity	Price	Net Amount
1	STK	ORD	12138	BX		10.000	8.230
2	STK	ORD	75804	EA	20.000		5.980
3	STK	BKO	ALP7292	EA	20.000		515.420
							10308.40

 Below the table, there are fields for:

- ALPINE 7292 REM. AM/FM/CAS
- Whse.: SEATTLE, Committed: 4.0000
- Salesperson: WM, Backorder Qty: 16.0000
- Tax: SEATX, Backorder Ref: 1210

 At the bottom, there is a "(New Document)" label and a row of icons for Ship Dtl, Nonstock, Details, Lines, Alias, Summary, Defaults, Credit Check, Recalc, Customer, Ship-To, Price, Sales, Invoice, ItemMaster, and LotScreen. There are also OK, Cancel, Header, and tracking buttons.

When the vendor PO is received the sales order number it is linked to will print on the PO receipts report and the line stage on the sales order will change from BKO to ORD.

1539 Assign Routing Codes to Sales Orders

New fields have been added to the customer master screen OE Info screen and the ship-to screen.

Ship-To

File Edit View Navigation Tools Actions Help

Find Prev Next Add Update Delete Browse

Customer Code: 1 ACTION SUPPLY

Ship-To: EAST

Ship-To Name: ACTION EAST

Residential: N

Freight Tax Code:

Contact: MARY SMITH

Address 1: 2000 SOUTH END AVE

Address 2:

City, State, Zip: ATLANTA GA 30339

Country: US UNITED STATES

Salesperson: TM TOM MACK

Commission Code: STD STANDARD COMMISSION RATE

Discount:

Ship Terms: PREPAID FREIGHT PREPAID- DO NOT INVOICE

Cell:

Fax:

Email:

Web Address:

Route Code: SH1-WASH

Tax Code:

Misc Tax Code: Enter route code.

Phone: 800-345-6089

1 of 2

OVR

The Order Entry program has been modified to first look at the ship-to code to retrieve the routing code and if not found there look at the customer record to retrieve the routing code. The routing code selected is then inserted into the Order Entry summary screen.

Extension summ

File Edit Help

Payment Method: Terms:

Credit Card Information

Credit Card No: Auth. Code: Auth. Date:
Auth. Amount: Decline Code:
Decline Messg.:
Email:
Ship Complete:

Shipping Information

Ship Via:
Residential?:
Ship Terms:
FOB Point:
Weight:
UPS Account:
Route Code:

Shipment Tracking Data

Deposit Amount Required:
Documents Sent:
Destination:
Consignee Name:
Consignee Address:

Notify Party Name:
Notify Party Info:
Truck BOL No:

Order Amounts

Sub-Total:
Discount:
Freight Amount:
Freight Tax Code:
Total Tax:
Total Order:

Enter the method of payment.

OVR

The picking ticket print program has been modified to first print all picking tickets with no routing code and then group subsequent picking tickets by routing code. You may also print picking tickets by routing code by entering the code in the picking ticket selection criteria screen.

Select whse

File

Picking Document Warehouse Selection

Warehouse:
Customer:
Order Date:
Order Number:
Order Document Number:
Route Code:
Ship Date:

Enter warehouse codes (blank selects all).

OVR