User Manual: System Administrator

N-K-1 Program Overviews

| August-20 |

**Document Overview**

**Documentation Goals**

This documentation is intended to provide a short overview for all of the current ***“N”-“K”-“1” System Files****.*

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# **Overview of Advantzware Specific Keys and Icons**

## Function Keys

|  |  |
| --- | --- |
| BRWS | The browser, which is a list of records in this file. This is functionally equivalent to the Find option of our standard package. |
| VIEW | View record provides the ability to ADD, CHANGE, DELETE, and UPDATE an individual record. |
| SORT BY | The selections at the bottom of the browser, which will sort the list alphabetic order. |
|  |  |
| Update | Update the current record. |
| Reset | Reset the current record. |
| Add | Add a record. |
| Copy | This will copy the existing record. |
| Delete | Delete the current record displayed on the screen. |
| Cancel | Cancel the information that was entered. |
| Save | Save the record. |
|  |  |
|  | Takes the user to the first current record. |
|  | Moves backward one record. |
|  | Moves forward one record. |
|  | Takes the user to the last current record. |
|  |  |
| F1 | Miscellaneous Fields |
| F3 | Search |
| F3 | List |
| F4 | Notes |
| F6 | Browse |
| F7 | Viewer |
| F12 | Exit |

## Advanced Software Standard Function Keys

|  |  |
| --- | --- |
| Next | Shows the next sequential record. |
| Prev | Shows the previous record. |
| Add | Add a record. |
| Change | Change the current record displayed on the screen. |
| Delete | Delete the current record displayed on the screen. |
| Find | Find a record by searching by description. |
| “1”, “2” | Number 1 or 2 to go the first or second page of this record. |
| Esc | Escape from the current transaction without updating. |
| Q | Quit from the current transaction without updating. |
| F1 | Save |
| F3 | Help information is available on every data field. Simply place the cursor on a field and press F3 to display documentation regarding this particular field. |
| F3 | To insert additional data in a data field without erasing the information currently displayed. |
| F4 | Notes – General |
| F1 | Field Lookup is available on every data field which is maintained in a separate file. Place the cursor on a field and press ***“F1”*** to search for the code by description or to advance a screen of records by pressing the next key. Place the cursor next to the desired record and press enter to transfer the record to the data entry screen. See ***“Page Up”*** / ***“Page Down”*** keys below as an alternative |
| F7 | Delete |
| F8 | Notes – File Specific |
| Enter | Advances the cursor to the next field |
| Page Up | Will skim forward through each record in a data file in sequential order |
| Page Down | Will skim backward through each record in a data file in sequential order |
|  |  |

## Program Icons

|  |  |  |
| --- | --- | --- |
|  | Job Notes |  |
|  | Customer Attachments | Attach files (such as Word/Excel/Images) for this specific customer order. |
|  | Change Move/Set Column Mode |  |
|  | Print Acknowledgement |  |
|  | Export to Excel |  |
|  | Add |  |
|  | Attachments | Attachments for this Estimate. Will transfer to all future repeat orders for this estimate. |
|  | Notes |  |
|  | Spec Notes | Notes for specific finished goods items. |
|  | Utility Application |  |
|  | Help |  |
|  | UDF Viewer |  |
|  | Commissions |  |
|  | Exit |  |
|  |  |  |
|  |  |  |

# **Overview**

The system control parameters make is possible to develop one standard software package to all clients while allowing each individual customer to utilize the package with different methodologies. The description of the control parameter may be modified so that each company may describe the function in their own words. I recommend utilizing the description defined in this manual.

## Name

The name is programmed by Advanced Software, Inc and cannot be changed. Each program name acts as a switch or toggle to turn on a feature of the software so that the standard industry packaged software becomes customized for each installation.

## Description

The description describes the nature of the enhancement as well as a help message for the use of the software feature. This may be changed to better explain the function.

## Integer Value

This field could be used as a default whole number without a decimal value.

For example, the number of invoice copies to print may be defined with the *INVCOPYS* feature.

## Decimal Value

This field could be used as a default number including decimals. For example, the SETPRINT option allows a matching markup percentage to be defined as the default for estimate calculations for Corrware Set estimates.

## Character Value

The character value is used by Advanced Software, Inc to define names of forms, bin locations or default specific calculations as well as various print options. The character values are utilized to define the names of all forms including acknowledgments, quotations, release tickets, bills of lading and invoices. To select the options available for this field, the page up or page down key will scroll through the options available for each program.

## Date Value

This field is used to define a default date. This field provides a default date to printing release tickets up to this date as defined in the *RELPRINT* feature. If no date is defined, then the user is forced to manually enter a date during release printing so that only releases or deliveries are only printed a day at a time.

## Logical value

This field as a ***“Yes”*** or ***“No”*** response to turn the modification on or off. This is used to print or not print the label headings on the forms.

# **1099MISC**

Add new menu item to print the information onto the 1099-MISC forms. Laser 2up. Must be able to print multiple copies of each vendor. Example if printing 5 copies of three vendors, it should print 1st copy of 1st vendor 1st copy of 2nd vendor and then 1st copy of 3rd vendor.

It should page break to top of form before printing the 2nd set . 2nd set should be the same 2nd copy of 1st vendor 2nd copy of 2nd vendor and then 2nd copy of third vendor...etc...until end of copies.

# **2PIECECD**

Two Piece Box / Setup Box Folding Estimate Default Truck Code.

# **ACKHEAD**

Print Headings on Order Acknowledgement on Plain Paper?

### Character Value

The character value is used to select an acknowledgement form to print. The logical value field is used to print the heading or not print the headings on a particular form.

Character value options include:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ASI | HOP | IWALKER | PACIFIC | WESIND | XPRINT |

The *XPRINT* prints boxes for data with headings in aerial font and should be printed with your letterhead.

# **ADDRELSE**

Method for Adding Releases. Bypass Release/Pick Tickets?

To bypass the release print and post programs and ship multiple orders on a single bill of lading, the logical value must be set to ***“Yes”***. The user can release each order to the same release via the release button, and then click the “***BOL”*** button to create a Bill of Lading. This will bypass the release print and post programs.

### Character Value

The *CHARACTER VALUE* is used to select the methodology for adding new release tickets via ***“O”-“T”-“1”*** menu option called enter/edit releases. The ASI version simply allows creating a single release without bypassing any fields, including the order number, ship to, item code, quantity and unit counts.

#### Value: BIN/TAG

Character value is *BIN/TAG*, the release button is building the actual release, then allowing the customer service rep to select the actual bin / tag numbers for all exiting jobs and bin/tag locations for delivery on the new release.

Please Note: The purchase order number from the last release for that job will move to the release line. This is the recommend method for clients using Sharp Shooter.

#### Value: ROYAL

Character value is *ROYAL* version is used to speed processing of adding releases for large customer orders with items and many shipping locations.

When adding a *ROYAL* release, the user enters the order number and ship to location, and then the software displays each item on the order so that the user just needs to enter the number of cases or units for each item. When the last item on the order is reached, the system automatically prompts for another ship to location, the repeats the list of items to be shipped.

### Decimal Value

#### 0

When the integer value is 0 or no, then the system will simply create the release without checking for unshipped inventory.

#### 1

*Decimal Value* = 1 will prompt check for previously unshipped open orders. Creating releases via order lines or release folder will check for on hand inventory for the item(s) released.

If a previous order exists with an inventory balance, the system will prompt *“On hand balance exists for older order (Show Order #'s), Continue with Release?"* – ***“No”*** will be the default so that the customer service rep will cancel this release and process the original release.

### Logical Value

#### No

The “***BOL”*** button in *Order Entry* will not work. This would force all deliveries via the ***“Release”*** button, which is mandatory for Sharp Shooter.

#### Yes

This will completely bypass the release process and create bills of lading during order entry. Bypassing the release may be ideal for shipping finished goods such as just in time items, stock boxes and distribution products. The assumption is that the products are already in the warehouse waiting to be shipped.

This option may also be used for custom jobs. However, it would be recommended to utilize a bill of lading format which is created with a *HOLD* status, and so that posting does not create an invoice. This would require the shipping clerk to update the bill of lading with valid unit counts before posting the bill of lading. In any event, both methods will save lots of time and make your sales service personnel more productive.

# **ADDPREP**

### Logical Value

Logical Value dictates updates to the prep file from the estimate. Current logic requires the Die # and Plate # to be added to the *PREP* file then added to the *SPEC* folder in estimating.

#### Yes

The system will search the Prep file when a Die# or Plate# is added to the spec folder. If the new numbers do not exist in the prep file, then the system will prompt the following message. Die # or Plate # does not exist, Update Prep File?

This will then create the record in the prep file and display the file for updating. The program will automatically download all the current estimating information such as customer code, estimate number up, style, length, width, depth, etc.

The owner information will default to customer X as 100%. Information such as Category, Cost, Account Number, Bin Location, etc. that is not contained in the estimate will transfer from the first prep material by prep material type.

For example, the Plate GL Account # will default from the first estimated Prep Plate. Likewise, the Die GL Account # will default from the first Die material.

Once the data is downloaded the new prep code will be in *UPDATE* mode so that the planner / estimator may make any changes before saving the data. Once saved, the system will return to the die# field. Logic will be added to both folding and corrugated spec folders for Die # and Plate #.

# **ADDXFER**

Create Transfer Release as type "T" with Customer X?

### Logical Value

#### No

This will use current logic, whereby the customer code will transfer from the order to the release.

#### Yes

When the Ship to on releases is for the Box Plants (Cust Type = X) warehouse, then the release file under O-T-2 will change the bill Customer Code from Customer on the Order Entry View screen under ***“O”-“U”-“1”*** to the Box Plants (Customer X).

Thereafter, multiple releases for various customers can be combined on one Bill of Lading when the release is posted or when Bill of Lading is created via Sharp Shooter BOL Creation. Effectively, this will allow a *MASTER TRUCKLOAD* bill of lading for company transfers from one warehouse location to offsite warehouse location.

The customer code will transfer from the customer file for the customer with the status of "X" if the ship to does not exist in the customers ship to file. Hence, this would transfer the Box Plant as the Customer to the release. The system will look at the customer on the order first.

The box manufacturer must be trained to make unique ship to for themselves as customer X. When creating the bill of lading, the release will post the release based on the existing ***“N”-“K”-“1”*** *RELPOST* character value = *BOL*, which combines all releases by Bill of Lading with the same customer, same release date and same ship to. Hence, no programming is required to the release posting logic.

The “***BOL PRINT”*** button in Sharp Shooter already posts the release by Ship to and will create one *BOL* for all the various customers that are transfer releases.

# **ADJUSTGL**

Automatically create general ledger dollars when posting finished goods adjustments?

### Character Value

#### Yes

General ledger dollars will be posted to the general ledger for the difference in finished goods inventory value when adjustments are posted to finished goods. This required adding general ledger number in the job cost product line file for finished goods.

# **AGEDAYS**

New logic to calculate the average number of days to pay invoices shown on the customer total screen to calculate only on the last 120 days. New system administration field called *AGEDAYS*. The integer value field will be used to determine the number of days to be used to calculate the average days to pay.

# **ALLIANCE**

Alliance Scheduling Integration

To set up the download, the disk drive and directory / folder to store the files may be must be defined on the description field via the system control parameter called *ALLIANCE*.

Please Note: This folder must exist in the system. Also, this folder must have a sub folder called (DATAXFER\IN) defined. The text file will be downloaded to the (DATAXFER\IN) folder with the format ending with the date and time.

In addition, the vendor field called *EDI* must be set to “***Yes”***. In addition, the control parameter called PO Export character value must be set to Alliance.

When printing a purchase order, the option to export to Corrugator will appear when the vendor is an *EDI* vendor. Once this option is selected on the purchase order print selection screen the data file will be exported.

When changing a purchase order after it had already been printed does not require selecting the *REPRINT* option. Our software automatically deselects the purchase order to and *UNPRINTED* status when the purchase order is updated. Therefore, Sutherland should simply press the print (do not select the reprint) option. The purchase order will print this is a change order.

# **AP GL#**

Default GL number from Purchasing? The general ledger that account number that will transfer to the purchase order will determined by the character value. Press ***“F1”*** on the character value field for a list of options.

Select the Vendor file to import the GL account from the vendor file entered on the purchase order. Select *ASSEST* to transfer the raw material asset account that is defined on the raw material cost type file. Select *EXPENSE* to transfer the expense account number from the raw material cost type file.

Please Note: Each raw material should have a material cost type defined in the item file and the material cost type file will need the general ledger asset account number defined if you select the *ASSET* or *EXPENSE* option.

If a single vendor may have multiple material types that would have many different general ledger account numbers, then your company should select the *EXPENSE* or *ASSET* as the character value option.

In any event, you may change the general ledger on the purchase order and that will transfer to the accounts payable invoice if the logical value is “***YES”*** to import the GL # from the purchase order.

If you do not wish to set up multiple expense accounts in the material cost type file, then set the character value to *VENDOR* and defined your default general ledger account numbers in the vendor file.

### Logical Value

#### No

When adding an accounts payable invoice, the general ledger account number will transfer the general ledger from the vendor file.

#### Yes

When adding an accounts payable invoice, the general ledger account number will transfer the general ledger from the purchase order

# **APAUTOCHECK**

AP Auto Check invoice to automatically create a Manual Check.

*Manual Check#* Field must be entered to Automatically create a Manual Check. When updated, the AP Invoice posting program ***“V”-“U”-“3”*** will create a Manual Check in ***“V”-“C”-“2”.***

The following fields from ***“V”-“C”-“2”***Data Fields will be Transferred from ***“V”-“U”-“1”:***

|  |  |  |  |
| --- | --- | --- | --- |
| Amount | Check # | Check Date | Payment Method |
| Bank | Check Amount | Invoice # | Vendor |

The purpose of this new logic is to save time for processing manual checks. The accounts payable clerk can enter the manual check number when adding an invoice that was paid via a manual check. The system will post the A/P invoice and simultaneously create a manual check in one step.

### Logical Value

#### Yes

This will invoke the logic when AP invoices are posted. When logical value is “***Yes”***, the Manual Check field will be modifiable.

# **APCHECKFILE**

Toggle Box *"AP Check File”* will create a text file to a bank in a format called *Positive Pay* that has a process that can verify Accounts Payable checks so someone can't cash an altered check. The text file has information per document in *GUI MANUAL* with the fields per this format. The customer must manually email the file to the bank.

The ***“V”-“T”-“3”*** check register must have the toggle box checked for the text file to be created including the vendor name.

### Character Value

#### Positive Pay

Dictates format of text file.

### Logical Value

#### Yes

Logical = “***Yes”***combined with Character Value Turns on this feature.

### View Form Tab

When the Customer/Vendor and Ship to will be Blank will house the location of Text File.

# **APDESC**

Copy the A/P line item description from first line to each successive line?

### Logical Value

#### Yes

If the logical value is “***Yes”***, then the accounts payable description that is typed during the addition of line items will transfer to the next line item description that is added. This is used when distributed expenses to multiple accounts.

# **APLOCKBX**

Create a .txt file when posting register to send to bank.

### Character Value

#### SIMKINS

Defines the format of the file.

View Form with Blank Customer and Blank Ship-To will house the Network Folder.

Create this .txt file at time of running the VC3 posting register.

# **APPAPER**

Separate logic for material type = ***"P"*** (Paper) for AP invoices.

### Character Value

#### MSF

This will not use the purchase unit of measure but rather use MSF as the accounts payable invoice receipt UOM.

#### POUOM

This will be the current logic for AP receipt quantity is to pull the purchase order UOM from the inventory folder.

For example, if we place a purchase order for 20 ROLLs of paper at cost of $30 per MSF, then receive 20,000 lineal fees, which is the consumption UOM. If character value is POUOM then the AP invoice will convert 20,000 LF into rolls. If character value is MSF, then the system will convert 20,000 LF into the MSF.

# **APSECURE**

### ALLIANCE

Enter the disk drive name and folder for output of the file to reside. Alliance will need to know where to pick up the file from your server.

### CORRTRIM

Enter the disk drive name and folder for output of the file to reside. Corrugated Technologies will need to know where to pick up the file from your server.

### OEITEM

Allow adding wrong customer items to another customers order? “***Yes”*** would be the current logic, which provides prompt. If the Logical value is “***No”***, then the prompt would still display. However, the user could not enter a “***Yes”*** to continue. PO Export to Corrugator Scheduling This file is used to export purchase orders for board to corrugators electronically. The following must be set to export data.

### POEXPORT

Set the logical value to “***Yes”*** to evoke this feature. Change the character value to *ALLIANCE* or *CORRTRIM* depending on the Scheduling Software that your vendor utilizes.

The purchase order will export all the pertinent data the board vendor requires including your company name, ship to code, ship to address, city, state zip, board code, board description, adder codes, cost, due date and more.

### VENDOR FILE

The EDI field must be set to “***Yes”*** in the vendor file. Only vendors with this denotation will receive purchase orders.

# **APINQ**

Select the accounts payable inquiry view screen.

### Character Value

The character value may be set to *BRICK* or *TRIAD*.

#### BRICK

The *BRICK* version will separate each Invoice with a dotted line and show the purchase order number with the balance for each invoice and the cumulative balance for all invoices.

#### TRIAD

The *TRIAD* version lists all invoices without separating lines and shows a cumulative running balance for all invoices.

# **APINVMSG**

### Logical Value

#### No

This will suppress all receipts for this P.O. have been invoiced. This logic will create an invoice even though there is no on-hand material to keep track that he received on the A/P invoice. The company will get a credit in another period that will reverse it.

# **APTX**

Method to charge A/P sales tax by PO? This will set all Vendors to a Specific Tax Code.

### Character Value

Character value = *ITEM* or *VENDOR* or *ALL* or *NO TAX*. This task requires modification to adding new Purchase Orders and Adding new A/P Invoices. The AP program should look at taxable lines if a PO exists otherwise use the Vendor Files tax code.

#### ITEM

The RM and FG items taxable flag would be used to determine if the item is taxable when the vendor code is taxable. Hence, I believe that this has been the current logic.

#### NO TAX

Adding new PO line items will be set to taxable. Changing this to *NOTAX* will erase tax code on PO and set OPEN PO Lines to Non-Taxable.

#### VENDOR

If the vendor file has a *TAX CODE* defined, this would set all PO Lines to taxable regardless of the items tax status. If the vendor tax code is blank, then all PO Lines would be set to no taxable regardless of the items taxable status.

### Logical Value

#### Yes

This is used to force the user to enter the tax code when adding or updated vendors in the vendor file. Please note, when the Taxable flag in the customer file is “***Yes”***, then the tax code must be entered.

# **ARINQ**

Select the accounts receivable inquiry view screen.

### Character Value

The character value may be set to *ASI* or *FIBRE*.

#### ASI

The *ASI* version will not show the purchase order number or the aging days and will show the balance on each invoice, with the total balance at the bottom of the inquiry.

#### FIBRE

The *FIBRE* version will show the check number, purchase order number, credit memo or debit memo number, the age of the invoice in days and the balance will show an accumulate running total.

# **AREXP**

Accounts receivable and order processing invoice posting option for exporting data to a corporate accounting system. The character value could be set to ASI, Sonoco or Inland. The ASI value will not create an export file.

For farm out items, the cost will transfer the cost directly from the warehouse / bin file from which the item was shipped. The bill of lading indicates the warehouse and bin location which will house the cost for the item and this cost will transfer to the ASCII file.

Each time the invoices are posted, the new line items will append to the file. Inland Corporation will need to purge the file when the data has been successfully imported to the corporate JD Edwards accounting database.

### Character Value

#### SONOCO

The *SONOCO* option is used for exporting posted invoice history to their People Soft corporate accounting system.

#### INLAND

If character value is *INLAND*, the invoice post will create an ASCII file, which will be sent to the corporate JD Edwards accounting software. The JD Edwards customer code must be defined in the Advantzware customer ship to file so that each line item on the invoice will include the JD Edwards customer code.

The file will be downloaded into the directory named on the *N-K-JDEDWDIR* description field. Each line item will generate a file with all factory and full costs from the cost estimate file. This will require recalculating the estimate for each line item for each invoice posted. All details of cost from the estimate will print on a separate field as a cost per thousand as the unit of measure cost.

# **ARMEMO**

Select the accounts receivable debit memo / credit memo format. Currently there is only one plain paper format regardless of the character value or logical value setting.

# **ARTIOS**

When adding estimates, new option will allow importing data directly from the Artios Cad Cam Software including style, length, width, depth, board code, sheet size, etc.

### Character Value

This stores the disk drive location of the file to be retrieved. Character Value will House Customer Name which will Index to Store FTP, Cad Files, Etc.

### Log Value

Log Value = Integration?

This will Prompt to Create SET Header Page then Prompt

Part 1. Cad File \_\_\_\_\_\_\_\_\_\_\_ Part 2. Cad File \_\_\_\_\_\_\_\_\_\_\_

Part 3. Cad File \_\_\_\_\_\_\_\_\_\_\_ Part 4. Cad File \_\_\_\_\_\_\_\_\_\_\_

***“N”-“Z”-“11”*** will be a Cad Cross Reference file with two columns Cad Field & ASI Field Name. The cross reference will find the cad field name, then transfer the ASI field name to estimate. When pressed, the estimator will pick a cad# from an Artios file on the server that will then import the style, blank length, width, depth, board code, die size, etc.

### Logical Value

#### Yes

Logical value “***Yes”*** will require password logic identical to RelCredt.

# **AUDITDIR**

AUDIT TRAIL when posting A/P Invoices, A/P Check Register, A/R Invoices, OP Invoices and Cash Receipts are stored electronically on the disk drive. This allows audit trails to be printed to the screen then posted, thus saving the cost of paper and ink toner on the printer.

In addition, accountants and auditors may review financial journals of the posting audit trails at any time. The Box Plant must create the folders on their network drive.

RCODE\AP\VC3 and RCODE\AP\VU3

RCODE\AR\AC2 and RCODE\AR\AU4

RCODE\OP\OB4

### Character Value

This stores the folder for each company audit trails.

For example: P:\ASI10Test\Rco1010\Audit 001\AUDIT TRAILS

Whereby Audit 001 would represent company 001.

### Menu Keys

Menu Keys A-C-2 Cash receipt posting will write a file to the RCODE\AR\AC2

Menu Keys A-U-4 A/R Invoice Posting will write a file to the RCODE\AR\AU4

Menu Keys V-C-3 Check Register posting will write a file to the RCODE\AP\VC3

Menu Keys V-U-3 A/P Invoice posting will write a file to the RCODE\AP\VU3

Menu Keys O-B-4 Order Invoice Posting will write a file to the RCODE\OP\OB4

# **AUTOFGISSUE**

***“N”-“K”-“1”*** *AUTOFGISSUE* allowed costs can be automatically issued by posting finished goods receipts for purchase orders for farm outs that have the customer order and/or job number. In addition, finished goods purchased on stock can be manually issued via the ***“I”-“U”-“9”*** menu option.

# **AUTOISSU**

### Character Value

*CHARACTER VALUE* Logic is used to post materials when the posting finished goods rather than when the job closes. Current logic will post the amount of material directly from the job file based on the original job quantity. New character option to be *FGPOST* or *JOBCLOSE*. Current logic will be *JOBCLOSE*.

#### FGPOST

New logic called *FGPOST* will multiply the total finished goods quantity posted by the ratio of each component material on a job. When the job is closed or reopened, no material issues will be created when the flag is *FGPOST*.

### Logical Value

*LOGICAL VALUE* is used to Auto issue materials to a Job from RM receipts for Purchase orders for materials.

#### No

When the logical value option is “***NO”***, only estimated materials are issued automatically, thus this will force you to issue stocked real material a separate step. Therefore, estimated materials received with job number will be immediately issued to the job.

Materials that are stocked (item code is ***"R"***) in the raw material file will not automatically create an *ISSUE* transaction. Thus, when the board is received for real material for a job, the receipt will post, but the user must create an *ISSUE* transaction for the actual material used on the job.

#### Yes

This switch will automatically create a raw material issue transaction whenever a material receipt transaction is created for a purchased material specifically for a job. Since an issue transaction requires a job number, only purchase orders for specific jobs would utilize this feature.

The advantage of this option is the data entry time saved by automatically creating the raw material issue transaction. The disadvantage of this feature is that the total quantity on hand for this item will always be zero since the receipt & issue transaction would occur simultaneously.

### Notes

Also, note, the ***N-K-CLOSEJOB*** logic determines when the job is closed; hence the materials may not be issued if the job is not closed when the flag is set to *JOBCLOSE*.

Please Note: Older logic in our system had utilized the character value as a default for the Bin location, but this logic was recently changed to default directly from the raw material bin file or item file. Hence the old logic should not be required. However, if the raw material location is blank, then the warehouse and bin must default from the Customer X warehouse and bin location.

# **AUTOISSUE**

Raw Materials Inventory Control via Roll Tags and Pallet Tags.

Raw material control without tags does not provide for tracking on hand sheets for estimated material.

For example, this requires adding receipts via menu ***“M”-“U”-“1”*** and receive 5 units at 1000 sheets per pallet for 200 C. 200 C is estimated, thus has no defined size.

Purchase Orders received for jobs will be immediately issued to the job. Therefore, on hand inventory is always zero. The Good News with pallet Tags for each pallet received via Sharp Shooter *SCAN VENDOR TAGS*, you have an option to track on hand inventory.

### Create Issues

#### No

This will leave incoming sheets with tags on hand to be issued later, so that they will show on reports such as ***“M”-“R”-“3”***.

#### Yes

This will immediately create issues to the job for each receipt. If posted via the toggle box, then On-Hand will be zero. Without RM Pallet Tags, the On-Hand is always zero as they are always issued.

### Logical Value

The Logical Value is used to control when Issues to Jobs are created. For estimated board without Roll/Pallet Tags, issues are automatically created when paperboard is received. Without tags, it is impossible to track on hand inventory of estimated material because every job has a different size and the ***“M”-“F”-“1”*** material file only houses 1 set of width and length dimensions.

However, when using roll tags or pallet tags for estimated material, you can track estimated on hand quantities. The bin file tracks on hand by tag# so that incoming materials can be issued to the job in real time. This allows material to be on hand for days, weeks or months until it is consumed.

Therefore, tagged inventory provides better inventory control for estimated material such as 200C or SBS18. Real material has always had the ability to control inventory, unfortunately real material would require a unique item code for every job, which is impractical and that is the advantage of estimated material.

#### No

Provides option when posting Raw Goods.

#### Yes

This will transfer to the RM Posting Screen. This forces the user to click either *Yes* or *No* to create the RM Issues for RM Receipts.

For example, a large delivery for 20 pallets arrive. The user can issue 10 pallets immediately to the job by clicking “***Yes”*** to create and “***Yes”*** to post. Then, receive the next 10 pallets and click create issues = “***No”***, and the rags remain on hand.

# **AUTOPOST**

Auto transfer Finished Goods Receipts Quantity posted during Production Control?

### Character Value

The character value is used to define the default warehouse and bin location for finished goods receipts.

#### FGFILE

The warehouse and bin will transfer from a currently stocked location. If there is no inventory on hand, the warehouse and bin location default to the location defined in the finished goods item file, otherwise the location will default from the warehouse and bin location for your company record, which is defined as a customer with the active field set to X.

#### SHIPTO

The warehouse and bin will transfer from the customer’s ship to warehouse and bin location regardless of the quantity on hand. This is useful to ensure that the inventory is pulled from the warehouse location nearest the customer’s ship to location.

### Logical Value

#### No

Posting production will have no effect on the finished goods.

#### Yes

If the logical value is “***Yes”***, and then the software will automatically create finished goods receipts during production control or plant data collection for the quantity posted on the last machine for the job. This will save the data entry time of manually adding finished goods receipts; however, the accuracy of the production personnel may be an issue for some companies.

Please Note: The finished goods receipts must be posted as a separate option; hence the user still has the ability to review and correct improper quantities and unit counts.

# **AUTOPDC**

The machine codes listed on the description line such as *HS* for hand stripping or *BAND* for banding will automatically post to the job cost and production module at the estimated hours and cost when the job is closed.

### Logical Value

#### Yes

The logical value must be set to “***Yes”*** to invoke this process, which can save countless hours recording hours for insignificant machines that were listed on the cost estimate.

# **AUTOREL**

Release Key default to transfer all items on order to the release file or bill of lading file.

This feature is available on the order entry line item screen by pressing the Release key, which triggers the system to ask, “Create Bill of Lading? Then asks to “Release all items?” This feature will automatically create a new bill of lading or create a new actual release and simultaneously transfer all unshipped line items to either the bill of lading or the actual release.

### Logical Value

#### Yes

This enhancement is turned on by setting the logical value equal to “***Yes”***.

Please Note: The system will only prompt to create a bill of lading if the *ADDRELSE* option has the logical value set equal to “***Yes”***.

To move the line items to either the bill of lading or actual release, the order entry clerk must answer yes to the prompt to release all items. To release a specific item on the order, the user should answer no to both message prompts. This will take the user to the planned release screen for that item whereby the user could depress the release key again to create a bill of lading or actual release for just that finished good item.

# **BACKLOG**

Print Cost on ***“B”-“R”-“1”*** Order Backlog Report?

### Logical Value

#### Yes

If the logical value is “***Yes”***, then the report will print the costs for each item. The *SECURITY* option will prompt for a password when selecting to print the sales value and profit on this report.

# **BARDIR**

***“N”-“K”-“1”*** BARDIR for Diskless Computers.

Plant computers normally are known as thin clients, dumb, or diskless computers. The key is that they do not have a disk drive, therefore they must use the disk drives of a terminal server that is a slave to the main server running Advantzware.

If the server storage is used for plant computers and forklift computers, then they need their own disk space. With Microsoft Explorer, you must define a folder for each user then name that folder in the user file.

For example, when a diskless plant computer makes a load tag, the software downloads the text file to a disk location that Label Matrix merges with the label. If all the plant computers used the same disk location, one user would overwrite the last user’s text file data. The solution is to have a separate disk location for each User.

If the User ID Label path within the System Controls Parameters Maintenance is not used, the labels will be downloaded to the directory defined in the description field of this parameter.

### Integer Value

#### 1

This will download the text file by UserID Location via the ***“N”-“U”*** menu. Clients printing load tags in the plan via a terminal services connection will all share the same disk drive. Therefore, the data in the text file will be overwritten unless the data is stored separately by user ID.

# **BITMAP**

Help for ***BITMAP***.

# **BOLCERT**

Help for ***BOLCERT***.

# **BOLDATE**

### Character Value

Character Value will create BOL date as either the *RELEASE* Date or *CURRENT* Date.

#### CURRENT

When the character value is *CURRENT*, then the logic will use the current date that the bill of lading was created, which is normally the date the release was posted. Therefore, if the Release date is May 21, but the release is posted on May 27, the BOL date would be created with the current date of 05-27-04.

#### RELEASE

RELEASE Date option will create the BOL date as the RELEASE date from the release screen, hence the character value will be *RELEASE DATE*.

### Logical Value

#### Yes

Set the logical value to YES to turn on this feature.

# **BOLFMT**

Bill of lading formats to use for printing the bill of lading?

To select a particular format, enter the change mode for this option and press ***“Page Up” / “Page Down”*** on the character value field. When adding bills of lading, several formats will automatically set the trailer number to *HOLD*.

This will allow printing but not allow posting the bill of lading. To post the bill of lading, the user must release the shipment off of hold by pressing the ***“Release”*** key. This acts as a safeguard against creating invoices via the bill of lading posting program.

### Character Value

The character value is used to select the bill of lading format to utilize when printing the bill of lading.

### Integer Value

#### 0

A zero will print all the tag numbers and job numbers on the bill of lading.

#### 1

This will make the certain forms such as Xprint and P&P to summarize the bill of lading lines by FG item number regardless of tag number or job number.

### Logical Value

This would be the recommended format when the release processing logic is not used because the *ADDRELSE* logical value is set equal to Yes. Your company is free to use any custom designed form, however future changes may be made without your consent or notice.

For example, when printing bill of lading for customer ship to that are defined as brokers, the company name on the bill of lading should print from the sold to list on the order entry header screen.

# **BOLFMTX**

## Maintenance

Bill of Lading Print has an Option to Print a Broker / Freight Bill Form on Demand. You will need a library of Logos for each Broker if checking the Print Logo option. When Printing at BOL you can opt to use the Broker BOL Form. The character value houses the forms that print when selecting this option.

## Print

Bill of Lading Print has an Option to Print a Broker / Freight Bill Form on Demand. To print the Freight Bill, you must check the toggle box called “Print Freight Bill / Logo?

When printing this bill of lading format, you have an option to print a LOGO. The Logo may or may not include an address, city and state. Therefore, when selecting this option, you can opt to print the address.

# **BOLPOST**

### Character Value

#### BIN > QTY

Set the character value to *Bin>Qty* to prevent posting the bill of lading when the quantity shipped from the warehouse and bin location defined on the bill of lading is greater than the actual quantity in the finished goods file for that warehouse and bin location.

To stop a mismatch on the bin location between finished goods receipts and bill of ladings, simply set the ***“N”-“K”-“1”*** *BOLPOST* character value to *Bin>Qty*, which means that the finished goods quantity on had in the warehouse and bin defined on the bill of lading must be greater than the quantity being shipped on the bill of lading. In this scenario, the bill of lading may be printed, but the bill of lading cannot be posted, hence an invoice will not be created until the correct bin location is entered on the bill of lading.

#### “BLANK”

Leave the character blank to not invoke this logic.

Please Note: Invoices will not be created until the proper bin location is defined on the bill of lading. This explains how inventory may become inaccurate. Each item has a default bin / warehouse location for FG receipts.

# **BOLPRINT**

Print column headings on Bill of Lading?

The character value is used to define a default bin location. The logical value is used to in combination with the *BOLFMT* option when printing the bill of lading form.

### Logical Value

Certain bill of lading formats will print with the heading or without the headings as specified by the logical value.

Please Note: This option may have no effect on many bill of lading formats. Companies that have forms designed by a printing company would normally change the logical value to “***No”***, whereas forms which have been designed on plain paper should set the logical value to “***Yes”***.

#### No

Printed Form

#### Yes

Letterhead Paper

# **BOLSIGN**

Bill of Ladings that are signed by the customers must be scanned via a program such as Adobe Photoshop. When Saving the file, the file name must be the BOL number with the extension of .jpg and the file must be saved in the folder designated in the character value of the ***“N”-“K”-“1”*** *BOLSIGN* control parameter.

This signed bill of lading can be reprinted via the *BOL ICON* displayed in the *ORDER INQUIRY* via the Invoice folder screen in Advantzware likewise, your customers can reprint a signed *BOL* over the internet via our Anywhere .Net software. This should get you paid quicker.

# **BOLTAGFILE**

New Menu called Create Pallet Tag for Bill of Lading. This will create a text file with the BOL# as the first field. All items on the *BOL* will print on one BOL Pallet Tag. The net result will print a new load tag for all items on the pallet. This will allow customer to consolidate all items to a consolidate BOL tag.

# **BOLWEIGHT**

### Logical Value

#### No

***“N”-“K”-“1”*** BOL Weight logical value = “***No”*** will use current calculation utilizing the Weight / 100 from Finished Goods Item File to calculate the weight for each item on the bill of lading.

#### Yes

***“N”-“K”-“1”*** BOL Weight logical value = “***Yes”*** will use weight field in Sharp Shooter Load Tag file.

1. New Weight in Finished Goods Load Tag File via Sharp Shooter menu.

2. Update button in SS load tag file will allow changing the weight.

3 ***“O”-“U”-“7”*** Load Tag Create will prompt for new Unit Weight and Pallet Weight.

4. Person creating the load tags will enter both case weight and pallet weight.

5. Program will download weight to the TEXT file and to the finished goods Load Tag File.

6. ***“N”-“K”-“1”*** BOL Weight = “***Yes”***.

The weight of each line will be calculated based on the weight in the tag file.

If this is zero, this will use current calculation via the Weight / 100 from Finished Goods File.

# **BOLWHSE**

### Character Value

The character value is used to define the default warehouse and bin location for finished goods receipts. The options are *SHIPTO*, *FGBIN* and *FIFO*. Valid selections are available by pressing the ***“Page Up” / “Page Down”*** keys when the cursor is on the character value field.

#### FGBIN

The warehouse and bin will only transfer from the orders job number that is a currently stocked location.

If there are no inventory items on hand, the warehouse and bin location transfer from the location defined in the finished goods item file; otherwise the location will transfer from the warehouse and bin location for the customer’s with the active field set to X. If no job exists or no bin file exists for the item, the system will import the first warehouse located in the finished goods item file.

#### FIFO

The warehouse and bin will transfer based on a first in first out basis regardless of the job number. Hence the bill of lading will import the oldest job to the newest job until the delivery quantity is fulfilled. Under this scenario, the actual job number on the order may not transfer to the order on the bill of lading if previous job quantities fulfilled the delivery quantity.

#### SHIPTO

When set to *SHIPTO*, the warehouse and bin will transfer from the customer’s ship to location. The reasoning for this option would be for customers with multiple warehouse locations whereby the bill of lading will always create a delivery ticket or bill of lading out of that warehouse closest to the customer location.

Please Note: The warehouse in the customer ship to file will default even though there may be inventory on hand for that in another warehouse. If the item has no quantity on hand, then the invoice-posting program would cause the quantity on hand for that warehouse to become a negative value, which would trigger the warehouse manager to transfer, finished goods to this warehouse from a warehouse with a positive quantity on hand.

# **BOLDESUM**

Box Design Scoring Unit of Measure for Job Ticket. This option is available for corrugated plant job tickets, folding carton job tickets, folding carton estimates and quotes. The box design will print the panel sizes including scoring allowance in metric, inches or both depending on the character value selection.

### Character Value

#### BOTH

When the value is BOTH, then the Metric Field on the *SPEC* folder dictates printing metric or imperial.

#### INCHES

When the *BOXDESUM* character field is *INCHES* then the dimensions will always be printed in imperial.

#### MM

When the *BOXDESUM* is *MM* for metric, the box design dimensions are always calculated in metric.

### Logical Value

#### No

When this flag is “***No”***, then the dimensions would print in inches.

#### Yes

This logic will print metric when the estimate spec folder field called *METRIC* is “***Yes”*** and the character value is *BOTH*.

# **BOXDESUM**

Box Design Unit of Measure. The estimates box design and scoring dimensions will display in metric for corrugated plant job tickets, folding carton job tickets, folding carton estimates, quotes and the estimates box design folder. The box design will print the panel sizes including scoring allowance in metric, inches or both depending on the character value selection.

Please Note: The dimensions are always entered in inches.

### Character Value

#### BOTH

The Metric Field on the Estimate’s SPEC folder dictates printing metric or imperial.

#### NM

The estimate dimensions entered in inches will always convert to metric millimeter on the box design dimensions, then print on business forms such as the job ticket in metric.

### Logical Value

#### No

Metric field = “***No”***, then the dimensions would print in inches.

#### Yes

Estimate *METRIC* = “***Yes”***, this logic will print metric dimensions.

# **BROWSER**

### Logical Value

#### No

No records exist on the browser; hence, the user cannot add an estimate or an order.

#### Yes

Display Select-focused-row error.

# **CADCAM**

Add Cad# and Die# to Estimate Folder to import Cad info. New Button on *SPEC* folder of both modules called CAD. This will prompt for the Die# to Retrieve Cad-Cam Dimensions from the Artios database when the Die Number is entered.

# **CADFILE**

The ***“N”-“K”-“1”*** control parameter called *CADFILE* will store the images on your server.

### Cutting Die Image

To assign a CAD image, click the “***Binoculars Icon”*** and the images will display for selection.

Please Note: The user can opt to add separate files for each customer so that they can retrieve images specific to each customer.  This is not required, but recommended.

Also, when renaming the cad image to a .JPG or .BMT or .PDF file, we recommend using the estimate number or customer part number as the file number as an easy way to recall the image.

### CAD-CAM File Location

**The character value indicates the folder / directory that the cad images are stored. The images must be .jpg or .bmp images (we recommend .jpg). From the corrugated estimate SPEC folder, pressing** “***F1”* on the CAD#, the file name of the image is selected; the die / cad image will transfer to the *BOX DESIGN* folder and overwrite the original image.**

**This image will print on the corrugated job ticket such as the Artios factory ticket as a separate page.**

**Please Note: The *N-K-DIEFILE* points to the Folding Estimate Binocular ICON next to the Die#. (The “Die #” binoculars are not used in the corrugated package).**

# **CASCNT**

Display Warning Message if Order Quantity is not devisable by Bundle/Case Count? This program will prevent order processing so that the items order quantity will never include a partial case of bundle. This is a valuable tool for stock box and just in time release orders whereby the quantity must be devisable by be quantity in the bundle or case.

For example, if an item were bundled with 25 boxes per bundle, then only multiples of 25 could be ordered, otherwise an error message would appear. Similarly, if boxes per packed 100 per case, only quantities with multiples on 100 could be ordered.

# **CASETAG**

Case Label Format? Scan finished good by Case Labels?

We have two methodologies for receiving finished goods via Sharp Shooter: By the Pallet or by the Case. This logic works in conjunction with the *SSFGSCAN* option.

### Logical Value

#### No

Logical value = “***No”*** and the receipts *SAVES* the tag number. Also, since the new parameter called *SSFGSCAN* is set to “***Yes”***, the program will not prompt for a Warehouse and Bin location. Hence the default warehouse and bin stored in the FG item file will become the default.

#### Yes

As the description of that parameter indicates, this will receive finished goods by the case label. This logic scans the case tag bar code then saves the line time and erases the tag number so that the client can enter the number of cases.

Therefore, each pallet that is scanned will utilize the same bar code number so that number pallets with the same case tag number may be stored in multiple locations.

### Sharp Shooter

Sharp Shooter has unique logic for shipping inventory. The FG item file has a field called Shipping Method case or Pallet. If this is set to Pallet, then scanning a pallet tag will import the entire pallet to the bill of lading line. If this is set the Case, then the sharp shooter creates bill of lading logic will prompt for number of cases to ship once the pallet tag number is scanned.

# **CASHRCPT**

Allow Overpayment of Invoices?

The logical value is used to allow or disallow over payment of accounts receivable invoices.

# **CASHSALE**

Allow cash sales added as invoices via B-4-1 to update the general ledger cash account?

### Logical Value

#### No

If the logical account is “***No”***, then only the accounts receivable account can be updated.

#### Yes

The cash / counter sales may update the cash account or the accounts receivable general ledger account.

# **CASLABEL**

Provides ability to assign unique labels per finished goods items or per customer ship to location then simultaneously print the correct label via the label matrix bar code software. The “***F1”*** key will search for a label beginning with the folder defined in the ***“N”-“K”-“1”*** Case Label's View Form folder defined for the blank customer and blank ship-to.

To print a unique tag by item, the label's disk drive directory path location for the label matrix software must be entered in the finished goods item file under the *TOTALS* folder. To print a unique label by customer for all their items, then leave the items *TOTALS* folder blank.

Then, type the customer's unique label disk drive directory path location for the label matrix software under the control parameter ***“N”-“K”-“1”*** Case Label View Form folder, which will print the unique label by customers.

In summary, the system's printing priority will be the items *TOTALS* folder, then the control parameters *VIEW* folder by customer. If the item does not have a unique case label, then the customer's standard case label will print.

If the customer file does not specify a label name or field is blank, then default label will print from the ***“N”-“K”-“1”*** Case Label Parameter.

### Character Value

#### CASE LABEL

Case Label Form to auto print if a unique label is not defined by Item or Customer.

### Integer Value

Integer value is used to set the number of duplicate case labels to adhere to multiple sides of the corrugated case or bundle.

### Logical Value

#### Yes

This will print the case label from Label Matrix by specific finished goods customer part number, by customer ship to code, by customer code or by the generic label defined on the View Control character value.

### Menu Keys

The menu keys ***“O”-“U”-“10”*** will print the case labels via the Label Matrix software.

When job and/or order # is entered, all items for the order will display the *CASE LABEL FORM* from the Item file or ***“N”-“K”-“1”***View folder. If a unique case label exists for an item's customer part number, this form will display.

If the item does not have a unique case label, then the customer's standard case label will print. If the case label does not exist in either the item or ***“N”-“K”-“1”*** Case Label View Folder by Customer, then the ***“N”-“K”-“1”*** character file form will print.

The user can change the labels path prior to printing. A new toggle box will be added that will automatically launch Label Matrix and print the selected label via the path defined. If the customer file does not specify a label name or field is blank, then default label will print from the ***“N”-“K”-“1”*** Case Label Parameter.

The file is automatically named (default.qdf), but allow user to override directory.

# **CE W>L**

Default to Display Warning when Carton Width > Length. The logical value is used force the software to display a warning message during estimating when the inside three-dimensional box width is greater than the box length. This does not prevent the estimator from adding the estimate; however, the warning message may prevent invalid dimensions from being entered.

# **CEBOARD**

Prompt to Override Board Cost and use Vendor Cost?

On the estimates Layout Folder, the estimator can add a unique board cost to override the vendor cost matrix. Print Folder, and ***“Calculate”*** Buttons. If there is a board cost on the layout screen and you pick a Vendor, you will get this message,

"Special Board Cost was Entered on Layout Folder" *VENDOR* Cost will override Special Cost

On Layout Folder, the estimator can add a special board cost, but select Blank Vendor. Print Folder, or ***“Calculate”*** Button.

If board cost on the layout screen and you pick the *BLANK VENDOR*, the Special Cost on Layout Folder will be used and there will be no prompt.

### Logical Value

#### No

This will not prompt and will use the Cost on Layout Folder for the blank vendor.

#### Yes

This will prompt when only when a vendor is selected and the cost on the layout screen is greater   
than zero.

# **CEBROWSE**

Clicking the ***“Show Browse”*** button will look at the integer value in the system control file under *CEBROWSE* and display the many previous records. Clicking the button for a second time will continue navigating back through in intervals of this number. Clicking the ***“Show Next”*** button will navigate forward though the records at that same interval.

# **CECOMM**

Help for ***CECCOMM***.

# **CECOPY**

Allow copy Finished Goods item blank information when adding estimates?

### Logical Value

#### Yes

Entering an existing customer part number of finished goods item number on the first screen of the estimate will transfer all the blank information as well as ink codes and packing and delivery data from screen three.

# **CECPURWAS**

Corrugated Estimating to Search *FARM* Folder Costs with or Without Machine Waste?

Waste = Make Ready waste and Run Spoilage. For purchased items, the FARM folder houses the cost for the purchased Finished Goods.

The machine routing on the Prep/Route Folder may include make ready waste and run spoilage when calculating the total quantity to purchase.

For example, the *FARM* folder had quantities and costs were $500 for 1 M, $300 for 5 M and $200 for 10 M and $100 for 999,999 M. If we quoted estimate quantities of 1000, 5000, 10000 and we had a 10% waste for the BUYOUT Machine representing the vendor waste, then the estimate would calculate sheets as 1100, 5500 and 11,000.

### Logical Value

#### No

Print Folder WILL include the calculated waste for the machines on the routing folder. The cost for 1M would be $300 as this would be over 1M and find the 5M cost. The cost for 5M would be $200 as this would be over 5M and would find the cost for 10M. The 10M cost would be $100 as this would find the 999,999 M cost.

#### Yes

The waste IS NOT included in the calculated quantity required to purchase finished goods when searching the FARM folder for the correct cost. If we ignore the waste the cost for 1M would be $500, 2M would be $300 and 10M as $200.

# **CECSCRN**

### Character Value

#### 32’s

Generate .01 as 1/32, .02 as 2/32's, .03 as 3/32's in the corrugated estimating blank dimensions, sheet sizes, box images and the raw materials file.

# **CECUNIT**

### Character Value

#### AUTOCALC

This will use logic similar to ***“N”-“Y”-“5”***. This is better logic for shipping height under the customers rack limitations. Plus, there is more flexibility on selecting a pallet height.

Formula follows: Layers = Pallet Height divided by bundle height or Layers = (Pallet Height less 5" of Wood divided by ((bundle count x (caliper x 2 / style balecount) Unit Count = 7 layers x 25 per bundle x 6 stacks per layer = 1050 KDF Thickness is caliper x style balecount or .156 x 2/1

For example, an estimate or 8x8x8 box would calculate as (60" - 5") / (25 x .156 x 2 ) = 7.05 layers rounded down to 7 layers.

#### FLUTEMX

This will import count from flute matrix. ***“N”-“K”-“1”*** *CECUNIT*

### UNITCALC

*UNITCALC* Button will Prompt *STACK UNDER PALLET HEIGHT* ?

#### Yes

“***Yes”*** will work like character value = *AUTOCALC*. “***Yes”*** will work like *UNITCALC*.

#### NO

This will display new popup allowing user to select number of layers. Layers Bundle Count, Stacks, Stack Height, Pallet Height (+5") Pallet Count

8 25 6 62.4 67.4 " 1200

7 25 6 54.6 59.6 " 1050

6 25 6 46.8 51.8 " 900

Override now allows changing bundle counts, stacks and layers. Upon “***Save”*** button, if over pallet height, Prompt *STACK IS HIGHER THEN PALLET HEIGHT*, *RECALC UNIT HEIGHT*?

“***No”*** will just save.

### Logical Value

This new logic will validate ship to destinations with warehouse Racks with Limited Height restrictions that the pallet + boxes *MUST NOT* exceed. The unit calc must prompt if this is *EXCEEDING* the Pallet *DEPTH* field. We may need to *ROUND* down the bundles to be under the Pallet height (Depth).

#### No

This will only show popup on attached when the pallet height is over the customer ship to file.

#### Yes

This will *ALWAYS* show unit count options when pressing the ***“Save”***  button. Even if the unit count is under the pallet size, the unit count options will still appear.

# **CEDELIVERYZONE**

The M-F-1 raw materials file for Board Material will have a field called Freight Class. The delivery zone will either transfer from the customer ship to file or via the raw materials file.

### Character Value

#### FREIGHT CLASS

The Raw Materials Freight Class from the ***“M”-“F”-“1”*** raw material *BOARD* code entered on the Estimate Folder will transfer to the delivery Zone on the *INKS/PACK* folder of the estimate. This logic will allow the delivery zone to be used as a freight classification to calculate the freight cost.

Since Chipboard and Corrugated Flute are different freight classifications, the freight rates will be different. When the “***+”*** sign or ***“Add”*** button is entered when adding an estimate, the *BOARD* code is mandatory.

Once the ***“Save”*** button is pressed the program, if ***“N”-“K”-“1”*** CE Delivery Zone character value = *FREIGHT CLASS*, then the Boards Freight Class will be transferred to the *INKS/PACK* delivery zone.

#### SHIPTO FILE

This is the existing logic whereby the delivery zone on the *INKS/PACK* folder of the estimate is transferred from the *SHIPTO* code for the customer defined on the estimate folder.

Please Note: The existing logic to calculate freight will not change, the estimate uses the delivery zone and shipping weight to find the item weight per 100 pounds (Weightt/100). The carrier file rates for that carrier and delivery zone from ***“A”-“F”-“8”*** is then multiplied by the quantity shipped. Once the weight is determined, the freight rate table is used to calculate the freight cost.

# **CEDFAULT**

Use CERUN & CEGSA values here?

No uses saved values during estimating when recalculating what if calculation. When calculating an estimate, the system displays two options for calculating the cost. The first is to recalculate the machine run speeds and the second is to override the general selling and administrative costs. The first time an estimate is calculated, the answers will default from the control parameters called *CEGSA* and *CERUN*.

When recalculating the cost estimate, the answer to the two questions will be default to the control parameters or will be same answers as the last time the estimate was calculated.

### Logical Value

#### No

Set the logical value to “***No”*** and the software will recalculate the estimate exactly the same as the last time the estimate was run.

#### Yes

Set the logical value to “***Yes”*** and this parameter will utilize the answers in the control parameters.

If we estimated an item that was unique, we modify the machine set up times or run speeds on screen four of estimating. To use these changes, the estimator must answer “***No”*** to the prompt to recalculate the run speeds.

If we were rerunning this same estimate six months later, we would probably not remember that we changed the machine standards; therefore, the safest way to recalculate the estimate would be with the same standards. The only way to make this happen would be to save the answers to the prompts and then recalculate the estimate with the stored answers. That would happen if this option has a logical value set to “***No”***.

# **CEDICADC**

Prompt to copy Cad or Die Number to All Corrugated Estimates? Whenever you change the die# image or cad# on an estimate, the system prompts to Copy the CAD# or DIE# to all other estimates for this finished goods item.

### Logical Value

#### No

This will stop the prompt to copy the die or cad number.

#### Yes

This will prompt to copy the die or cad number.

# **CEDICADF**

Prompt to copy Cad or Die Number to All Folding Estimates? Whenever you change the die# image or cad# on an estimate, the system prompts to Copy the CAD# or DIE# to all other estimates for this finished goods item.

### Logical Value

#### No

This will stop the prompt to copy the die or cad number.

#### Yes

This will prompt to copy the die or cad number.

# **CEFGITEM**

### Logical Value

#### Yes

This will turn the color of the finished goods item code to RED when the item in the FG file is marked as inactive. Change the FG number in both folding and Corrugated estimates to *RED*. This would need to be changed on the Browser, Estimate and Specs folders.

# **CEGOTO**

Help for ***CEGOTO***.

# **CEGSA**

What if default to override General Selling and Administrative Overhead and Warehouse charges when calculating an estimate.

### Logical Value

The logical value is the default answer to the above question when calculating an estimate. This default may be changed during estimating. The default will be either “***Yes”*** or “***No”***.

#### No

A “***No”*** response will not utilize the costs from the estimate control file for general selling and administrative markups as well as warehouse charges.

#### Yes

Answering “***Yes”*** will allow the estimator to override the Warehouse or General Selling and Administrative and warehouse markup percentages for each estimated quantity.

Please Note: This serves as the original default. The *CEDEFAULT* value will determine the default when the estimate is calculated in the future.

# **CELAYOUT**

*CELAYOUT* uses the *AUTOCALC* button when changing the number up or changing the board. Once the die size is calculated, the layout screen adds machine trim to the net sheet size. Seldom, the additional trim will display a net sheet size in 64ths of an inch.

### Character Value

#### 1/8 INCH

1/8 inch will always round both net sheet width and length to the nearest 1/8 of an inch.

#### NONE

This will not adjust the net sheet size.

### Decimal Value

#### 0

If this field was left as 0, then all quantities would utilize the valid roll widths.

#### Anything Greater Than 0

The Decimal Value = Total weight in TONS to import the valid roll widths from the boards vendor cost matrix.

For example, if the decimal value is 10, then this would represent 10 TONS. All estimate quantities that require 10 TON of board material or greater would NO LONGER import the valid roll width field.

For example, if the sheet size was calculated as 24.25-inch width and valid roll widths for SBS-18 were listed as 25, 25.5, 27, etc. then the system would import the 25-inch roll width if the estimate quantity were less than 10 tons.

However, if the estimate quantity was over 10 Tons, then the system would retain the original sheet width and roll width of 24.25 inches and NOT import the 25-inch roll. The reasoning is that the purchasing department would order an exact size roll to match the sheet size with the volume is over 10 Tons.

Please note: This uses Blank Length x Blank Width / 144 to calculate square inches as this is closer to the sheet size.

# **CEMATL**

CEMATL for Markup for Material

### Logical Value

Logical Value will automatically force the calculation of a Markup Line on the Estimate similar to the *CEMISC*, except it will only markup Direct Material. The Markup Percentage will be the Decimal Value that will be used to calculate the Direct Material Markup. When pressing the ***“Override”*** button, the new percentage for *DIRECT MAT'L* will transfer from the decimal value. This will not markup Prep & Die material, as this markup may be marked up separately by material type in the prep & die file.

#### Yes

When the *LOGICAL VALUE* of *CEMATL* is “***Yes”***, the *CEMATL* markup will print as a separate *LINE* under the GS&A total markup dollars/M on the hard copy similar to GS&A board. If the GS&A markups are defined, then this will be an additional markup line similar to GS&A board.

Also, add a line called Cont% under FACTORY COST. This will be selling price less factory cost / selling price, which is GROSS PROFIT on the what if screen.

# **CEMENU**

### Character Value

Which Estimating Menu? (*FOLDWARE*, *CORRWARE*, or *BOTH*). The character value is used to determine the estimating menu options. Folding carton estimating will be set to *FOLDWARE*, corrugated estimating will be set to *CORRWARE* and plants processing both types will set this to *BOTH*.

### Logical Value

When the character value is set to *CORRWARE*, the logical value is used to allow adding estimates on the first screen or header screen of order entry.

#### No

The estimate number may be added only to the line item data entry screen. This will force users to always enter the estimate number on the line item screen, which will allow multiple estimates/jobs per order including stock boxes, supplies and just in times items previously produced on other jobs.

#### Yes

estimates may be added to the first order entry screen. This will prevent multiple estimates/jobs per each order. Hence only one order per job may be entered.

# **CEMISC**

Decimal Value will be the default markup percentage. When updating the MISC change on the MISC / SUBCONTRACT folder, the percentage will transfer to the markup.

Please Note: This may be changed.

# **CEPANEL**

This utility is used for corrugated estimates for box styles only.

### Character Value

#### PminPmax

This is an abbreviation for the panel minimum and panel maximum. This parameter setting will compare all panels on the blank length against the machine files minimum and maximum head to head limitations. The slot/score machine limitations will be used to compare the first two blank width panels running through the machine.

When the character value is PminPmax, styles for boxes will search the first two blank width panel sizes on the spec folder and compare the total dimension against the maximum slot/score limitations in the machine file.

For example. If the machines maximum slot/score is 50 inches and the first two width panels total 51 inches, then the machine defined in the style routing will not transfer to the estimate routing screen. If you add the machine, the warning will display "panel size too large for machine.

This logic will display an error message when the machine routing tries to add a machine below the machine limitations. Please note, this logic will only apply to styles that are ***"B"*** box styles. Styles defined as ***"D"*** die cuts will not utilize this logic.

#### WminLmin

When the character value is *WminLmin* is described as the box width minimum panel size and box length minimum panel size. The machine file will compare the Score/Slot parameters against the box length and the Head to Head machine limitations against the box width.

When adding or changing a corrugated estimate or set, the blank length panels including the score allowance are compared to the limitations in the machine file.

Please Note: The panel sizes are calculated from the inside carton length and inside carton width dimensions entered on the spec folder. The minimum slot/score size will be compared to the carton's length and the machine minimum panel head/head size will be compared to the calculated inside carton's width.

### Logical Value

#### No

When the logical value is “***No”***, the machine dimensions are not used to determine the machine routing. This logic will display an error message when the machine routing tries to add a machine beyond the machine limitations.

#### Yes

The machine panel score/slot and head to head minimum and maximum dimensions are used when the logical value is “***Yes”***.

Please Note: This logic will only apply to styles that are ***"B"*** box styles. Styles defined as ***"D"*** Die cuts will not utilize this logic.

# **CEPARTITION**

When adding a new estimate, the estimator can press the ***“Assemble Partition”*** menu button. This has unique logic for producing assembled partitions including fields that automate the building of the long and the short partition.

Clients may have roll fed or sheet fed converting equipment to manufacture and assemble the partitions. Roll fed equipment will feed the blank length of the partition through the machine from front to back. However, sheet machines will be fed either the blank width through the machine so that the blank length runs from side to side on the machine.

The program will default the *LAYOUT* folder to produce just 1 blank per sheet or otherwise known as 1 x 1 up on the die. The calculation of the layout may be either normal grain as a sheet fed operation will desire or 1 for a roll fed machine. Each company and define this as a default based on the integer value of this field.

### Integer Value

#### 0

This will default the Rev Corr direction to ***“N”*** for Normal Grain. This should be the default for roll fed equipment.

#### 1

This will default the Rev Corr direction to ***“S”*** for Sheet Cross Grain. This should be the default for roll fed equipment.

#### 2

This will default the Rev Corr direction to ***“B”*** or Blank Cross Grain

# **CEPg2**

Reverse Width and Length Labels for Roll and Sheet Size on page two of folding carton estimates?

### Logical Value

#### Yes

This will simply change the L to a W and the W to an L. This allows the estimator to view the machine maximum dimensions as sheet dimensions or machine dimensions whichever is easier to understand. Most sheet plants and offset plants should set this to “***Yes”*** so that the width displays like the sheet width. Most roll fed pla

nts will set this to “***No”***.

# **CEPREP**

Provides logic to round up the prep charge on the quote. *N-K CEPREP* New Option to Round Up Billable Prep Charges

### Character Values

Character Value options are *PENNY* and *DOLLAR*.

#### DOLLAR

If the flag is set to Dollar, then the estimate charge and the quote would no show only dollars.

#### PENNY

To round up the billable charge for prep material to the nearest dollar or penny. Set this to Penny and the estimate will calculate to the penny.

# **CEPRICE**

Utilize Machine file Minimum Charge as cost for this machine?

### Decimal Value

Decimal Value provides a new markup percentage for folding carton estimates for use in calculating the selling price. The decimal value serves as a markup% that will be added to Profit Mark Up field in the customer file or added to the Profit Mark Up percentage in the estimate control file. The estimate control file field called Calculate Sell Price on Net/Gross will determine if sell price is calculated by dividing the total markup percentage by the factory cost or the full Cost.

#### 0

If this is zero, then the control file field called Profit Mark Up% will be used to determine the selling price on all estimate types.

#### > 0

When the customer field called Markup% is greater than zero, then this markup will be used in place of the cost estimate control file markup%.

An additional markup% will be added to the Customer Markup% for all Folding Carton Estimates based on the N-K-CEPRICE decimal value field.

### Logical Value

#### No

The normal labor cost calculation could be less that the minimum charge.

#### Yes

The machine file's field called minimum charge is utilized for the total cost for the machine for folding carton estimates. If the calculated cost of labor, (calculated hours times total machine rate) is less than the minimum charge, then the minimum charge will be imported.

# **CEPRINT**

### Character Value

Character value to print the old DOS format when character value = TEXT.

#### CONSOLIDATE

This will consolidate will combine the 1st page and estimate analysis if it fits on 1 page.

#### SEGMENT

This will generate an estimate printout in segments. The estimate analysis is printing on the 2nd page, box design on the 3rd page.

# **CERCROUT**

Import RC Dept via Style Routing regardless of # out or Sheet Size?

### Logical Value

#### No

This will import the RC department when the gross sheet has multiple out on the gross sheet and the gross sheet is larger than the net sheet. This layout must import an RC department such as the slitter, band saw, ream cutter or power cutter. In fact, the slitter would be imported twice when both the number out on the width and the length are greater than 1.

#### Yes

This will import the RC department, which is either the band saw or slitter machine for corrugated estimates or ream cutting, power cutter or guillotine for folding estimates automatically or directly from the corrugated style file routing matrix.

For corrugated estimates, the routing must include the RC Department so that the Slitter or Saw will automatically import to the machine routing regardless of the number out. Therefore, if the number out is 1 the routing will still import a machine from the RC Department.

If this logical value is “***Yes”***, then the ***“N”-“K”-“1”*** *CESLIT* logical value should be set the “***Yes”*** to automatically drop the RC department when the MSF is greater than the minimum.

Alternatively, multiple machine routings may be defined on the routing screen to support the different estimates quantities to reflex the proper machine routings.

# **CEROUND**

Corrugated estimates will round the selling price to nearest Penny, Dime or Buck. Select the character value as Penny, Dime or Buck when calculating corrugated estimates to round up the calculated selling price.

# **CEROUTEC**

Build machine routing from page one of corrugated Estimates.

### Character Value

The character value is used to define a valid machine code which will be used on page two to automatically calculate the die size, sheet size and number up so that the system will automatically calculate the machine routing on page four. Therefore, after adding page one, the estimator could immediately press the ***“What If”*** button to calculate the estimate.

### Logical Value

The logical value turns this feature on or off.

# **CEWHSCHG**

Character Value = $/Pallet and Logical Value = YES.

Calculating the Estimate and clicking Override button allow changing the number of pallets shipped per month. In this example, customer requested five deliveries. Since there are ten pallets of 400 each, this will require setting *PALLETS per MONTH* to 2.

The cost of warehousing will be 10 x 3 = $30 + totals pallets warehouses for all months. That is 8 in month 1, + 6 in month 2, 4 in month 3, and 2 in month 4. Total pallets warehoused = 8+6+4+2 = 20 x $5 = $100. Total = $130.

# **CORRUGATORS**

### Character Value

If the machine code defined on the *CHARACTER VALUE* is from the CR department, then the system will calculate the maximum number out on the gross sheet rather than the number up on the die. i.e. the number up on the die will default to 1 x 1.

Also, this new logic should utilize the maximum number up on the width and length from the machine file to determine the maximum number out on the Corrugator width and length. The Corrugator machine cannot have more than 1 up on the length running through the machine since it is a roll fed machine.

Hence the Corrugator machine with department CR will have a 1 defined in the Max Num up Length field. The Maximum number up on the Width will be limited to the number of cutting knives similar to a slitter.

### Integer Value

The *INTEGER VALUE* will be used as a maximum width dimension to be used in place of the machine maximum width when calculating the number out on the width.

#### 0

If the integer value is 0, then utilize the machine maximum width.

# **CEROUTE**

Build machine routing from page one of corrugated Estimates.

### Character Value

Character value is used to define a valid machine code which will be used on the estimates layout folder to automatically calculate the die size, sheet size and number up so that the system will automatically calculate the machine routing on page four. Therefore, after saving the *ESTIMATE* folder, the estimator could immediately access the *PRINT* folder and calculate the estimate.

### Decimal Value

#### 0

This will calculate the maximum number up on the width and length of the machine which will calculate the net and gross sheet size.

#### 1

This will default to one up with the machine code on the character value. This transfers as the layout machine on the layout screen but must also import the machine trim on the net and gross sheet size. They don't want the system to calculate the sheet size based on the machine. Therefore, the sheet size will be equal to the blank size plus machine trim.

### Integer Value

*INTEGER VALUE* will be used as a maximum width dimension to be used in place of the machine maximum width when calculating the number out on the width.

#### 0

If the integer value is 0, then utilize the machine maximum width.

### Logical Value

The logical value turns this feature on or off. The character value is used to define a valid machine code which will be used on page two to automatically calculate the die size, sheet size and number up so that the system will automatically calculate the machine routing on page four. Therefore, after adding page one, the estimator could immediately press the ***“What If”*** button to calculate the estimate.

#### No

Logical value equal to “***No”*** turns this feature off.

#### Yes

Logical value equal to “***Yes”*** turns this feature on.

## Corrugators

If the machine code defined on the *CHARACTER VALUE* is from the CR department, then the system will calculate the maximum number out on the gross sheet rather than the number up on the die. i.e. the number up on the die will default to 1 x 1. Also, this new logic should utilize the maximum number up on the width and length from the machine file to determine the maximum number out on the Corrugator width and length.

The Corrugator machine cannot have more than 1 up on the length running through the machine since it is a roll fed machine. Hence the Corrugator machine with department CR will have a 1 defined in the Max Num up Length field. The Maximum number up on the Width will be limited to the number of cutting knives similar to a slitter.

The *INTEGER VALUE* will be used as a maximum width dimension to be used in place of the machine maximum width when calculating the number out on the width. If the integer value is 0, then utilize the machine maximum width.

# **CEROUTE#OUT**

This will allow updating the *PREP/ROUTE* folder Number Out for Diecutting (DC) and Gluing (GL) via the ***“Override”*** Button.

### Logical Value

#### Yes

This allows updating the number out on machine routing screen for die cutting and gluing via the override button. A standard code = 30 will be added via the ***“N”-“Z”-“7”*** matrix called Routing # Out, which will allow the adding of machine standards by Routing # Out.

When clicking the ***“Import”*** button, the system currently imports the machine speeds from the machine files standards matrixes. If the machine file is defined by the new number 30 standard, then the run speed imported will be based on the number out entered on the machine routing. This logic will only work for the DC and GL departments.

When the Recalc toggle Machine Run Speed is unchecked, this program isn't needed. When the Recalc toggle Machine Run Speed is checked, this program will import the run speed based on the new #30 standard matrix code.

In the machine file, number 30 validation will be added so that the #30 standard can only be added to a machine listed in the DC or GL departments.

# **CEROUTE1**

Prompt list of Machines Unable to run Box? This will look at the style file routing screen and show a popup list of the machines that are setup to run on this estimate. This will only show the popup list if one of the machines will not run due to machine limitations.

### Logical Value

#### No

Logical Value = “***No”***, would simply turn off the logic.

#### Yes

Logical Value = “***Yes”*** will run this logic.

# **CEROUTEC**

Build machine routing from page one of Corrugated Estimates.

### Logical Value

The logical value turns this feature on or off.

#### No

Logical Value = “***No”***, would simply turn off the logic.

#### Yes

Logical Value = “***Yes”*** will run this logic.

### Character Value

The character value is used to define a valid machine code which will be used on page two to automatically calculate the die size, sheet size and number up so that the system will automatically calculate the machine routing on page four. Therefore, after adding page one, the estimator could immediately press the ***“What If”*** button to calculate the estimate.

Character value is used to define a valid machine code which will be used on the estimates layout folder to automatically calculate the die size, sheet size and number up so that the system will automatically calculate the machine routing on page four. Therefore, after saving the *ESTIMATE* folder, the estimator could immediately access the *PRINT* folder and calculate the estimate.

### Decimal Value

#### 0

This will calculate the maximum number up on the width and length of the machine which will calculate the net and gross sheet size.

#### 1

This will default to one up with the machine code on the character value. This transfers as the layout machine on the layout screen but must also import the machine trim on the net and gross sheet size. They don't want the system to calculate the sheet size based on the machine. Therefore, the sheet size will be equal to the blank size plus machine trim.

## Corrugators

### Character Value

If the machine code defined on the character value is from the CR department (i.e. Corrugators machine code), then the system will calculate the maximum number out on the gross sheet rather than the number up on the die and the number up on the die will default to 1 x 1. Also, this new logic should utilize the maximum number up on the width and length from the machine file to determine the maximum number out on the corrugators width and length.

The corrugators machine cannot have more than 1 up on the length running through the machine since it is a roll fed machine. Hence the corrugators machine with department CR will have a 1 defined in the Max Num Up Length field. The Maximum number up on the Width will be limited to the number of cutting knives similar to a slitter.

### Integer Value

*INTEGER VALUE* will be used as a maximum width dimension to be used in place of the machine maximum width when calculating the number out on the width.

#### 0

If the integer value is 0, then utilize the machine maximum width.

# **CEROUTEF**

Build machine routing from page 1 of Estimate Folder. The logical value turns this feature on or off. The character value is used to define a valid machine code which will be used on page two to automatically calculate the die size, sheet size and number up so that the system will automatically calculate the machine routing on page four.

Therefore, after adding page one, the estimator could immediately press what if to calculate the estimate.

# **CERUN**

### Integer Value

*INTEGER VALUE* is used to have the system turn off the automatic quantity price break on the what if screen for corrugated estimates.

#### 0

If the value is set to 0 this will turn calculation off.

#### 1

If the value is set to 1 this will turn this flag on. The 1 should always equal “***Yes”*** to be consistent with other S-8 options. Default to 1.

Update the S-8-CERUN description to read, Calculate Qty Price Break? Print Method? Default Prompt for What if? Automatically show the next estimate quantity for the next board price break. Leave the integer value to 0 as useful marketing tool to sell more boxes based on the board materials cost matrix price levels.

### Logical Value

*LOGICAL VALUE* serves as the default setting when calculating corrugated estimates. The default may be either “***Yes”*** or “***No”***, but may be changed during estimating.

#### Yes

Set the logical value to “***Yes”*** and the small box will be checked when the estimate calculation program displays the question "Recalculate Machines Speed, Spoil%, MR Hours and Waste? “***Yes”***, will force the software to utilize the machine set up times and run speeds from in the estimates machine routing from the Prep/Route Folder for all estimated quantities.

This option should be used when the estimator uses the ***“Override”*** button to change the machine standards on the Prep/Route folder.

#### No

Set the logical value to “***No”***, and the box will remain blank or unchecked. This will force the program to import the machine standards for run speed, run spoil percentage, and make ready hours and setup waste from the machine file for each estimate quantity. Hence each quantity could have different machine standards.

Please Note: This serves as the original default. The *CEDEFAULT* value will determine the default when the estimate is calculated in the future.

If the *CEDEFAULT* is set to “***Yes”***, then the default will be reverting back to this setting. If the *CEDEFAULT* is “***No”***, then the setting will be saved from the last time the estimate was calculated. This is the recommended method so that the estimate is and hence the order and job cost is calculated the same way.

# **CERUNC**

Corrugated estimate default for Board Price Breaks and Default for calculating the estimated Run Speed standards and Markup Percentages for General Selling and Administrative and Warehousing.

### Integer Value

*INTEGER VALUE* is used to have the system automatically show the next estimate quantity for the next board price break. This may be very useful marketing tool to sell more boxes based on the board materials cost matrix price levels.

### Logical Value

*LOGICAL VALUE* serves as the default setting when calculating the estimate. The default may be either “***Yes”*** or “***No”***, but may be changed during estimating.

#### No

Set the logical value to “***No”***, and the box will remain blank or unchecked. This will force the program to import the machine standards for run speed, run spoil percentage, and make ready hours and setup waste from the machine file for each estimate quantity. Hence each quantity could have different machine standards.

#### Yes

Set the logical value to “***Yes”*** and the small box will be checked when the estimate calculation program displays the question "Recalculate Machines Speed, Spoil%, MR Hrs and Waste? “***Yes”***, will force the software to utilize the machine set up times and run speeds from in the estimates machine routing from the Prep/Route Folder for all estimated quantities.

This option should be used when the estimator uses the ***“Override”*** button to change the machine standards on the Prep/Route folder.

## Corrugators and Single Face Logic

New logic when the Board Material has the Cost matrix defined plus is using the BOM for liner and medium. If the user builds the boards cost matrix such as the matrix of 200C, then the BOM will not print Liner/Medium/Liner combinations on the estimate print out the estimate would print out exactly like a corrugated sheet plant estimate.

If the cost matrix is blank, the current logic of printing the liner and medium combination will print. In either scenario, the job file will be creating with the BOM liner and medium combination. This is the actual material that will be used on the job. Normally corrugated plants will auto post this material when the job closes or when the finished goods are received.

# **CERUNF**

Folding Carton estimate default Print Format and What if Default to recalculate Run Speeds prompt.

### Character Value

The character value field is used to select the format for the estimate printout. The character value is used to select different print out versions of the estimate.

Corrugated estimate options include ASI, HOP and MCLEAN. The ASI version will print the details for each quantity and extend the sub-totals. The other options will print the detail costs for each quantity; however, the sub-totals will list up to five estimate quantities showing the cost per thousand for each sub-total. The Sutherland option will prompt to print the box design.

### Logical Value

The logical value serves as the default answer for the estimating question “Recalculate Machine Run Speeds? The default may be either “***Yes”*** or “***No”***, but may be changed during estimating.

#### Yes

“***Yes”***, will force the software to find machine set up times and run speeds in the machine standards file for each estimate quantity.

#### No

“***No”***, will force the system to utilize the set-up times and run speeds on page four of the estimate.

# **CESLIT**

For Corrugated estimates only, the logical value is used to prompt to ask to Drop Slitter during order entry cost calculation. If the estimate routing has a slitter and the estimated board material square footage is over the minimum square footage required for the order quantity, then the system will prompt to drop the machine charge for the slitter.

The rationale is that the estimate was quoted with small and larger quantities whereby the smaller quantities would use the slitter whereas the larger quantities would not.

# **CESTYLEC**

Cost Estimating Prompt to update Box Design when changing Style Code.

In estimating, when changing styles, the system prompts to update the layout screen then prompts to change the box design.

### Logical Value

#### No

This will stop the prompt for the box design all estimates.

#### Yes

This will prompt for the box design all estimates.

# **CESTYLEF**

Cost Estimating Prompt to update Box Design when changing Style Code.

In estimating, when changing styles, the system prompts to update the layout screen then prompts to change the box design.

### Logical Value

#### No

This will stop the prompt for the box design all estimates.

#### Yes

This will prompt for the box design all estimates.

# **CEVENDOR**

Help for ***CEVENDOR***.

# **CEWHATIF**

Help for ***CEWHATE***.

# **CEWHSCHG**

New Logic for calculating the cost for warehousing. The integer value stores the in/out handling charge per pallet and the decimal value stores the cost per pallet per month.

### Character Value

#### PERCENTAGE

To evoke this logic, the character value must be set to $/Pallet. When calculating an estimate, the Override GS&A or Warehouse charge must check. When evoked, number of releases (deliveries) along with the unit count from the packing folder will transfer the screen.

Additional fields called Units/Pallet, Warehouse Cost per Pallet, Pallets Delivered per Month, Total Pallets to Warehouse, Warehouse Months, and Deliveries per Estimate Quantity? If the value is *PERCENT*, the current logic, which utilizes the cost estimate control file as the default percentage.

Character value = $/PALLET will be new logic to charge per pallet per month as described under the decimal value and integer value fields.

### Decimal Value

This will represent a dollar charge per pallet per month.

For example, $3.00 per pallet. Each estimate quantity must calculate the cost based on the number of pallets per month remaining in the warehouse after each delivery.

For example, the estimated unit count is 500 boxes per pallet. If the estimate quantity is 10,000, then this is 20 pallets. We assume that the first month has one delivery, hence no pallets are warehoused. If the take per month is 2500 boxes (5 pallets) then warehouse months are 4. Hence the first month will have 15 pallets, the second month will have 10 pallets, and 3rd month will have 5.

The warehousing cost will be (15+10+5) or 30 pallets times $3.00 = $150 dollars plus the in/out handling charge for the integer value.

Please Note: If you stack two units on a single pallet, then the pallet count would be doubled, hence the warehouse charge would be 50% less.

### Integer Value

This will represent the cost per pallet as the in and out handling charge per pallet. This cost is Total Pallets x Cost per Pallet of defined in the integer value. This cost is added to the warehouse charge per pallet per month to yield the total warehouse charge.

### Total Warehouse Charge

This field is automatically calculated whenever any field is changed. The total warehouse charge may be manually changed to override the calculation. The total charge may be unique for each estimated quantity. The total charge is divided by the estimate quantity and multiplied by 1000 to display the cost per thousand on the hard copy print out.

# **CHKFMT**

A/P Check format. The character value is used to select the accounts payable check format. The Laser option prints checks on laser forms. The other options must be printed on a matrix printer.

# **CINVOICE**

Commercial Invoices are bill of lading forms for specific countries such a Mexico, Canada, etc.

### Character Value

#### VIEW CONTROL

Not Used. The form must be defined by customer ship-to on the View Form Folder.

#### VIEW FORM

Houses the name of the commercial invoice form for each Customer's Ship to. The ***“F1”*** key will show all commercial invoice forms such as FibreMexico.

The FibreMexico commercial invoice will summarize by Form by Ship to by Freight Class, whereby BOL's to Tijuana and Mexico City with same FORM such as FibreMexico will subtotal by Freight Class.

# **CLOSEJOB**

When/how to Close Job? To ignore the job status? To post waste automatically?

The ***“N”-“K”-“1”*** parameter called *CLOSEJOB* indicates when to close the job, but this may also automatically calculate waste based on the board issued to the job as well as the quantity produced on each machine.

Job summary report via the menu ***“J”-“R”-“3”*** will also reflect the actual waste.

### Character Value

The character value provides three options to close a job. Manually, FG Post and Orders Close.

#### FG POST

The FG Post option will close the job during finished goods posting when the quantity received is within the under-run quantity defined on the job.

#### MANUAL

The manual option does nothing so that the user through the job cost software must close the job.

#### ORDER CLOSE

The Order Close option will close the job when the order is closed during invoice posting.

### Integer Value

#### 0

When the integer value is 0, then the job status must be "W" work in process, otherwise the job will not close.

#### 1

When the integer value is 1 the program assumes YES to ignore the job status when closing jobs. When the finished goods are posted before the actual production from the plant floor, then this flag should be set to 1.

Clients using the Touch Screen data collection may take several days to verify employee hours and machine hours before posting to the job, hence this allows the job to be closed in advance of the actual production.

Please Note: When materials are received/issued or production is posted to the job, the job status will change to ***"W"*** work in Process. When the integer value is 0, the job will not close if there has not been any work in process performed, therefore, board must be issued, or production posted.

Once material has been issued or production has been processed to the job, the job status will change to a ***"W"*** for work in process. Only jobs with status flag of ***"W"*** will be closed if the value is 0.

If the logical value is 1 or “***Yes”***, then the job will be closed regardless of the job status as long as the receipt quantity is within the under-run quantity allowed for the job quantity.

### Logical Value

#### No

When the logical value is “***No”***, then the plant data collection process will enter the waste for each machine.

#### Yes

When the value is “***Yes”***, then the program will automatically be calculated wasted based on the quantity received versus produced for the job.

Please Note: Manually adding waste for each machine will be more accurate.

# **COMBCOST**

Use average cost for Combination Items?

### Logical Value

#### Yes

Folding carton combination estimates will utilize this option to show the cost for each item as an average cost based on the entire cost for all items when the logical value is set to “***Yes”***.

#### No

If the logical field is set to “***No”***, then the cost of each part number on the estimate will be calculated separately on a square inch basis plus individual finishing costs.

# **CORKRAFT**

Help for ***CORKRAFT***.

# **CORRTRIM**

This information is a copy from an old estimate. This estimate number is displayed for reference.

# **CORSUPLY**

Help for ***CORSUPLY***.

# **CUSTOMER**

Use Customer Security for Hold Days, Credit Limit, Order Limit, Invoice per Purchase Order, Payment Terms, Finance Charge, Discount percentage, Customer Markup%?

### Logical Value

#### Yes

If the logical value is “***Yes”*** on the customer and customer pass control parameters, then the system will prompt for a password when updating the credit fields on the customer file. The character value field is used to secure each field.

Type either a “***Y”*** or an “***N”*** to represent each field listed above respectfully. Enter *YYYYYYYY* to secure all the financial fields. If the user entered *YYYNNNNNN*, then only the hold days and credit limits would be prompt for a password.

# **CUSTOMERLIST**

Order Entry and Order Inquiry can now limit what orders display for specific customers by User ID. A customer service rep will only be able to “***Add”*** or “***View”*** orders for their customers. Order Entry and Order Inquiry can now be limited to specific customers by User ID.

The ***“N”-“K”-“1”*** *CUSTOMERLIST*. View Form Character Value = *OU1*  Logical Value must = “***Yes”***.

The ***“N”-“K”-“1”*** CUSTOMERLIST. View Form Character Value = *OQ1*  Logical Value must = “***Yes”***.

Defining Customers for Specific User ID.

1. Set ***“N”-“K”-“1”*** *CUSTOMERLIST* Logical Value = Yes
2. Set ***“N”-“K”-“1”*** *CUSTOMERLIST* View Form  Logical Value = Yes and customer Code = Blank.
3. For each User Id, click he Customers Tab and Select Customers

# **CUSTPASS**

Prompt for password when updating the customer financial fields? The character value retains the password that is required when changing a customer’s financial data.

### Character Value

Change the character value to any characters that you desire. For example, if I typed in ADVANCED, then any user must type that password when they change any customer financial fields such as hold days, credit limit, order limit, payment terms and other fields defined in the ***“N”-“K”-“1”*** *CUSTOMER* control parameter.

### Logical Value

#### Yes

Change the logical value to YES to turn on this feature, which will prompt for a password when updating financial information defined in the *N-K-CUSTOMER* character value fields.

# **CUSTSIZE**

This field is used to force adding customers with a fixed length size or varying size.

### Character Value

Set this to ASI to have varying size customer codes.

#### HUGHES

Enter *HUGHES* if you want the customer size to be a fixed length during the add mode of adding customers. The integer value is used to determine the fixed size.

### Integer Value

The integer value up to the number 8 is used to force adding customers with this number of alphanumeric characters. If the integer value were 6 and a user attempt to add customer such as ABC10, the system will prompt "Must enter 6 characters and return to the customer code.

### Special Note

The customer code *TEMP* is used in estimating to add estimates for prospective customers who are not set up in the customer file. If the *TEMP* customer does not exist and you cannot enter the code *TEMP*, because the integer value is set to a number other than 4, then you must change the integer value to 4, add TEMP customer, then change the integer value back to the correct number.

# **CUSTXFER**

*CUSTXFER* This logic is for intercompany transfer of customers and customer's data within a common database connected via a single network.

### Logical Value

#### No

This will be existing logic and not transfer data between companies. Logical Value will automatically transfer data between companies.

### Character Value

Character Value will list the companies such as 001,002.

Each company will be separated by a comma. Press the ***“F1”*** key on the character value will only allow companies from the ***“G”-“F”-“1”*** Company File. The company codes on character value will have synchronized customer data. All files and fields will be transferred such as Bill to, Sold-To and Ship-To data will be transferred.

Please note, no data on the *TOTALS* folder will be transferred as the customer balance for each plant will have unique numbers depending on the order and A/R Invoice values at each plant, as well as default warehouse and bins.

# **DCPOSTGL**

Data Collection posting will credit general ledger accounts for WIP direct labor, WIP fixed overhead, WIP variable overhead and debit Finished Goods Direct Labor, Finished Goods fixed overhead and Finished Goods variable overhead. Set the Logical value to “***Yes”*** to invoke this logic.

The general ledger accounts must be defined in the job cost module under the file maintenance program under the product line file. Product categories must be defined for a specific product line.

The finished goods item will have a product category defined in the item file, which is used to reference the product line, hence the general ledger account numbers to utilize when posting data collection. This same logic will reverse the entries when the invoice is posted based on the quantity invoiced.

Please Note: All dollar amounts will be posted on a per thousand basis.

### Logical Value

Logical Value NO is still posting GL account. This should not happen.

### Debit

WIP D/L,VAR O/H, FIX O/H accounts from the product line file in job costing.

### Credit

Actual Applied Expense for D/L, Var O/H and Fix O/H accounts from the product line file.

# **DIEFILE**

New ***“Magnifying Glass Icon”*** or “***Binocular Icon”*** next to the Die #. This will Browse Microsoft Explorer starting with the folder defined under ***“N”-“K”-“1”*** *DIEFILE* parameter whereby the customer can enter the Disk Drive and folder to search for the Die numbers on their system.

New Die button will be a nice feature on Box Design to preview the die image. Once selected, the .JPG file will transfer to the *DIE IMAGE* folder. The Existing “***F1”*** on the Die# currently searches the Prep File and this will remain the same logic.

### Integer Value

#### 0

Integer value = 0 will default to .Jpg

Integer value = 1 will default to .Bmt

#### 2

Integer value = 2 will default to .Pdf

# **EDIBOLPOST**

This program creates a file that is transferred to the customer that will be used to electronically create inventory receipts.

This is exactly what is printed by ?Post BOL / Invoice Create? report/process. The above fields are TAB delimited on a single row/line of data. The file name created is ?BOL? + STRING (TODAY,?99999999?). Data will append to this file if is it already exists and moved to an ?archive? Directory after being sent via FTP to the customer site.

### Logical Value

#### Yes

This is the only time that your program will begin to search the bill of ladings that are posted to extract data to be *EXPORTED*. We only need to *EXPORT* the file for specific clients which will be defined in the View Form Folder.

# **EDIRELEASE**

This program will create a release in the Advantzware system for an existing order for specific customers that are defined. The file is transferred to the box plant that will be used to electronically create releases for orders for the customer.

### Logical Value

#### No

This will bypass any EDI logic, thus saving processor time for clients not using this modification.

#### Yes

This is the only time that your program will begin to search for data to import.

### View Control Character

View Control Character Value will house the Disk Drive Location of the incoming file. When Advantzware creates the releases, the software will look in this folder for a new file with a specific name. The box plant customer must send the file with the correct name to this location.

### View Form

View Form, Customer/Vendor ID with Customer Checked will house ONLY the customers that will send EDI Releases. RHEEM, IBM and HERSHEY will be defined.

View Form Character Value = This will name the format that this customer will use such as Rheem (Format B) or IBM (Format A). (In a perfect world, there would be ONE Format, however customers have different Purchasing Software. They may have different fields that they want to send. The IMPORTED EDI RELEASE program will know field 1, field 2, field 3 based on the format (XML, Text, Excel, etc.).

# **EFBROWSE**

### Character Value

#### STD

STD will be the current Estimate Browser. Std & Paper 1/2 will be the new estimate browser with two new column headings called Paper1 and Paper 2. The BOM on the Layout has Paper 1 and Paper 2. Copy these two fields to Estimate browser. We need ability to eliminate these two fields for all other clients. Both fields currently have F1 lookup in add mode, hence the estimate browser will need the same logic.

# **ESTOPMCH**

Folding & Corrugated In Estimating Routing Screen

### Logical Value

#### No

The ***“Override”*** button will skip the Machine code and only allow changes to the MR Hours and continue from there. They want to make sure the machine cannot be overridden.

#### Yes

The ***“Override”*** button on the Routing screen of the estimate. If you click on that button, the line that is highlighted will change so that you can override anything on that line starting with the machine.

You must use the “***Import”*** button to change the machine center.

# **FASTOE**

Default Order Entry Method to skip Estimate number. The character value field is utilized to dictate and order entry methodology. The ASI version expects orders from cost estimates and prompts for an estimate number which would automatically create a job file.

The other methods will skip the estimate number, hence would only be useful for customers that are primarily sell stock boxes and packing supplies. When using the other methods, jobs must be created in job costing directly from an estimate.

# **FAXCODE**

### Character Value

The character value will have the area code number such as 610 for Valley Forge, PA, so that any customer with the area code of 610 will drop the 1 before faxing the document. Other clients could select another area code such as 215 for Yardley, PA.

Likewise, both area codes could be entered as 215,610 so that both area codes would drop the prefix before dialing. All customers and vendors phone and fax numbers with blank area code to 205.

### Logical Value

Logic to drop the 1 when sending fax via our software.

#### No

If the logical value is “***No”***, then the 1 before the number will not be dropped.

#### Yes

If the logical value is “***Yes”***, then the 1 will be dropped when faxing for the area code entered in the character value field. The character value will have the number 205 so that any customer with the area code of 205 will drop the 1 before faxing the document. Other clients could select another area code such as 215 for Pennsylvania.

# **FAXSOFT**

*N-K FAXSOFT* Fax Invoices in a Batch.

### Character Value

Houses the 3rd Party Fax Software Used by the Box Plant.

The option to fax a range of invoices with numerous customers is available when printing invoices via the hot keys ***“O”-“B”-“3”*** invoice printing via an option called FAX that will display. When selecting either option, the program will print a hard copy then sort all invoices by customer. Each batch of invoices per customer will become an attachment for each customer.

### Customer Fax Numbers

All customers fax numbers must be defined in the customer file. There is an icon at the top of the customer file that looks like book tabs and displays phone info when the cursor is positioned on this icon. Add as many contact names and fax / email numbers as required. The title must show FAX for this to be a valid fax address.

# **FGBROWSE**

This parameter dilates the number of records displayed when searching for a finished goods item. This browser now provides faster access and the ability to select multiple selection parameters.

### Character value

#### BRONZE.MAROON

Bronze/Maroon will display STOCKED items on the finished goods item browser that have zero quantity on hand as Maroon and stocked items with on hand quantity greater than zero as bronze. Hence, the item must have the stocked field in the finished goods item inventory folder must be checked. Therefore, just in time items or items that should remain with an on hand stocked quantity should be bronze. Items that are Maroon need to be purchased or manufactured as they are short.

#### SPACES

This will show on colors on FG item browser.

### Integer Value

Enter number of records to display on the finished goods browser. Limiting the number of records will improve the response time to access the finished goods records.

# **FGCOLORS**

Use Color Folder in FG Item Maintenance to Update Estimate Inks?

Change the label on the Color folder in the finished goods file. The ***“Add”*** button will allow the user to enter Sheet Fed ONLY inks defined as Offset and Letterpress inks. The Web Fed inks will apply to Gravure and Flexo inks only.

When adding and saving the inks, the inks will update the estimates based on the printing press on the machine routing screen. If the press machine is web fed, then the Flexo and gravure inks will transfer to the ink screen. Likewise, if the machine on the routing is sheet fed, then the inks defined as offset or letterpress will transfer.

Please Note: The inks defined must be all the same ink type on the *COLOR* folder as well as the estimate *INK* folder. “***RESET INK”*** Button on Estimate INK folder would have new options. Import Style File Inks? Import Finished Goods Inks Colors? This would prompt Flexo Inks or Offset Inks which would then import from the *FG COLOR* Folder.

Additionally, when updating estimates inks, the system will update the FG Color Inks based on the either Sheet or Web. Likewise, when updating inks in the *FG COLOR* folder this would update the estimates based on the machine routing press type.

# **FGEMAILS**

FG post to automatically Email Customer Service for Hot Customers.

### Character Value

The character version will dictate the method when emails are automatically distributed.

#### NONE

Option 1 is *NONE*, which will turn off this feature.

#### UNDERRUN

*UNDERRUN* this will automatically create Emails whenever the Quantity received is less than the Jobs allowable under run.

#### RECEIPTS

If the character value is *RECEIPTS* then any FG receipt will create an email.

### New Logic

There must be a new customer status code called ***“E”*** for *E-SERVICE* in addition to existing codes called Active, Inactive, X House or Statement.

Also a new title code called *EHOTS* with description of E Mail Customer Service which may be added to the customer phone *ICON* for all service representatives that should receive the email notice when the Finished Goods Items have been received and posted to finished goods on hand.

Unlimited service representatives and / or customers will receive the email notice as to what was received. The Email Topic line will show the Job #, Item# and quantity Received to Inventory. The message will read, Finished Goods Receipts have been posted.

# **FGINVREC**

Invoice Drop Shipped FGs when Received? This option will create an Invoice for finished goods receipts for purchased finished goods that were created as a drop shipment to a customer. This logic would save many steps for box brokers, which simply place purchase orders then invoice the delivery.

### Logical Value

#### Yes

When the logical value is “***Yes”***, finished goods posting will automatically create an Invoice for Finished Goods receipts via purchasing with a purchase order type of ***“D”*** for Drop Shipped. First a purchase order is created for a finished goods that is purchased as a drop shipment type purchase order. Hence the vendors on the purchase order will deliver the goods to the customer.

When the vendor notifies the box maker that the goods have been delivered, the finished goods receipt should be entered. The finished goods receipt will prompt "Create Invoice for Drop Shipped Purchase Order?

“***Yes”*** will flag the item during FG posting to automatically update the release quantity to the finished good receipt quantity, post the release and post the bill of lading, which will create the invoice. The bill of lading will have the same warehouse / bin location as the finished goods receipt.

# **FGCOST**

Create Finished Goods Cost in Job File with only the board cost?

### Commission Report

The commission report will base the commission based on sell price or gross profit based on the order cost or the board cost. The salesman file commission matrix dictates the commission percentage, which is multiplied by the gross profit or sell price percentage. The percentage is transferred to estimating, which may be changed and is imported to new orders. Still, the commission percentage may be changed during order entry for each item on the order.

In Summary, the commission report will only print the order cost as full or direct cost, if the *FGCOST* parameter in “***No”*** and the report option “Use only Board Cost” is unchecked. The commission report would print only the board cost regardless of the report option if the *FGCOST* parameter is “***Yes”***, because the order cost would show only the board cost.

### Logical Value

#### No

The logical value is used to dictate the order entry cost per thousand for finished goods created from estimates. Normally this should be set to “***No”*** so that the cost includes only direct factory cost for material, direct labor, variable overhead and fixed overhead.

If the ***“N”-“K”-“1”*** *FGCOST* logical value were “***No”***, then the cost on the order would be the direct factory cost or full cost depending on the ***“N”-“K”-“1”*** *FGOECOST* logical value. The logical value field is used to determine the costing method. Selecting “***No”*** is the recommended method since it is the only method supported in the job cost module. When selecting “***No”***, the cost would include only direct material cost per thousand, direct labor, fixed overhead and variable overhead.

#### Yes

The control parameter called ***“N”-“K”-“1”*** *FGCOST* option will transfer only the board cost on the order if you have the logical value set to “***Yes”***. Under this scenario, the cost on the commission report will always be the board cost. Meaning the report option to print estimated cost versus printing the order cost will be the same cost, hence the flag will do nothing, since the cost on the order and the board cost are the same.

The option to carry finished goods cost at only the value of board is available by setting the logical value to “***Yes”***.

Set the value to “***Yes”*** to carry the inventory at full cost. This logic was written for a customer that does not utilize job costing, but wanted the inventory reports to show the full cost including material, direct labor, fixed overhead, variable overhead and all other markup costs such as freight, commissions, warehousing, general selling and administration. All costs other than machine costs are added to material cost for this costing method.

# **FGINVREC**

Invoice Drop-Shipped FG’s when Received?

This option will create an Invoice for finished goods receipts for purchased finished goods that were created as a drop shipment to a customer. This logic would save many steps for purchased finished goods dropped shipped, which simply place purchase orders then invoice the delivery.

### Logical Value

#### Yes

When the logical value is “***Yes”***, finished goods posting will automatically create an Invoice for Finished Goods receipts via purchasing with a purchase order type of ***“D”*** for Drop Shipped. First, a purchase order is created for a finished goods that is purchased as a drop shipment type purchase order. Therefore, the vendor on the purchase order will deliver the finished goods directly to the to the customer.

When the vendor notifies the box maker that the goods have been delivered, the finished goods receipt should be entered. The finished goods receipt will prompt "Create Invoice for Drop Shipped Purchase Order?

“***Yes”*** will flag the item during FG posting to automatically update the release quantity to the finished good receipt quantity, post the release and post the bill of lading, which will create the invoice. The bill of lading will have the same warehouse / bin location as the finished goods receipt.

# **FGITEM#**

Use Customer Part Number as FG Item Number? This option will dictate the method of creating finished goods item numbers from estimates during order entry.

### Character Value

Value is *HOLD*, *MANUAL*, *HUGHES* and *FIBRE*.

Please note, the length of the item number is dictated by the customer size, which can be determined by the N-K-1 Custom size value.

#### FIBRE

Character value equal to *FIBER*, the first letter is the determined by the type of style. Folding estimates will start with and ***“F”*** and Corrugated estimates will start with a ***“C”***.

Hence, orders for folding estimates or items from folding estimates must search for the last sequential number that starts with the letter ***“F”***. Where orders for corrugated estimates or items from corrugated estimates must search for the last sequential number that starts with the letter ***“C”***.

Please Note: The FG item import to the screen for Fiber to update or accept accordingly. Sets will assign the set item ending with a 0 and each component will end with ***“A1”*** through ***“A9”***.

#### HOLD

When the value is *HOLD*, if the *FGITEM*# is missing from the estimate, then the order cannot be added when an estimate number is entered on the order. The program will prompt, "Sorry FG item does not exist, order has not been approved."

#### HUGHES

If the character value is *HUGHES*, then the finished goods item number will be assigned automatically when adding an order from an estimate. This will create a default Finished Goods item# that may be modified during order entry.

Each item will be 15 characters. First letter will default to the first letter for the product line file, hence must search for the product category in the product line file. The next 6 characters will default to the customer code, which should be limited to 6 via the ***“N”-“K”-“1”*** Custom size parameter. The next 4 characters will be sequential number starting with 1 for each customer. The program will find the last sequential item number and add one.

Next, the letter A will default to next character, which represents the initial item revision code. Hence changes to the item would be B, C, etc. The next two characters will be 00 for a set header or 01, 02, 03 for each component.

For single items not created as a set, the last two numbers will be a 99. The last character will be blank. If the set item number is changed when adding an order, the item code and the component numbers must match the parent number plus an ending suffix of 01, 02, 03 etc.

#### MANUAL

When the value is *MANUAL*, if the *FGITEM*# is missing from the estimate, then the order entry clerk will manually enter the FG item code.

### Integer Value

#### 0

If the integer value is 0, then set part numbers will be created as UNASSEMBLED sets as the default.

#### 1

If the integer value is 1, then the finished good set item number will be defined as ASSEMBLED. When receiving Assembled sets, the components are deducted from inventory and the set item is added into quantity on hand. When posting finished goods receipts for sets that are UNASSEMBLED, both the set item and the components on hand inventory are increased when the set item receipts are added.

### Logical Value

#### No

If the logical value is “***No”***, then the finished goods item code will be dictated by the character value field.

#### Yes

Set to “***Yes”*** to transfer the customer part number defined on the estimate to the order when creating the finished goods item code. This will not allow changing the item code prior to saving the screen.

# **FGITEMSF**

This parameter will determine the square footage on the *TOTALS/CP#* folder. The character value will determine how the finished goods items square footage is calculated when items are created or when the *FG TOTALS* folder recalculates item square footage. This will then include trim waste with blank Square feet.

### Character Value

#### BLANK

This will be the blank size width times blank length.

#### GROSS SHEET

This will use the estimates gross sheet dimensions to calculate the FG Item square feet. The calculation will be blank length times blank width whereby Blank Length = Estimate Gross Sheet Length / ( #out on length X # Up on length) and Blank Width = Estimate Gross Sheet Width / ( #out on Width X # Up on Width)

Please Note: If alternative stocked sheets or rolls are issued to job, the square footage from the purchase order and job may not match the items square footage via the estimate.

# **FGMASTER**

*N-K FGMASTER* will use the finished goods item code that will be used for default fields when creating finished goods items via order entry or via the “***ADD”*** button in finished goods.

The new item will copy the fields such as Product Category, Ship Method, Inventory Class, Selling UOM, Cost UOM, Currency, Warehouse, Bin, Purchased or Manufactured, Stocked, Active, Cycle Count Code, Production Code, Taxable, Vendor Code1, Vendor Code 2, Reorder Policy, Assembled or Unassembled and Freight Classification.

### Character Value

Set the character value to an item that will serve as a *MASTER* finished goods item when creating a new finished goods item record.

Please Note: This works similar to the customer X logic when adding new customers.

# **FGOECOST**

Order Entry Finished Goods Item Cost?

### Logical Value

The logical value field is used to determine the costing method.

#### No

“***No”*** = Direct Factory Cost

“***No”*** is the recommended method since it is the only method supported in the job cost module. When selecting “***No”***, the cost would include only direct material cost per thousand, direct labor, fixed overhead and variable overhead.

#### Yes

“***Yes”*** = Full.

Set the value to “***Yes”*** to carry the inventory at full cost. This logic was written for a customer that does not utilize job costing, but wanted the inventory reports to show the full cost including material, direct labor, fixed overhead, variable overhead and all other markup costs such as freight, commissions, warehousing, general selling and administration. All costs other than machine costs are added to material cost for this costing method.

# **FGPART#**

To make the customer part number unique all FG items throughout the entire system.

### Logical Value

#### No

Logic will allow the same customer part# for different customers, hence many customers may call a box 8x8x8, but the FG item code may be unique.

#### Yes

During order entry when a finished good item is created, the customer part number unique. i.e. Only 1 customer part number for 1 finished goods item code.

Please Note: The ***“N”-“Q”-“3”*** merging FG items will not use this logic since it will be assumed that all items are unique prior to merging.

### Update Programs

The following programs must be updated.

Add FG items via order processing.

Copy items in order lines. Add items via ADD TANDEM logic. Others ? etc.

# **FGPOCOST**

Update order entry cost from purchasing for purchased finished goods.

### Logical Value

#### No

If the logical value is “***No”***, then the average cost from the Finished Goods item file will transfer to the order.

#### Yes

To better match selling price to actual cost on booking reports, this value should be set to “***Yes”***. If the logical value is “***Yes”***, the cost from the purchase order will transfer to the item’s cost in order entry.

# **FGPOFRT**

Include the cost of freight into the cost of purchased goods?

### Logical Value

#### Yes

This turns this switch on. When receiving finished goods from a purchase order, this will include the cost of freight from the purchase order into the cost of the item.

First, the total weight of all items on the purchase order is divided by the total freight cost per 100 items. The quantity of each item received must be divided by 100 and multiple by cost of freight / 100 pounds from the purchase order. This would yield the same calculation for multiple items on a single purchase order or partial receipts.

# **FGPOST**

Print posting report Before Posting? No will print After Posted.

### Logical Value

#### No

This will be default logic to print the posting report before posting the inventory transactions. If the logical value is “***No”***, then the program will prompt to post “***Yes”*** or “***No”*** immediately. This will create a temporary file, whereby a “***Yes”*** answer will then post the transaction then print the report.

If logical value is “***No”***, then the edit list report is the only way to view the data entry transactions prior to posting the finished goods. The reason to set the logical value to “***No”***, is that the posting report serves as an audit trail of what posted to the inventory balances.

#### Yes

When logical value is “***Yes”*** , then the user has the option to ***NOT POST*** after printing and viewing the audit trail. Therefore, the user can update the receipts, transfers, adjustments then print the audit trail again. If the wrong audit trail is saved in the file cabinet, then the user may not trust the inventory balances. In summary, logical value set to “***No”*** will show exactly what posted to inventory since this print after posting.

# **FGPOSTGL**

FG receipts and Invoicing to Post general ledger accounts for purchased finished goods, manufactured goods or both.

The job cost product line houses the general ledger accounts for finished goods and work in process accounts for material, direct labor, fixed overhead and variable overhead. When posting manufactured goods, the program will debit the finished goods accounts and credit the WIP accounts for material, direct labor, variable overhead and fixed overhead respectfully.

When posting finished goods receipts for purchased items, the finished goods asset account will be debited and a credit will be applied to the WIP material, which should be defined as the accounts payable accrued. When invoices are posted, the finished goods are credited, and the cost of goods sold are debited for material, direct labor and variable overhead and fixed overhead.

### Character Value

The logical value “***Yes”*** will invoke the logic, but the character value dictates the methodology that is used.

#### ALLITEMS

*ALLITEMS* will post debits and credits to both purchased and manufactured goods.

#### POONLY

*POONLY* will only post general ledger accounts for purchased items.

#### NONE

*NONE* will not post any transactions.

# **FGRECPT**

Dictates the creation method of Finished Goods Receipts. Receipts for finished goods items as well as components of sets may be manually entered, created via touch data collection or via Advantzware data collection. The FG receipts will not be posted to Advantzware, but will just create the data entry transaction.

The warehouse and bin location will default based on the ***“N”-“K”-“1”*** *AUTOPOST* character value criteria. When receiving assembled sets, the system will verify that the components on hand quantity will satisfy the set receipt quantity.

If the components are short, then the system will pop up a window of the components with the available balances of each component to determine how many sets can be produced. When receipts are posted, the system will reduce the component inventory by the set on hand balance received.

For example, if the set includes 1 RSC, 3 width partitions and 5 length partitions and we receive 1000 assembled sets, then the inventory will add 1000 sets, but subtract 1000 RSC's, 3000 partition widths and 5000 Length Partitions from the existing components on hand balances. If the current RSC inventory was under 1000 or the Part Length was under 3000 or the Part Width was under 5000, the popup window would display.

When assembled sets are shipped, only the set item's on hand balance is reduced. When receiving Unassembled sets, the set receipt will also add to the components inventory as multiplied by the quantity per set.

The set item and the components on hand balances will all increase via receipts. The logic is that the components may be used with other sets, so the inventory is maintained separately. When shipped, both the set and the components are on hand balances are reduced. When receiving sets defined as Assembled with Parts, the components items will be added to the finished goods receipts screen just like unassembled sets, however only the set inventory will increase.

### Character Value

This will dictate method of creating finished goods receipts. Options will be *AUTOPOST, TSPOSTFG, TSPARTS, MANUAL* and *LOADTAG*.

#### AUTOPOST

When selecting *AUTOPOST*, the system will change the ***“N”-“K”-“1”*** *AUTOPOST* logical value to “***Yes”*** so that FG receipts will be created via Advantzware data collection. Character Value = MANUAL will turn both ***“N”-“K”-“1”*** *AUTOPOST* and *TSPOST* logical values to “***No”***. Therefore, finished goods receipts must be manually entered via the Advantzware ***“I”-“U”-“1”*** screen.

For assembled sets, the components receipts must be entered and posted before the set item may be received. If the components are short, a list of the components balances will display. FG Posting the assembled set will update the sets on hand balanced, but reduce the components inventory.

Both unassembled and assembled w/parts items will automatically add the components to the receipt screen after the set receipt is entered. When receipts for unassembled sets are posted the set and the components balances will increase. For assembled with parts, only the set inventory balance will increase since the components received will be used via the assemble of the set.

The finished goods receipts are created during Advantzware data collection via D-U and D-F once posted. The inventory process works identical to the *MANUAL* process, except receipts are created via the last operation for each form via data collection. Set items must be received via the Advantzware finished goods receipt process.

#### TSPOSTFG

The finished goods receipts are created during Touch Screen Data collection immediately upon completing the last operation of each form, hence this process is real time. The *N-K-TSPOST* logical value will become “***Yes”***.

The FG goods set receipt will also be created when the production for the assembly machine is completed. The assembly machine is defined in the character value field of the ***“N”-“K”-“1”*** *TSPOST* parameter. Therefore, the last operation of each form will create the receipt for the component, but the assembly operation will create the receipt for the set item.

*TSPOSTFG* however only the components will be automatically received via touch screen data collection. The FG component receipts that were created would still be posted via Advantzware. The warehouse and bin location for the components must be imported from the items warehouse and bin, since no set header exists. If the components warehouse and bin are blank, the normal defaults will occur.

#### LOADTAG

*LOADTAG* will also turn both ***“N”-“K”-“1”*** *AUTOPOAST* and *TSPOST* logical values to “***No”*** and will create finished goods receipts when the *LOADTAG* is created via the program run via the ***“O”-“U”-“7”*** menu or via the “***Sharp Shooter Load Tag Creation”*** Button.

#### TSPARTS

*TSPARTS* will generate finished goods receipts for set components only during touch screen data collection. All sets and single item jobs will be received via the Advantzware receipts including the set headers.

This is similar to *TSPOSTFG* however only the components will be automatically received via touch screen data collection. The FG component receipts that were created would still be posted via Advantzware.

The warehouse and bin location for the components must be imported from the items warehouse and bin, since no set header exists. If the components warehouse and bin are blank, the normal defaults will occur.

### Integer Value

#### 1

When Integer Value is 1, then Tag # cannot be changed in update mode of FG receipts, transfers or adjustments. This is important logic for clients on Sharp Shooter which has tag numbers created via the load tag program.

### Logical Value

#### No

Dictates if a Job number or Purchase Order number is mandatory when adding finished goods receipts? If the logical value is yes, then either the job or the purchase number must be added to the receipt screen. If the value is “***No”***, then neither number is required.

# **FGREORDER**

### Character Value

#### ReOrder Point Items Only

When Bill of Lading is posted / Invoice is Created, the system will check logical value. If “***Yes”***, system will then check the file ECODES.

ECODE program called R-BOLPST will house the customer contact to be emailed. Customer Service Reps and employees of box manufacturer must also be defined.

Therefore, box employees as well as customer employees must be defined in the customer file under the PHONE ICON including the email address.

### Logical Value

#### Yes

The system will check each finished goods item on the bill of lading to determine if the *QUANTITY AVAILABLE* is equal or below the *REORDER* level field. This is same logic that the reorder advice report via “***I”-“R”-“1””*** utilizes.

When the items quantity on the customer’s bill of lading is below the reorder level, an email will be sent immediately to the list of contacts defined on the *ECODE* program named R-BOLPst.r.

Please Note: Only one email will be sent for the entire batch of bill of ladings. The email will list the finished goods items that fall below the reorder level. Fields similar to I-R-1 report will be on the email.

The Character Value = ReOrder Point Items Only will dictate that only items below the reorder level will be selected when the Bill of Lading is posted, which creates the invoice. *ECODE* program called R-*BOLPST* will house the customer contact to be emailed.

Customer Service Reps and employees of box manufacturer may also be defined. Therefore, box employees as well as customer employees must be defined in the customer file under the *PHONE ICON* including the email address.

Please Note: 1 single email will be sent for the *BATCH*. The email will list the finished goods items that fall below the reorder level. Fields similar to “***I”-“R”-“1”*** report will be on the email.

# **FGSECURE**

This will provide security on the cost fields of finished goods.

1) Finished Goods Item - *VIEW* folder.

2) Finished Goods Item - *Bins* folder.

3) Finished Goods Item - *History* folder.

4) Job File - *View* Folder.

5) Finished Goods Receipts via ***“I”-“U”-“1”***

### Character Value

#### FGCOST

This is the user group id that must be added to the ***“N”-“C”*** user groups file. User Ids added to the group will have access to view the cost fields. User ID's defined under the *FGCOST* group will be able to view the Finished Goods costs on the following menus / folders

### Logical Value

#### No

“***No”*** will show finished goods costs regardless of user ID.

#### Yes

“***Yes”*** would invoke security to show or not show costs.

# **FGSETASSEMBLY**

This parameter provides logic for Assembled Set Receipts processed via the ***“I”-“U”-“1”*** menu keys when the Finished Goods File (***“I”-“F”-“1”***) Toggle Box fields called Set Header and Assembled are both checked. The reason for the business logic is for components that are produced at Plant A then transferred to Plant B for Assembly.

All Pallet Tags are shipped and stored in various Bin Locations (known as Rack Numbers) in Plant B, then specific Pallet Tags will be transferred to the Bin Location called *ASSEMBY* as a staging location. When adding *SET* Receipts, the software will be automatically import pallet tags stored in the Assembly bin to the *SET PARTS* tab of the ***“I”-“U”-“1”*** Set Receipt Screen.

When posted they are then subtracted from the components On Hand Inventory and increases the Sets On-Hand.

Both ***“O”-“U”-“7”*** Load Tag creation and ***“I”-“U”-“1”*** Set Receipts will receive the Sets Pallet Tags to the warehouse and bin location based on existing logic for ***“N”-“K”-“1”*** *FGSETREC* parameter which is either a fixed bin or defined by the Sets ***“I”-“F”-“1”*** Warehouse. The sets warehouse will also be default warehouse for the components.

However, the components Bin Location will first search on hand Pallet Tags from the Bin Location defined in the ***“N”-“K”-“1”*** *FGSETASSEMBLY’S* character value such as *ASSEMBLY*. If there is insufficient component inventory in the Assembly Bin Location, the program will import existing bin Locations.

***“I”-“U”-“5”*** Inventory Posting will not post set receipts or components unless all components have the Assembly Bin locations. The ***“I”-“U”-“5”*** Posting report will show the message, "Component Assembly Bin Location is Required" and they will not Post until Component Bin = Assembly.

### Character Value

ASSEMBLY   
A bin location matching the character value must be created in the ***“I”-“F”-“4”*** warehouse file. The bin location defined in the character value will be the default bin for the software to automatically import Set Component Pallet Tags to the *SET PART*S tab of the ***“I”-“U”-“1”*** Set Receipt Screen. This will ensure a standard bin location as a staging area for set components to be consumed when adding Receipts for Assembled Sets.

### Logical Value

#### No

This will use existing Logic that pulls random inventory pallet tags.

#### Yes

This will turn on this new logic for Adding receipts for assembled sets.

# **FGSETREC**

Default warehouse and bin location for components during finished goods receipts for unassembled sets. When adding receipts for unassembled sets, the component receipts are simultaneously created.

This parameter dictates the warehouse and bin location for components on the *SET/PARTS* Tab of the ***“I”-“U”-“1”*** Finished Goods Receipts Screen when adding receipts for unassembled sets or assembled with parts, since the component receipts are simultaneously created.

For Example, Set Item MILLER HL has the Toggle Box set to Assembled with Parts checked in the Inventory Tab of I-F-1.   This logic creates both a Positive Quantity and Negative Quantity for each Component on the *SET PARTS* tab for the Set Header added to the ***“I”-“U”-“1”*** Receipts Screen.

For Purchased Components, the Set Receipt will only create a receipt with a *NEGATIVE QTY* on the Set/Parts, because the receipt for Purchased Components are created as a separate transaction via Sharp Shooter receipts or ***“I”-“U”-“1”*** Receipts and Posted to on Hand Inventory.  The On-Hand Location for the Purchased Component will transfer to the *SET PARTS* tab when receiving Sets Assembled with Parts.

### Character Value

#### IGNORE COMPONENTS

Assembled sets WILL NOT create the Component Adjustments.

#### ITEM

If the character value is *ITEM*, then the components warehouse and bin location will default from the components bin file if an on-hand value exists, otherwise the default will transfer from the components item file. In either event, the locations may be changed during the receipt process.

The warehouse and bin will pull from the Components Bins/Jobs from the ***“I”-“F”-“1”*** Inventory Tab.  When adding receipts for Unassembled Sets or Sets assembled with parts, then the components warehouse and bin location will default to the *SETS* warehouse and bin when an on-hand quantity does not  exist for the component.

If on-hand quantities do not exist for the components, the default will transfer from the components Inventory Tab Locations.  In either event, the locations may be changed during the receipt process.

#### SET

When the character value is *SET*, the components warehouse and bin location will be identical to the warehouse and bin location defined for the Set item number.

Adding unassembled or assembled with parts, the components warehouse and bin location will be identical to the warehouse and bin location defined for the Set Item Code.  This will transfer the Sets Job#/Whse/Bin/Tag to the Set/Parts Tab for each component.

For Sets Assembled with Parts, this will not transfer the Tag#. This will only transfer the Job#/Whse/Bin so the components tag numbers will be *BLANK*.

### Integer Value

#### 0

Creates adjustments for the components of assembled sets. For example, the set requires 1 Length Partition and 2 Width Partitions.  If you receive 1000 assembled sets, the software will create a negative adjustment of 1000 Lengths and negative adjustment of 2000 widths.

#### 1

No adjustment transactions for the components on the *SET* Parts Tab. When adding Assembled Set Receipts via ***“I”-“U”-“1”*** or ***“O”-“U”-“7”***, only the *SET* will be received. Likewise, when posting finished goods, the Set Receipt will Post while ignoring and not validating the components are on hand.

### Logical Value

#### No

This will search all available components jobs and bins to produce the assembled set header item.  The system now verifies that the component on hand quantity exists for that specific job. If this fails, prompt the normal message but expand the FG Item code field so the entire item exists and also display the job number. After this error, add *PROMPT*, use inventory from other jobs?

#### Yes

This will search only for the Sets Job# when creating the Set/Parts location.  The system will verify that the component on hand quantity exists for that specific job. When there are insufficient components for the existing job, the components from other jobs will display.

Please Note” The toggle box on this popup window that indicates to search for all jobs.

(When Logical Value is “***Yes”***) Answer “***Yes”*** to search for other jobs will then utilize other jobs on hand inventory.

### Program Updates

The following programs must be updated.

***“I”-“U”-“1”*** Add Receipts and Update Receipts.

***“O”-“U”-“7”***  Load tags for Sets when

***“N”-“K”-“1”*** *FGRECEIPT* character value = LoadTag.

***“N”-“K”-“1”*** *SSPOSTFG*, Character Value = LoadTag and Logical Value = “***Yes”***

This  will POST the finished good receipt created via Load tag Creation.

# **FGWHSBIN**

### Character Value

Character value will dictate the default location for all items during the creation of FG receipts via Advantzware, Touch Screen, Sharp Shooter or Load Tag Creation.

#### AUTOPOST

The character value will default to *AUTOPOST* which is the current logic for creating FG receipts which is dictated by the ***“N”-“K”-“1”*** *AUTOPOST* character value. If the character value is not equal to *AUTOPOST* then the character value entered will be a combination of the 5-character warehouse and the 8 character bin location.

Therefore, if the default location is *MAIN* and *FLOOR* is the default bin location, then the user must enter the space so the character value will read *MAIN FLOOR*. The first 5 characters must exist in the warehouse file and the next 8 characters must exist in the bin location.

#### FGITEM

This option will default the finished goods receipts directly from the Finished Goods item's *VIEW* folder warehouse / bin file.  If the item’s Warehouse and Bin are blank, then the warehouse and bin will transfer from the Customer with the Status of X.  Therefore, the new character value will pull from the finished goods item from the *VIEW* folder, regardless of where the item is currently located.

# **FOAMCOST**

Help for ***FOAMCOST***.

# **FOAMDATE**

This will serve as the default due date for producing foam jobs. This logic must work from the *LINE ITEM* screen, since we don’t know what the style type is until they enter an FG item number or an estimate on the header or line item. The integer value will be used to as the manufacturing days which will be added to the order date to determine the default due date on the line item screen only for foam jobs. All other items will import the due date from the order header.

The last ship date will continue to be determined by the *LASTSHIP* value, which uses the customer warehouse days to add to the order date to determine the last ship date for each customer.

# **FREEZENOTE**

The characters in this field will be the password required when Logical Value = Yes.

### Logical Value

#### No

This will not prompt for password when checking the ***“O”-“U”-“7”*** Freeze Notes field. When this box is checked, the current logic will continue as normal.

Please Note: This logic creates a new record key for the department notes. No password will be required for logic to continue.

#### Yes

This will prompt for a password when checking the ***“O”-“U”-“7”*** Freeze Notes field.

If the correct password is entered, the program will continue its existing logic to update the Record Key. When printing a job ticket, the user may accidently check the toggle box "*Freeze Notes*". This new logic will password protect the toggle box on the job ticket selection parameter for *Freeze Job Notes*?

If they enter the wrong password, the program will RESET the toggle box to UNCHECKED before printing the job ticket.

# **FREEZENOTES**

### Logical Value

#### No

*Freeze Job* Notes toggle should only be checked when freeze notes was already applied to job. Otherwise it will be based on user's last printing of any invoice whether or not freeze notes is checked.

# **GLPOST**

Description = Post AP Invoices within current period only?

### Logical Value

Logical Value = “***No”*** as Default.

#### Yes

If logical value is set to “***Yes”***, then this feature will be turned on. This will check the invoice dates entered in ***“V”-“U”-“1”*** against the corresponding

# **GRAPHIC**

*GRAPHIC* parameter to house the disk drive and folder location of all scanned images for finished   
goods items.

Character value to list the disk and directory location to find the images. The image name will be stored on the finished goods item folder called *IMAGE*. The image tab for all FG items would auto populate the drive and folder name followed by the FG item number.jpg

(for example, N:\ScannedPrintCards\FHER10000121A.jpg)

New UTIL/SETIMAGE.r program will search for images located on the disk drive and folder location of the ***“N”-“K”-“1”*** Graphic character value to find images that have been scanned. When an image matches the FG Item code then this file will be written to the finished goods image folder.

When creating new finished good items via Estimating, Order Processing or Job File or FG item maintenance, the system will search the folder for a image under the ***“N”-“K”-“1”*** Graphic location. If it matches the item, then this will be written to the image folder.

The images will be named the finished goods item code as a .JPG extension. The scanning company would prompt for the FG item number every time an item was scanned.

# **HRMS**

This control parameter stores the directory of the file for exporting the HRMS scheduling software. This program works in conjunction with the *POEXPORT* control parameter. This file is used to export purchase orders for board to corrugators electronically. The following must be set to export data.

### POEXPORT

Set the logical value to “***Yes”*** to evoke this feature. Change the character value to *HRMS*. The purchase order will export all the pertinent data the board vendor requires including your company name, ship to code, ship to address, city, state zip, board code, board description, adder codes, cost, due date and more.

Also, a cross reference database table must be defined that lists the HRMS board code and adder codes with the Advantzware board codes and adder codes. To enter this database, run the Network / System Administration menu, then the Run Custom Utility and type UTIL/W-HRMS.r. This will display a list of HRMS and Advantzware item codes that will be used as a cross reference when exporting the purchase order to the HRMS scheduling software.

### Vendor File

The EDI field must be set to “***Yes”*** in the vendor file. Only vendors with this denotation will receive purchase orders.

# **INEXPORT**

Invoice export format options when posting invoices.

Formats reside on our GUIMANUAL\Order Processing\Export\ folder to export A/R and Order Entry Invoices to CIT financial corp. When ***“N”-“K”-“1”*** Invprint = Frankstn provides the toggle box which will allow creating the file when printing or reprinting POSTED invoices / Credit Memos was this could duplicate the data. New field in the Finished Goods Item file Totals File called Factor Invoice.

Only items that are checked will be downloaded to the CIT batch file when the invoice is posting and the Download to CIT box is checked. Currently, the invoice posting program requires a field called Download to CIT. This new logic will automatically create the file for items checked as factored.

### Logical Value

#### Yes

Please Note: This logic is only for OE invoice since the AR invoice does not have an FG item code. Add check box for Factored item only? If “***Yes”***, do only for factored item or any invoice that has at least one factored item. When posting invoices the Box called Export to CIT must be CHECKED. This will create a file for factored items only. This will create a file for ONLY the finished goods items that are checked.

Also, add toggle box on AR Aging report called Include Factored FG Items? “***Yes”*** will be the current logic. Unchecked, will then create an AR aging for only invoices with non-factored items. i.e. invoiced items that must be collected by Frankston. Factored invoices for factored items will be collected by the Collection Agency / Bank. Please note, when an invoice has both factored and non-factored items, the aging will include that invoice.

# **INVCOPYS**

Number of duplicate invoice copies to be printed? The integer value is used to print multiple copies of invoices. This option would be used with invoice formats, which are printed on plain paper or letterhead paper, which is not multiple part paper. Not all invoice formats support this function.

# **INVDATE**

### Character Value

Character Value option to create Invoice date as either the Bill of Lading (BOL) Date or Current Date that the BOL was posted to create the Invoice.

#### BOL

When the character value is BOL, then the logic creates the invoice date as the same date as the Bill of Lading date.

#### CURRENT

When the character value is CURRENT, then the invoice will have the date that the invoice was created as a result of posting the bill of lading. Therefore, if the BOL date is May 21, but the invoice is created on May 27, the Invoice date would be created with the current date of 05-27-04.

### Logical Value

Set the logical value to “***Yes”*** to turn on this feature.

# **INVPASS**

Password Protection for Printing Order Entry Invoices.

Character Value will store the Password required to print the invoice.

Logical Value = “***Yes”*** will turn on this feature to prompt for Password before printing an invoice.

This would be for OE invoices only

Prompt for password when printing in ***“O”-“B”-“1”*** invoice via Icon. / Prompt for password when printing invoice via ***“O”-“B”-“3”***.

“***Cancel”*** Button will allow escape.

If password defined in Character Value is not correct, invoice will not print.

# **INVPOST**

Help for ***INVPOST***.

# **INVPRINT**

Invoice Format? Print Invoice headings on Invoice Form? Both the character value and logical values are used to determine the print format for invoices. The character value support number versions including preprinted forms as well as plain paper forms. The logical value is used to select the printing of the column headings such as ship to address, purchase order number, invoice number, etc.

Not all forms have the option to print or not print the headings. When requesting a program modification for a new invoice form, it is recommended to find an existing invoice format to be modified. When printing an invoice form for a forms supplier to design invoice forms, you must print the exact options which you will use.

Do not print an invoice with headings for your graphics supplier to design forms, then turn the headings off when the forms arrive. The formats with and without headings will not print in the exact locations. Your company is free to use any custom designed form, however future changes may be made without your consent or notice.

### Logical Value

Logical Value is used to select the printing of the column headings such as ship to address, purchase order number, invoice number, etc. Not all forms have the option to print or not print the headings.

# **JCBROWSE**

***JCBROWSE*** to limit the records displayed when accessing Job File.

### Integer Value

The number entered limits the number of records displayed when accessing the ***“J”-“U”-“1”*** and ***“J”-“Q”-“1”*** file. The smaller the number, the faster the access time to the file.

### Logical Value

#### No

The logical value will show no records.

#### Yes

This will limit the number of records just like *OEBROWSE*.

# **JCPREP**

Create Job standards to transfer all prep material to the job material and job labor. This includes new material types 7,8,9, X and Y. Currently, this data is transferred to the *PREP* Folder. This is better logic because the PO and material receipts never ties together.

This new change will support everything via materials or labor. Order Entry automatically create a raw material identical to the PREP code if the raw material. The PREP file in job file will show the *PREP* raw materials code.

### Logical Value

#### No

Logical Value = “***No”*** will not use this logic.

Yes

Logical Value = “***Yes”*** will turn on this logic.

## Prep Material Codes

PREP material codes are converted into unique raw goods material types:

|  |  |  |
| --- | --- | --- |
| ***Original Code*** | ***Material*** | ***Becomes New Code*** |
| D | Prep Cutting Dies | 8 |
| F | Flat Die | X |
| M | Miscellaneous | M |
| P | Plates | 7 |
| R | Rule/Rotary Dies | Y |

Please Note: The new material types will be treated as ***"M"*** Miscellaneous materials.

Prep / Die file need to be purchased as a Raw Material; therefore, we will make prep / dies on the estimate transfer to the Material File of the Job file rather than the Prep Folder of Job File. RM material Code will be added to Prep file to cross reference to the estimate prep code so that the system will automatically create the raw material item code.

# **JDEDWDIR**

Help for ***JDEDWDIR***.

# **JOB QTY**

Create Job Quantity with overrun percentage from Order Entry Quantity?

### Logical Value / Character Value Combinations

The logical value is used to calculate the job quantity. The character value is used to calculate the sheet quantity for each board material on the job for each form.

#### Logical Value = “Yes” / Character Value = NET SHTS

This option will calculate the board materials total number of sheets or impressions required known as MRP quantity on the Job File's Material Folder. The net sheets option will take the items Job Quantity and divide by Number Up on the die times the Number Out on the Slitter or Sheeter.

For example, if the job required 200,000 boxes and the die was 4 up but this was cut 2 out of a larger gross sheet the net sheets would be 200,000 / (4x2) or 25,000 sheets. The normal waste for each machine would be added to the 25,000 sheets. If we assumed a 10% of wasted, then the MRP quantity of sheets would be approximately 27,500 sheets required for this job.

Please Note: The Board Required calculation is the same for Log Value = “***Yes”*** and Char Value = *NET SHTS* is same board quantity calculation as Log Value = “***No”*** and Char Value = *BLANK*.

#### Logical Value = “Yes” / Character Value = BLANK

This option will calculate the board materials total number of sheets or impressions required known as MRP quantity on the Job File's Material Folder. The net sheets option will take the items Job Quantity with *OVERRUN* percentage and divide by Number Up on the die times the Number Out on the Slitter or Sheeter.

For example, if the job required 200,000 boxes with a 10% then the Job Quantity would be 220,000. If the was 4 up but this was cut 2 out of a larger gross sheet the net sheets would be 220,000 divided by (4x2) equals 27,500 without waste. However, the character value as *BLANK* forces the inclusion of waste. If we assumed a 10% of wasted, then the MRP quantity of sheets would be approximately 30,250 which is 27,500 times 1.10

#### Logical Value = “No” and Character Value = BLANK

This option will calculate the board materials total number of sheets or impressions required known as MRP quantity on the Job File's Material Folder. The net sheets option will take the items Job Quantity and divide by Number Up on the die times the Number Out on the Slitter or Sheeter.

For example, if the job required 200,000 boxes and the die was 4 up but this was cut 2 out of a larger gross sheet the net sheets would be 200,000 / (4x2) or 25,000 sheets. The normal waste for each machine would be added to the 25,000 sheets. If we assumed a 10% of wasted, then the MRP quantity of sheets would be approximately 27,500 sheets required for this job.

Please Note: The Board Required calculation is the same for Log Value = “***Yes”*** and Char Value = *NET SHTS* is same board quantity calculation as Log Value = “***No”*** and Char Value = *BLANK*.

#### Logical Value = “Yes” and Character Value = NET SHTS

This option will calculate the Job Quantity equal to the Order Quantity. The number of sheets of board required known as MRP quantity on the Job File's Material Folder will be calculated without overrun and without any waste. The net sheets option will take the items Job Quantity divide by Number Up on the die times the Number Out on the Slitter or Sheeter.

For example, if the job required 200,000 boxes with a 10% then the Job Quantity would exclude the overrun and yield 200,000. If the was 4 up but this was cut 2 out of a larger gross sheet the net sheets would be 200,000 divided by (4x2) equals 25,500 without waste.

#### Yes

This will include the allowable overrun quantity from the order to calculate the finished goods items job quantity. This will change each items job quantity on the job based on the overrun percentage defined on the order line item screen. Each finished good item may have a different overrun quantity.

#### No

This will NOT include the allowable overrun quantity from the order to calculate the finished goods items job quantity. Hence, the items quantity on the job will be equal to the order entry lines quantity.

# **JOB#**

Create Job Number identical to Order# or Blank for Estimate#.

### Character Value

Character value may be set to estimate# or order# which represents estimate number and order number respectively.

#### JOBCREAT

When adding an order with an estimate number, the system will automatically create a job when the parameter *JOBCREAT* logical value is set to “***Yes”***. The job number will default to either the estimate number defined or the order number depending on the option defined here.

#### YYMMSQ#

There is also an option called *YYMMSEQ#* that will create the job number with the Year, Month and sequence number.

Please Note: This will allow a maximum of 99 jobs per month.

### Logical Value

#### No

Then the job number cannot be updated when adding new orders.

#### Yes

This will allow the job# to be changed when adding an order.

# **JOBCARDF**

Folding Job Card Ticket Format? Print During Order Entry?

### Character Value

Many options exist such as *ASI, CENTURY, FIBRE, HOP, XPRINT*, and *LIVINGSTON*. The value is used to determine the format for the job ticket.

#### ASI

The *ASI* format is a plain paper text format.

#### HOP

The *HOP* version is a two-page preprinted form that caters to multiple form combination jobs.

#### Others

The other options utilize the *XPRINT* forms utility to print on plain paper and provide email and fax capability.

### Integer Value

This value will be used for ***"S"*** sheet / Short grain layouts for certain job tickets such as Ott and Dayton.

#### 0

The number 0 will print the net sheet size and die size exactly as the dimension is displayed on the estimate layout screen.

#### 1

The number 1 will reverse the dimensions on the estimate layout screen for the Keystone Job Ticket.

### Logical Value

#### No

The job ticket must be printed via the order menu option by pressing the hot keys ***“O”-“U”-“5”***.

#### Yes

If this value is “***Yes”***, then the job ticket will print whenever the job standards is created during order entry, estimating or during job file rebuilding. This option will print the job ticket to the screen for review then provide the option to print, fax, email, etc.

When first adding an order with an estimate the program will create the job file by building the job standards, hence this will automatically output to the printer. Likewise, changing the quantity will prompt to rebuild the standards, which will reprint the job ticket.

Likewise, press the Job standards button on the estimate Layout Folder or the “***StdCreate”*** button in the Job file will prompt to reprint the job ticket.

# **JOBCARDC**

Corrugated Job Ticket Format? Print During Order Entry?

### Character Value

Many options exist such as *ASI, ARTIOS, HUGHES, MWFIBRE, XPRINT*, etc. The value is used to determine the format for the job ticket.

#### ARTIOS

The *ARTIOS* version is linked to the *ARTIOS* CAD program so that the DIE# from the estimate spec folder will trigger the Artios CAD drawing.

#### MWFIBRE

The *MWFIBRE* option is a 1-page format that does not print the box drawing.

#### XPRINT

*XPRINT* may be printed in Landscape using 10 CPI courier font or Portrait using a 17 CPI courier font.

#### Others

Hughes and Pacific and Artios print 2 pages for each form per job ticket. All options utilize the XPRINT forms utility to print on plain paper and provide email and fax capability.

### Logical Value

#### No

The job ticket must be printed via the order menu option by pressing the hot keys ***“O”-“U”-“5”***.

#### Yes

LOGICAL VALUE: “***Yes”***: If this value is “***Yes”***, then the job ticket will print whenever the job standards is created during order entry, estimating or during job file rebuilding. This option will print the job ticket to the screen for review then provide the option to print, fax, email, etc.

When first adding an order with an estimate the program will create the job file by building the job standards, hence this will automatically output to the printer. Likewise, changing the quantity will prompt to rebuild the standards, which will reprint the job ticket.

Likewise, press the Job standards button on the estimate Layout Folder or the “***StdCreate”*** button in the Job file will prompt to reprint the job ticket.

# **JOBCREAT**

Create Job Standards during OE? If the logical value is set to “***Yes”***, jobs will automatically be created when orders are added from estimates. All materials, dies, preparation, and machine routing will be downloaded to the job file so that the job ticket prints data from the job file.

Once the job is created, the job status will change to an ***“R”*** for Released. If the logical value is set to “***No”***, the job standards must be manually created through the job-costing module, therefore the job status would remain as P for Pending until released.

### Character Value

The Character Value is also used as a prefix to the job number when adding jobs in job costing directly from an estimate. The first letter in the character value is for adding jobs directly from an estimate. The second letter in the character value is for adding jobs without an estimate, which requires adding all materials and machines manually.

### Decimal Value

Decimal value dictates in billable prep costs are transferred to the job file.

#### 0

This currently does not move the costs from estimating to the job file, if the costs are billed separately.

#### 1

The Miscellaneous Materials and Prep costs that are billed separately would also be listed on the job file.

### Integer Value

#### 0

Set the number to 0 to not allow the job number to be changed.

#### 1

Set the number to 1 to allow changing the job number when creating jobs via the job cost module.

Please Note: Job numbers created via order entry are determined by the JOB # control parameter.

### Logical Value

#### No

If the logical value is set to “***No”***, the job standards must be manually created through the job cost module, therefore the job status would remain as ***“P”*** for Pending until released.

#### Yes

Logical Value = “***Yes”***, then jobs will automatically be created when orders are added from estimates. All materials, dies, preparation, and machine routing will be downloaded to the job file so that the job ticket prints data from the job file. Once the job is created, the job status will change to an ***“R”*** for Released.

# **JOBDATESMAX**

Currently able to enter a due date beyond 6 months from start date and save it, but when you rebuild the standards the date defaults to 6 months from today. They need to be able to enter the due date and not have it default to 6 months if a date beyond 6 months is entered.

Please Note: This can cause severe slowness to schedule board as system must build downtimes up to the last number.

There may need to be a ***“N”-“K”-“1”*** Parameter to limit date?

### Integer Value

Integer Value will be Oldest Date from Today.

### Logical Value

#### No

Logical Value = “***No”*** will not use this logic.

#### Yes

Logical Value = “***Yes”*** will invoke this logic.

# **JOBPASS**

***“N”-“K”-“1”*** Job Pass logical value = “***Yes”*** will prompt for password. ***“N”-“K”-“1”*** Job Pass character value will house the password.

Need to be able to set security on the unapproved button.

Once a Factory ticket is transferred to ***“J”-“U”-“2”***, they would like the ability to set security so that only the CSR that transferred to ***“J”-“U”-“2”*** could Unapproved the Job.

Click button will search ***“N”-“K”-“1”*** Job Pass logical value.

# **JOBQTYCUST**

Add job through ***“J”-“U”-“1”*** job file to create Job quantity with overrun from the customer file. Please note, jobs created via order entry will continue to use the overrun percentage from the order. The exact job quantity for jobs created via order entry depends on the parameters setting of ***“N”-“K”-“1”*** JobQty.

### Integer Value

#### 0

This will not prompt to import customers overrun percentage to calculate the job quantity. When logical value is “***Yes”***, the program will automatically use the customers overrun percentage to calculate the job quantity.

#### 1

This will prompt to import customers overrun percentage to calculate the job quantity. If they answer “***Yes”***, the program will automatically use the customers overrun percentage to calculate the job quantity. If they answer “***No”***, the program will calculate the job quantity without the customers overrun quantity.

### Logical Value

#### No

This will not use the customers overrun percentage.

#### Yes

This will turn on the logic to import the customers over run percentage when calculating the job quantity.

# **LABEL**

Default label for Qty/Set on Page 1 of Estimate. The character value is used to type any seven characters to display on page one of the estimates.

Two definitions normally are used for this field. Qty/Set, which means quantity per, set for estimate for sets such as point of purchase displays or multiple part boxes. Ft/Roll, which represents foot per roll, used when estimating rolls of single face, which causes the price per roll to calculate on the summary section of the estimate.

# **LASTSHIP**

Order entry defaults for due date and last ship date.

### Character Value

The character value options are *FIBRE* or *ASI*.

#### ASI

The *ASI* logic will calculate the due date and last ship date as the same date by adding the field called whs/mfg days from the customer file to the order date.

#### FIBRE

When the character value is *FIBRE* and the estimate type is blank or corrugated, the integer value will be used as a number of days to manufacture the boxes, hence the default orders due date.

For estimates that are folding carton types, the integer value (number of manufacturing days) will be multiplied by the decimal value to determine the orders due date.

For example, if the decimal value were 2 and the integer value was 14, folding orders would add 28 days to the order date as the default due date. To calculate the orders Last Ship Date (warehousing days), only the decimal value days will be added to the order date.

For orders with a blank estimate number (stock box) or a corrugated estimate, the number of days in the customer field called whs/mfg days are added to the order date to determine the last ship date. For orders for folding carton estimates, the whs/mfg days from the customer file is multiplied by the decimal value, then added to the order date as the default last ship date.

# **LAYOUT**

Reverse Labels for the layout machine to match sheet? The estimate screens two field labels for the layout machine width and length to read W and L or L and W. This is used to have the machine file minimum and maximum length and width dimensions coincide with the paperboard’s width and length dimensions.

Please Note: This is better used by sheet fed operations since the board’s length dimensions normally lays across the machines width and the board’s sheet width runs across the machine length. Roll fed equipment sheet dimensions and machine dimensions are synonymous.

# **LOADPLAN**

Department Codes to Exclude from Planner. Convert Sheets to Blanks? Department codes from the department file may be entered in the character value field which will eliminate all machines in that department from downloading into the scheduling when the scheduler down loads machines to the planner scheduling software.

# **LOADTAG**

Special load tag print out options.

### AUTOPRINT

The *AUTOPRINT* logic of Label Matrix can automatically print the load tag so that the ***“O”-“U”-“7”*** Load tag program will print immediately.

### Character Value

*ASI, BarOne, SSLabel, SSBarOne* and *Triad* dictate what bar code software is used to create the proper text file format.

### Decimal Value

#### ?

This will default the number of load tags to 0 so that the number of tags to be created must be manually entered.

#### 0

This will generate just 1 load tag. This option would be used when producing load tag for each pallet produced on the production floor. The *N-K-Caselabel* value will allow scanning a bar coded case label to automatically preload the load tag criteria.

#### 1

This must be 1 to generate the total load tags required by dividing the order quantity by the pallet count. The ASI version will create one additional tag that will have a blank unit count. When receipts are scanned via sharp shooter, the program will prompt for a unit count for this load tag.

### Integer Value

This is used to set the number of duplicate load tags per pallet. The customer file No. Load Tags field will override this field. To set all customers to just 1 load tag per pallet, then set this to 1. To print 2 or 4 duplicate tags per pallet, the customer file No. Load Tags should be 2,3 or 4.

### Logical Value

#### Yes

Set to “***Yes”*** to scan a Case Tag Label to print a Load Tag and bypass the existing load tag print menu. The case label must have a bar code that represents the FG item/job number.

The format must be X(15) 99999999 and this field is downloaded to the text file as well as the Sharp Shooter case label file via the O-U-10 case label program. The system will prompt to *SCAN 1 CASE LABEL* Bar code which is the FG Item # and Job #. Once the case label is scanned, the fields on the normal *LOADTAG* screen will be automatically populated with the job number, order number and finished goods item number as beginning and ending numbers.

This normal print selection menu will be bypassed and then the screen will import the case tag fields to update the quantity per unit/case, units/cases per pallet and partial unit/case. Once *SAVED*, the system will download the data and the warehouse person can print the *LOAD TAG* label via the Label Matrix software.

# **LOGOCOLOR**

This field will change the *XPRINT* forms for the customer with the active code type equal to X. The customer type X in the customer file is currently used for the company name and address for all *XPRINT* formats when the logical value is “***Yes”***. This option will change the color of the company name and address to black or red. This will do all forms including:

|  |  |  |  |
| --- | --- | --- | --- |
| AR Invoice | OE Invoice | Purchase Order Print | Release Ticket |
| Bill of Lading | Order Acknowledgment | Quote |  |

### Character Value

Change the character value to *RED* or *BLACK.*

# **MACHFILE**

Reverse W & L Labels in Machine File? The logical value set as Yes will reverse the width and length labels in the machine file.

### Logical Value

#### Yes

“***Yes”*** will cause the machine file to resemble the minimum and maximum sheet dimensions. This is used to have the machine file minimum and maximum length and width dimensions coincide with the paperboard’s width and length dimensions.

Please Note: This is better used by sheet fed operations since the board’s length dimensions normally lays across the machines width and the board’s sheet width runs across the machine length. Roll fed equipment sheet dimensions and machine dimensions are synonymous.

# **MSFCALC**

Square Foot Calculation method. Foldware / 144, Corrware x .007.

### Character Value

The character value is used to determine the square foot and square inch calculation throughout the system.

#### CORRWARE

*CORRWARE* with multiple length times width times .007. *FOLDWARE* is the only accurate calculation, however many board suppliers still use the *CORRWARE* method. The *CORRWARE* method will increase your cost on the purchase order and increase the cost of the estimate since the square footage is inflated.

#### FOLDWARE

*FOLDWARE* will multiple the blank width times the blank length and divide by 144 inches.

# **NOTEPAD**

Output Reports to Microsoft Notepad

When printing a report and selectin the output to screen, the report will display in a text file or directly to Microsoft notepad so that a full screen is displayed. The ***“N”-“K”-“1”*** Notepad parameter dictates the functionality of reports sent to output directly to Microsoft NotePad.

This provides search capabilities and provided for more dynamic scrolling. To print from notepad requires selecting a font so the report is printed correctly. For printing, the best option is to return to the Advantzware print selecting and select the output to printer.

### Character Value

#### NOTEPAD

The users defined in the user group called Notepad will be the only users that will display reports to Notepad. The User Group must be created under the network administration, change user groups menu (***“N”-“C”***).

#### SPACES

All users will output reports to Notepad.

### Logical Value

#### No

This will turn this feature off and output all reports to a text file.

#### Yes

Reports will output to Notepad.

## Change User Groups

To set the notepad by user ID, a new user group must be created. This must be called *NOTEPAD*. The User Group must be created under the network administration, change user groups menu (***“N”-“C”***).

Each user ID that desires to display reports in Notepad must be listed as a user. The User Id must match the name defined under system administration’s users file.

# **NOTES**

Create Spec Code notes automatically during quotes, order entry and invoicing? If the logical value is set to “***Yes”***, then customer service (CS) notes are created automatically when adding or updating quotes, orders and invoices including the user ID, quote number, order number or invoice number respectively plus the quantity and sell price. To view the notes, press the book icon.

The ***“Book Icon”*** for finished goods which is available via order processing, estimating, job costing and finished goods will be automatically updated when adding an order line, changing an order line item quantity, deleting a line item and invoice posting.

The *SPEC* code CS will update the current date, time and user ID will transfer to the note file for that item. The Note title will display Order# 9999999 Qty 999999999 Sell Price 9999.99 When posting the invoice, the note title will read INV# 999999 Qty 9999999999999 Sell Price 9999.99

Changing the order quantity, price or UOM will also write a line. When adding or updating a quote will also update this if the FG item exists. With Quote #, Quantity, Sell price / ?? Also add this information in the notes section so that multiple quantities are added into the body of the notes. The title line will only hold 1 quantity. The body of the text will show the same information when pressing the ***“Update”*** button.

### Character Value

The department codes entered on the character value field will be exclude the department notes from the job card. This will allow entering notes that may be viewed on the estimate screens, but will not print on the job ticket.

### Logical Value

#### No

This will stop notes from creation, hence will not print on job ticket. If the logical value is “***No”***, then the notes will not be created.

#### Yes

This will evoke this logic and add Spec Code CS notes to the finished goods item. The notes are automatically created only when the logical value is “***Yes”***.

# **OEAPROV**

Update order status after approved by credit? This flag pertains to approving credit held orders, which the system has placed on hold due to order limit, credit limit or invoices older than the invoice date plus the grace period days found in the customer file.

### Logical Value

#### No

If the value is “***No”***, then after a credit held order has been approved, the order status would never change back to Hold when changing the order quantity, price etc.

#### Yes

If the logical value is “***Yes”***, then the current logic would prevail for placing orders on hold when prices or quantities change.

# **OEAUTOFG**

Option to automatically prompt to create purchase orders for purchased finished goods. This will display the list of vendors for the item from the vendor cost matrix similar to automatically ordering board for jobs.

Once the vendor is selected, the purchase order will be created with the FG item; Order Qty will equal the Purchase Order Quantity, Cost, size, item name, description and Order number transferred to the PO. Likewise, the cost will transfer back to the customer order.

Prompt for PO Date and Due Date prior to creating the PO. Lastly prompt for PO Type normal or Drop Ship. Drop Ship will pull from the release ship to on the order. If the vendor matrix is not created, the program will prompt for the purchase cost.

Please Note: The general ledger number will also transfer to the purchase with the same logic as when adding the finished goods manually to the purchase order.

### Character Value

Dictates when to automatically create a purchase order for a finished good item. If the fields in the finished goods item file are defined as below.

Please Note: The purchased/manufactured field in the Finished Goods file must be set to Purchased. The character Value options are as follows:

#### ANY

If any one of the above are true, will prompt to automatically create a purchase order.

#### AVAIL < 0

Purchase orders will be created for only F.G. items which have a balance of Quantity Available Under or < the Customer Order Quantity. This means that the order quantity exceeds the item's available inventory.

#### LOTCNTRL

Purchase orders will be created for only F.G. items which have the field called "Lot Controlled" checked.

#### NONSTOCK

Purchase orders will be created for only F.G. items which have the field called "Stocked" not checked.

# **OEAUTOPO**

Automatic or Manual PO Creation from Order Entry? Multiple Jobs per PO?

### Character Value

The character value provides different options when creating purchase orders for board directly during order entry from estimates. Valid character options are *MANUAL, AUTO* and *AUTORM*.

#### AUTO and AUTORM

The *AUTO* and *AUTORM* option will automatically create a purchase order during order entry by allowing the customer service clerk to select a vendor and due date.

The *AUTORM* will also create a unique raw material board item using the same code as the finished goods number with a ***“T”*** suffix.

#### MANUAL

The *MANUAL* option will not create a purchase order during order entry.

### Logical Value

#### Yes

If the logical value is set to “***Yes”***, this will allow multiple jobs for board on a single purchase order.

# **OEAUTOPR**

*N-K OEAutoPrep* Prompts to Create PO from Order Entry. System will creation purchase order for prep material based on new :***”N”-“Z”-“3”*** material types below:

|  |  |  |
| --- | --- | --- |
| ***Original Code*** | ***Material*** | ***Becomes New Code*** |
| D | Prep Cutting Dies | 8 |
| F | Flat Die | X |
| P | Printing Plates | 7 |
| R | Rule/Rotary Dies | Y |

New prep material types will replace ***"M"*** (Miscellaneous) materials for inventory control and purchases validations. Raw goods receipts for these material types will automatically update the schedule board based on the new material types. The users will be able to color code jobs waiting for plates or dies. Best of all, the system will update the board when the plates and dies are in received.

Please Note: A series of modification tasks were required to integrate Prep.

Job standards creation will transfer all Misc. & Prep material to the job file's material folder. When the order line has a status of *NEW*, then purchase orders will be created for all Plate and Die Prep codes on the estimate in the job file regardless of *SIMON* code. The AutoPrep will create PO for all prep material regardless of SIMON codes. In summary, modification will

* Automatically prompt to create Purchase Order,
* Automatically update cost from Purchase Order back to the MISC folder of Order.
* Automatically updates the Schedule Board when Dies or Plates are Received
* Automatically updates the Schedule Board when Dies or Plates are on Hand.
* Automatically create Raw Material Item Codes to Match the Plate or Die Number.
* Automatically cross reference Plates and Dies to a Raw Material Item Code.
* Automatically update the Job -Material Folder.

### Logical Value

#### No

This will not prompt to create purchase order for prep material.

#### Yes

This will prompt to add purchase order for prep material such as plates or dies.

# **OEBROWSE**

Clicking the ***“Show Previous”*** button will look at the integer value in the system control file under *OEBROWSE* and display that many previous records. Clicking the button a second time will continue navigating back through in intervals of this number. Clicking the ***“Show Next”*** button will navigate forward though the records at that same interval.

# **OECARRIER**

Default carrier from Header or Shinto: The character value is used to select the default-shipping carrier during order entry. The options are the order Header or customer Ship to location.

# **OECLOSE**

Methodology to close customer orders.

# **OECOMB**

Order Entry Tandem and Combination Options.

### Character Value

Character value will house the password when the logical value is “***Yes”***.

Character Value options dictate when customer orders are closed. Option are *ONHAND=0* or *COMPLETE*.

#### COMPLETE

This will close the order when the ship quantity is within the under run of the order quantity, regardless of the quantity on hand.

#### ONHAND = 0

This will close the order only when the finished good on hand is zero for all finished goods items.

For example, if the quantity produced is greater than the total quantity shipped then the inventory balance would be greater than zero, hence the customer order would remain open.

Likewise, an overrun on the job is more than the 10% allowable overrun, then the order will remain open until all the items have been shipped making the on-hand quantity = 0 for this particular job number.

### Integer Value

#### 0

This will not prompt and will use existing logic thus adding all items immediately to the order entry line screen.

Please Note: The finished goods item code must exist on the estimate to automatically add the lines to the order, otherwise the program must prompt for each finished goods item code.

#### 1

All orders for combination estimates upon saving the order Header Screen will prompt "Do you need to update items on order?" “***Yes”*** would pause for each item, “***No”*** would proceed to add all items immediately as the current logic works. To enter unique customer purchase order numbers per line item will require setting this to 1.

### Logical Value

#### Yes

This will prompt for security when pressing the ***“Delete”*** button for Combination estimates. This is only prompt for Order for Folding Carton *COMBINATION* estimates. The ***“Delete”*** button on Line Items should prompt for password for Tandem estimates. Only combination estimates will prompt for the password.

# **OECOMM**

Display Commission Dollars and % in Order Entry & Invoicing?

### Logical Value

#### No

Commissions will not display.

#### Yes

The commission is displayed during order entry and invoicing.

### Character Value

The character value options are *MATRIX* or *MANUAL*.

#### MANUAL

If *MANUAL* is selected, then the commission percentage entered on the order header screen is used as the default for all line items and cannot be changed.

#### MATRIX

If the value is set to *MATRIX*, then the commission percentage will import from the salesman matrix file.

# **OECOUNT**

Default Order Entry Count to Case/Bundle Count?

### Logical Value

The logical value is used to transfer either the case count/bundle count or pallet count to the order entry line item screen.

#### Yes

Set the value to “***Yes”*** to transfer either the case count or bundle count. Folding carton clients would normally default to “***Yes”***, whereas corrugated clients would select no. “***Yes”*** will invoke the logic for updating estimate unit count or case count from the order line.

#### No

Set the value to “***No”*** to default to the total unit or pallet count.

If the user changes the count, description, etc. in order entry the FG item file and estimates are updated based on the ***“N”-“K”-“1”*** *OEFGUPT* character fields. Finished good item fields are updated via order entry for each field such as count, part number, description. Hence when updating the count field on the order, the logical value dictates to update either the case count or bundle count.

# **OECREDIT**

Update order entry status after order has been approved by credit? When the system places and order on credit hold, the order must be approved via the ***“B”-“6”*** credit approval menu. Once approved, the system could place the order on hold again if the quantity or cost changes if the logical value is “***Yes”*** If the logical value is “***No”***, the system would never place the order on hold after approval.

### Logical Value

#### No

If the logical value is “***No”***, the system would never place the order on hold after the order has been approved via the O-C menu.

#### Yes

Once approved, the system could place the order on hold again if the quantity or cost changes, whereby the customer order limit or credit limits are exceeded if the logical value is “***Yes”***.

# **OECUSTPART#**

### Logical Values

#### No

The “***Update”*** button in Order Entry will NOT update the Customer Part# on the Totals Folder for that Finished Goods Item Code. Likewise, “***No”*** will NOT update all the older orders customer part number when updating or adding a new order for this finished goods item code. Thus, the customer number will be different on older orders than on newer orders for the same finished goods item code.

#### Yes

The “***Update”*** button in Order Entry will update the FG items Total Folder for that Customer's Part Number. In addition, “***Yes”*** will also update all the older orders customer part number when updating or adding a new order for this finished goods item code. Thus, the customer number will always be the same throughout all open and closed orders for the same finished goods item code.

# **OEDATE**

New system control parameter called OEDATE.

### Logical Value

#### No

“***No”*** will not allow the order header date to be modified.

#### Yes

“***Yes”*** will allow the order header date to be modified.

When you *ADD* an order the date that the system assigns to the order (order date) will be not be modifiable. This would need a system flag so that current users who do not want this changed could turn off this feature.

# **OEDATECHANGE**

### Logical Value

#### No

This will not force entry of Reason Code

#### Yes

This will force entry of Reason Code for a date change. ***“O”-“U”-“1”*** “***Update”*** Button on Release Tab & ***“O”-“T”-“1”*** Screen will prompt for Reason Code for the Date Change. Changing release date will update the User ID on the release line.

***“O”-“F”-“9”*** will house Date Change Reason Codes. Data Examples:

|  |  |
| --- | --- |
| ***Code*** | ***Description*** |
| PressCap | Press Capacity BackLog Problem |
| VendLate | Vendor Late on Delivery |

***“O”-“R”-“14”*** On Time Delivery Report Changes. New Toggle Boxes:

|  |  |
| --- | --- |
| ***Toggle Box*** | ***Description*** |
| Promise Date | Current report looks at BOL date versus Release Date |
| Promise Date or Release Date |  |
| Print Promise Date and Reason Code on Report |  |
| Compare BOL Date to ***“O”-“U”-“1”*** Item Promise Date |  |
| Print Percentage per Reasons Code |  |

Check Box on ***“O”-“U”-“1”*** Release Tab will show the Date and Notes for date changes of a release.

## Security

Program Master security program = OEDateChg.r is used for security by Group or User ID for the Update Button on the Order’s Release Tab. If a user updates Date of Release, the program will prompt for Reason Code. Their User ID or user group must exist in Program Master.

# **OEDELETE**

Delete items from folding tandem or combo estimates when deleting items from order.

### Logical Value

#### No

If the logical value is “***No”***, the item cannot be deleted from the order, therefore the estimate must be first modified, then the order can be rebuilt via the add button on the order line item screen. Most clients will consider “***No”*** the safer alternative.

#### Yes

If the logical value is “***Yes”***, the system will allow the order enter clerk to delete a line item from the order, which will simultaneously deletes the item from the estimate.

# **OEESTCOM**

ESTIMATE COMMISSION

### Logical Values

#### No

This will calculate with current logic via ***“N”-“K”-“1”*** OEComm character value.

#### Yes

This will calculate on new Estimating Margin Logic. This will import the commission based on the margin percentage. The commission is not stored in a field in estimating, therefore we must find the margin based on the quantity and sell price then find the commission from the sales matrix. The estimating *PRINT* folder has a margin percentage by quantity and sales price that must be used to find the commission percentage.

Then find margin. Once we have the margin, we find the product category for the item then the customer type for the customer and sales representative on the estimate. Then we will have the fields required to find and import the commission percentage.

Please Note: If the margin is below the first field on the matrix, then we will import the lowest commission from the first quantity on the matrix. For example, a negative margin would import the lowest commission percentage.

When adding order with an estimate the program must search the print folder for a sales price for a quantity. Additional modifications added the COMM % to the estimates WHATIF folder to be used during order processing. However, the quantity must exist on this folder to import to the order.

# **OEEXPORT**

New Batch Download at 12AM each day. Corporate office process of picking up the exported file is   
as follows:

A) Delete FCORINTG.BAK

B) Ftp FCORINTG.DAT to Corporate Office

C) Rename FCORINTG.DAT to FCORINTG.BAK

Each line item on an order will output to the file format on the excel sample.

1) Each item on an order will be a separate record per item on the order.

2) The (25) release number fields should be used for the customers unique shipping release id purchase order number.

3) Pallet Counts will be the Default from the ORDER Entry Screen

4) HAVE ready date will be the DUE DATE from the Order Header

5) AGE DATE will be the 1st receipt date. The Corporate web software calculates the aged days from this date.

# **OEFGUPDT**

Update the following Finished Goods item fields during order entry? Estimate number, Sell Price, selling unit of measure, unit count, item name, item description 1 & 2, job number and vendor.

The previous fields are transferred to the line item screen of the order from estimating for custom orders or via the finished goods item file for stock or purchased items. Many times, the information may be changed during order entry, therefore this feature provides the ability to update the finished goods item.

### Integer Value

The integer value and character value values are used to denote which field should transfer from the order to the item file. The integer value is used to update the estimate number whereby a 1 is effectively answering yes to update the item, whereas a 0 stops the update.

Each letter on the character value represents the fields following the estimate number, therefore the letter “***Y”*** would represent a “***Yes”*** to update the finished goods item for that field.

### Logical Value

#### No

If the logical value is set to “***No”***, then the system will update without prompting.

#### Yes

When the logical value field is set to “***Yes”***, then a menu will display to modify the setting established here.

# **OEIMPORT**

Functionality is activated by setting the ***“N”-“K”-“1”*** *OEIMPORT* logical value = “***Yes”***.

The *OEIMPORT* Character value field is used to identify the folder from which batch imports can be run. This is accomplished by simply hitting “Run Process” without specifying a single file path. The batch import will import every file that is located in the batch folder path, one file per order.

# **OEINQ**

Sort Order Status inquiry by due date and last jobs first.

### Logical Value

#### No

If the logical value is “***No”***, the inquiry is listed ascending by order number and shows the cost in place of the due date.

#### Yes

When the logical value is “***Yes”***, the cost does not display on the screen and is replaced in sequential order due date for each line item. In addition, the finished goods history button on this screen is sorted by descending transaction date with the most current date first. This option is very quick to discuss multiple open orders with a customer.

# **OEITEM**

Allow adding wrong customer items to another customers order? “***Yes”*** would be the current logic, which provides prompt. If the Logical value is “***No”***, then the prompt would still display, however the user could not enter a “***Yes”*** to continue.

### ALLIANCE

Enter the disk drive name and folder for output of the file to reside. Alliance will need to know where to pick up the file from your server.

### CORRTRIM

Enter the disk drive name and folder for output of the file to reside. Corrugated Technologies will need to know where to pick up the file from your server.

### POEXPORT

PO Export to Corrugator Scheduling. This file is used to export purchase orders for board to corrugators electronically. The following must be set to export data. Set the logical value to “***Yes”*** to evoke this feature. Change the character value to *ALLIANCE* or *CORRTRIM* depending on the Scheduling Software that your vendor utilizes.

The purchase order will export all the pertinent data the board vendor requires including your company name, ship to code, ship to address, city, state zip, board code, board description, adder codes, cost, due date and more.

### Vendor File

The EDI field must be set to “***Yes”*** in the vendor file. Only vendors with this denotation will receive purchase orders.

# **OEPARTS**

Show insufficient component quantity for sets during Order Entry?

### Logical Value

#### No

If the logical value is “***No”***, the pop-up component list will never display.

#### Yes

When the logical value is “***Yes”***, the components inventory balances will pop up on the screen when there are insufficient components to fulfill the order quantity for the set.

# **OEPROMPT**

Prompt for duplicate purchase order number during order entry? When the logical value is “***Yes”***, the system will display other orders for the customer with the same purchase order number. Set the logical value to “***No”***, to prevent the warning from displaying.

Please Note: A blank purchase order will have no effect on the warning, however constantly using a word such as *VERBAL* as the purchase order number will cause the warning to display. If this message stops one order from duplicating, it will save money.

# **OEPOPUP**

When the logical value is “***Yes”***, then the character value is used to define the *SPEC CODE* that will pop up during order enter. Finished goods items may have unique specification notes that will automatically display when adding or changing an order line.

### Character Value

Department codes listed on the character value will not print on the *ASI* or *ARTIOS* job ticket even though the department notes were added to estimating. Each department should be separated by a comma.

### Logical Value

#### No

Change the logical value to “***No”*** and the notes will not be created.

#### Yes

If the logical value is set to “***Yes”***, then the *SPEC* notes defined in estimating book icon will display on item page of the order whenever an order is added or changed for that estimate. In addition, the CS or customer service notes will automatically be created for the finished good item whenever an order is added, the price or quantity is changed, an item is invoiced, or an item is quoted provided the item had been created.

### Notes

Display Manufacturing Notes during order entry?

# **OEPREP**

New option to delete Prep Changes from the Estimate.

### Logical Value

#### No

If the logical value is “***No”***, then the prep charges will be changed to ***"N"*** no Charge from ***"B"*** Billable.

#### Yes

Logical Value = “***Yes”***, the prep charges will be deleted.

Please Note: The amortization percentage must be 100%, otherwise, the prep code will remain for future billing.

## Simon Code

When the Simon code is an **"S"**, after the first order has been billed for the line item pertaining to that forms prep charge, the prep charges will be deleted from the estimate. .

Please Note: If the prep charges are billed by Form#, then the prep charge would be deleted based on the FG item that was billed. Therefore, if the first item was billed, then only the plate charge for that item/form should be billed, hence only that prep item should be deleted from the estimate.

# **OEPREPPO**

When the order line has a status of *NEW*, then purchase orders will be created for all Plate and Die Prep codes on the estimate. New DB field in the *PREP* file will be used to transfer to the *MISC* folder of the order as well as transfer to the Material File of the Job file rather than the Prep Folder of Job File.

If the raw material item code in the Prep file in blank, the system will automatically create a raw material identical to the PREP code. Job standards creation will transfer all miscellaneous and prep material to the job file's material folder. Currently, this data is transferred to the *PREP* Folder. This is better logic because the PO and material receipts never ties together.

ASI will create new unique material types for the following PREP material:

|  |  |  |
| --- | --- | --- |
| ***Original Code*** | ***Material*** | ***Becomes New Code*** |
| D | Prep Cutting Dies | 8 |
| F | Flat Die | X |
| P | Printing Plates | 7 |
| R | Rule/Rotary Dies | Y |

Please Note: The new material types will be treated as ***"M"*** (Miscellaneous) materials for inventory control and purchases validations. Lastly, raw goods receipts for new material types will automatically update the schedule board based on the new material types. The users will be able to color code jobs waiting for plates or dies. Best of all, the system will update the board when the plates and dies are in received.

This feature will:

* Automatically prompt to create Purchase Order,
* Automatically update cost from Purchase Order back to the MISC folder of Order.
* Automatically updates the Schedule Board when Dies or Plates are Received
* Automatically updates the Schedule Board when Dies or Plates are on Hand.
* Automatically create Raw Material Item Codes to Match the Plate or Die Number.
* Automatically cross reference Plates and Dies to a Raw Material Item Code.
* Automatically update the Job Material Folder.

### Logical Value

#### Yes

This will prompt to create purchase order for Plates & Dies during order entry when creating the job from the estimate.

# **OEPREPTAXCODE**

When this is defined, this Tax Code will Display on the Orders MISC folder.

When this is defined, this Taxable Field on the *MISC* field will be “***Yes”*** regardless of Customer Ship-to Taxable Toggle or Customer View Taxable Field.

Prep (Miscellaneous Folder of Order) such as plates are not shipped to the customer but normally used in the manufacturing plant for making the boxes. Thus, when billing customers for *PREP*, the tax code should be based on the Tax Prep Code.

### Logical Value

#### Yes

***“N”-“K”-“1”*** *OEPREPTAXCODE* Logical Value = “***Yes”*** and Customer Prep Tax Code is not Blank, then *PREP* charges on *MISC* folder of the Order will default the *TAXABLE* Field to “***Yes”*** and Display the Prep Tax Code.

# **OEPRICECHECK**

The ***“N”-“K”-“1”*** *OEPRICECHECK* parameter is used to import the Sell Price for Orders without an Estimate Number. Many just in time manufactured items, farm out purchased boxes and packaging supplies may have an estimate number attached to the finished goods file. Therefore, there may be a valid quote attached to that estimate number in the ***“E”-“Q”*** Quote file.

Advantzware has a variety of selling prices but there is a definite hierarchy. First, if the order has an estimate, then the quote file is used to import the sales prices. If the order with an estimate does not have find a quoted price, then the sell price from the ***“I”-“F”-“1”*** item file will be imported. If the order does not have an estimate, the ***“N”-“K”-“1”*** *OEPRICEMATRIX* dictates the priority.

The first priority is an existing quote, then the next priority is the ***“O”-“F”-“3”*** sales matrix, which has a priority sequence by customer, then customer type, then finished good item code. If a price matrix does not exist, then the program will use the ***“N”-“K”-“1”*** *OEPRICECHECK*.

### Logical Value

#### No

When adding orders without an estimate number, the program will import sales price from either the ***“O”-“F”-“3”*** price matrix or ***“I”-“F”-“1”*** finished goods file. In addition, a user may override and manually type the sales price on the Order *ITEMS* folder.

#### Yes

When adding orders without an estimate number, the software will check for estimate number on ***“I”-“F”-“1”*** Item file, then search for last quoted price for that item. If the price entered on the Order Line item is different from the last quoted price a warning message will be displayed

Please Note: The ***“O”-“F”-“3”*** Sales Price Matrix will not be used if the Finished Goods item has an estimate and a quote exists for that estimate. If a quote does not exist, the program will search the price matrix to import a selling price. If the ***“O”-“F”-“3”*** price matrix does not exist, then the sales price will import from the ***“I”-“F”-“1”*** Finished Goods File.

### Price Matrix

You can still click the *MATRIX* tab to see any prices associated with this finished goods item.

### Quoted Prices

When the logical value = “***Yes”***, the Order Entry program will automatically search for an existing quoted price and display the matrix below. However, even if the logical value = “***No”***, the button *QUOTED PRICES* will still show any quoted prices.

### Release Tab

The Sell Price on the Release tab was designed for special pricing for overruns. When defined, this will override the sales price on the *ITEMS* Tab. Normally, the first release would show zero price so that the *ITEMS* tab price will transfer to the invoice.

An extra release is created for the overrun and a special price is entered. If you were shipping a release a *ZERO* Cost, you must set the field $0 = yes., then the sell price of $0 on the release will be transferred to the invoice.

# **OEPROMPT**

Prompt for duplicate purchase order number during order entry?

### Logical Value

#### No

Set the logical value to “***No”***, to prevent the warning from displaying.

#### Yes

When the logical value is “***Yes”***, the system will display other orders for the customer with the same purchase order number.

Please Note: A blank purchase order will have no effect on the warning, however constantly using a word such as *VERBAL* as the purchase order number will cause the warning to display. If this message stops one order from duplicating, it will save money.

# **OERELEAS**

When adding new orders, create scheduled release? With Last ship date or due date?

### Character Value

Use character value of either *DUE DATE* or *LASTSHIP* as the default date for creating the scheduled release date when adding a scheduled release.

### Logical Value

Current logic is based on Last Ship Date. New Logic must be added to create release with Due Date from the Line Item Screen.

#### No

If the logical value is “***No”***, then no scheduled releases are created when adding orders.

#### Yes

If the logical value is “***Yes”***, then scheduled releases are created automatically when adding new orders.

# **OERELEASEPOPUP**

### Logical Value

#### No

This will always have the toggle boxes unchecked.

#### Yes

This will always have the toggle boxes checked.

When modifying the date on the release, the attached pop-up shows date choices to be modified and defaults with every box checked.

# **OEREORDR**

Use Actual Release to calculate the quantity allocated during order entry.

During order entry, the items inventory balances are displayed which show a RED block when the reorder level is below the quantity available.

### Logical Value

#### No

If the logical value is “***No”***, then the total order quantity will always equal the quantity allocated for this order, which would be 10,000 in this example.

#### Yes

Set this to “***Yes”*** to control inventory by future delivery dates.

When the logical value is “***Yes”***, the allocated quantity is determined by the total released quantity up to the current computers date. Hence an order quantity of 10,000 with 1000 shipped per week would have only 1000 allocated the first week, then 2000 the second week, etc.

# **OESCREEN**

If your customer service or order entry personnel get the order quantity confused with the Sell Price unit of measure, this is your solution.

### Logical Value

#### No

Set the logical value “***No”*** to not display the order quantity UOM.

#### Yes

Set the logical value “***Yes”*** to display order quantity UOM during order entry.

Please note, valid unit of measures may need to be added to the system administration UOM file under ***“N”-“Z”*** menu.

# **OESHIP**

Ship Components Separately from Set Item Part?

### Character Value

Currently, when adding an order and the estimate number is blank on the order header screen, multiple estimate numbers may be added to the line item screen.

#### EST SHIPTO

This will import the ship to code for each estimate. Hence, each item added on the order line could import a different ship to code.

#### OESHIPTO

Prompt for import from the estimate. Additional items will default to the ship-to from the first item.

### Logical Value

#### No

This will only show the Set Item Number and will only all shipping the Set Item.

#### Yes

This will add components for Unassembled Sets to the order entry screen, thus will show both the Set Part number as well as all the component parts. Each component may be shipped individually in any quantity as the items are shipped.

When the bill of lading is posted the component inventory will be reduced and the program will check create an invoice and reduce the set item quantity on hand that can be invoiced. This logic will search all components shipped on this order to determine how many complete sets have been created, but not invoiced. Therefore, the last component shipped to complete the set will trigger the invoice to be created. If no sets have been completed, then no invoice will be created for the set item.

### Notes

Please Note: When invoicing an unassembled set under this scenario, only the components shipped on the last bill of lading will be reduced from the on-hand quantity. Whenever invoicing an unassembled set, the sets on hand balance and quantity allocated will be reduced as the current logic current exists. During order entry, the component items will not allow deleting the component item.

In update mode, the items unit count may be changed. When adding a unassembled set which is set to ship components separately, each component release will be created whenever the set scheduled release is create. Each release quantity may be changed. Likewise, the order quantity will be automatically created by multiplying the set order quantity by the quantity / set defined.

Please Note: The ***“N”-“K”-“1”*** *OESHIP* flag will set the default for sets to Assembled or Unassembled via the Logical Value. When the Logical Value is set to “***Yes”***, then set part numbers will be created as *UNASSEMBLED* sets as the default. If the value is “***No”***, then the FG set item number will be defined as *ASSEMBLED*. When receiving Assembled sets, components are deducted from inventory and the set item is added into quantity on hand. When posting FG receipts for sets that are *UNASSEMBLED*, both the set item and the components on hand inventory are increased when the set item receipts are added.

# **OEUSERID**

New ***“N”-“K”-“1”*** *OEUSERID* parameter. Update User ID when updating order?

### Logical Value

#### No

“***No”*** will keep ID to original user ID. Current logic will update the user ID when the order is modified.

#### Yes

Logical Value = “***Yes”*** will be default.

Please Note: Reports such as ***“O”-“R”-“16”*** have a print selection range for User ID based on the user ID. This will print from User ID on order header therefore when the logical value is “***No”***; the original users that entered the order will appear. If the logical value is “***Yes”***, then the last user to update the order will print on the report.

# **PACKSLIP**

Bill of Lading Print Selection Toggle Box " Print Bar Coded Pack List?.

This will create a text file similar to the load tag creation text file, allowing them to print a bar-coded packing slip to accompany their Bill of Lading.

### Character Value

Character Value to House the Disk Drive path of the *TEXT* file for the of Packing slips.

*TEXT FILE FIELDS* Included are:

|  |  |  |  |
| --- | --- | --- | --- |
| BOL # | Customer Part # | Note Fields | Release # |
| BOL Date | FG Item Code | Order Line # | Spec Code |
| Carrier | FG Item Name | Partial/Complete Flag | Tag # |
| Customer Bill-To Code | FG Description | Partial Count | Total Pallets |
| Customer Bill-To Name | FG Order Line | PO # | Total Qty Shipped |
| Customer Ship-To Code | Job # | Qty/Unit | Total Weight |
| Customer Ship-To Name | Lot # | Quantity UOM | Units |

# **PANELS**

### Logical Value

#### No

Set the logical value to “***No”*** so that the panel sizes may not be changed. Any changes made to the panel sizes will move to page six when the Rebuild option is pressed on page six.

#### Yes

CE Lock = “***Yes”*** Panel Size Popup when Overriding W&L? This option allows modifying the panel sizes in the Corrware estimate screen one requires defining the logical value to “***Yes”***. This is a useful option for odd ball styles used a few times a year.

# **PAYBANK**

Help for ***PAYBANK***.

# **PAYVEND**

Help for ***PAYVEND***.

# **PLAN DIR**

Default path name where the planner software was installed. The logical value is used to type in the directory or folder name when the planner scheduling was installed on the client computer running windows 95/98. Windows 95 directory default installation is C:\progra~1\thepla~1.

# **POBROWSE**

***“Show Previous”*** and ***“Show Next”*** buttons will display the next number of records defined in *POBROWSE* integer value.

# **POCOST**

Default purchase order cost via job file or raw material vendor matrix? Hold Overprices?

### Character Value

The character value field may be either *JOB FILE* or *VENDOR*.

#### JOB FILE

When selecting Job File, the purchase order will import the raw material cost from the job file materials, which was built directly from an estimate.

#### VENDOR

If Vendor is chosen, then the purchase order cost will import from the raw materials vendor matrix defined on screen two for estimated material only. This option allows estimating with a standard cost matrix; however, purchase orders will be generated based on each vendor’s cost matrix.

### Logical Value

The logical value is used to automatically place purchase orders on hold when the cost entered on the purchase order is greater than the cost in the vendor price matrix. The purchase order will not print when it is on hold until someone releases the purchase order.

# **POCOST?**

Display warning message when adding purchase orders when the cost of the material in the job file is less than the cost of the material on the purchase order for a specific vendor.

### Logical Value

#### Yes

Logical Value = “***Yes”***. This warning message will display "*VENDOR COST IS HIGHER THEN ESTIMATED COST*. Answering “***No”*** will require entering a new cost. “***Yes”*** would allow adding the cost.

Please Note: The item cost on a purchase order must include the cost of all adders and setup charges from the job file for each form against the purchase items cost. Therefore, if the estimate was generated with a certain vendor and a different vendor was selected with a higher cost, the warning message would appear.

# **POEXPORT**

PURCHASING EXPORT METHOD to Export Purchase Orders to Corrugator Scheduling

### ALLIANCE

Enter the disk drive name and folder for output of the file to reside. Alliance will need to know where to pick up the file from your server.

### CORRTRIM

Enter the disk drive name and folder for output of the file to reside. Corrugated Technologies will need to know where to pick up the file from your server.

### HRMS

See the HRMS control parameter. This will also require building a cross reference database table must be defined that lists the HRMS board code and adder codes with the Advantzware board codes and adder codes.

To enter this database, run the Network / System Administration menu, then the Run Custom Utility and type UTIL/W-HRMS.r. This will display a list of HRMS and Advantzware item codes that will be used as a cross reference when exporting the purchase order to the HRMS scheduling software.

### Logical Value

This file is used to export purchase orders for board to corrugators electronically. The following must be set to export data.

### POEXPORT

Set the logical value to “***Yes”*** to evoke this feature. Change the character value to *ALLIANCE*, *CORRTRIM*, *HRMS* or *NONE* depending on the Scheduling Software that your vendor utilizes. The purchase order will export all the pertinent data that the board vendor requires including your company name, ship to code, ship to address, city, state zip, board code, board description, adder codes, cost, due date and more.

### Vendor File

The EDI field must be set to “***Yes”*** in the vendor file. Only vendors with this denotation will receive purchase orders.

# **POFARMOUTSCORES**

New ***“N”-“K”-“1”*** PO Farm Out Scores. “***Yes”*** will download Scores to the PO Item Scores Button. Currently Score Allowances for Farm Outs Finished Goods Boxes is not automatically downloaded. It logic only exists for Board Material for a Job. Once the Scores are downloaded to the PO, they will print on the PO Form.

### Logical Value

#### No

The scores will not be downloaded when adding a PO for a finished goods item.

#### Yes

*ADDING* a new FG Item will check the ***“I”-“F”-“1”*** Item file to see if an estimate exists for the item. If an estimate exists, the program will transfer the scores to the Scores button of the PO Item Screen.

# **POIMAGE**

This will display the location of the file that will be printed for the legal terms when printing a purchase order. A new toggle box to print an additional page for our terms and conditions. This would print an existing Jpeg file. This file could be updated without future programming if the new file within the size of 1 page with the same page width and length.

# **POPAPERCLIP**

*N-K-POPAPERCLIP* for Purchasing Paper Clip Icon provides logic for attachments added via the Paper Clip Icon on PO Line item.

### Character Value

Character Value = Houses the location of the PO attachments.

### Logical Value

#### No

This will not add attachments to the email or prompt to select which files to send.

#### Yes

Logical Value = “***Yes”*** will provide ability to email the attachment for ***“N”-“K”-“1”*** POPrint = Xprint or FIBRE.

The attachment(s) will be included in the email. A dialog box will come when any attachments exist. This will let the user select which attachment to send. All will be Checked by Default.

# **POPRINT**

Purchase Order Format. Fraction=.08 Decimal=.5 & Log Val=Print W, L and Score?

### Character Value

The character value is used to select the Purchase Order print format. Foldware should select 32nd’s, whereas Corrware clients should select either 16th’s or other formats.

### Decimal Value

The decimal value is used to display the sheet width and length is either sixteenths or decimal values. Enter .08 to display in 1/16th’s, or .5 to display in decimals.

### Integer Value

Also, the Integer Value is used as a minimum MSF to trigger a warning message for special pricing. Set this to 50 and when the sheet square footage exceeds this amount, a message appears.

### Logical Value

The logical value is used to indicate printing of the sheet width, length and scoring allowances.

# **POQTY**

Purchase order for sheets to import the number of sheets based on the job quantity or the net sheets.

### Character Value

Character Value may be set to *JOBQTY* or *NET SHTS* to set your selection.

#### JOBQTY

The job quantity option will simply import the number of sheets from the job file, which is calculated based on the *JOBQTY* control flag.

#### NET SHTS

Net sheets calculate the quantity based on the order quantity with any waste or overrun.

### Logical Value

#### Yes

Logical Value is “***Yes”***. This new option will show the next quantity break on the PO Screen when adding purchase orders for board and paper material. This will work similar to the cost estimate Calculate Button logic that shows the next price break.

The PO will show the sheets, cost/UOM and Extended Cost. Once the quantity is entered on the purchase order, the system will look at the next cost level, then calculate the quantity in the appropriate UOM such as MSF and show the number of sheets required to obtain the next board cost break.

For example: Let’s assume we order 1500 sheets of 200C that are 24x36 or 6 SF and 9 MSF. We will assume that the board has a cost of $40 up to 4.999 MSF, $38 up to 9.999 MSF and $35 up to 20 MSF. The PO would import the cost of $38 / MSF.

This modification would show the next cost break at $35 per MSF for 10MSF, which would calculate into 1667 Sheets. Formula is MSF x 1000 / Sheet Square Feet = Sheets or 10 x 1000 / 6 = 1666.666

# **POSTDATE**

AP invoice posting date logic and default date?

### Character Value

The Character Value allows the users to define a date in the character value to validate against a date entered on the *ACCOUNTS PAYABLE INVOICE* posting date entered. If the date value entered in the *POSTDATE* character value is 05-31-05, then the date entered on the AP posting screen must be after 5/31/04. Hence only a date of 06-01-04 or later would be valid.

### Logical Value

The logical value dictates if the AP post date will import as blank or with today’s computer date.

# **POUOM**

*PURCHASING QTY UNIT OF MEASURE DEFAULT* for Finished Goods and Raw Materials: The purchased quantity unit of measure will default the PO Order Qty UOM to either the Stock UOM or Purchasing UOM.

The new windows version has a folder called *INVENTORY* in raw materials and 2nd PAGE in finished goods. This folder houses the Purchase Qty unit of measure and the consumption or stocking unit of measure. We recommend that all clients change this to *PURCHASE* so that each your company can dictates the Purchased quantity UOM as the first modifiable UOM.

### Character Value

Character value will be *STOCK* or *PURCHASE*.

#### PURCHASE

Character value as *PURCHASE* is recommended so that clients may set the Purchased quantity unit of measure. Just be clear, this is the first modifiable UOM on the purchase order line.

For raw goods, this could be EA, MSF, TON, LB, M, etc, whereas for finished goods this could be M, C, EA, ROL, SET, PKG, ROL, BDL, etc. The cost UOM will transfer from the VENDOR COST MATRIX unit of measure.

#### STOCK

Current existing logic will be *STOCK*, which is the Stock / Consumption UOM and that will be the default when our software creates this control parameter so that existing clients programs work the same. Of course, this may require constantly changing the purchased unit of measure during purchasing.

Please Note: Estimated raw materials may not have the *INVENTORY* folder fields defined, hence the purchasing quantity would default to EA for each. This may be fine for purchased sheets but may not be ideal for rolls, foam, ink, etc. The cost UOM will transfer from the *VENDOR COST MATRIX* unit of measure.

Please note, when adding receipts, the Purchase Quantity UOM will transfer from the purchase order and the cost UOM defaults from the purchased cost UOM, but both will convert into to stocking or consumption UOM.

# **PREPDIEBIN**

New ***“N”-“K”-“1”*** parameters to store default GL Acct # and default bin when creating new dies and plate from estimating.

*PREPDIEGL* / *PREPDIEBIN / PREPPLGL / PREPPLBIN* to store default values in char field if logical fields are set to “***Yes”***. To create these parameters, create a new die or plate via estimating.

# **PREPPGL**

New ***“N”-“K”-“1”*** parameters to store default GL Acct # and default bin when creating new dies and plate from estimating.

*PREPDIEGL* / *PREPDIEBIN / PREPPLGL / PREPPLBIN* to store default values in char field if logical fields are set to “***Yes”***. To create these parameters, create a new die or plate via estimating**.**

# **PRODCODE**

Update the FG Inventory Production Code as New / Repeat.

### Logical Value

#### Yes

This will turn on the logic. When creating new finished goods items via Order Entry, Estimating, Job File or Finished Goods, the inventory class will default to *NEW*. When an item is added on a second order, then the FG item's Class field will be renamed as *REPEAT*.

Please Note: An item may be on different estimates / jobs, hence the system must verify if another job exists for this item.

Please Note: The Utility via N-R-util/prodcode.r will update existing Finished Goods to set the Item status to repeat or New based on if the item has 1 order or more orders for each item.

# **PROMPTMD**

New ***“N”-“K”-“1”*** parameters to store default GL Acct # and default bin when creating new dies and plate from estimating.

*PREPDIEGL* / *PREPDIEBIN / PREPPLGL / PREPPLBIN* to store default values in char field if logical fields are set to “***Yes”***. To create these parameters, create a new die or plate via estimating.

# **PUSHPIN**

***“N”-“K”-“1”*** *PUSHPIN* Order File is a new parameter to house attached file.

Character Value = Default Location of the disk drive and folder to house files.

* ***“O”-“U”-“1”*** and ***“O”-“Q”-“1”***.
* Type any Order.
* Click “***Push Pin Icon”***.
* Click “***Add”*** Button.
* Press “***F1”*** on File. See Attached.
* This now defaults to N: rcode\ box image

# **QUOIMAGE**

Character value will display the location of the file that will be printed for the legal terms when printing a quote. A new toggle box to print an additional page for our terms and conditions. This would print an existing Jpeg file. This file could be updated without future programming if the new file within the size of 1 page with the same page width and length.

# **QUOPRICE**

Default Order Entry Finished Goods Line Selling Price from Last Quote? This option is used for orders from estimates only.

### Character Value

The character value determines the default selling price when creating a new quotation. Current options are either “***M”*** or “***EA”***. However, the quote folder called *QUANTITY* provides the button called “***Reprice”*** that has the options of M, EA, MSF or CASE. Please note, case would be converted to CS on the quote and orders sell price unit of measure.

### Decimal Value

#### 0

If the decimal value is 0, then the quote is not required to enter an order.

#### 1

When the decimal value is 1, quotes with the exact order quantity must exist, otherwise the order cannot be added. If the value is 1, then the order will not be created if a quote is not created for that quantity.

### Integer Value

#### 0

If the integer value is 0, then the sell price may be changed.

#### 1

When the integer value is 1, the sell price may not be changed.

### Logical Value

#### No

If the logical value is “***No”***, then the order entry clerk must enter the selling price. The selling price may be modified during order entry whether the integer value is “***Yes”*** or “***No”***. Orders for items without an estimate such as stock boxes and distribution items, the sell price will transfer from the item's stock price matrix.

#### Yes

If the logical value is “***Yes”***, the quoted selling price will transfer to the order entry line item for the finished good. The quoted quantity should match the order quantity for the price to transfer from the quote, however if the order quantity in different, the program will import the quoted sell price for the next smallest quantity.

# **QUOPRINT**

Print Headers on Quotation form?

### Character Value

The character value is used to select the quotation format. Options are as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| 10 PITCH | CONTSRVC | LANDSCAPE | PACIFIC |
| ABOX | GENERAL | MIDWEST | RUDD |
| BRICK | HOP | POTRAIT | TRIAD |

#### PACIFIC

*PACIFIC* requires the XPrint report utility at a cost of $125 for unlimited users. The *PACIFIC* version uses plain paper, but will print logos, box diagrams and more.

#### Others

The *ABOX*, *HOP* and *LANDSCAPE* versions require preprinted forms.

### Logical Value

The logical value in used on some forms to print the column headings. Your company is free to use any custom designed form, however future changes may be made without your consent or notice if the original client makes further changes.

When *QUOPRINT = FIBRE*, adding new orders will not allow changing the sell price. Also, the quoted quantity must match the order quantity; otherwise the system will not allow entry of the quantity. An error message will display that the quantity has not been quoted. In any event, the price cannot be modified.

# **QUOSHEET**

The Print Price List via quote screen will print the form based on the character value for this form. XPRINT or Southpak are the only options. Southpak will print the existing price sheet, but Xprint will print the same heading as *QUOPRINT* for the customer name and address.

# **QUOTDSGN**

Print Box Design on Quotation?

### Logical Value

The logical value field is used with certain corrugated quotation printouts.

#### Yes

If the value is set to “***Yes”***, when printing a quotation, the system will prompt the question, Print Box Design? Answer “***Yes”*** to print the box design on the quotation.

# **REBROWSE**

Clicking the ***“Show Previous”*** button will look at the integer value in the system control file under *REBROWSE* and display that many previous records. Clicking the button a second time will continue navigating back through in intervals of this number. Clicking the ***“Show Next”*** button will navigate forward though the records at that same interval.

# **RELCOPYS**

Number of duplicate release/pick ticket copies to be printed.

### Integer Value

The integer value is used to determine how many release tickets will print for certain release ticket forms. This option would be most often used when the release ticket form is printed on plain paper or letterhead on a laser printer. Since laser printer normally will not print multiple part forms, this feature will reprint the release ticket.

Please Note: The release ticket may be used as a delivery ticket, packing list as well as the release ticket.

# **RELCREAT**

Help for ***RELCREAT***.

# **RELCREDIT**

***“N”-“K”-“1”*** RELCREDT is new parameter to check credit limit for past due invoices.

### Logical Value

#### Yes

The system will check for past due invoices when the customer file field called GRACE days is greater than zero.

## Hold Button

***“Hold”*** button on ***“O”-“T”-“1”*** with Security. Releases with a *HOLD* Status will not post via ***“O”-“T”-“4”***, hence will not create a bill of lading. This button will toggle Status between *HOLD* and *RELEASED* status.

The ***“N”-“K”-“1”*** *CUSTPASS* parameter houses the security parameter in the character value field.   Releases that are on Hold cannot be printed.   Credit Checks will appear when attempting to create a release via the following:

|  |  |
| --- | --- |
| ***“O”-“T”-“1”*** | *Add* Button,  If Over Credit, Release created with HOLD status. |
| ***“O”-“T”-“3”*** | Release will not Print if status is HOLD |
| ***“O”-“T”-“4”*** | Post Release Menu.   If release is on HOLD it will not POST / not create BOL. |
| ***“O”-“U”-“1”*** | Release Folder, *Release* Button.  If Over Credit, Release created with HOLD status. |
| ***“O”-“U”-“1”*** | Release Folder, *BOL* Button.  BOL will not be created.  Also, Ticket Icon. |
| ***“O”-“Q”-“1”*** | *Release* Button & Ticket Icon. |

Order entry will continue to check credit limits and past due aging when adding an order or updating the quantity or sales price.   However, customers may warehouse for months and their financial status may change, therefore this provides an additional credit check when a release is created.

The *RELCREDT* parameter will only check for customers unpaid invoices past payment terms.  If an invoice exceeds the due plus grace period days and the grace period dollar amount then the program will prompt.  "Sorry, invoices are past payment terms grace period", the release is on Credit Hold.

The new logic will not check order limits or credit limits when creating a release.

# **RELMERGE**

*RELMERGE* logic will dictate creation of actual releases for scheduled releases from order entry. Also, if multiple job numbers may be shipped for a customer order number.

### Integer Value

*RELMERGE* integer value to prevent ***“O”-“T”-“1”*** and ***“O”-“S”-“1”*** from allowing multiple job numbers or job numbers that are different than the job number on the order.

SS Receipts to a job/order should equal shipments/BOL to job/order. If a load tag is scanned to create BOL but that exact order is not on release(i.e. same FG but different order) it should revert to the logic on mod task number 11030410. Even if is same FG number but different order/job, it should add to release for scanned order and delete from release on original released order.

#### 0

This will not allow a job number that does not exist on the order to be added to the actual release via the ***“O”-“T”-“1”*** keys. This will only apply to orders with an estimate and job number.

For example, if an order that was created from an estimate has a job number 600-00, then only inventory received to that job number 600-00 for that item may be added to the actual release lines via ***“O”-“T”-“1”*** or via ***“O”-“S”-“1”*** bill of lading.

#### 1

This will allow job numbers that are not for the existing orders job number.

### Logical Value

#### No

When the logical value is “***No”***, then new releases will only prompt to merge to actual releases that have not been printed.

#### Yes

This will trigger the system to prompt to add the new scheduled release to an existing printed actual release for the same customer, same ship to and same ship date.

# **RELPACK**

### Character Value

#### HEADINGS

Headings to be printed on release ticket or delivery ticket. The character value field is used as the Heading on plain paper or letterhead forms. Preprinted forms should leave this field blank. Common headings are Shipper, Release, Pick Slip, Pack List, etc.

### Logical Value

#### No

The logical value is used to indicate printing of the column headings on certain formats. Preprinted forms with column headings should set the logical value to “***No”***.

# **RELPOST**

Release Posting to Create Nothing, Invoice, BOL Method? Hold Bills?

### Character Value

Posting printed releases will create *Invoice*, *Bill of Lading*, or *Nothing* depending on the character value.

#### Bill of Lading

If BOL is the character value, then release posting will automatically create a bill of lading for all orders and line items with the same release date and ship location. If BOL/REL is defined, then release posting will automatically create a separate bill of lading for each release for each customer order regardless of release date and ship location.

#### Invoice

If Invoice is selected, then release posting will create an invoice for the items and quantities defined on the release. The Invoice option should be used when creating an invoice immediately upon shipping whereby all the steps involved in adding, printing and posting a bill of lading are bypassed.

#### Nothing

If nothing is selected, then the bills of lading must be manually added.

### Logical Value

#### No

This will create the bill of lading as a released status.

#### Yes

Logical Value = “***Yes”*** will create the bill of lading with the status of *HOLD*. The status code will be displayed on the top of the bill of lading screen. The ***“Release”*** button in bill of lading will release the bill of lading from the hold status or place the bill of lading on hold.

The trailer ID will not be updated. Any bill of lading that has a status of Hold will not create a bill of lading. This logic may be used to hold a group of bill of ladings for clients so that the bill of ladings may be grouped together onto one invoice number.

# **RELPRINT**

Print Headings on Release/Delivery ticket? “***No”*** = Preprinted Form.

### Character Value

Character value is used to dictate the release format to print.

### Date Value

The date value is used as a default date for the release print screen. If the date is left blank here, then the user is forced to manually enter the date before printing release tickets. This is a good safeguard so that only release tickets print for one day at a time.

### Integer Value

#### 0

A zero will print all the tag numbers and job numbers shown on the release lines.

#### 1

This will make the Xprint form to summarize the release lines by FG item number regardless of tag number or job number.

### Logical Value

The logical value field works in conjunction with the format. Some formats allowing printing the form with column headings or without column headings.

# **RELTYPE**

Default Release Type by Customer when pressing the “***Add”*** BUTTON.

### Character Values

*VIEW CONTROL & VIEW FORM* Character Values = Valid Types are Ship Only, Transfer, Bill &Ship, Invoice Only.

|  |  |  |
| --- | --- | --- |
| B | Bill & Ship | The letter ***“B”*** will transfer to the Release Folder. |
| I | Invoice Only | The letter ***“I”*** will transfer to the Release Folder. |
| S | Ship Only | The letter ***“S”*** will transfer to the Release Folder. |
| T | Transfer Only | The letter ***“T”*** will transfer to the *Release* Folder. |

#### VIEW CONTROL

This will be default for all customers not defined on the *VIEW FORM* when logical value = “***Yes”***. If customer is note defined, then the *VIEW CONTROL* character value will set the release type.

#### VIEW FORM

This will allow adding *CUSTOMERS* to set a release type such as *SHIP ONLY*. This will be the priority when Logical Value is “***Yes”***.

### Logical Value

#### No

This will not use this logic, thus will use existing logic for new orders.

#### Yes

This will use the character values in the View Form to set the release type by Customer or View Control to set Release Type as Default for all customers. When ***“N”-“K”-“1”*** *OERELEAS*

This creates release when adding an order. Releases are currently automatically created with the status of ***"B"*** (Both, Ship and Invoice). When ***“N”-“K”-“1”*** *OERELEAS* the release is automatically created during order entry with or without an estimate.

# **RFIDTAG**

Create and use RFID Tags?

New database fields called RFID tag in the Sharp Shooter Loadtag File, LoadtagText File. The Order Entry Control File (***“O”-“F”-“2”***) field called Last Bar Code Label used will be changed to Last RFID Number Used. This will be expanded to 24 digits.

### Character Value

Character Value Field = Houses the Location of the Text File to Import.

Load Tag creation will create a finished goods load tags which will have a new field called RFID Tag. ***“O”-“U”-“7”*** Load Tag program creates a unique 24 digit RFID tag#. This will then provide a new RFID Tag# as a cross reference to the ASI internal bar coded LoadTag ID code.

The ASI Loadtag file has all the necessary data including Finished Goods Item Code, Job#, Order#, Customer code, PO#, Item Name, Item Description, Number of Units, Quantity per Unit, Cases per Pallet, etc. The 3rd Party Software by Miles Technology will create a text file that includes the transaction type, RFID number, warehouse and location.

This text file will have a transaction type of ***“R”*** for Receipt and ***“T”*** for Transfer. This will be assigned based on the zone that RFID Reader is located.

### Logical Value

#### Yes

This will be used to turn logic on to search for RFID tag. It will create an RFID tag number for each LoadTag number created. The SS Finished Goods Loadtag File will have a new field called RFID Tag Number. This will also be downloaded to the Existing Text File.

When creating load tags our system creates a load tag number equal to the FG item code plus a 5-digit number. This is too many characters for the least expensive RFID tag number. This new RFID tag number will be used as a cross reference field to the existing load tag number.

# **RFQBROWS**

Add new browser to allow sorting by multiple fields similar to estimating. Also, copy logic for *CEBROWSE* to *RFWBROWSE* so that the number of records displayed is limited to opening the first window.

### Integer Value

The integer value will default to 10 records and this will speed up the time to open the browser. When creating this new ***“N”-“K”*** parameter, default to “***Yes”*** and 10 in the integer value. We will need a “***Previous”*** Key to show the previous 10 records.

# **RFQISQ#**

New ISO Code FCD-0098 to print to left of Page number on RFQ List by RFQ# in Detail or Summary. The customer can enter and number of characters in the character value field and this will print on the top line of the RFQ listings.

# **RFQPRINT**

This will be created after ***“Q”-“L”-“1”*** is run.

### Character Value

#### CUSTOMER

This will transfer the send to contact from the customer on the RFQ.

#### CUSTX

This will transfer from Customer X which will be an internal contact.

# **RM=FG**

Validate RM issues = FG Produced Plus Waste?

### Logical Value

The logical value is used to force the production control process to enter the same number of sheets received as posted during production control. If finished goods quantity produced plus waste does not equal quantity received for the job, the job will not post the production data entered.

# **RMBARDIR**

Logical value = “***Yes”*** and Character Value = Receipts will Auto Create Email.

# **RMEMAILS**

* To store the default label file name and logical field for auto print.
* Scanning RM case label add label file entry and auto print toggle box.
* ***“M”-“U”-“8”***, add the label file entry field and auto print toggle box.
* Copy the logic behind these new fields from ***“O”-“U”-“7”*** Loadtag creation.
* Blank will not create Email. 1 message for Receipt and 1 unique message for Overrun Receipts.

*RMEMAILS* will create email confirmation for RM receipts. Add new *ECODE* called *RMPOST* which will also be used via SS Raw Mat'l Post Program.

When posting RM receipts ***“M”-“U”-“6”*** or SS Posing menu, the system will check Receipt Qty (All Receipts) vs. PO quantity plus overrun % from PO.

When receipt quantity exceeds Allowable PO Qty, the user is sent Email warning message. Email will be sent to email list defined on the new *ECODE* code *RMPOST*.

# **RMISSUE**

### Character Value

Character value will be *NETSHTS* or *GRXSHTS*. Current logic is gross sheets which utilizes the job material sheet size. Hence, the user must enter the number of gross sheets finished.

#### NETSHTS

The user enters the number of sheets produced on the sheeter/slitter. This will prompt message "Number Out on Sheeter/Slitter?" The number out will default from the estimated number out, but may be changed.

The number out will divide into the calculated gross sheets. Issue 1000 EA (net sheets) for Job 7129 for estimate 8025. The system calculates 14.418 MSF. This should be 7.209 MSF because the production qty is net sheets. i.e. sheets after the RC department. Hence, the converted quantity must divide by the number out on the estimate.

Calculation is 53.50 x 38.50 job sheet size x sheets issued / 144,000 divided by number out = 7.1519095.

Existing logic allows issues for stocked real rolls to enter the number of sheets finished on the sheeter, then converts the number of sheets (EA) into the consumption unit of measure (i.e. MSF,TON,LF).

This works perfect unless the sheeter slits the gross sheet into two. The estimate number out is 2 x 1 hence the number of MSF issues should be divided by the number out on the gross sheet.

# **ROUND**

Round Up Scoring Allowances?

### Logical Value

The logical value is used to round up or down the calculated panel size when the size is a 32nd’s of an inch. This is only used for Corrware estimating which utilizes 16ht’s for calculating the blank dimensions whereas Foldware estimating uses 32nd’s.

# **RMPOST / RMPOSTGL**

Raw Material Posting will debit and credit general ledger accounts for A/P Accrued, Raw Material Assets and WIP Material.

### Character Value

Options will be *SPACES* or *ALL ITEMS* for the current logic.

#### REALONLY

New option called *REALONLY* will only allow materials defined as *REAL* to be received without Job # on the raw material receipts screen. Hence estimated materials without a job # will not allow receipts to the system when a job number is not on the receipt line.

### Logical Value

#### Yes

Set the logical value to “***Yes”*** to invoke this logic. Raw Material receipts will debit the *ASSET* account and will credit the A/P Accrued general ledger account defined in the raw material cost type fields. Accounts Payable will debit the A/P Accrued GL account and credit the A/P general ledger account defined in the accounts payable control file.

Raw material issues will debit the WIP Material account defined in the Job Cost Product Line File for the FG item defined on the job and credit the raw material asset GL account defined in the material cost type file.

# **RMUNDEROVER**

New popup warning message when receiving outside the allowable overrun and underrun of a purchase order quantity.

### Character Value

#### OVERRUNS ONLY

When receiving over the quantity plus the overrun, a popup comes up to notify you that the receipt quantity is over the allowable overrun.

#### UNDERRUNS AND OVERRUN

When receiving over the quantity plus the overrun, a popup comes up to notify you.

Also, when receiving under the Purchase Order quantity less the under run percentage, system will display a warning message.

### Logical Value

#### No

Logical Value = “***No”*** will not use this logic.

#### Yes

Logical Value = “***Yes”*** turns on this logic.

# **RMRECPT**

Logic to dictate creation of Raw Materials Receipts.

### Character Value

This will dictate method of creating raw material receipts. Options will be *BLANK* and *RMTAG*.

#### RMTAG

*RMTAG* with logical value set to “***Yes”***, will create raw material receipts when the *LOADTAG* is created via the program run by ***“M”-“U”-“8”*** or via the Sharp Shooter Load Tag Creation Button call Raw Materials.

The *RMTAG* option will create the tag number with using the combination of the purchase order number, line number sequence of the purchase order and a sequential number. With any option above, the raw goods receipts will not be posted to Advantzware, but rather just the data entry will be created. The warehouse and bin location will default based on the *RMWHSBIN* character value criteria.

### Integer Value

#### 0

When the integer value is a 0, then the user may change the tag number which would be the normal logic for clients not using sharp shooter.

#### 1

To ensure that only valid Sharp Shooter load Tag #s are received, the Integer Value should be set to 1. Then the Tag # must match the sharp shooter load tag file when processing receipts, transfers or adjustments. This is important logic for clients on Sharp Shooter which has tag numbers created via the load tag program.

### Logical Value

#### Yes

Set the value to “***Yes”*** to automatically create raw material receipts when the raw goods load text file is created.

# **RMTAGS**

Help for RMTAGS.

# **RMWHSBIN**

### Character Value

*RMWHSBIN* character value will dictate the default location for all items during the creation of raw material receipts via Advantzware, Sharp Shooter or Load Tag Creation.

#### SPACES

The character value will default to *SPACES*, which is the current logic for default the warehouse and bin location when creating raw material receipts. If the character value is not equal to a blank field, then the character value entered must be a combination of the 5 character warehouse and the 8 character bin location.

#### MAIN FLOOR

Therefore, if the default location is *MAIN* and *FLOOR* is the default bin location, then the user must enter the space so the character value will read *MAIN FLOOR*. The first 5 characters must exist in the warehouse file and the next 8 characters must exist in the bin location.

# **RUNSHIP**

RUNSHIP parameter will remove the "Run & Ship" toggle box in order entry.

### Logical Value

#### Yes

This will hide the run and ship box and skip this field. Use will no longer need to tab thru the "Run & Ship" box on the Order Item Detail screen, customer requests to turn it off (possible grey it out).

# **SALESBUDGET**

### Logical Value

#### No

Logical value = “***No”***. Sales Budget Reports Menu program will check the ***“N”-“K”-“1”*** Sales Budget Parameter. If value = “***No”***, program will prompt, "Wrong password will change the logical value back to No" . Then Prompt "Budget Report are available for purchase, please call ASI" Changing the value to “***Yes”*** will require the password.

#### Yes

Logical Value = “***Yes”*** allows users to run the sales budget reports. Running sales budget reports from main menu will check the N-K-1 Sales Budget parameter. Users cannot run the reports if the Logical Value = “***No”***, because this was not paid as part of a *SHARED MODIFICATION*. Only customers paying for the mod will have access to this report.

Only ASI can change the password which give your company access.

# **SCHDCARD**

This prints different forms of the schedule cards.

# **SCHEDULE**

SCHEDULE to determine the job start date and due date.

### Character Value

#### NODATE

The job start date will be created with a no date, hence will be excluded from the scheduling board until selected by the scheduler. Dates will be blank on screen below.

#### PLANDATE

The system will automatically create a job start date during order entry or when manually adding a job via the job file of ***“J”-“U”-“1”***. When the due date is after the calculated due date, the system will regenerate the due date.

### Logical Value

#### No

Set this to “***No”***, then the add and update line item will not use scheduling to update the promise date or the Due Date.

#### Yes

Set the logical value is “***Yes”*** will allow scheduling to update promise date. If the Character value is *NODATE*, then the job start date will be created with a no date, hence will be excluded from the scheduling board until selected by the scheduler.

If the logical value is “***Yes”*** and the character value is *PLANDATE*, then the current logic for logical value of “***Yes”*** will automatically create a job start date during order entry. When the due date is after the calculated due date, the system will regenerate the due date.

# **SECURITY**

Password? Prompt for Password to Show Prices/Sales on ***“B”-“R”-“1”***.

### Character Value

The character value is used to enter the PASSWORD, which must be entered to show pricing and sales on this report.

### Logical Value

#### Yes

If the logical value is “***Yes”***, then the system will prompt for a security code when running certain reports.

# **SELLRPICE**

### OEITEM

Allow adding wrong customer items to another customers order?

### ALLIANCE

Enter the disk drive name and folder for output of the file to reside. Alliance will need to know where to pick up the file from your server.

### CORRTRIM

Enter the disk drive name and folder for output of the file to reside. Corrugated Technologies will need to know where to pick up the file from your server.

ATT1000 has a price matrix for 5x5x5. When I add an order for 5x5x5 the price imports from the last price for this customer. It must first search the matrix for a price for this customer. If no price exists for this customer, then it would import the last price.

Please Note: The customer code must match. Do not search the customer type or category in the matrix.

### Logical Value

#### No

If the Logical value is “***No”***, then the prompt would still display, however the user could not enter a “***Yes”*** to continue. PO Export to Corrugator Scheduling This file is used to export purchase orders for board to corrugators electronically. The following must be set to export data.

#### Yes

“***Yes”*** would be the current logic, which provides prompt.

### POEXPORT

Set the logical value to “***Yes”*** to evoke this feature. Change the character value to *ALLIANCE* or *CORRTRIM* depending on the Scheduling Software that your vendor utilizes.

The purchase order will export all the pertinent data the board vendor requires including your company name, ship to code, ship to address, city, state zip, board code, board description, adder codes, cost, due date and more.

### Vendor File

The EDI field must be set to “***Yes”*** in the vendor file. Only vendors with this denotation will receive purchase orders.

# **SETPRINT**

Matching markup % default for Set Estimates. Set Estimate Format?

### Character Value

The character value field is used to select the print out format for set estimates.

### Decimal Value

The decimal value field is used to define a markup percentage for matching all parts of a set when calculating an estimate for a set.

### Logical Value

#### No

If the value is “***No”***, then the finished good set item number will be defined as *ASSEMBLED*. When receiving Assembled sets, the components are deducted from inventory and the set item is added into quantity on hand. When posting finished goods receipts for sets that are *UNASSEMBLED*, both the set item and the components on hand inventory are increased when the set item receipts are added.

#### Yes

Logical Value - If the “***Yes”***, then set part numbers will be created as *UNASSEMBLED* sets as the default.

# **SHTCALC**

This parameter controls the corrugated estimate Sheet Calculation program to determine the stocked sheet with the least waste.

### Character Value

#### All Items

When the character value is set to All Items, the program will show all stocked sheets regardless of the quantity on hand, therefore normally stocked sheets, which are not on hand will still display on the inquiry.

### Logical Value

#### Yes

When the logical value is “***Yes”***, the program will prompt for the first three characters of item name to limit the search to specific board material. Therefore characters such as 200 would only show board material with the item names starting as 200. When the character value is QOH>QEst then the On Hand quantity must be greater than the estimated material required for the estimate quantity

# **SSBOL**

Sharp Shooter Bill of Lading Creation Options:

### Logical Value

#### No

If Logical Value = “***No”***, then orders that do not exist on the Release when the item is scanned will not allow new orders / items to be added.

Please Note: To invoke emailing the following files must be defined.

1) The user file under ***“N”-“U”***. You should add the email address there. Hence the user id that entered / last modified the order would automatically get the email notice.

2) Add new Title code called ERelease. I would add the other Email codes such as Equate, EHots, Email, EOrder, EPO, etc. This is above the estimate menu, above the user id name, *CODES*.

Once the code is added, then you will go to the customer file and click the Phone Info Icon on the right. The is the icon with green, red, blue tabs. Add as many users to receive the Email for release changes. Add the name, and make the title code *ERELEASE* and you are done.

#### Yes

Logical value “***Yes”*** will allow Orders added to Release. Orders for jobs will only allow items for same job. New orders will prompt "Order / Item not on release, Add to Release? " This will transfer the order, job, etc. from the Load Tag file to the existing release identical to adding order to ***“O”-“T”-“1”***.

During *SS BOL* creation, when scanning tag that is not on release BUT for the SAME CUSTOMER, then prompt "This Order / item is not on release, do you want to *ADD TO RELEASE*?" If “***Yes”***, send an automated email to user ID on the order entry screen creator "CSR" on item being added to release with quantity.

This will also send an EMAIL to all contacts defined in the customer file with the Title of ERELEASE. When creating BOL, if item that was released was not scanned, prompt "Item X was not scanned, is it OK to *DELETE FROM RELEASE*?" If “***Yes”***, send e-mail to order creator "CSR" on item being deleted from release with quantity. This will also send an *EMAIL* to all contacts defined in the customer file with the Title of *ERELEASE*.

Email defined in the USER ID file as well as the Customer File *PHONE INFO* Icon with the title of ERELEASE will receive emails.

# **SSBOLPRINT**

*N-K SSBOLPRINT* will bypass the BOL Print Selection Screen during Sharp Shooter BOL Creation. This print selection box is too large to read using the Panasonic screen. Printers should be defined as default printers by Forklift Drivers. When the BOL Print button is run, this would immediately print to that user Ids printer.

### Integer Value

The integer value will set the toggle box to post or not post when the Sharp Shooter “***Print BOL”*** Button is run. Since the bill of lading print selection screen will not display and all the parameters are automatically loaded by the system, this will automatically load the *POST* or *NOT POST* option.

#### 0

Integer Value = 0 to Set BOL Post Toggle to “***No”***.

#### 1

Integer Value = 1 to Set BOL POST toggle to “***Yes”***

### Logical Value

#### No

This will not display the attached print selection menu.

#### Yes

This will display the attached print selection menu.

# **SSBOLSCAN**

Forces Sharp Shooter Create Bill of Lading button to scan truck ID when scanning pallet tags.

### Character Value

#### BLANK

*BLANK* will not prompt to scan Trailer so will bypass new trailer field

#### TRAILER

*TRAILER* will prompt to scan Trailer.

SS Bill of Lading Creation line for each TAG will have field called Trailer after tag#. The trailer ID scanned must match the A-F-8 Carrier File Trailer ID. This must also validate against the Trailer on the release screen.

If the trailer on the release screen is blank, then update release with scanned trailer# when hitting save only when character value is not blank.

If there is already a trailer number, then this must validate the release with that trailer#. The Truck ID will be used for scanning. Post Release should update the Trailer as the Truck Id on Release and BOL

# **SSFGLABEL**

This parameter will be used for the Sharp Shooter Label File to Browse Records.

### Integer Value

Integer Value = 10 will only show the 1st 10 records. This will work like ***“N”-“K”-“1”*** FGBrowse

# **SSFGSCAN**

New option when scanning finished goods receipts via the sharp shooter software.

### Logical Value

#### No

This will prompt for the Tag #, and then import the Warehouse and Bin from the load Tag File. If this is blank, then the warehouse and bin location will import the default location as Advantzware. Same logic as when pressing Back TAG. Finally, after importing a default warehouse and bin, the save the line and Prompt for the next Tag#.

#### Yes

This will prompt for the Tag# then prompt for the Warehouse/Bin. If this is blank, then the warehouse and bin location will import the default location as Advantzware. Same logic as when pressing Back TAG. If the warehouse clerk presses the ***“Enter”*** button, then the default warehouse/bin imported will be saved and the program will prompt for the next pallet tag number.

# **SSMISSUE**

New Parameter to immediately post Sharp Shooter Raw Material Issues when Issue line is saved. This parameter will be created when clicking the Sharp Shooter ISSUE button.

### Logical Value

#### No

When scanning a raw material bar code to issue the material to a job, the SAVE button WILL NOT post the transaction line. The “***Post”*** button or *POST* menu option must be used to post the issue transaction.

#### Yes

When scanning a raw material bar code to issue the material to a job, the “***Save”*** button will post the transaction line immediately, which will reduce the on-hand quantity. The “***Post”*** button or *POST* menu option WILL NOT be needed.

For example, once a raw material tag number is scanned and the user types the Job#, the program saves the line. If logical value = “***Yes”***, then the system will post that line and that line only. Essentially, this will execute the logic in the POST button with the UserID, tag#, item code, job#, defaulted.

# **SSPOSTFG**

***“N”-“K”-“1”*** *SSPOSTFG* - This parameter provides the ability to post the receipt for the load tag either when the load tag is created or when the load tag is scanned during the sharp shooter receipts process.

This parameter provides the timing of the adding to on hand inventory by working with the ***“N”-“K”-“1”*** *FGRECEIPT* parameter.

### Character Value

#### BLANK

Character Value = *BLANK* and Logical value = “***Yes”***. Loadtag Creation will create the FG receipt, but not post. The warehouse clerk can scan tag, then warehouse and the “***Save”*** Button will *POST* to on hand. This allows the receipt record to be created, but Sharp Shooter to scan tag, then scan and warehouse/ bin added, then the receipt transaction line will be immediately posted.

#### LOADTAG

When ***“N”-“K”-“1”*** *FGRECPT* character value = *LOADTAG*, the system creates a finished goods receipt when creating the load tag via ***“O”-“U”-“7”***, via the “***Loadtag”*** Icon in the Item Folder of ***“O”-“U”-“1”*** or from Sharp Shooter Loadtag creation / File Maintenance .

Character Value = LoadTag and Logical Value = “***Yes”***, will update on hand quantity immediately via the creation of the *LOADTAG* via ***“O”-“U”-“7”***. Hence the receipt is simultaneously created and posted to finished goods

Please Note: Only Finished Goods Receipts may be posted immediately when creating load tag or after scanning a load tag. A future mod may be programmed to automatically post other finished goods transactions codes R,T,E,C for receipts, transfers, returns and cycle counts.

### Logical Value

#### No

This will require someone to post finished goods receipts manually via the *POST* button in sharp shooter or the ***“I”-“U”-“5”*** menu via Advantzware. This is the existing logic, whereby the finished goods receipt requests a scan of the pallet load tag.

Once scanned, the job number, unit count, warehouse and bin location transfer to the receipt line. A separate transaction is required to post the receipt which then updates the finished goods on hand quantity in the bin file.

#### Yes

This will post Sharp Shooter Finished receipts based on the ***“N”-“K”-“1”*** *SSPOSTFG* character logic.

# **SSRMSCAN**

Help for SSRMSCAN.

# **SSTRANSF**

### Character Value

#### ITEM FILE

Character value set to *ITEM FILE* will utilize the current logic to transfer by the ship method of pallet or by the case when processing transfers.

#### PALLET

The new logic will be used when the character value if *PALLET*, whereby the FG item ship method is not used. Hence transfers will not allow transfer by the case when the character value is *PALLET*.

# **SSUPDRELPMPT**

#### No

Logical Value = “***No”*** will display Prompt.

#### Yes

This will suppress the message prompt "In Progress" Message, which is displayed in Sharp Shooter when Creating the BOL.

# **STMTPRIN**

Print column headings on statement form?

### Logical Value

The logical value field is used to determine if the column headings will print on the statement form.

# **TAG#**

Assign RM Receipt Tag # Using PO # and Sequence?

### Logical Value

The logical value field will turn this feature on or off.

#### Yes

Receipts for raw materials entered against a purchase order will automatically assign a unique tag number identical to the purchase order number and the line number sequence on the purchase order.

# **TAXCODE**

The Tax Code Mandatory for All Customers?

### Logical Value

The logical value is used to force the entering of the tax code when adding new customers in the customer file.

Many states which require reporting gross sales and taxable sales by tax jurisdiction must have a tax code defined in the customer ship to file whether the customer is taxable or not. The taxable? field in the customer file determines the calculation of tax whereas the tax code determines the jurisdiction and taxable percentage.

Please Note: When the Taxable flag in the customer file is “***Yes”***, then the tax code still must be entered for each ship-to location.

Please Note: The customer *SHIPTO* also has a field called *MANDATORY TAX*? Y/N When this is “***Yes”*** the logic used during order entry and when adding cash invoices will default all items and Misc. charges as *TAXABLE*, regardless of the finished goods items taxable code.

When the *MANDATORY TAX* field in the Ship to File is “***No”*** and the Customer Header screen *TAXABLE* field is “***Yes”***, then the Tax is determined by the FG items tax code.

# **TRIALBAL**

Download trial balance to Excel?

### Logical Value

#### Yes

The system will automatically download the trial balance to a file which is formatted for importing into excel. The file name will be TRYMMDDYY.cvs into the working directory defined on your desk tops icon. The MMDDYY represents the current month, day and year that the report is printed.

# **TSBREAKS**

Automatically post breaks to machines? “***Yes”*** will invoke the new logic, “***No”*** will use the existing logic.

First, add new database fields to the Shift file to allow multiple start and stop times plus a machine charge code. Most likely there would be a break in the morning and another break in the afternoon as well as a lunch break. Hence each break would have a start and stop time. For example, a shift may start at 7am, Break from 9am - 9:15 am, Lunch from 11:00 to 11:30, break from 1:00 to 1:15 PM and Cleanup from 2:45 - 3:00 pm.

When the job data collect enters *SETUP* from 7am to 10:00am, the program would create 3 entries. SETUP from 7-9, Break from 9-915 and *SETUP* from 9:15 to 9:30. If RUN went from 9:30 to 12:00pm, then 3 more entries would show 9:30 - 11:00 am *RUN*, 11:00 am to 11;30 *BREAK* and 11:30am to 12:PM RUN.

Likewise, the program would automatically Logout each employee when the break started and log in each employee on the machine when the Break Ended.

# **TSCLOCK**

Two new ***“Menu”*** buttons called ***CLOCK IN*** and ***CLOCK OUT***. This will update the touch screen Login / Logout button directly into touch screen employee login / logout file. The user will click or touch either the ***CLOCK IN*** or ***CLOCK OUT*** to start scanning employee timecard badges.

All editing capabilities will be done in Touch Screen Login/Out file. Existing *LOGIN* and *LOGOUT* to use ***“N”-“K”-“1”*** *TSCLOCK*. Login will only work if user is ***CLOCKED IN*** and ***CLOCKED OUT*** will only work if user has logged out of touch screen data collection.

Time will import from the *SERVER* so the employee cannot adjust the PC clock. When pressing ***CLOCK IN*** or ***CLOCK OUT***, A sizeable font will prompt *SCAN EMPLOYEE BADGE*. If an error exists, the employee can type the employee number.

# **TSDOCKSEC**

### Logical Value

#### Yes

This will add a second to end time of login/logout transaction if there is dock time for the employee.

For example, if the transaction ends at 1:30:00 PM instead of 1:29:59 PM for example. This prevents creating new employee login with start/end time the same for example shift 2 - 1:30 - 1:30 when clocking out at 1:30, only have employee login transaction 5:00 AM - 1:30 PM shift 1 when this flag is on.

# **TSENDWASH**

In operation "Wash Up", when "Ending Wash Up"

### Logical Value

#### Yes

“***Yes”*** is the default which closes you out of the job when you are between form and tasks. Default should be “***No”***.

Original e-mail: To prevent any untimely errors: I would like to have an improvement made to the end wash. It should default to “***No”*** not “***Yes”***. If I end wash between forms and between tasks it closes me out of the job. I will have to take valuable time to fix it. I should be able to select yes when it is needed**.**

# **TSFINISH**

To determine default for machine completed field per operation.

### Character Value

#### ALL MACHINES

This will be the current logic of defaulting the *COMPLETED* field to “***Yes”***when ending any MR, RUN or Downtime charge code.

#### LAST MACHINE

This will default all operations to “***No”*** for not completed except for the *END* of the last operation. The last operation is dictated by the last operation under the

#### NO

This will always default the completed flag to “***No”*** , on all machines.

***“T”-“F”-“8”*** Machine Assigned charge codes sequence folder if defined, else via ***“T”-“F”-“6”*** Job Sequence. Once the last operation is completed, all prior operations will also be set to Completed in the job's routing file.

# **TSKEYBOARD**

If you are using a real keyboard in the plant, the operator may not want to see the virtual keyboard during touch screen. The logical value will turn this on or off.

### Logical Value

#### No

This will not display the on-screen keyboards to the plant personnel to type user ID, job number, waste and production quantities. This option will require a keyboard and mouse at each data collection device.

#### Yes

This will display the on-screen keyboards to the plant personnel to type user ID, job number, waste and production quantities.

# **TSLOGIN**

This will prompt for User ID which will default to proper Company.

### Logical Value

#### Yes

This ill force the Touch Screen Icon to prompt for User ID. Once entered, the system will default the proper company code. Also, if you exit out you should not be allowed changing companies.

If a company has more than 1 plant or more than 1 company. The Touch Screen Icon does not prompt for a LOGIN / USER ID prompt. Therefore, this will default to only one company.

If Company File has just *ONE COMPANY*, then the prompt should default to that company and the login screen need not appear.

# **TSPOST**

*TSPOST* to post touch screen labor and machine transactions. Direct Labor may now be posted at actual labor rates or at standard machine rates via the character value. Also, touch screen can also bypass the Advantzware data collection and post directly to the work in process, thereby saving the steps of reviewing the Advantzware hours then transferring to WIP.

### Character Value

Character values would be *STANDARD* or *ACTUAL*.

### ACTUAL

When the character value is *ACTUAL*, then direct labor will post the labor rate for each person on each from Touch Screen Plant Floor reporting directly to the Job Cost work in process files. The total machine hours will continue to post the standard machine rates for Fixed O/H and Variable O/H.

### STANDARD

Current logic would be *STANDARD* which transfers the actual crew from touch screen and multiply by the standard direct labor rate from the machine file. The standard DL rate, Variable O/H and Fixed O/H from the machine file.

### Logical Value

The Logical Value will turn this feature *ON* or *OFF*.

Please Note: If you do not use tough screen, then this must be set to ***“No”***.

#### No

This will post the Touch Screen transactions to the Advantzware data collection with the *STANDARD RATES* only.

#### Yes

This would post directly to WIP based on the character value of either actual or standard rates. Hence this would no longer require posting to job cost / WIP via Advantzware D-T hot keys. The *TSPOST* would post directly to the Advantzware job cost / WIP at actual Direct Labor Costs, but Standard Fixed and Variable O/H rates.

# **TSPOSTFG**

### Character Value

The Character value will house the Machine Codes such as *ASSEM1.ASSEM2, ASSEM3* that will trigger when the Set Header item is created as a finished goods receipt. Hence, each machine is separated by a comma.

Please Note: Advantzware Finished goods posting for assemble set will reduce the components when the set header is receipt is posted.

### Integer Value

#### 1

This will automatically create Set Header Receipts for the machine operation defined in the character value. The set header item code is defined on the estimate via the *SET* button, which is then transferred to the order enter system as well as the finished goods file.

Touch Screen currently creates the finished goods receipts for all the components when the last operation production quantity is posted for each part / form. When the very last form has an operation that will *ASSEMBLE* the set components, this new logic will create a finished goods receipt for the Set Header FG item code.

We will assume the machine code is *ASSEM1* or *ASSEM2* or *ASSEM3* or otherwise defined in the character value. The net result will be the last two machine codes on the last part / form will both produce finished goods receipts for the component and then the set header item respectively.

### Logical Value

Is Logic to create *SET* Header Receipts via Touch Screen. Touch screen plant data collection will prompt for units and unit count, bin location and warehouse to post immediately to the finished goods receipts for the SET item when the assembled machine denoted in the character value is recorded during touch screen data collection. Components are created based on the ***“N”-“K”-“1”*** FGRECPT character value.

#### Yes

This will invoke Set Receipts; therefore the ***“N”-“K”-“1”*** FGRECEPT character value will be either *TSPOSTFG* or *TSPARTS*. The system will prompt for the unit count which will be divided by the quantity produced to determine the number of units received.

Please Note: The finished goods receipt will be created when each form is completed regardless whether the set is Assembled or Unassembled. Each form that completes production *RUN* will post to the FG receipt for that component only.

# **TSQTY**

Touch Screen Production Quantity Check

### Logical Value

#### Yes

Adding a machines production and waste totals via Touch Screen Data Collection, the total quantity entered must be validated against the previous machines total quantity produced. If the data collection plant person enters a total that exceeds the prior machine, then a prompt will display , *QUANTITY + WASTE EXCEEDS PRIOR MACHINE*, press ***“Ignore”*** or **“Correct”**.

Correct will place the cursor back to the quantity field. The touch screen must validate all previously posted quantities in addition to the current data collection quantity to validate the previous machines totals.

Please Note: This logic must validate by form number and must use the number out and number up. For example, if we slit 1000 sheets 50 x 100 into 50x50 and we print and die cut a 2 up die, then the gluer will produce 4000 blanks.

If a job is started on Monday and 500 sheets are slit then posted, then Tuesday another 500 sheets are slit and 50 sheets wasted, but not posted, the Printer must verify that a total of ONLY 2000 good sheets (2x1000) can be entered for the printer including quantity produced plus waste.

Therefore, if the plant enters 1950 produced and 150 wasted on the printer, a message would appear "Production/Waste of 2200 exceeds 2000 via Prior Operation. Likewise, if the die cutter produces 2000 good sheets, then the glue can only produce a total of 4000 blanks including waste, which is calculated as 2000 x 2 up on the die.

# **TSSECURE**

New security password to show / not show Labor Rates when posting Touch Screen. Also add option on print screen called *PRINT LABOR RATES* on the screen.

### Logical Value

#### No

If the Logical Value is “***No”***, then no password will be required. If the wrong password is entered, then the *PRINT LABOR RATES* cannot be changed, hence the report will print without labor rates if this is Unchecked. *SAVE THE PRINT SELECTIONS* with the *GREEN* Bar.

#### Yes

This can only be modified when the password in entered. If the logical value is “***Yes”***, then the program will prompt for the Password defined in the Character Value.

# **TRIALBAL**

Download trial balance to Excel?

### Logical Value

#### Yes

The system will automatically download the trial balance to a file which is formatted for importing into excel. The file name will be TRYMMDDYY.cvs into the working directory defined on your desk tops icon. The MMDDYY represents the current month, day and year that the report is printed.

# **TSTIME**

*TSTIME* parameter to allow the selection of which clock to use (server clock or workstation clock).

### Character Value

#### SERVER

The log-in and log-out time will be based on the Server's clock. Before this mod which clock was used depended on which *ICON*.

Access touch screen via the touch screen icon. However, if you use the Add-ons menu to access Touch Screen the log-in and log-out time is based on the server time.

Then make certain that the application uses the same specified clock regardless of where it was launched from (TS icon or add-ons).

#### WORKSTATION

The log-in and log-out time will be based on the workstation's clock.

# **TSVALIDATE**

This will print an employee list by date, time, and shifts for missing hours not posted to a job. Add *SHIFT* Range similar to ***“D”-“R”-“3”*** drop down screen to select multiple shifts. Toggle box for Clock will sort by Date and Time and each employee will be separated like the ***“T”-“R”-“9”*** Report.

# **UPSFILE**

Help for ***UPSFILE***

# **VENDFXER**

*VENDFXER* This logic is for intercompany transfer of vendors and vendors data within a common database connected via a single network.

### Character Value

Character Value will list the companies such as 001,002. Each company will be separated by a comma. ***“F1”*** on the character value will only allow companies from the ***“G”-“F”-“1”*** Company File.

The company codes on character value will have synchronized customer data. All files and fields will be transferred such as Vendor Code, Remit To, Terms, etc. will be transferred.

### Logical Value

#### No

This will be existing logic and not transfer data between companies.

#### Yes

This will automatically transfer data between companies.

### New Logic

“***Save”*** Button for Add / Change/Delete will update other company Vendor file for the same vendor code. Add mode will copy the data from existing company to all other companies on the character value.

“***Update”*** button will transfer all the data to the other company. For example, if I login as ASI to company 001 and add a new vendor called SEWA, the vendor will be added to the other companies listed on the character value.

If I delete a vendor, that same vendor code will be deleted from all companies. If I update SEWA, then all new the data will transfer to the other companies.

Please Note: No data on the TOTALS folder will not be transferred as the vendor balance for each plant may be different depending on the purchase order and A/P invoice values at each plant.

# **WIPWHSBIN**

### Character Value

The Character Value houses the name of the WIP Warehouse and Bin Location. This will dictate the default location for items during the creation of work in process tags via Advantzware or Sharp Shooter.

#### SPACES

The character value will default to *SPACES*, which is the current logic for defaulting the warehouse and bin location when creating raw material receipts. If the character value is not equal to a blank field, then the character value entered must be a combination of the 5-*character* warehouse and the 8-character bin location.

Therefore, if the default location is *MAIN* and FLOOR is the default bin location, then the user must enter the space so the character value will read *MAIN FLOOR*. The first 5-characters must exist in the warehouse file and the next 8 characters must exist in the bin location.

# **X-VERSION**

*XMLORDER* – Logical Value = “***Yes”*** will invoke this logic to send XML File to specific customers set to EDI? View Control Character Value will Store the DISK Drive Location to Store the File.

### Character Value

View Form Character Value. Different Customers may want different layouts and require different FTP rights.

#### BLANK

If View Form Customer is *BLANK*, the Character Value Layout will be for all customers.

#### PREMIER

This will store the File Layout and FTP Login and password for specific customers by Customer Code.

1. CS agent enters order as normal.

2. Released order will export via xml to FTP or local destination.

3. Fields to be exported to xml are Order#, Customer Name, Customer#, Due Date, FG Item#, Cust. Part#, Cust. PO#, Ordered Qty, Actual Rel. Quantity.

4. If the release is deleted and re-released the process should repeat. (Scroll down for more)

(Output to File should be similar logic to ECodes program Act Rel.rThe xml could look something like this.

Raw data(string format) is fine no formatting is necessary.

#### VALID CUSTOMER

If View Form Customer is *VALID CUASTOMER*, then Character Value will house format for that specific customer. ***“O”-“U”-“1”*** Release Creation will automatically export order information to xml and auto send using an FTP client and have the choice to just save the xml file.

Different Character Values will Define Different Layouts.