Global Shop SOLUTIONS ERP SOFTWARE

We simplify your manufacturing.™

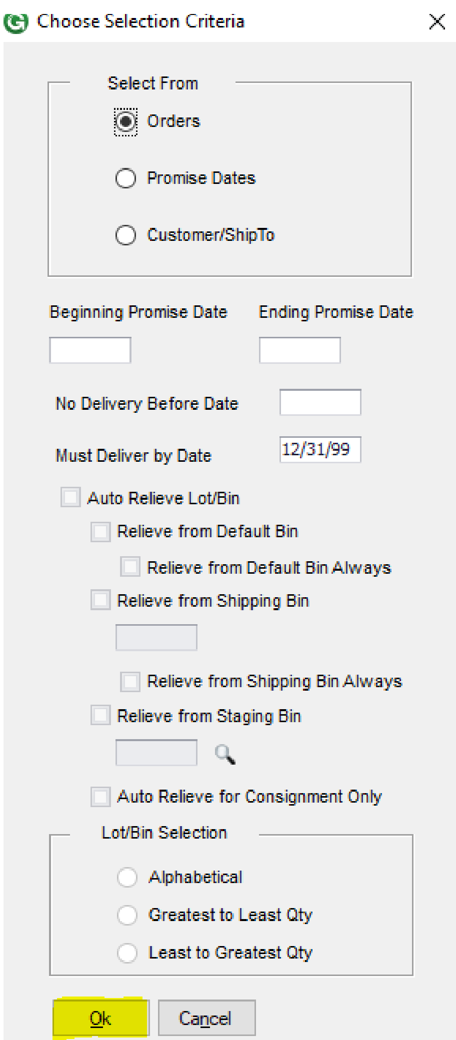
Instrument Tracker Project

Testing Instructions

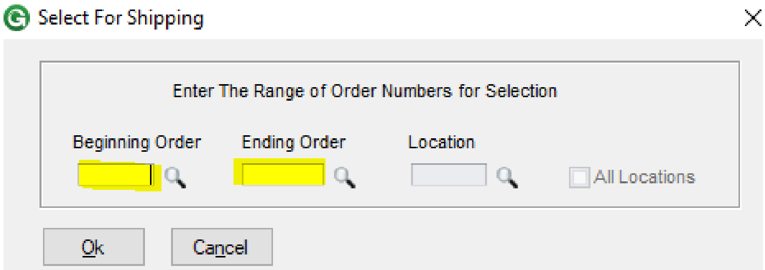
Written By: Ashley Collins

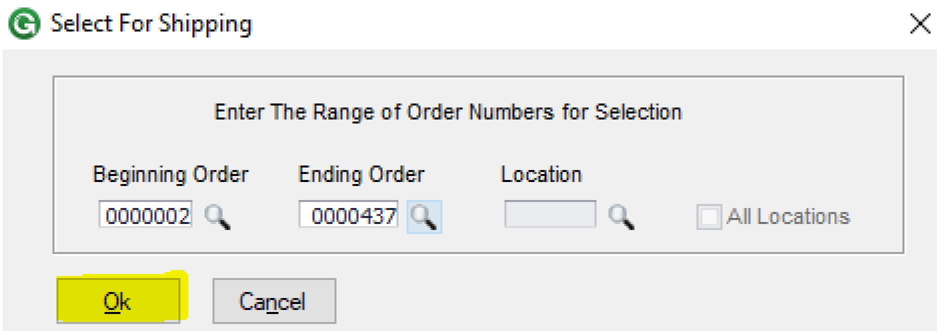
Shipping & Receiving > Transactions > Shipments > New

1. The user will need to confirm they have the correct selection criteria baaed on the Shipping Process used within the company. Once this information is confirmed, the user will need to click ‘Ok.’

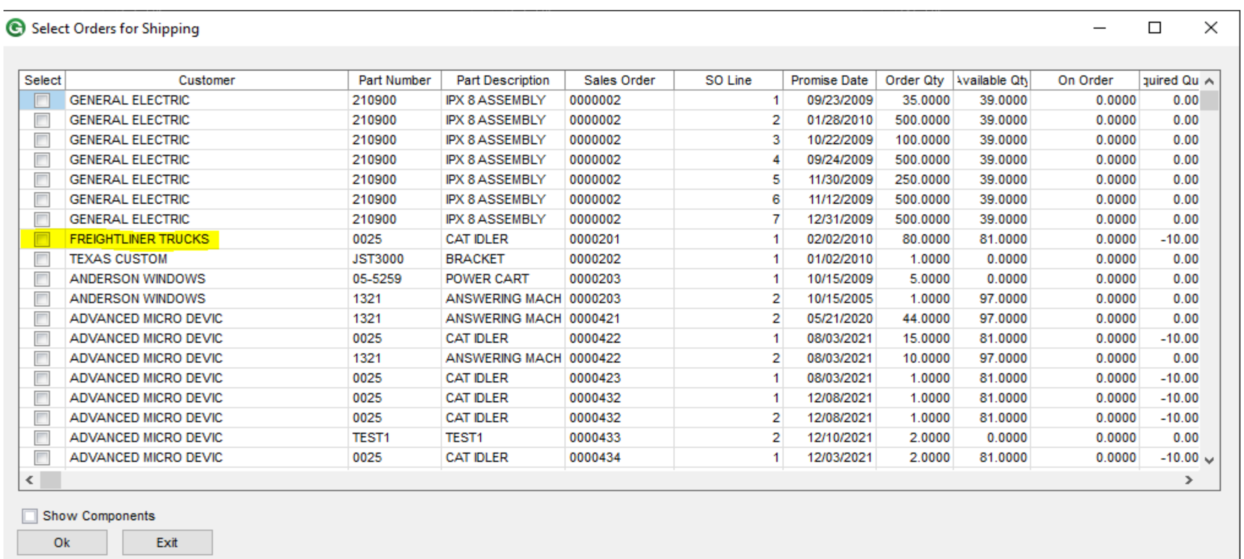


2. The user will need to enter a range of orders and click ‘Ok’ to load all the orders that are ready to be shipped.





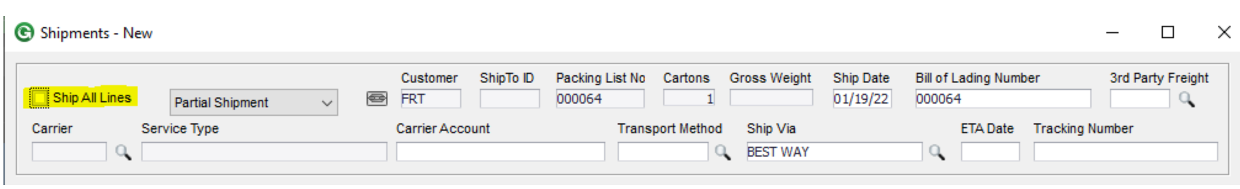
3. The grid below will open and allow the user to select the orders they want to ship. To open the shipment screen, the user will need to click the checkbox in the ‘Select’ column.


Select Orders for Shipping

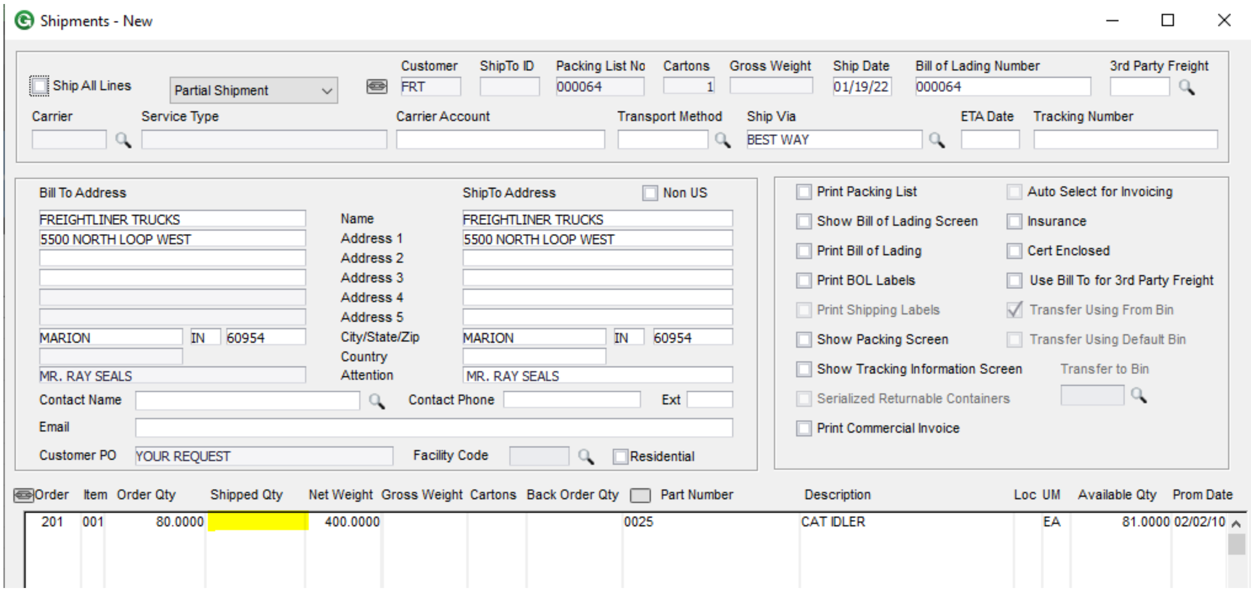
Select	Customer	Part Number	Part Description	Sales Order	SO Line	Promise Date	Order Qty	vailable Qty	On Order	quired Qu
	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	1	09/23/2009	35.0000	39.0000	0.0000	0.00
	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	2	01/28/2010	500.0000	39.0000	0.0000	0.00
	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	3	10/22/2009	100.0000	39.0000	0.0000	0.00
	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	4	09/24/2009	500.0000	39.0000	0.0000	0.00
	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	5	11/30/2009	250.0000	39.0000	0.0000	0.00
	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	6	11/12/2009	500.0000	39.0000	0.0000	0.00
	GENERAL ELECTRIC	210900	IPX 8 ASSEMBLY	0000002	7	12/31/2009	500.0000	39.0000	0.0000	0.00
	FREIGHTLINER TRUCKS	0025	CAT IDLER	0000201	1	02/02/2010	80.0000	81.0000	0.0000	-10.00
	TEXAS CUSTOM	JST3000	BRACKET	0000202	1	01/02/2010	1.0000	0.0000	0.0000	0.00
	ANDERSON WINDOWS	05-5259	POWER CART	0000203	1	10/15/2009	5.0000	0.0000	0.0000	0.00
	ANDERSON WINDOWS	1321	ANSWERING MACH	0000203	2	10/15/2005	1.0000	97.0000	0.0000	0.00
	ADVANCED MICRO DEVIC	1321	ANSWERING MACH	0000421	2	05/21/2020	44.0000	97.0000	0.0000	0.00
	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000422	1	08/03/2021	15.0000	81.0000	0.0000	-10.00
	ADVANCED MICRO DEVIC	1321	ANSWERING MACH	0000422	2	08/03/2021	10.0000	97.0000	0.0000	0.00
	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000423	1	08/03/2021	1.0000	81.0000	0.0000	-10.00
	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000432	1	12/08/2021	1.0000	81.0000	0.0000	-10.00
	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000432	2	12/08/2021	1.0000	81.0000	0.0000	-10.00
	ADVANCED MICRO DEVIC	TEST1	TEST1	0000433	2	12/10/2021	2.0000	0.0000	0.0000	0.00
	ADVANCED MICRO DEVIC	0025	CAT IDLER	0000434	1	12/03/2021	2.0000	81.0000	0.0000	-10.00

Show Components
Ok Exit

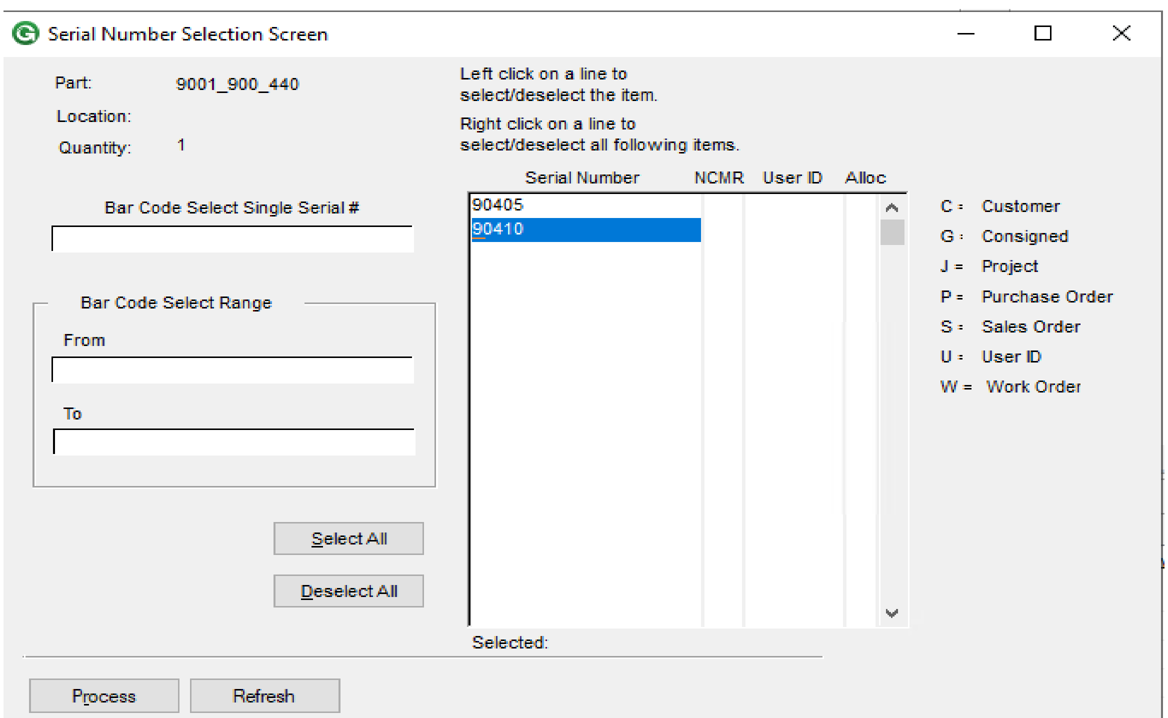
4. The user can ship all lines for the order by checking the ‘Ship All Lines’ checkbox.



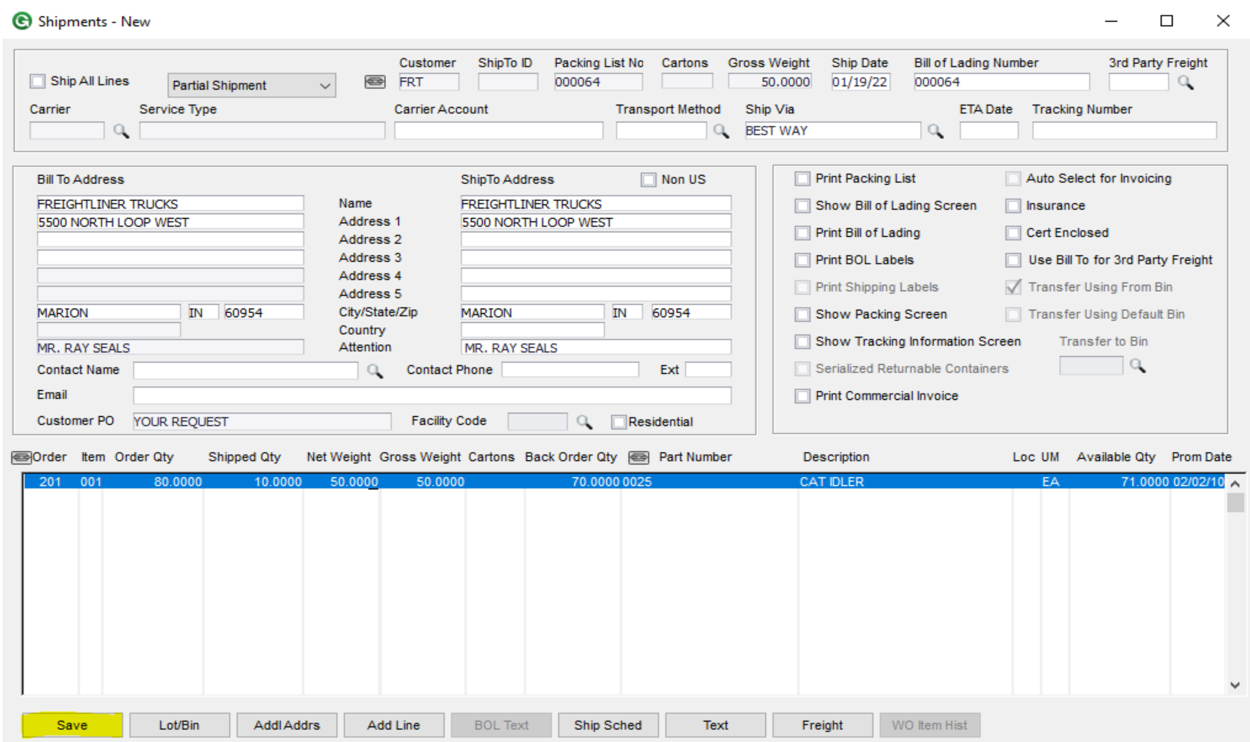
5. If the user wants to process a partial shipment, they will need to enter the correct quantity in the 'Shipped Qty' column.



6. If the part has a corresponding Serial record, the screen below will open and allow the user to select the Serial they want to ship the part from.
7. Once the user has selected the correct Serial Number, the 'Process' number will need to be clicked to finish the selection.

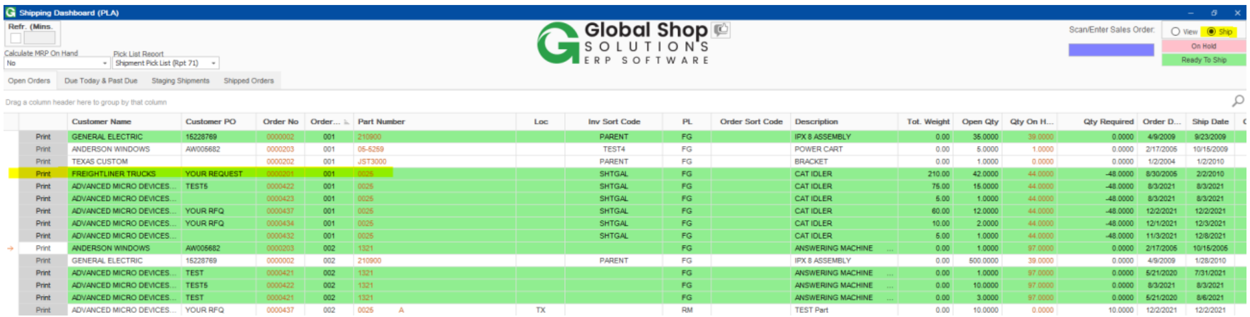


8. The user will need to confirm that the 'Shipped Qty' is correct, and then they can click 'Save' to process the shipment. Once the shipment is processed, the corresponding records will be added to the custom Instrument Serial table.

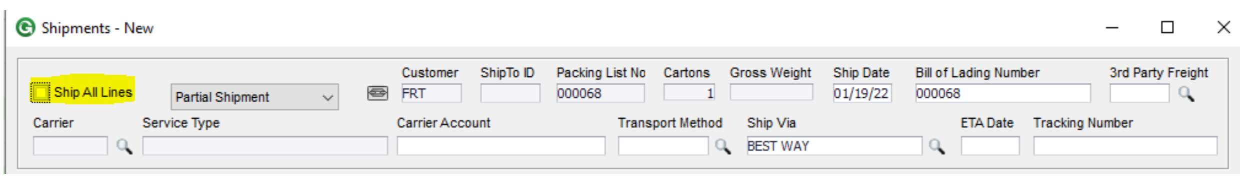


Shipping & Receiving > View > Shipping Dashboard

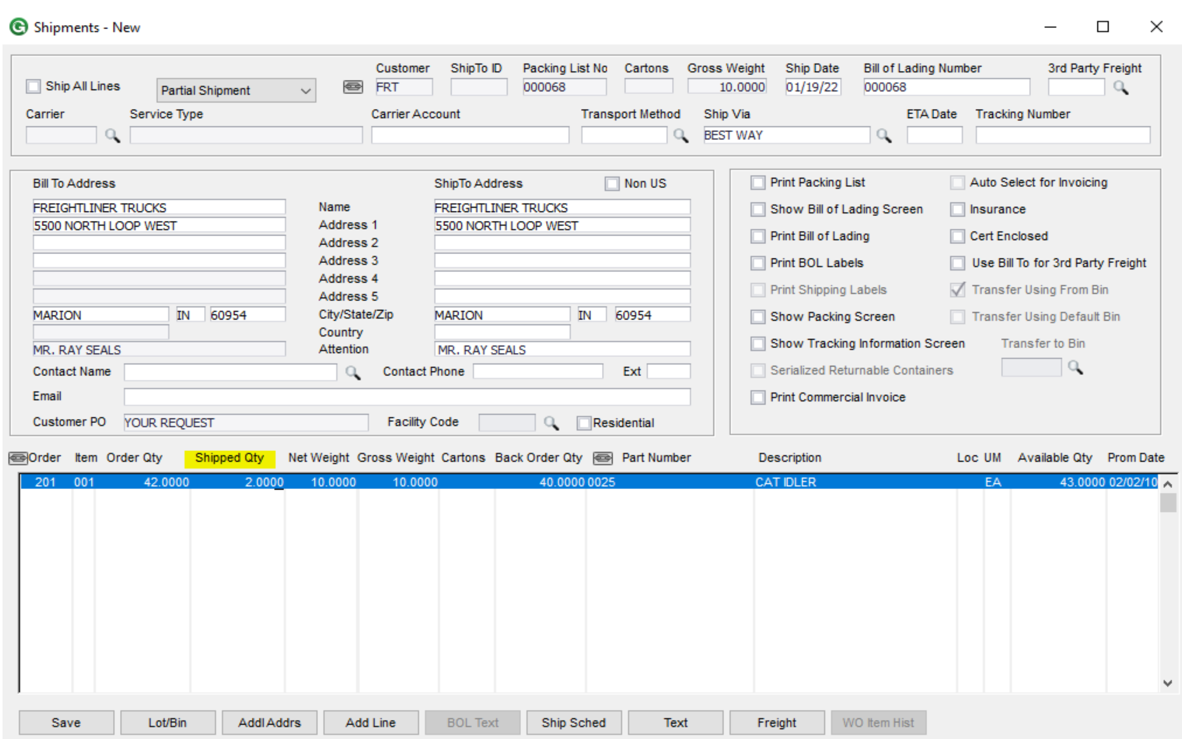
1. If the user has security, they can also ship from the Shipping Dashboard.
2. The user will need to make sure the 'Ship' radio button is selected before they can ship any orders.



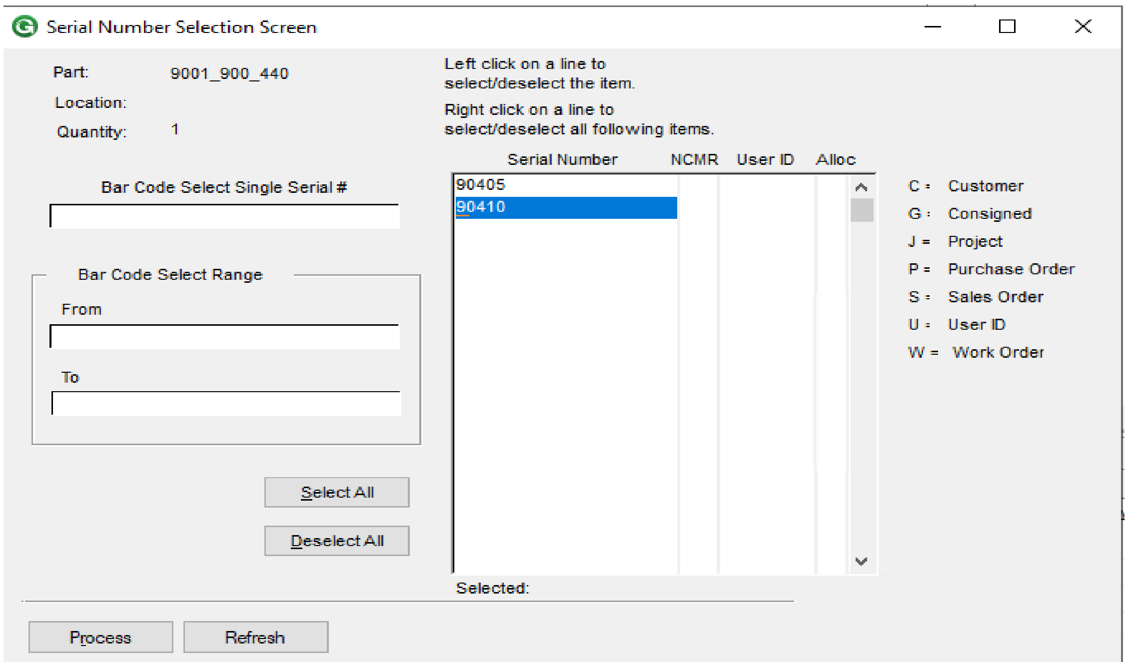
3. When the user clicks the Order Number in the 'Order No' column, it will open the core shipping screen that was shown above.
4. The user can ship all lines for the order by checking the 'Ship All Lines' checkbox.



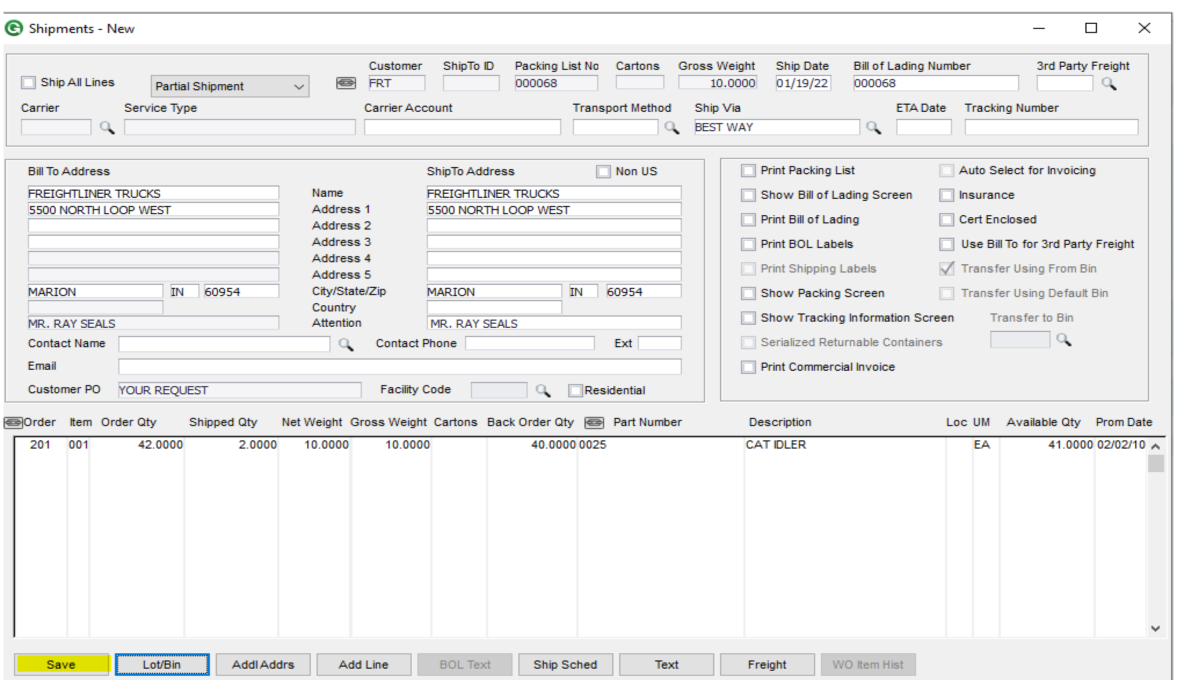
5. If the user wants to process a partial shipment, they will need to enter the correct quantity in the 'Shipped Qty' column.



6. If the part has a corresponding Serial record, the screen below will open and allow the user to select the Serial they want to ship the part from.
7. Once the user has selected the correct Serial Number, the 'Process' number will need to be clicked to finish the selection.

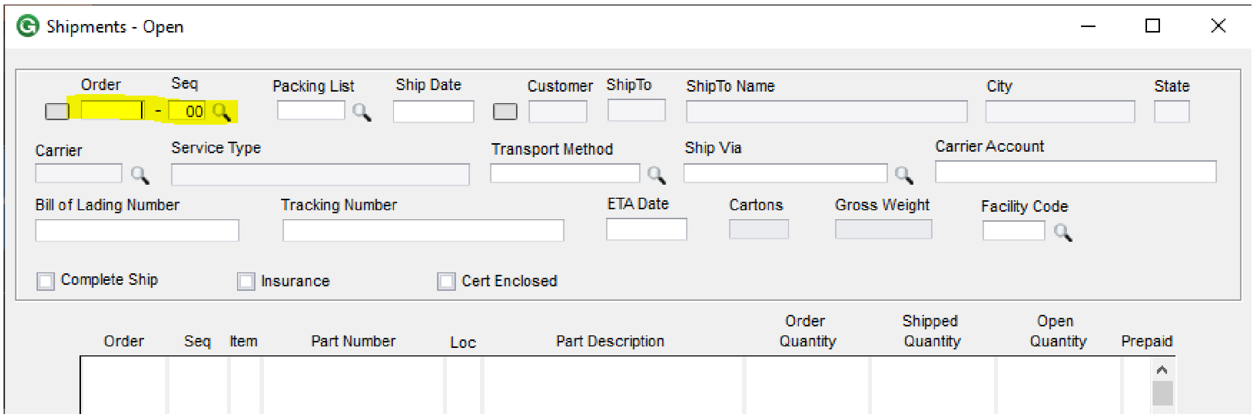


8. The user will need to confirm that the 'Shipped Qty' is correct, and then they can click 'Save' to process the shipment. Once the shipment is processed, the corresponding records will be added to the custom Instrument Serial table.

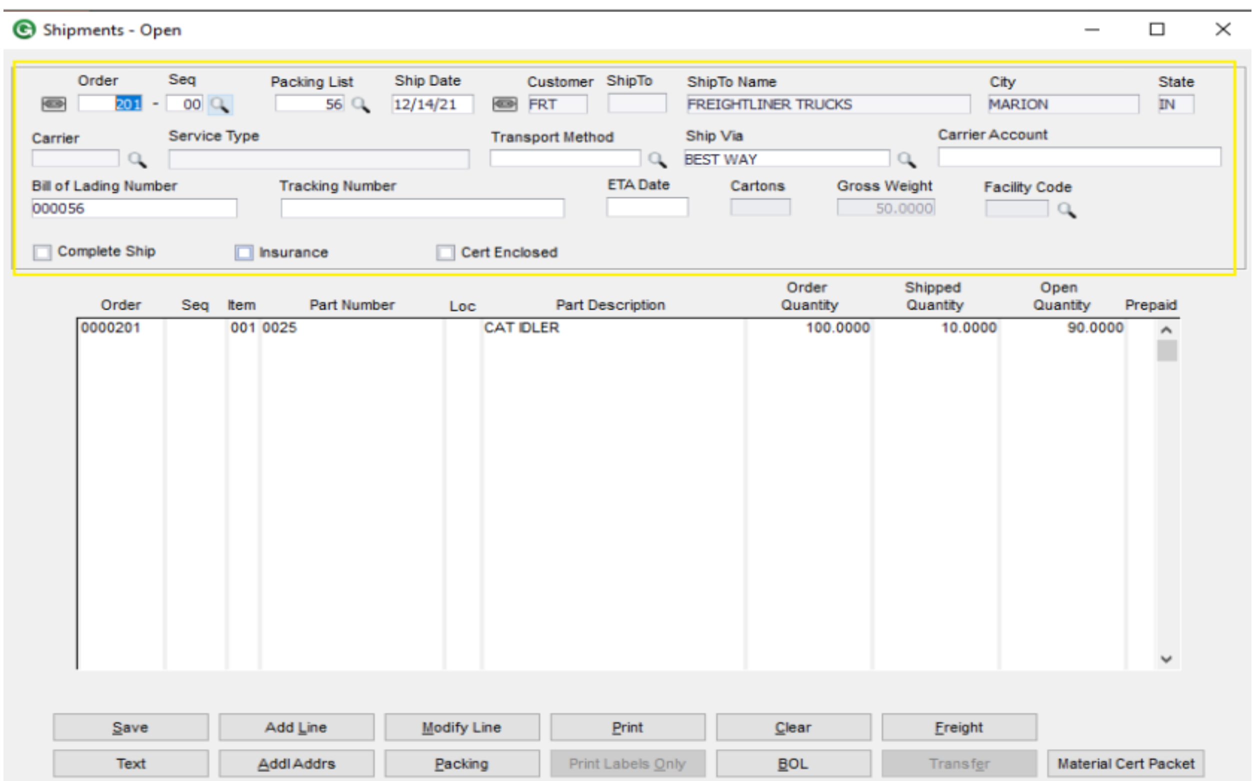


Shipping & Receiving > Transactions > Shipments > Open

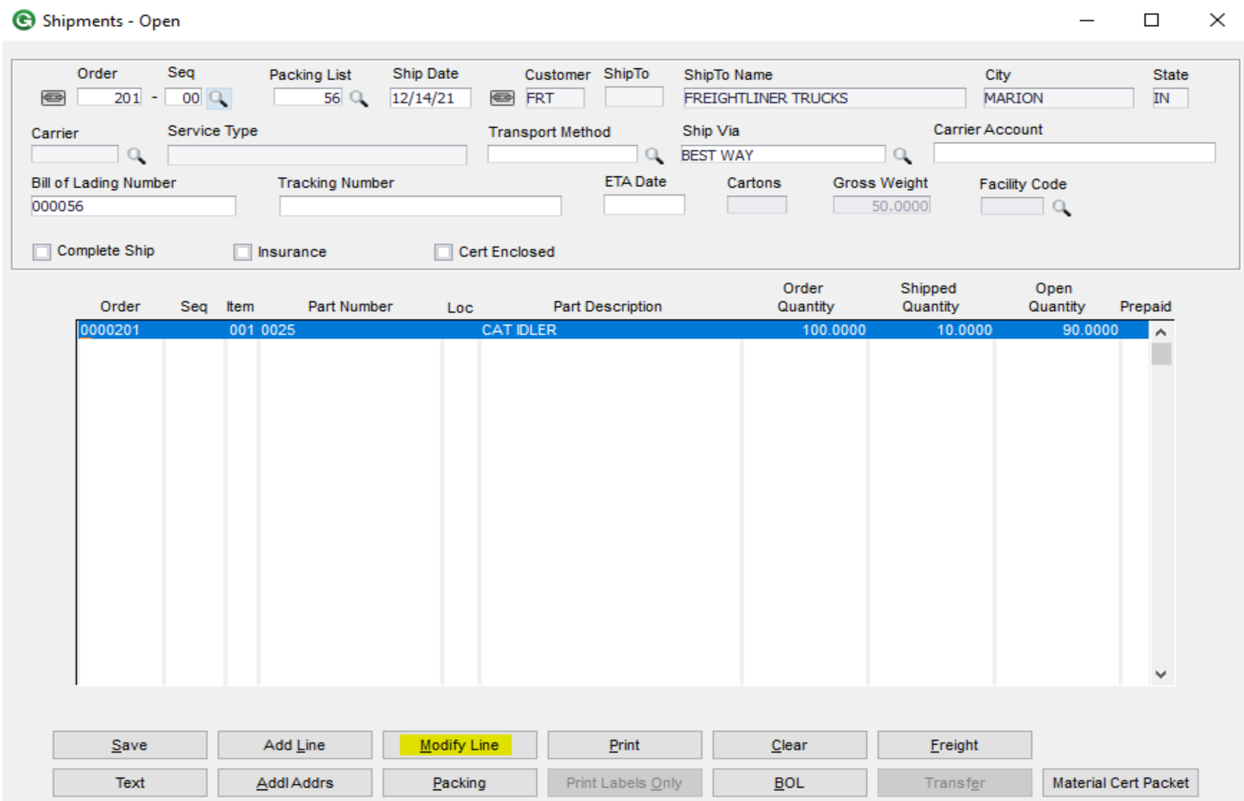
1. The user can use Shipping & Receiving > Transactions > Shipments > Open to modify existing shipments in Global Shop.
2. The user will need to select the Order/Suffix they want to modify. This can be done by entering the order manually or by selecting it with the browser.



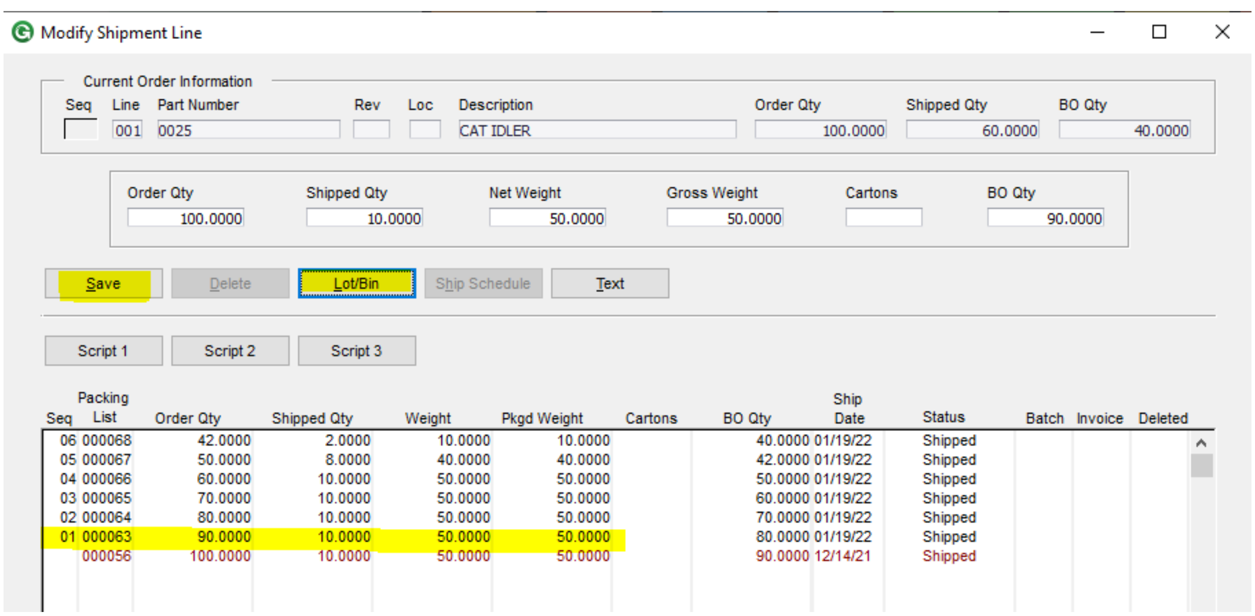
3. The user can modify the Shipment Header information in the yellow box below, as well as, modify existing lines or add lines to the shipment.



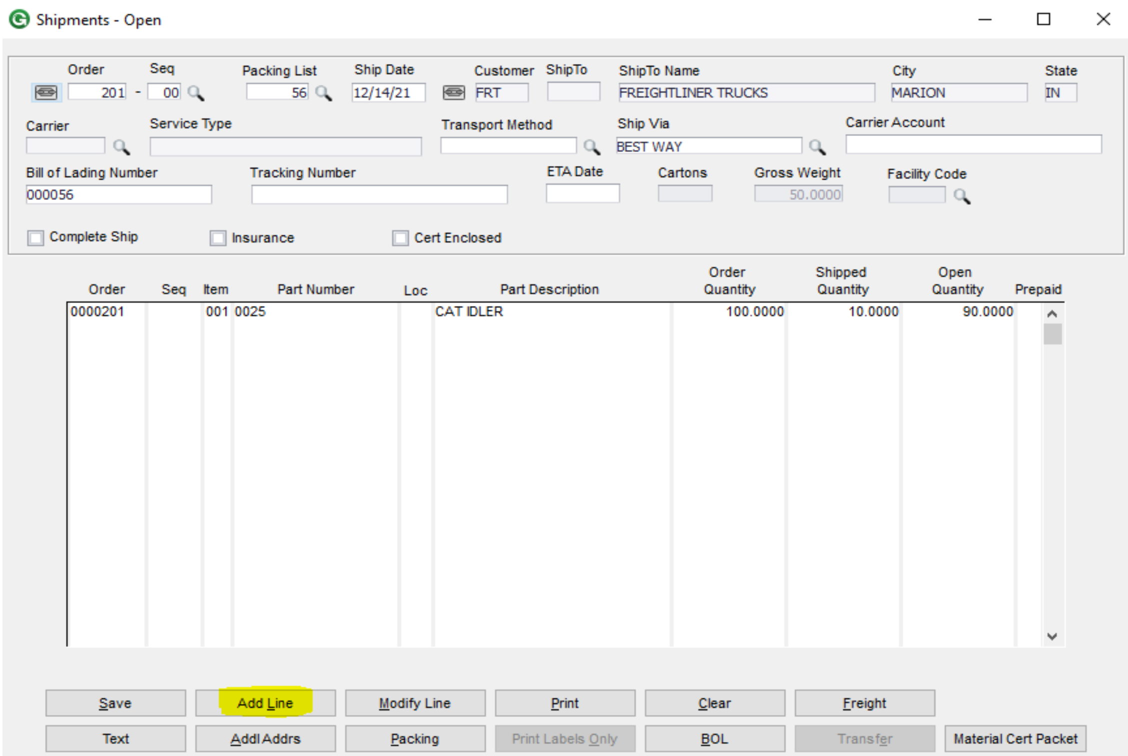
4. To modify a line on the shipment, the user will need to select the line and click ‘Modify Line’.



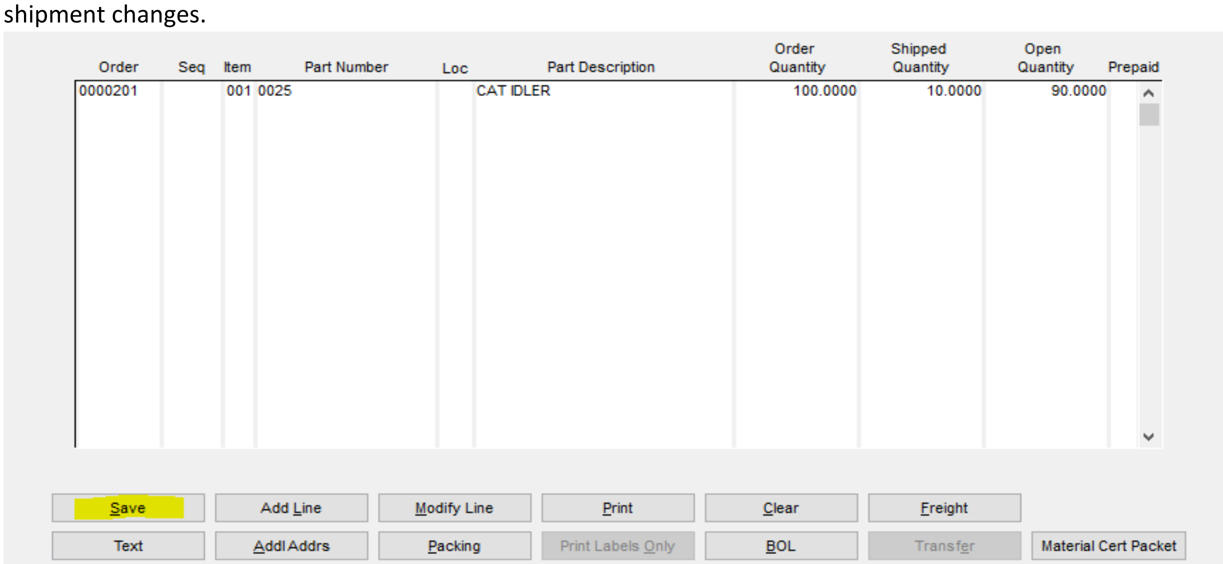
5. The screen below will open and allow the user to select a sequence, modify the shipped quantity and allow the user to select a different Serial Number for the shipment.
6. Once the user modifies the line, they will need to click ‘Save’ to process the changes to the line.



7. The user can add a line to the shipment by clicking ‘Add Line.’



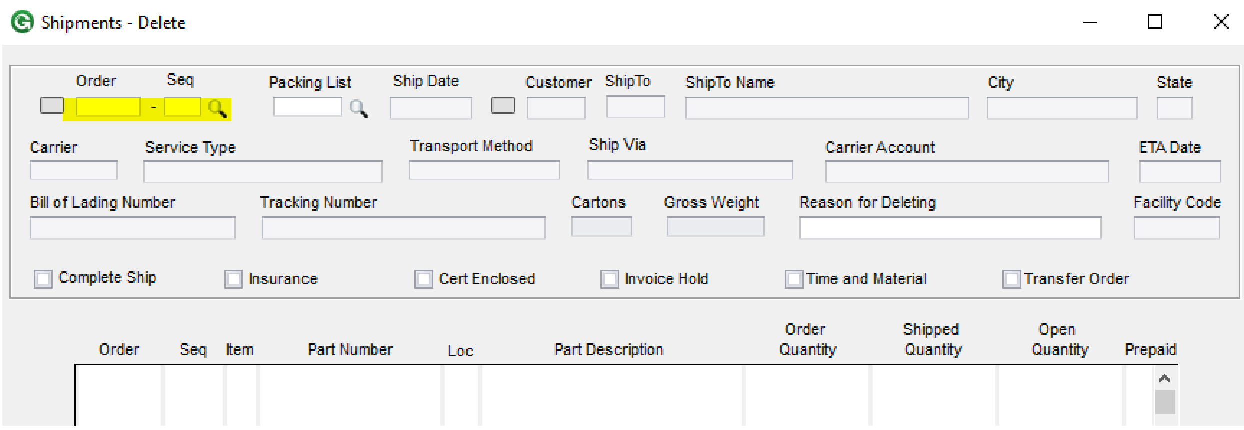
8. Once the user has finished modifying the shipment, they will need to click ‘Save’ to finish processing the shipment changes.



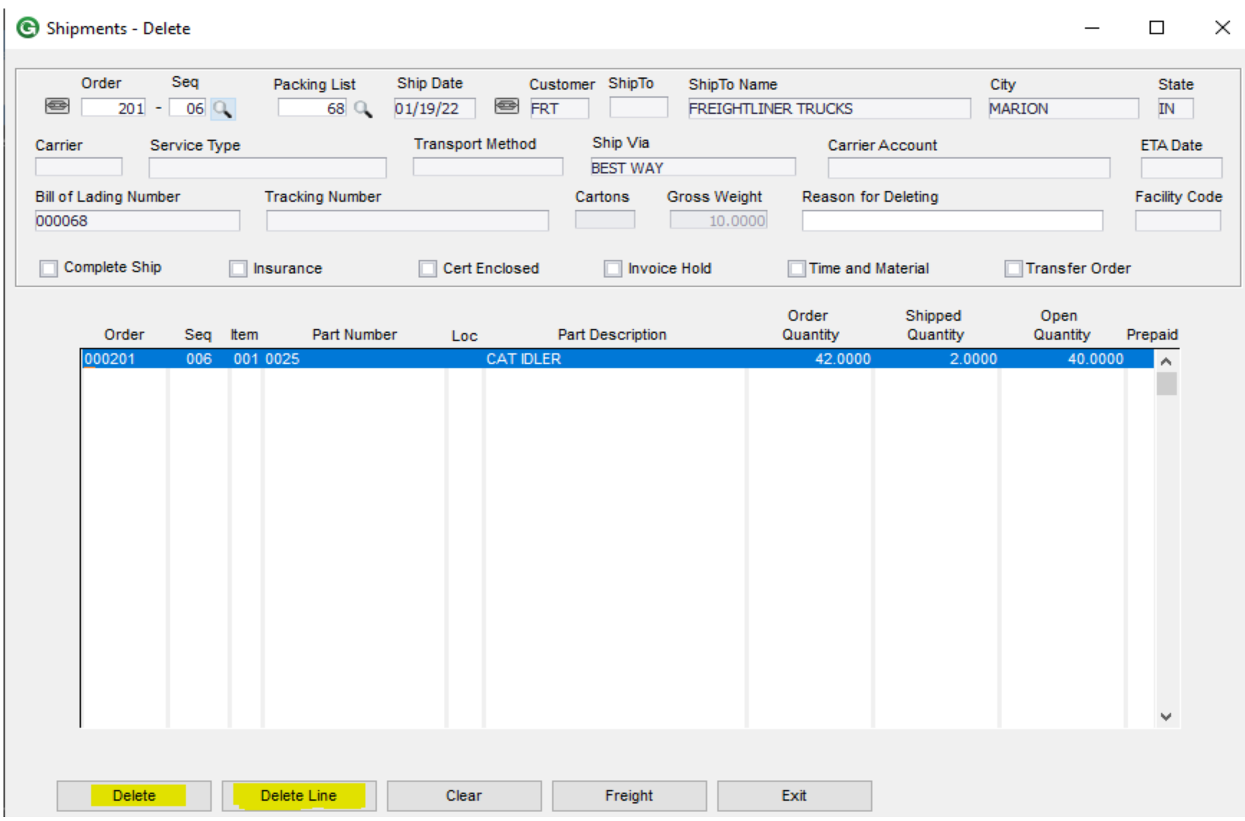
9. After the shipment has finished updating, the custom Instrument tracker table will be updated to match the Serials that were changed in the shipment.

Shipping & Receiving > Transactions > Shipments > Delete

1. The Delete Shipment screen is the same as the Open Shipment screen, minus the fact that the user can either delete the entire shipment or delete lines from the shipment.
2. The user will need to either enter the order number and sequence manually, or they can browse for an order using the browser.



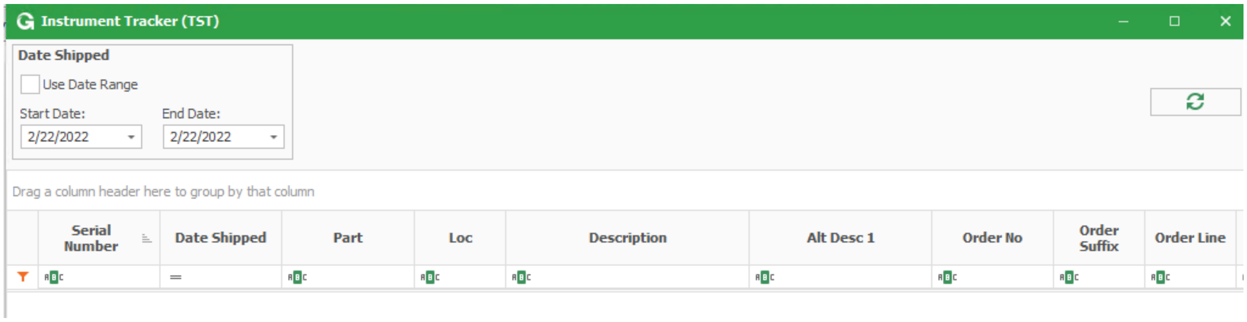
3. Once the user has selected the Order, they will have the option to either delete the entire order using the 'Delete' button, or they can select a line from the grid and use the 'Delete Line' button.



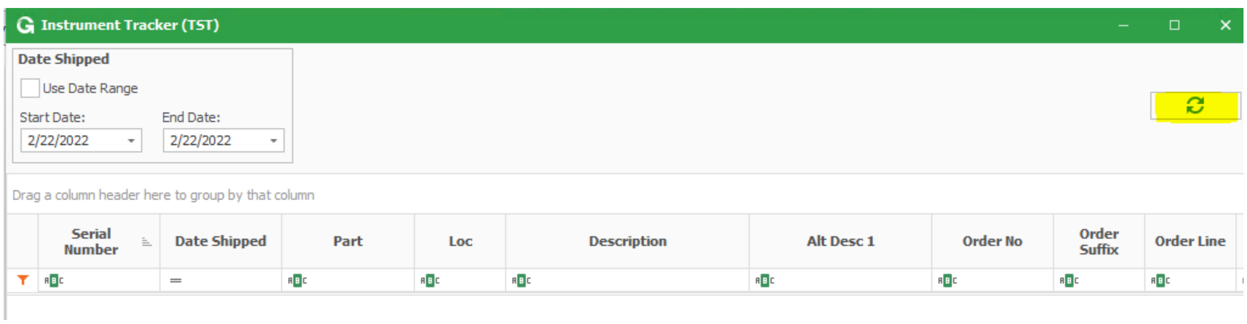
4. After the core process has finished deleting the line or deleting the entire shipment, the custom instrument table will be updated to reflect the changes.

Sales Analysis > View > Instrument Tracker (6581)

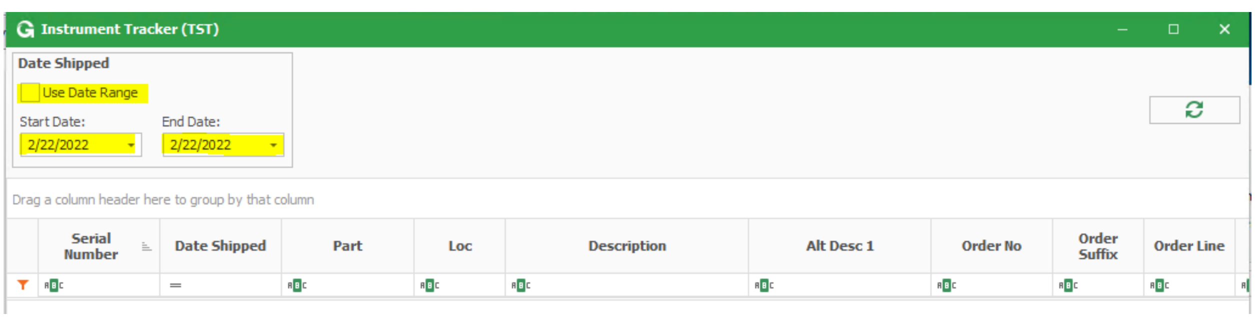
1. To view the imported and shipped Instrument Serial data, the user will need to open the dashboard using the Sales Analysis > View > Instrument Tracker (6581) menu item. The screen below will open.



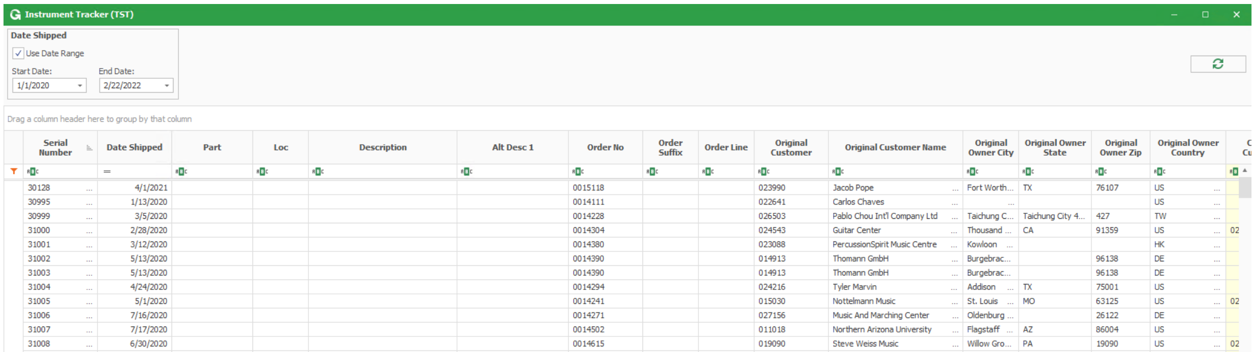
2. The user can load the data using a date range for the date shipped or the user can forgo the date range and load all the data up to today's date. If the user forgoes the date range, they will just click the 'Refresh' button to load the data.



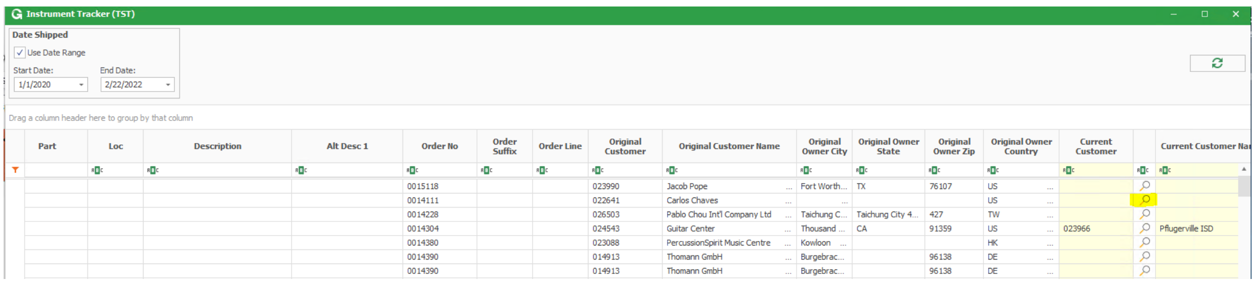
3. If the user chooses to use the date range, they will need to check the 'Use Date Range' checkbox and select the Start Date and End Date. The user will then need to click the 'Refresh' button to load the Instrument Data with a Shipped Date that falls within the selected range.



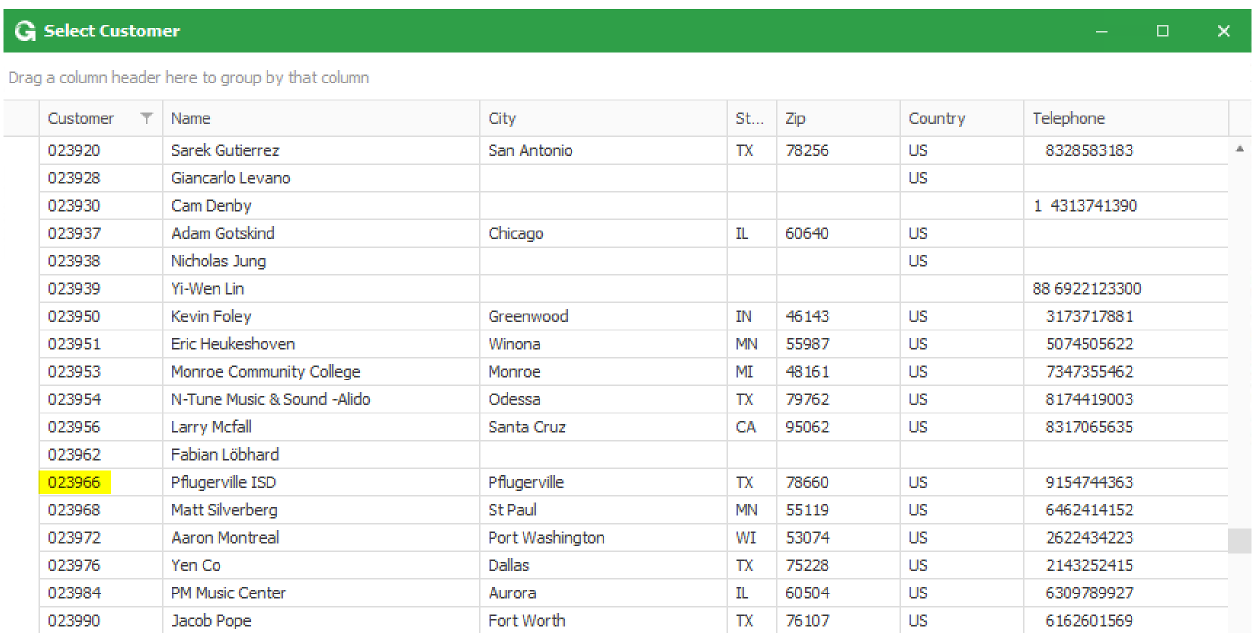
4. The data will appear as shown below.



5. The user can change the current customer by selecting the magnifying glass next to the 'Current Customer' column.



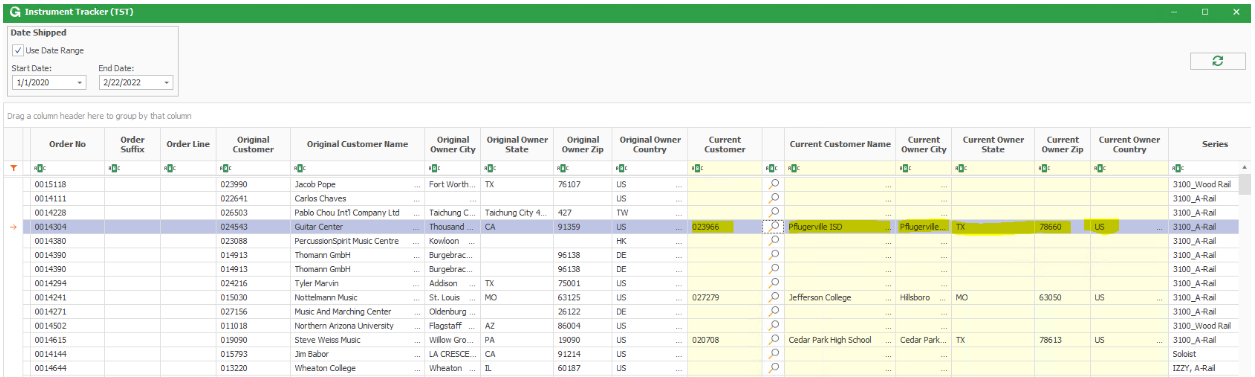
6. The Customer Master browser will open and allow the user to select the new Current Customer.


Select Customer

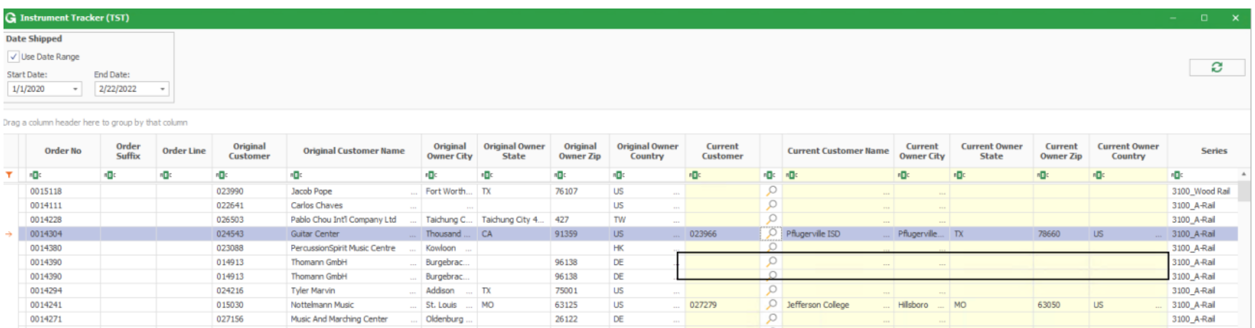
Drag a column header here to group by that column

Customer	Name	City	St...	Zip	Country	Telephone
023920	Sarek Gutierrez	San Antonio	TX	78256	US	8328583183
023928	Giancarlo Levano				US	
023930	Cam Denby					1 4313741390
023937	Adam Gotskind	Chicago	IL	60640	US	
023938	Nicholas Jung				US	
023939	Yi-Wen Lin					88 6922123300
023950	Kevin Foley	Greenwood	IN	46143	US	3173717881
023951	Eric Heukeshoven	Winona	MN	55987	US	5074505622
023953	Monroe Community College	Monroe	MI	48161	US	7347355462
023954	N-Tune Music & Sound -Alido	Odessa	TX	79762	US	8174419003
023956	Larry Mcfall	Santa Cruz	CA	95062	US	8317065635
023962	Fabian Löbhard					
023966	Pflugerville ISD	Pflugerville	TX	78660	US	9154744363
023968	Matt Silverberg	St Paul	MN	55119	US	6462414152
023972	Aaron Montreal	Port Washington	WI	53074	US	2622434223
023976	Yen Co	Dallas	TX	75228	US	2143252415
023984	PM Music Center	Aurora	IL	60504	US	6309789927
023990	Jacob Pope	Fort Worth	TX	76107	US	6162601569

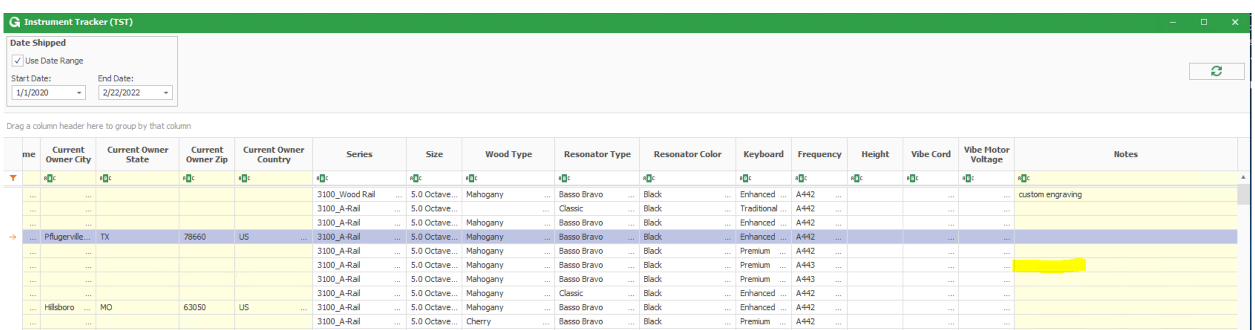
7. Once the user selects the Current Customer, the 'Current Customer' column will be updated to reflect the changes. The customer's name, city, state zip and country columns will also be populated with the selected customer's information.



8. The user also can manually enter the current customer's number, name, city, state, zip, and country if the customer doesn't exist in the Customer Master. They can do this by typing in the yellow columns for the corresponding field and tabbing to the next column.



9. The user also can add Notes to a serial number by typing in the 'Notes' column and tabbing. The Notes will be stored in the custom Instrument Serial table and will appear each time the data is loaded.



Inventory > Administration > Instrument Historical Upload (6581)

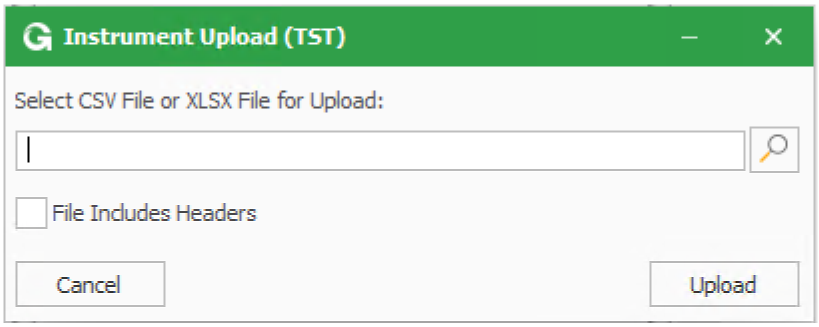
1. To Upload the existing Instrument Serial Numbers, you will need to create either a CSV or XLSX following the attached templates. The template also indicates the data type for each column, the number of allotted characters and an example of what the data should look like
2. The columns should be in the following order:
    a. Serial Number
    b. Order Number
    c. Order Line
    d. Original Customer
    e. Original Customer Name
    f. Original Customer City
    g. Original Customer State
    h. Original Customer Zip
    i. Original Customer Country
    j. Current Customer
    k. Current Customer Name
    l. Current Customer City
    m. Current Customer State
    n. Current Customer Zip
    o. Current Customer Country
    p. Date Shipped
    q. Series
    r. Size
    s. Wood Type
    t. Resonator Type
    u. Resonator Color
    v. Keyboard
    w. Frequency
    x. Height
    y. Vibe Cord
    z. Vibe Motor Voltage
    aa. Notes

**Note: if you have any questions about the template, please don't hesitate to ask

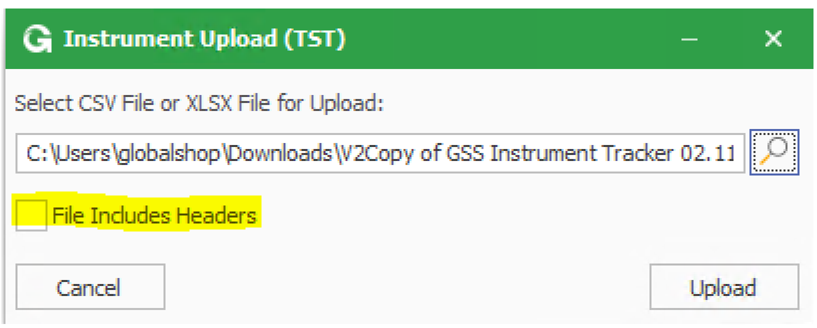
6581_Upload_Template.xlsx

6581_Upload_Template.csv

3. Once you have sent over the CSV or XLSX of all Instruments that need to be uploaded, I will review the data to make sure everything is in the correct format. Once I have confirmed the information is correct, I will run the Instrument Upload from Inventory > Administration > Instrument Historical Upload (6581).



4. If you know the file includes headers, you will need to check the ‘File Includes Headers’ checkbox so the process doesn’t try to insert the header record into the custom table.



5. I will move the CSV to a location on the server, browse for the file using the Windows browser, and click ‘Upload’ to add the information to the custom Instrument Serial table.