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User Interface Conventions

This section specifies the user interface portion of the application, along with associated program logic.

Text marked in blue identifies changes that will be implemented in a future release.

Text marked in green identifies changes that should be implemented in the v6.01.15.x

Section Organization

The User Interface Specification presents screen displays or “dialogs” in numeric order. Screen numbers are assigned to each dialog so as to maintain a logical hierarchy. In general, dialogs associated with a given function or module will be grouped together. 9000 Series dialogs are shared by multiple functions or modules, and appear at the end of this section.

Documentation Conventions

This section incorporates illustrations of the application user interface. Each screen display “dialog” consists of the screen display image, a screen heading, a paragraph documenting the processing required for the dialog, a paragraph listing the navigation options, and a table listing for each variable field on the dialog, its database source or destination, format, and any instructions required to process the field. The following section contains a sample dialog with each area identified:

Screen Heading	3400 A/R Collection	Screen Dialog																				
Processing Requirements	<p>Process</p> <p>User inputs or edits reference numbers and amounts in table.</p>																					
Navigation Options	<p>Navigation</p> <p>[Exit] Return</p> <p>[Add] Perform 9290 Add A/R Item</p> <p>[Del] MsgBox “Are you sure you want to delete this item?”, Yes, No*</p> <p>If Yes response then discard record</p> <p>Else retain record</p> <p>Remain at the current dialog</p> <p>⌨[Esc] MsgBox “Do you want to discard changes?”, Yes, No*</p> <p>If Yes response then discard changes, return</p> <p>Else remain at the current dialog</p>																					
Field Definition Table	<table border="1"> <thead> <tr> <th>File.Field Name</th> <th>Format</th> <th>C</th> <th>Instructions</th> </tr> </thead> <tbody> <tr> <td>ARD.InvoicePrefix +</td> <td>N0 01/08</td> <td>O</td> <td>Concatenated for input and display</td> </tr> <tr> <td>ARD.InvoiceSequence</td> <td>N0 01/04</td> <td></td> <td></td> </tr> <tr> <td>ARD.AmountPaid</td> <td>S2 01/09</td> <td>O</td> <td></td> </tr> <tr> <td>Total Amount Due</td> <td>S2 01/09</td> <td>L</td> <td>Sum(ARD.AmountPaid)</td> </tr> </tbody> </table>		File.Field Name	Format	C	Instructions	ARD.InvoicePrefix +	N0 01/08	O	Concatenated for input and display	ARD.InvoiceSequence	N0 01/04			ARD.AmountPaid	S2 01/09	O		Total Amount Due	S2 01/09	L	Sum(ARD.AmountPaid)
File.Field Name	Format	C	Instructions																			
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ARD.AmountPaid	S2 01/09	O																				
Total Amount Due	S2 01/09	L	Sum(ARD.AmountPaid)																			

- **Screen Headings** identify the name and number of the dialog. For full-screen displays, the name and number are also included on the status bar. Screen numbers identify approximately where a dialog fits in the overall program logic.
- All literal (static) fields on the **Screen Dialog** are shown explicitly on the display. Variable fields may contain a text identifier or a string of numerals depicting the approximate number of characters that the field will display. Note that when using variable-pitch fonts, the exact number of alphabetic characters displayed will depend on the combination of characters in use. Numeric characters are always fixed pitch, even in variable-pitch fonts.
- The **Process** section briefly describes what the user will accomplish on each dialog. This section may also contain information on how the screen should be prepared prior to its initial display, e.g., if a table is to be populated from a database file. Unless otherwise specified, input fields will be populated prior to display. Local and output fields will be initialized to blanks or zero prior to first display of the screen, and will subsequently display their current value.
- The **Navigation** section lists the action taken upon mouse-up event for touch button controls, along with actions of all enabled hard keyboard keys. Keys not listed in this section will assume default actions listed below. Keys not listed in either dialog-specific or default sections will have no effect.
- Source and content of variable fields are identified in the **Field Definition Table** that accompanies each form. Unless otherwise specified, fields are referenced in left-to-right, top-to-bottom order.

Column Label	Content
File.FieldName	For input fields, the source location; for output fields, the destination location; for locals, local name. Input/Output names use <file_abbrev>.<field_name> notation
Format	Standard data format designation (see File Interface Conventions)
C	Field class code where I = input, O = output, L = local (calculated at time of display)
Instructions	Information provided on how to populate input fields, how to calculate output and local fields, other data or conditions as required

- **Table Notes**
 - Fields on screen are listed in table in left-to-right, top-to-bottom order
 - Fields to which the user has access are shaded in table

Message Boxes

Message boxes are used to convey information to the user, ask questions, or confirm operations. Message boxes will conform to Microsoft Windows Messaging API standards and are not shown graphically in this document. When a message box is required, the following information will be provided:

- The text of the message (including variable references)
- Available buttons, e.g., OK, Yes, No, Cancel
- Default button (indicated by asterisk)
- Action(s) based on user response

Default Key Assignments

[Enter]	If touch button control has focus, performs action indicated for button.
[Esc]	Cancels current operation, restoring all variables to previous values (if any). Returns to calling form.
[BkSp]	Deletes character(s) to left of cursor position. If multiple characters are highlighted, then all characters are deleted.
[Tab]	Navigates to next field on dialog, or to first field on dialog if focus currently on last field.

Logical Conventions

- Contents of user input fields will be highlighted upon receiving focus via pen-tap or use of the [Tab] key. The field contents will be cleared if the user presses non-navigation keys while an input field is highlighted.
- If a database search on a key field fails, display MsgBox (Prompt, SearchParm, "Not found", OK*). Clear message box from display automatically if no user response in one second, or immediately if the user activates the "OK" touch button.

Standard Dialog Objects

The application will utilize the following dialog objects (controls). Conventional behavior is described when appropriate.

- **Edit controls:** used to display variables. Will be defined as String controls (alphanumeric fields). Bignum controls (numeric fields), Formatted Input, Date, or Time. In general, edit controls which are user-accessible will be displayed with a white background, and non-user-accessible controls will be displayed with a gray background.
- **Button:** used to select menu items, options, program branches, and respond to questions. Colors are inverted when button is in the "down" position.
- **List box:** allows user to select from among a set of pre-defined options.
- **Drop-down list box:** similar to list box, except that only the current or default option is displayed on a single line. When the control receives focus, a list box will drop down to display additional choices.
- **Spin buttons:** used in pairs, in conjunction with a variable. Allows user to scroll through values, usually in some logical order.
- **Table control:** used to display data in spreadsheet format. One or more fields in each row may be editable. User-accessible fields are generally displayed with a white background, and non-user-accessible fields are displayed with a gray background.
- **Radio button:** mutually exclusive within a group, i.e., only one radio button may be selected at any given time.
- **Check box:** may also be grouped, but any number of check boxes may be selected at any given time.
- **Window:** all dialogs occupy a window control which typically covers the entire screen. Child windows are used within some window controls in conjunction with Notebook controls to allow the Notebook to occupy less than the full size of the dialog. In this usage, the child window will not have a title bar, system or control buttons, or a border.
- **Notebook:** occupies the full window in which it is placed; places two or more "tabs" across top of dialog, each of which is associated with a "page" of information. Notebook controls are sometimes placed inside a child window with common controls, e.g., buttons, placed in the main dialog window. The currently selected tab will be highlighted.

Standard Navigation Controls

Many dialogs use the following on-screen buttons (or keyboard equivalents) for navigating table controls.



[Gold]+[5]



[Gold]+[2]

Line Up / Line Down: move highlight up or down one record in the associated table. Does not wraparound at beginning or end of list.



[Gold]+[4]



[Gold]+[6]

Page Up / Page Down: move highlight up or down one page in the associated table. Page length varies by table. If first record highlighted and Page Down is pressed, then highlight last record on first page. If last record highlighted and Page Up pressed, then highlight first record on last page.

Framework Features

Activating an External Pocket PC Application

It is possible to run up to four external Pocket PC application(s) on top of this application. Pressing a Pocket PC hardware application key starts the program assigned to the key and displays the initiated application on top of this application. The PXClient.INI configuration file contains the names of the executable files assigned to each hardware application key. (See the "PXClient.INI File Information" section in the appendices for more information.) If the configuration file does not specify an executable filename for a hardware application key, then a message box will display the following message: "The application executable filename for this hardware key is not defined in the ini file."

To start an application, press the hardware application key assigned to the application. The hardware application keys are available at all times, except when communication processes such as printing, telecommunications, and background telecommunications are in progress. Hardware application keys are available even when an initiated application is currently visible.

To return to this application or a previously initiated program, close the currently visible program(s).

Connection Indicator

A connection indicator icon may be displayed in the upper right hand corner of the application title bar. The following "Active" Connection Indicator icon means that the user is able to send/receive real-time messages:

When displayed, the "Active" Connection Indicator provides the user with the following information:



- The Intermec Device is attached to a wireless data network. This means that the wireless network is available to send/receive messages. However, it does not necessarily mean that the device will be able to communicate with the server as server availability is independent of wireless network availability.
- The InterComm Server was available when the ArciTech client application was started. At start-up, the ArciTech client attempts to establish a connection to the InterComm server. If the InterComm server is not available at initial start-up, the "active" wireless network indicator will not be displayed. However, after initial start-up, the wireless network indicator does not have visibility to server availability and only represents the availability of the wireless network.

The following "Inactive" Connection Indicator icon means that the user is unable to send/receive real-time messages.



When displayed, the "Inactive" Connection Indicator provides the user with the following information:

- The Intermec device is NOT attached to a wireless data network. Therefore, wireless messages cannot be sent or received by the device.

If the user initiates another program via the hardware application keys, the connection indicator icon is not displayed on the initiated program. When the user returns to this application, the connection indicator icon will once again be displayed.

If a "cannot start radio handler" message is detected, then display MsgBox "Radio error. Please finish and reboot the HHC."; and remove the connection indicator. This is an error that the HHC does not recover from. A reboot is necessary.

The Connection Indicator will be displayed when wireless networking is enabled for GPRS networks on Intermec 700 color devices. The wireless network indicator is not displayed on 700 mono devices.

Password Protection

The handheld is password protected by the 9097 User Login screen. If there is no mouse movement or key presses within a configured amount of time, the 9097 User Login screen is displayed and the user is forced to enter the password before they are allowed to continue.

Start-Up/Main Menu

Upon initial entry into the application, the logo/copyright dialog will be displayed while the application performs setup procedures. User must press [OK] to acknowledge the copyright.

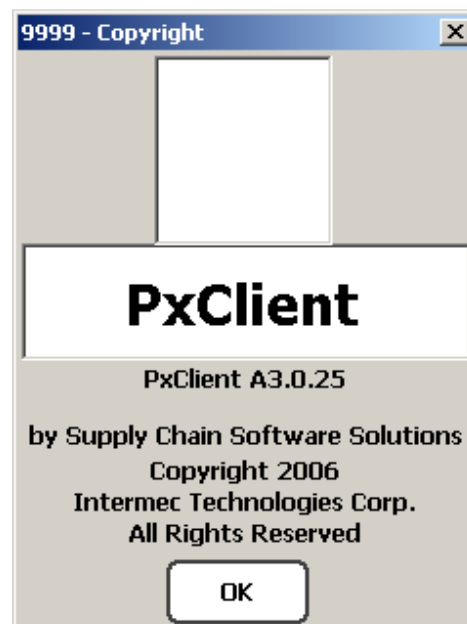
9999 Copyright

Process

Displays copyright notice.

Navigation

[OK] If application is not in initial power up (no data) state
Go to 0000 Main Menu
Else
Perform 9097 User Login
Go to 0000 Main Menu



File.Field Name	Format	C	Instructions
(none)			

0000 Main Menu**Process**

All buttons displayed at all times. Options that are not available will be grayed out. The table below summarizes functions enabled based on application program states.

[Inventory] button disabled if RCT.EnableInventory = 0 (disable).

[Service Customer] button disabled if RCT.EnableInventory = 2 AND SCT.ApplicationState < 2 (Load Vehicle not completed).

[End Day] button disabled if RCT.EnableInventory = 2 AND SCT.Application State < 3 (Unload Vehicle not completed)

[Transmit Data] button disabled if RCT.EnableMidDayTelecom = 0.

Program State	Functions Enabled ¹
Power Up (no data)	Transmit Data, Setup
Power Up (with data) or End Day done	Start Day, Transmit Data, Setup
Start Day done	All (however, see disabled conditions listed above)


**Navigation**

[Start Day]	Perform 1000 Start Day
[Inventory]	Perform 2000 Inventory Menu
[Service Customer]	If RCT.EnableInventory = 1 (perpetual inventory) AND SCT.ApplicationState < 2 (load vehicle not completed) then Roll previous day's End Stock Qty into INV.BeginStockQty Write ITC Inventory Transaction Control record with document number, document prefix, and TransactionType = 01 (load vehicle) Write ITD Inventory Transaction Detail records with TransactionTypeCode = 01 (load out) Update INV Route Inventory records Delete the LDC Route Load Control download file if it exists Set SCT.ApplicationState = 2 (load vehicle done) If RCT.EnableDelayPrint = 1 then Generate a Final Load Report & add to Print Documents table marked as <i>DELAYED</i> Else generate a Final Load Report & add to Print Documents table marked as <i>PRINTED</i> Perform 3000 Service Customer Perform 3000 Service Customer
[End Day]	If RTC.PasswordArray(Settlement) < > 0 then perform 9090 Password Input If PasswordStatus(Pass) then perform 4000 End Day Menu Else remain at current dialog Else Perform 4000 End Day Menu
[Mail]	Perform 9020 Mail
[Information]	Perform 6000 Information Menu
[Transmit Data]	If [Program State < > Start Day Done] OR [Program State = Start Day Done and RCT.EnableMidDayTelecom = 1] then If literals exist for midday tcom pop-up message box then MsgBox "Continue with midday tcom?"; Yes, No* If Yes response then perform 7000 Transmit Data Else close MsgBox and remain at current dialog Else disable button, remain at current dialog

¹ List is cumulative, i.e., for any given state, the listed functions are enabled *in addition to* all functions listed for preceding states.

[Transmit Data] If [Program State < > Start Day Done] or [Program State = Start Day Done and RCT.EnableMidDayTelecom = 1] then perform 7000 Transmit Data
Else disable button, remain at current dialog

[Setup] Perform 8000 Setup Menu

[Esc] If RTC.PasswordArray(ProgramExit) < > 0 then
Perform 9090 Password Input
If PasswordStatus(Pass) then
MsgBox "Are you sure you want to exit?", Yes, No*
If Yes response then terminate application
Else remain at current dialog
Else terminate application

File.Field Name	Format	C	Instructions
(none)			

Start Day

This function allows the user to view route identification fields and review/edit user information. Start Day also establishes the System Date and Time. The user is required to review messages before continuing. This function must be executed before access to Service Customer is allowed.

1000 Start Day

Process

If user control active (RCT.PasswordArray[6] or [7] is non-blank/zero)
AND no user currently logged in then initially display 9095 User Login.
[Exit] button disabled if route display messages exist
(MSG.MessageTypeCode = 01) and have not yet been accessed.
[Survey] button disabled if no start day surveys exist.
[Msgs] button disabled if no route display messages exist.
Changes to Route Control (RCT) fields are written to the Route Control file and the Route Information Change (RTC) file.

Upon entering this screen if the RCT.StartDayWarningTime <> 0 and Industrial Route (MSG.MessageTypeCode = 4 and MSG.MessageText <> "Healthcare" or "Medigas"), then start a timer to track the amount of time the user is in the Start of Day and Load functions until the user selects a work order on 3010.

Navigation

[keyboard] button	Perform 9010 Keyboard
[calendar] button	If RTC.PasswordArray(DateTimeChange)<>0 then Perform 9090 Password Input If PasswordStatus(Pass) then Perform 9040 Calendar
[clock] button	If RTC.PasswordArray(DateTimeChange)<>0 then Perform 9090 Password Input If PasswordStatus(Pass) then perform 9050 Set Time
[Exit]	If uncompleted, mandatory start day surveys exist then MsgBox "Please complete survey before exiting.", OK* Perform 3520A Survey & Audit Processing and upon return redisplay this dialog If SCT.ApplicationState = 0 (power up) or > 3 (end of day has been done) then If RCT.PromptOdomInput > 0 then Perform 9080 Odometer Input If route is a medical route (see Message Master file) Perform 9082 Source Vessel Numbers Perform Start Day Processing: Increment RouteKey Reset VisitKey, TransactionKey, DetailKey, InventoryKey and SequenceKey values Clear the upload files as well as the internal files (DSQ, RSQ, JSQ and ORQ) Set SCT.ApplicationState = 1 (start day done) Write STD Start/End Day upload record Write SCD Status Change Detail upload record with StatusNumber = 9901 Perform 7000A Real-Time Incoming Messages If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND RTM.MessageType = 1 (status change message) record found then Perform 7000 Transmit Data in real-time Create route sequence from SEQ file building work orders to be serviced Create jobs and orders to be done today Return
[Notes]	Perform 9120 Route Notebook
[Survey]	Perform 3520A Survey & Audit Processing
[Msgs]	Perform 9060 Customer Messages
[Esc]	Perform 9110 Exit Function If not canceled then Return

Else remain at current dialog

File.Field Name	Format	C	Instructions
RCT.LocationNumber	AN 01/06	I	View only.
RCT.RouteNumber	AN 01/12	I	View only.
RCT.SalesRepNumber	AN 01/10	I	Editable only if RCT.EnableStartDaySalesRepEdit = 1
RCT.SalesRepName	AN 01/30	I	Editable only if RCT.EnableStartDayNameEdit = 1
System Date	DT 10/10	L	Editable only if RCT.EnableStartDayDateTimeEdit = 1
System Time	TM 08/08	L	Editable only if RCT.EnableStartDayDateTimeEdit = 1; "hh:mm AM" format

Inventory

The Inventory module consists of five routines designed to manage all aspects of route inventory other than customer invoices. All data-generating routines produce serial-numbered transactions and reports and may be password protected.

Load Vehicle

This function is used to record transactions involving parts being loaded into route inventory, typically at the beginning of the route day. Load Vehicle may process a downloaded starting load file and/or inventory rolled forward from the previous route day.

The Load Vehicle transaction creates one Inventory Control (ITC) record, TransactionType = 01, plus Inventory Detail (ITD) records, TransactionTypeCode = 01, for each part loaded out. In addition, the Inventory (INV) file LoadQty field is populated by the Load Vehicle transaction.

Parts Transfer

This function allows the user to perform inventory transactions during the route day. A pop-up list allows selection of the "location" to which the part will be transferred. Parts Transfer supports three transaction types:

Off Load: Remove saleable parts from route inventory

Add On: Add parts to route inventory

Damaged: Remove damaged (non-saleable) parts returned from customers from route inventory.

The Parts Transfer transaction creates one Inventory Control (ITC) record, TransactionType = 02, plus Inventory Detail (ITD) records, TransactionTypeCode = 02..04, for each part transferred by transaction type. In addition, the Inventory (INV) file LoadAddQty, LoadCutQty, DamagedAddQty, and/or DamagedCutQty fields are updated by the Parts Transfer transaction.

Unload Vehicle

This function allows the user to perform inventory transactions associated with the end of the route. An option flag controls whether the application will automatically calculate the Unload Vehicle transaction for the user. Executing Unload Vehicle "closes" the inventory, so Load Vehicle must be run before Customer Operations are allowed. Unload Vehicle supports three transaction types:

Inventory: Input or adjust inventory remaining on route

Rtn Stock: Remove salable parts from inventory

Damaged: Account for damaged (non-salable) inventory returned from customers.

The Unload Vehicle transaction creates one Inventory Control (ITC) record, TransactionType = 03, plus Inventory Detail (ITD) records, TransactionTypeCode = 05..07 & 09..10, for each part unloaded by transaction type. Type 09 & 10 records are written only for parts with a variance. In addition, the Inventory (INV) file EndStockQty, UnloadQty and/or DamagedUnloadQty fields are updated by the Unload Vehicle transaction.

The Unload Vehicle function optionally calculates quantity variances for each part in inventory, based on the calculated inventory quantity (CIQ), i.e., the quantity of each part that "should" be in inventory based on all prior transactions. Inventory Variance is calculated by subtracting the CIQ from the quantity entered on the Inventory page. The same calculation is also performed for Damaged Returns, subtracting the CIQ from the quantity entered on the Damaged page. Return Stock does not directly affect variance calculation, other than by reducing the CIQ by the quantity of the Rtn Stock transaction. Quantity and amount variances are optionally printed on the Inventory report and the amount variance is optionally included in the End Day Cash Settlement calculation. If ending inventory is rolled over to become the next day's Load Vehicle, then the actual quantities input by the user are used rather than the CIQ. Damaged returns are not rolled over.

Parts Request

This function allows the user to create an order for product to be placed in inventory at a future date. Parts Request transactions are also uploaded, where they may be processed on the host and downloaded as a starting load file at some future date.

The Parts Request transaction creates one Inventory Control (ITC) record, TransactionType = 04, plus Inventory Detail (ITD) records, TransactionTypeCode = 08, for each part requested. The Inventory (INV) file is not updated by the Parts Request transaction.

Hazardous Materials

This function is used to determine if any items currently on the vehicle are hazardous materials (items found in the GAS Gas File). It will also determine which placards are required and display them to the user. User may optional print a Hazardous Materials Report as well.

Inventory Options

Enabling/Disabling the Inventory Feature

Inventory must be enabled to access the features described above. Inventory is enabled and disabled by the RCT.EnableInventory flag contained in the RCT Route Control File. To enable the inventory features of the application, this flag should be set to a value of 1 (perpetual inventory) or 2 (daily inventory).

To disable inventory features, RCT.EnableInventory should be set to a value of 0. When inventory is disabled, the [Inventory] button on dialog 0000 Main Menu will be grayed out and inactive. All remaining inventory features will also be disabled.

Maintaining Perpetual Vehicle Inventory

Many service vehicles maintain a perpetual inventory of parts. Parts that remain unused at the end of a day, are often left on the truck for use on subsequent days. In order for the the application to track perpetual inventory, Load processing must occur at the beginning of each day to activate inventory and allows for the user to load any additional items needed for the current day. Unload processing must also be performed at the end of each day in order to reconcile inventory and roll it forward for the next day. Both the Load and Unload functions can be completed manually or the program will automatically execute the processing required for the user if not manually selected. RCT.EnableInventory must be set to a 1 to enable perpetual inventory.

Maintaining Daily Inventory (removing all inventory from the vehicle each day)

Many delivery vehicles are completely unloaded at the completion of a day and then reloaded for the next day's deliveries. In this scenario, the Load function must be manually performed in order to track items being loaded onto the truck and activate inventory. The Unload function must also be performed at the end of each day to reconcile inventory and clear inventory for the next day. RCT.EnableInventory must be set to a 2 to enable daily inventory.

Understanding Inventory Groups

The application supports the use of two inventory groups to segment inventory carried on the vehicle. These groups are the "Sales" inventory group and the "Damages" inventory group. An inventory balance is maintained by item for each of these groups, and enables the user to know what is on the vehicle at all times.

“Sales” Inventory

The Sales inventory group tracks the quantity of an item on the vehicle that may be delivered or sold to a customer. The balance of this inventory group may be rolled from one day to the next.

Mobile Transactions affecting the balance of Sales inventory for an item:

User action	Transaction used to enter item qty	Effect on Sales inventory balance** for the item	Field for daily accumulation of transaction qtys
Put item on vehicle at start of day	Load (ITD.Trxn = 01)	Increase by qty entered	INV.LoadQty*
Put item on vehicle during day	Transfer – Add On Tab (ITD.Trxn = 03)	Increase by qty entered	INV.LoadAddQty*
Remove item from vehicle during day	Transfer – Offload Tab (ITD.Trxn = 02)	Decrease by qty entered	INV.LoadCutQty*
Remove item from vehicle for customer	Service Customer – Sales Tab	Decrease by qty entered	INV.SaleQty*
Put item on vehicle from customer	Service Customer – Returns Tab	Increase by qty entered	INV.ReturnQty*
Remove item from vehicle at end of day	Unload – Return to Stock Tab (ITD.Trxn = 06)	Decrease by qty entered	INV.UnloadQty*
Count quantity of item remaining on vehicle at end of day	Unload – Inventory Tab (ITD.Trxn = 05)	Set balance to qty entered. Calc over/short variance if different than qty calculated from inventory activity.	INV.EndStockQty* (Not accumulated. Set to qty entered)

*Beginning Balance for each route day is zero

**Depending on Load option used, the ending inventory balance from the current day (INV.EndStockQty) may be rolled forward as the beginning inventory balance for the next day (INV.BeginStockQty), rolled into the suggested load qty or cleared to 0.

“Damaged” Inventory

The Damaged inventory group tracks the quantity of an item that is placed on the vehicle as the result of a customer return or pick-up. Items placed in Damaged inventory may not be sold or delivered to another customer. These items may have actual flaws or characteristics that prevent sale or delivery of the item to another customer. The Damaged inventory grouping may also be used to simply segregate customer returns/pick-ups from deliveries. The application assumes that all items in damaged inventory will be removed from the vehicle at the end of the route. Therefore, the balance of this inventory group is cleared at the end of each route day and may not be rolled forward to subsequent days.

Mobile Transactions affecting the balance of ‘Damaged’ inventory for an item

User action	Transaction used to enter item qty	Effect on Damaged inventory balance* for Item	Field for daily accumulation of transaction qtys
Put item on Vehicle from Cust	Service Customer – Damage Tab	Increase by qty entered	INV.DamagedAddQty*
Remove item from Vehicle during day	Transfer – Damages Tab (ITD.Trxn = 04)	Decrease by qty entered	INV.DamagedCutQty*
Remove item from Vehicle at end of day	Unload – Damages Tab (ITD.Trxn = 07)	Set balance to qty entered. Calc over/short variance if different than qty calculated from inventory activity.	INV.DamagedUnloadQty*

*Beginning Balance for each route day is zero

Selecting a Load Option

Load options are controlled by the RCT.AutoCalculateLoadOut flag in the RCT Route Control File. The selected Load option determines what items and quantities will be displayed to the user during the Load function.

The default Load option is “Ending Inventory + LDC” (option 0 and 1). Both of these options will display items that contain non-zero ending inventory quantities from the prior day as well as any items found in a LDC Route Load Control File with a non-zero LoadQuantity for this route day and allow the user to enter additional load quantities. The user can view an item’s current inventory level and add load quantities as necessary. The LDC file may be generated by the enterprise or it may be generated by the mobile system based upon scheduled jobs for the current day. The LDC file may be the result of a load performed using a WMS system. This is a good option for firms whose business process is to remove all inventory each day. The next day’s inventory is determined based upon scheduled orders and any exceptions left on the vehicle during the prior day.

The other Load option is “LDC file only” (option 3). This option will only display items found in the LDC Route Load Control File with a non-zero LoadQuantity for this route day and allow the user to modify downloaded load quantities.

For both options, any ending inventory quantities from the prior day will be rolled into today’s beginning stock quantity and will be displayed to help the user determine if additional load quantities are needed.

Unload Options

Unload options are controlled by the RCT.AutoCalculateLoadIn flag in the RCT Route Control File. This flag controls the calculation of ending inventory for the unload process.

The default Option 0 disables the calculation of ending inventory values during the unload process. In this case, the unload screen is blank and the user must perform a physical inventory of items on the vehicle. Items that are to remain on the vehicle are entered on the Ending Inventory tab. Items to be removed are entered on the ‘RTS’ or Return to Stock tab.

Option 1 calculates unload quantities for Return to Stock and Damaged Returns. It assumes that all remaining inventory is to be unloaded from the vehicle and fills the table this way. Changes to quantities are not allowed.

Option 2 calculates unload quantities just as option 1, but allows the user to adjust ending quantities. May leave items on the truck.

Option 3 calculates unload quantities for Inventory and Damaged Returns. It assumes that all remaining inventory is to be unloaded from the vehicle and fills the table this way. Changes to quantities are not allowed.

Option 4 calculates unload quantities just as option 1, but allows the user to adjust ending quantities. May leave items on the truck.

Inventory by Type Option

If inventory by type is enabled (RCT.InventoryInput = 1) then part number fields in Load Vehicle, Parts Transfer, and Unload Vehicle refer to type definition Item Master records (ITM.ItemTypeCode = 99). Individual parts (ITM.ItemTypeCode = 01) are associated with type definitions via the ITM.TypeCode field, but cannot be transaction in these three functions. All parts must be associated with a type in order for inventory to be correctly maintained.

Empty items (ITM.ItemTypeCode = 02) are always inventoried by part. Type codes are not supported for empty items.

Parts Request always uses product part numbers rather than type codes, regardless of the inventory input option enabled. If inventory by type is used, then the inventory quantity on the Parts Request dialog will reflect the associated type total, not the individual part quantity.

Supported Inventory flag combinations:**When RCT.EnableInventory = 0 (disabled):**

RCT.AutoCalculateLoadOut	can only be = 0/1	(ending inventory + LDC)
RCT.AutoCalculateLoadIn	can only be = 0	(disabled)
RCT.InventoryVariance	can only be = 1	(variance not due at EOD)
RCT.InvenOversell	can only be = 2	(enable oversell & don't prompt)

When RCT.EnableInventory = 1 (enabled, Load & Unload are optional):

RCT.AutoCalculateLoadOut	can only be = 0/1	(ending inventory + LDC)
	or = 3	(LDC file only)
RCT.AutoCalculateLoadIn	can only be = 0	(disabled)
	or = 4	(calculate load in qty for Inventory & Damaged Returns, enable changes)
RCT.InventoryVariance	can only be = 0	(disabled)
	or = 1	(variance not due at EOD)
RCT.InvenOversell	can only be = 1	(enable oversell & prompt)
	or = 2	(enable oversell & don't prompt)

When RCT.EnableInventory = 2 (enabled, Load & Unload are required):

RCT.AutoCalculateLoadOut	can only be = 0/1	(ending inventory + LDC)
	or = 3	(LDC file only)
RCT.AutoCalculateLoadIn	can only be = 1	(calculate load in qtys for Return To Stock & Damaged Returns, disable chgs)
	or = 2	(calculate load in qtys for Return To Stock & Damaged Returns, enable chgs)
RCT.InventoryVariance	can only be = 0	(disabled)
	or = 1	(variance not due at EOD)
	or = 2	(variance due at EOD)
RCT.InvenOversell	can only be = 1	(enable oversell & prompt)
	or = 2	(enable oversell & don't prompt)

2000 Inventory Menu**Process**

[Load Vehicle] disabled if SCT.ApplicationState = 2 (load vehicle done)

[Parts Transfer] disabled if SCT.ApplicationState = 3 (unload vehicle done)

[Unload Vehicle] disabled if SCT.ApplicationState = 1 (start day done) or = 3 (unload vehicle done).

Inventory sub-function access is password protected (excluding Hazardous Materials and Print Report).

If RCT.PasswordArray[06] < > 0 and RCT.Password[n] < > 0 then

 Perform 9090 Password Input

 If PasswordStatus(Pass) then access granted

 Else remain at current dialog

Endif

Note that once the inventory password has been successfully entered, access will automatically be granted to each protected sub-function until such time as this dialog is exited.

[Hazardous Materials] disabled if RCT.EnableHazardousMaterials = 0 (disabled).

Navigation


[Load Vehicle] Perform 2100 Load Vehicle

[Parts Transfer] Perform 2200 Parts Transfer

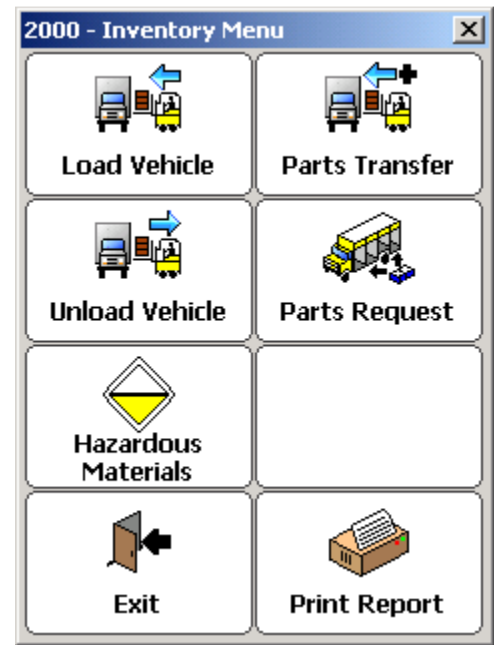
[Unload Vehicle] Perform 2300 Unload Vehicle

[Parts Request] Perform 2400 Parts Request

[Hazardous Materials] Perform 2500 Hazardous Materials

[Exit] or  [Esc] Return

[Print Report] If RCT.RoutePrinter = 99 (no printer) then
 MsgBox "No printer selected.", OK*
 Close MsgBox and remain at current dialog
 Else
 Perform 9100 Print Report (Route Inventory)



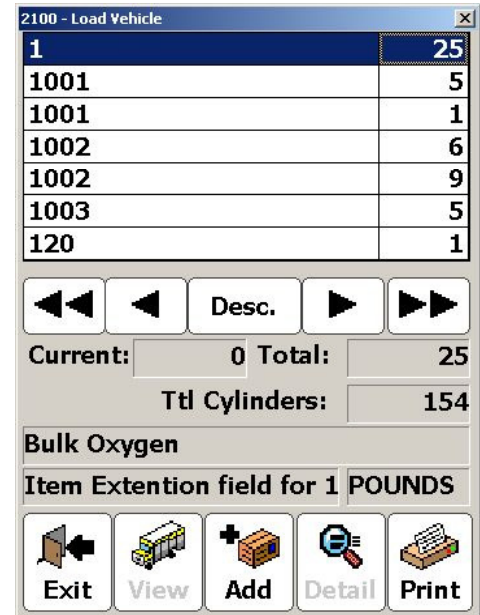
File.Field Name	Format	C	Instructions
(none)			

2100 Load Vehicle

Process


Populate the grid (upper half of the dialog as shown at right) based on the following RCT.AutoCalculateLoadOut values:

Value	Action
0	Populate the table with all items that either contain a non-zero previous day's ending inventory value OR can be found in a downloaded LDC Route Load Control File for this route day. The quantity initially displayed in the grid will either be a zero (for items that only have a non-zero previous day's ending inventory value) OR will be populated from LDC.LoadQuantity. Combine LDC records with the same ItemNumber and ItemExtension, but not for records with the same ItemNumber but differing ItemExtensions.
1	Same as value = 0.
2	Reserved for future use.



3	Populate the table with all items found in the LDC Route Load Control File for this route day. If no LDC records are found, then the table will be empty. The quantity initially displayed in the grid will be populated from LDC.LoadQuantity. Combine LDC records with the same ItemNumber and ItemExtension, but not for records with the same ItemNumber but differing ItemExtensions.
---	--

Navigation

[Number/Desc.]	If Number displayed and pressed then Display part numbers in the grid and the part description in the first text box below the grid Else (Desc. displayed and pressed) Display part descriptions in the grid and the part number in the first text box below the grid
[Exit] or  [Esc]	If details present then Perform 9110 Exit Function If exit confirmed then return Else remain at current dialog Else return
[View]	not implemented
[Add]	Perform 9030 Select Part
[Detail]	not implemented
[Print]	If RCT.RoutePrinter < 99 (printer selected) then perform 9300 Print Numbered Document If PrintStatus(Done) or RCT.RoutePrinter = 99 (no printer) then Roll previous day's End Stock Qty into INV.BeginStockQty Write ITC Inventory Transaction Control record with document number, document prefix, and TransactionType = 01 (load vehicle) Write ITD Inventory Transaction Detail records with TransactionTypeCode = 01 (load out), including all transactions with zero quantities Update INV Route Inventory records Delete the LDC Route Load Control download file if it exists Set SCT.ApplicationState = 2 (load vehicle done) If RCT.EnableLoadTelecom = 1 then perform 7000 Transmit Data (Load) and return if RCT.HTMLHazMat = 1 then print an HTML Hazmat report Else remain at current dialog

File.Field Name	Format	C	Instructions
ITM.ItemDescription or ITM.ItemNumber ITD.ItemNumber	AN 01/40 AN 01/ 26	I I O	Use AID.ItemDescription if exists for selected RCT.Language/item ITD.TransactionTypeCode = 01 (load out)
ITD.ItemQuantity	N0 01/05	O	Quantities displayed in the grid (upper half of the dialog) are populated per the action described in the table in the Process section above
INV.BeginStockQty	N0 01/05	O	
Total Quantity	N0 01/05	O	Sum of ITD.ItemQuantity (where ITD.TransactionTypeCode = 01) + INV.BeginStockQty for currently selected item
Total Cylinders	N0 01/05	O	Sum of ITD.ItemQuantity (where ITD.TransactionTypeCode = 01) for all items in the grid.
ITM.ItemNumber ITD.ItemNumber or ITM.ItemDescription	AN 01/18 AN 01/40	I I O	ITD.TransactionTypeCode = 01 (load out) Use AID.ItemDescription if exists for selected RCT.Language/item
LDC.ItemExtension	AN 01/30	I	
ITM.UnitOfMeasure	AN 01/06	I	

2200 Parts Transfer**Process**

Tabs: Off Load, Add On, Damaged

Initially perform 9150 List Selection (with SEL.ListTypeCode = 15, Transfer Location).

If canceled then Return.

Tables are initially empty.

Each part transfer may consist of up to three sub-transactions, which are summarized on separate pages.

If RCT.RoutePrinter = 99 (no printer) then [Print] button will display [Finish] text instead.

Navigation

[Enter]	(on quantity field) If quantity > Stock Quantity then Perform 9230 Oversell Warning Remain at current dialog
[Number/Desc.]	If Number displayed and pressed then Display part numbers in the grid and the part description in text box below the grid Else (Desc. displayed and pressed) Display part descriptions in the grid and the part number in text box below the grid
[Exit] or [Esc]	If details present then Perform 9110 Exit Function If exit confirmed then return Else remain at current dialog Else return
[View]	not implemented
[Add]	Perform 9030 Select Part
[Print]	If RCT.RoutePrinter < 99 (printer selected) then perform 9300 Print Numbered Document If PrintStatus(Done) or RCT.RoutePrinter = 99 (no printer) then Write ITC Inventory Transaction Control record with document number, document prefix, and TransactionType = 02 (parts transfer) Write ITD Inventory Transaction Detail records with appropriate TransactionTypeCode = 02 (reload off load product), = 03 (reload add on product), and = 04 (reload dmgd returns) If load vehicle has not yet been done then set SCT.ApplicationState = 2 (load vehicle done) If RCT.EnableLoadTelecom = 1 then Perform 7000 Transmit Data (Load) Return Else remain at current dialog

File.Field Name	Format	C	Instructions
ITM.ItemDescription or	AN 01/40	I	Keyed from ITD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
ITD.ItemNumber	AN 01/26	O	ITD.TransactionTypeCode: 02 = off load, 03 = add on, 04 = damaged
ITD.ItemQuantity	N0 01/05	O	
ITD.ItemNumber or ITM.ItemDescription	AN 01/ 26 AN 01/40	O I	ITD.TransactionTypeCode: 02 = off load, 03 = add on, 04 = damaged Keyed from ITD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item

2300 Unload Vehicle**Process**

Tabs: Inventory, Rtn Stock, Damaged

If RCT.AutoCalculateLoadIn = 1 or 2 then

Create Inventory record for each part in inventory with qty = 0

Create Rtn Stock record for each part in inventory with qty =
calculated inventory

If RCT.AutoCalculateLoadIn = 3 or 4 then

Create Inventory record for each part in inventory with qty = calculated
inventory

Create Return to Stock record for each part in inventory with qty = 0

If RCT.AutoCalculateLoadIn > 0 then

Create Damaged record for each part in Damaged Return inventory
with qty = calculated inventory quantity

If RCT.AutoCalculateLoadIn = 1 or 3 (disable changes) then

Disable the [Add] button

If RCT.RoutePrinter = 99 (no printer) then [Print] button will display [Finish]
text instead.

Navigation

- [Enter] (on quantity field)
If quantity > Stock Quantity then
Perform 9230 Oversell Warning
Remain at current dialog
- [Number/Desc.] If Number displayed and pressed then
Display part numbers in the grid and the part description in text box below the grid
Else (Desc. displayed and pressed)
Display part descriptions in the grid and the part number in text box below the grid
- [Exit] or [Esc] If details present then
Perform 9110 Exit Function
If exit confirmed then return
Else remain at current dialog
Else return

[View] not implemented

[Add] Perform 9030 Select Part

[Print] If RCT.RoutePrinter < 99 (printer selected) then perform 9300 Print Numbered Document

If PrintStatus(Done) or RCT.RoutePrinter = 99 (no printer) then

Write ITC Inventory Transaction Control record with document number, document prefix,
and TransactionType = 03 (unload vehicle)

Write ITD Inventory Transaction Detail records with appropriate TransactionTypeCode = 05
(unload End Inventory), = 06 (unload Return to Stock), = 07 (unload Damaged Returns),
= 09 (unload variance), and = 10 (unload Damaged Returns variance)

Update INV Route Inventory records

Set SCT.ApplicationState = 3 (unload vehicle done)

Return

Else remain at current dialog


File.Field Name	Format	C	Instructions
ITM.ItemDescription or	AN 01/40	I	Keyed from ITD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
ITD.ItemNumber	AN 01 26	O	ITD.TransactionTypeCode: 05 = end inven, 06 = rtn stk, 07 = dmgd
ITD.ItemQuantity	N0 01/05	O	
ITD.ItemNumber or ITM.ItemDescription	AN 01/ 26 AN 01/40	O I	ITD.TransactionTypeCode: 05 = end inven, 06 = rtn stk, 07 = dmgd Keyed from ITD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item

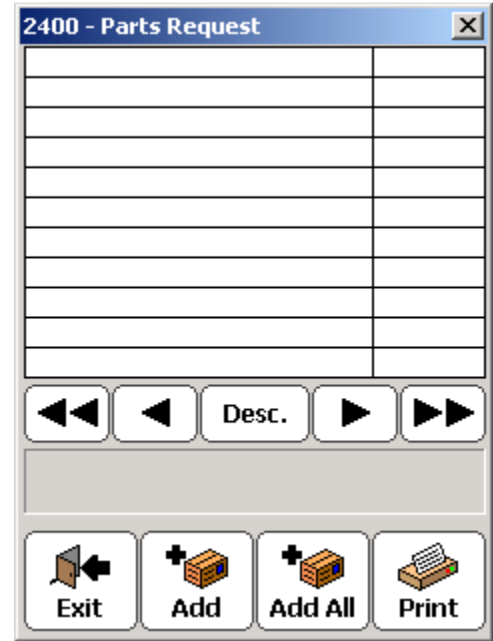
2400 Parts Request**Process**

Table is initially empty.

If RCT.RoutePrinter = 99 (no printer) then [Print] button will display [Finish] text instead.

Navigation

- [Number/Desc.] If Number displayed and pressed then
 Display part numbers in the grid and the part description in the text box below the grid
 Else (Desc. displayed and pressed)
 Display part descriptions in the grid and the part number in the text box below the grid
- [Exit] or [Esc] If details present then
 Perform 9110 Exit Function
 If exit confirmed then return
 Else remain at current dialog
 Else return
- [Add]
 [Add All]
 [Print] If RCT.RoutePrinter < 99 (printer selected) then
 Write ITC Inventory Transaction Control record with document number, document prefix, and TransactionType = 04 (parts request)
 Write ITD Inventory Transaction Detail records with appropriate TransactionTypeCode = 08 (load request)
 Perform 9300 Print Numbered Document
 If PrintStatus(Done) or RCT.RoutePrinter = 99 (no printer) then return
 Else remain at current dialog



File.Field Name	Format	C	Instructions
ITM.ItemDescription or	AN 01/40	I	Keyed from ITD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
ITD.ItemNumber	AN 01/ 26	O	ITD.TransactionTypeCode = 08 (Parts Request)
ITD.ItemQuantity	N0 01/05	O	
ITD.ItemNumber or ITM.ItemDescription	AN 01/ 26 AN 01/40	O I	ITD.TransactionTypeCode = 08 (Parts Request) Keyed from ITD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item

2500 Hazardous Materials

Process

Application will parse current INV Route Inventory and determine if any items currently on the vehicle are hazardous materials (items are also found in the GAS Gas File). Table will be populated with all downloaded SEL.ListTypeCode 26 records and an X bitmap will display by those materials which are determined to be on board. This dialog will also determine which placards are required and display them to the user.

If RCT.RoutePrinter = 99 (no printer) then [Print] button will display [Finish] text instead.

NOTE: ArciTech and i-gistics contains some features which you may find helpful in complying with some of the DOT hazardous materials regulations. These features include an electronic hazardous materials manifest and vehicle signage recommendations. These features are based on requests from various Intermec customers and those customer's interpretations of the DOT regulations affecting their businesses. Intermec has not reviewed these features for compliance with the DOT regulations and is not qualified to do so. Intermec hereby disclaims all warranties regarding the fitness or suitability of these features for compliance with DOT regulations. Each customer should consult legal counsel to obtain advice regarding compliance with all laws and regulations regarding the conduct of their business.

Navigation

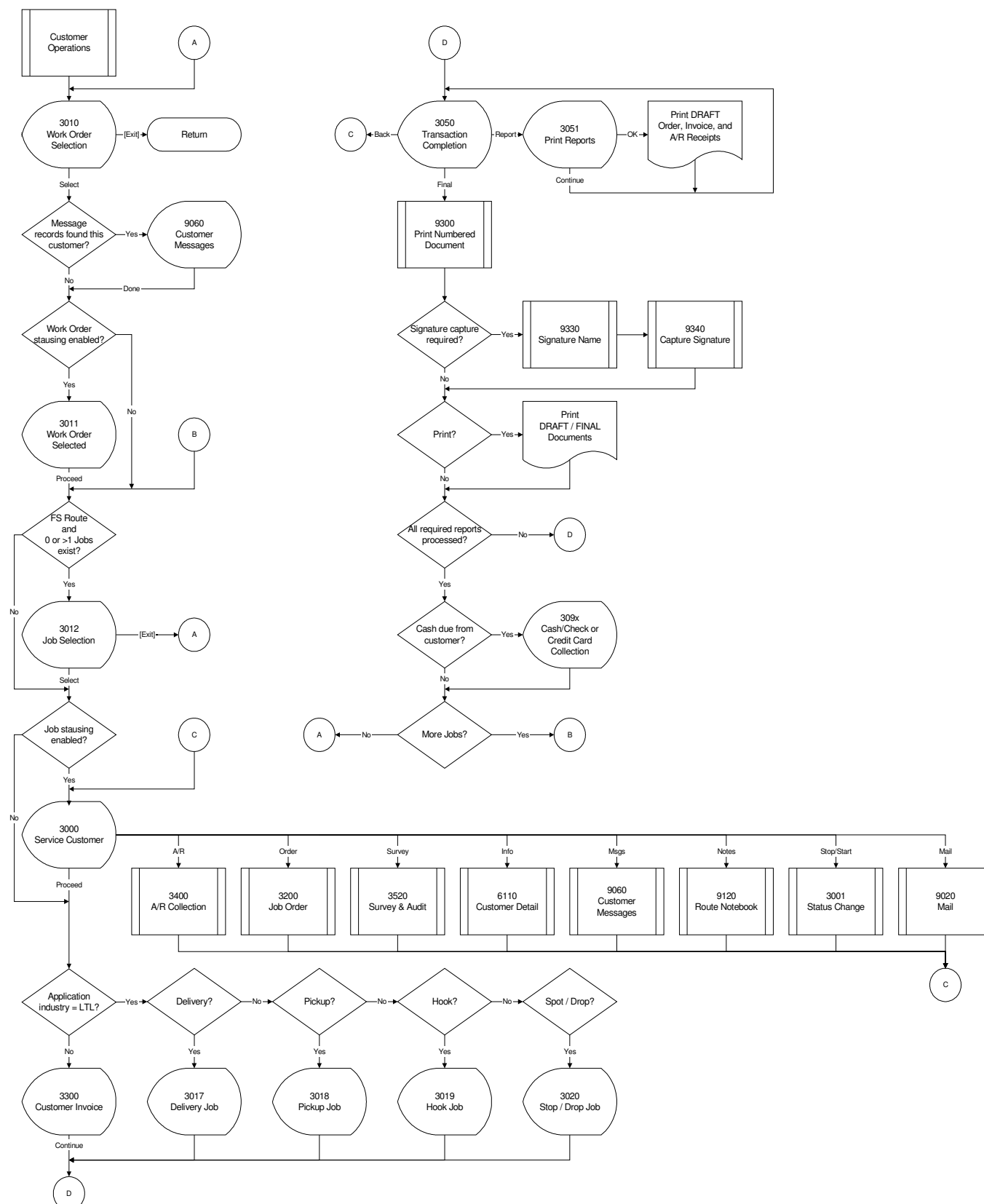
[Exit] or  [Esc] Return
 [Print] Perform 9100 Print Report (Hazardous Materials)

File.Field Name	Format	C	Instructions
Material On Board Indicator	bitmap	L	X bitmap if material determined to be on board, otherwise blank
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 26 (hazardous material)
SEL.ListText	AN 01/20	I	If no hazardous materials on board then field is blank Else display appropriate SEL.ListTypeCode = 27 (placard description) from first X'ed material
SEL.ListText	AN 01/20	I	If no second placard required then field is blank Else If RCT.EnableHazardousMaterials = 1 (U.S. requirements) then display appropriate SEL.ListTypeCode = 27 (placard description) from second X'ed material Else (Canadian requirements) display SEL.ListTypecode = 27, ListIDCode = 99



Customer Operations

The following flowcharts overview the Customer Operations function.



3000 Service Customer**Process**

Go to 3010 Work Order Selection initially.

If canceled then return to 0000 Main Menu.

[Exit] will not be accessible after job flow has started and not halted.

If no resource or job statuses found (STS.StatusType = 0 or 1) then

Disable the [Stoplight] button and enable the [Checkbox] button

Else if either resource or job statuses found (STS.StatusType = 0 or 1)
AND either is inactive (STS.StatusAction = 3) then

Display "Start" on the [Stoplight] button and use green light bitmap

Disable the [Checkbox] button


Else (resource or job statuses found and
are active (STS.StatusAction = 0))

Display "Stop" on the [Stoplight] button and use red light bitmap

Enable the [Checkbox] button

The [Checkbox] button will look ahead to the next job flow status and display that status' text from STS.StatusDescriptionButton.

Navigation

[Exit] or 	Return to calling dialog
[More]	Perform 3002 More Icons
[Stoplight] button	Perform 3001 Status Change
[Checkbox] button	Get next job flow status (STS.StatusType = 2)
	If STS.StatusAction = 0 then
	Update Current Status and display next job flow status' STS.StatusDescriptionButton
	Write SCD Status Change Detail
	If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
	RTM.MessageType = 1 (status change message) record found then
	Perform 7000 Transmit Data in real-time and only send SCD records where the
	associated STS.SendStatusOption = 1
	Else if STS.StatusAction = 1 then
	Job is considered started and the begin time for job billing is set
	Disallow [Exit] button
	Update Current Status and display next job flow status' STS.StatusDescriptionButton
	Write SCD Status Change Detail
	If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
	RTM.MessageType = 1 (status change message) record found then
	Perform 7000 Transmit Data in real-time and only send SCD records where the
	associated STS.SendStatusOption = 1
	Else (STS.StatusAction = 2)
	If no records with STS.StatusAction = 1 processed yet then
	Job is considered started and the begin time for job billing is set
	Update Current Status and write SCD Status Change Detail
	If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
	RTM.MessageType = 1 (status change message) record found then
	Perform 7000 Transmit Data in real-time and only send SCD records where the
	associated STS.SendStatusOption = 1
	If job level comments exist for this job then perform 9060 Customer Messages
	If JOB.JobType = 00 (Service) then perform 3300 Customer Invoice
	Else if JOB.JobType = 01 (Delivery) then perform 3017 Delivery Job
	Else if JOB.JobType = 02 (Pickup) then perform 3018 Pickup Job
	Else if JOB.JobType = 03 (Hook) then perform 3019 Hook Job
	Else (JOB.JobType = 04 (Spot/Drop)) perform 3020 Stop/Drop Job

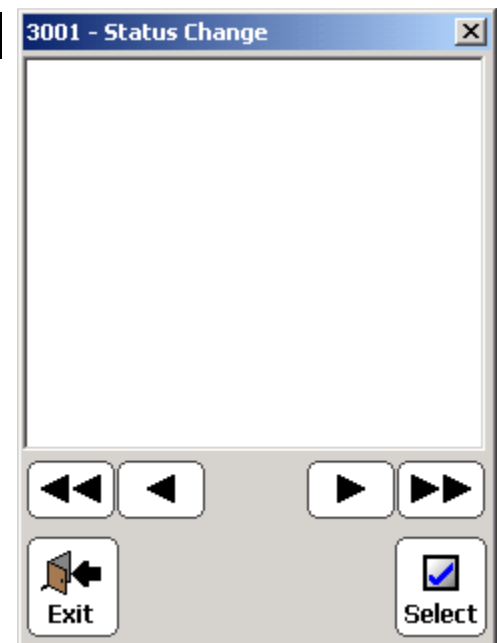


File.Field Name	Format	C	Instructions
SEQ.WorkOrderNumber	AN 01/18	I	
CST.CustomerName	AN 01/40	I	Override with SEQ.Name if it exists
CST.CustomerAddress1	AN 01/40	I	Override with SEQ.Address1 if it exists
CST.CustomerContactName or JOB.Contact	AN 01/30 AN 01/40	I	Display JOB.Contact unless no JOB record for this work order, in which case display CST.CustomerContactName
CST.CustomerPhone	AN 01/30	I	
JOB.JobDescription	AN 01/40	I	
JOB.Location	AN 01/20	I	
SEL.ListText	AN 01/20	I	Keyed from JOB.TroubleCode = SEL.ListIDCode and SEL.ListTypeCode = 22 (trouble code)
JOB.Comments	AN 01/40	I	
JOB.StartTime+JOB.EndTime or SEQ.StartTime+SEQ.EndTime	TM 08/08 TM 08/08	I	Display JOB.StartTime+JOB.EndTime unless no JOB record for this work order, in which case display SEQ.StartTime+SEQ.EndTime; formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM
STS.StatusLongDescription	AN 01/20	I	If resource is active, then display the job flow status. Otherwise if the resource is inactive, then display the resource status.


3001 Status Change

Process

If called from 3000 Service Customer then
 If the current "resource status" is active then
 If the current "job status" is active then
 Populate dialog with all status records where
 (STS.StatusType = 0 and STS.StatusAction = 3)
 If the current "job flow status" is started then
 Add to dialog population all status records where
 (STS.StatusType = 1 and STS.StatusAction = 3)
 Else (current "job status" is inactive)
 Populate dialog with all status records where
 (STS.StatusType = 1 and STS.StatusAction = 0)
 Else ("resource status" is inactive)
 Populate dialog with all status records where
 (STS.StatusType = 0 AND STS.StatusAction = 0)
Else (called from 3010, 3011, or 3012)
 If the current "resource status" is active then
 Populate dialog with all status records where
 (STS.StatusType = 0 AND STS.StatusAction = 3)
 Else (current "resource status" is inactive)
 Populate dialog with all status records where (STS.StatusType = 0 AND STS.StatusAction = 0)



Navigation

[Exit] or [Esc] Return
[Select] Change status to currently highlighted item and write SCD Status Change Detail
 If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
 RTM.MessageType = 1 (status change message) record found then
 Perform 7000 Transmit Data in real-time and only send SCD records where the
 associated STS.SendStatusOption = 1
 Endif
 Return to calling dialog

File.Field Name	Format	C	Instructions
STS.StatusLongDescription	AN 01/20	I	

3002 More Icons**Process**

Disable [A/R], [Order], and [Survey] if job flow status records (STS.StatusType = 2) found AND the job has not yet been started (STS.StatusAction = 0).

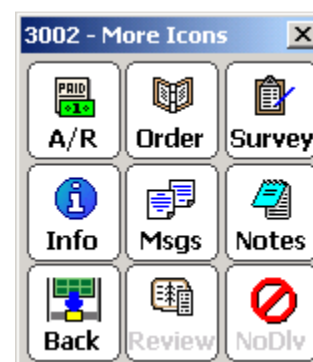
[A/R] disabled if (RCT.EnableCollections = 0) or (CST.EnableARCollection = 0) or (CST/JOB.PaymentType = 3 (send bill only) or = 6 (prepaid)).

[A/R] and [Order] are only enabled if JOB.JobType = 00 (Service).

[Survey] disabled if CST.EnableSurveyAudit = 0.

[Msgs] button disabled if no customer display messages exist (MSG.MessageTypeCode = 02) for the currently selected customer.

[NoDlv] button enabled only if called from 3300 Customer Invoice AND RCT.EnableVerificationScanning = 2 or 3.

**Navigation**

[A/R] Perform 3400 A/R Collection

[Order] Perform 3200 Job Order

[Survey] Perform 3520A Survey & Audit Processing

[Info] Perform 6110 Customer Detail

[Msgs] Perform 9060 Customer Messages

[Notes] Perform 9120 Route Notebook

[Back] Return

[Review] *not implemented*

[NoDlv] Perform 9150 List Selection (with SEL.ListTypeCode = 33, non-delivered reason)

If not canceled then

Write a Non-Delivery Detail (NDD) record

Return to 3300 Customer Invoice and position highlight bar within grid on selected item, mark as NON-delivered, and update the progress field

File.Field Name	Format	C	Instructions
(none)			

3007 New Work Orders Received**Process**

Populate table with all work orders that have not been accepted or rejected, sorted first in SEQ.SequenceNumber order and then in SEQ.StartTime order (earliest to latest). Highlight is initially positioned on the first work order.

If RCT.EnableJobBitmap = 0 (disabled) then grid has 2 columns:

Display Status Indicator in column 1

Display CST.CustomerName or CustomerAddress1 in column 2

Else (RCT.EnableJobBitmap = 1 (enabled), grid has 3 columns)

Display Status Indicator in column 1

Display associated bitmap for SEQ.WorkOrderType in column 2

Display CST.CustomerName or CustomerAddress1 in column 3

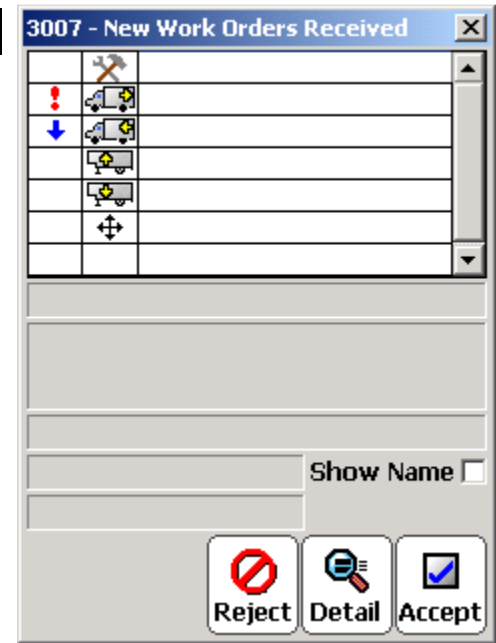
The following MsgBoxes will be displayed when various real-time messages are received:

MsgBox "New mail received.", OK*

MsgBox "Work Order: x--work order #-x for customer:

x---customer #-x was removed.", OK*

MsgBox "Work Order: x--work order #-x for customer: x---customer #-x was changed.", OK*

**Navigation**

- [Reject] Perform 9150 List Selection (with SEL.ListTypeCode = 6, no service reason)
 If not canceled then
 Send FMR message (with FMR.TransactionType = 7 and FMR.RejectionReason = selected SEL.ListIDCode)
 If all work orders accepted or rejected then return to calling screen
 Else remove current work order
- [Detail] Perform 6110 Customer Detail
- [Accept] Send a FMR message (with FMR.TransactionType = 6)
 If all work orders accepted or rejected then return to calling screen
 Else remove current work order
- [Enter] Do [Accept] for the currently highlighted work order

File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	Blank if normal priority work order Exclamation Point bitmap if high priority work order Down Arrow bitmap if low priority work order
Work Order Type Indicator	bitmap	L	Only displayed if RCT.EnableJobBitmap = 1 Service bitmap if SEQ.WorkOrderType = 00 (Service) Vehicle Out bitmap if SEQ.WorkOrderType = 01 (Delivery) Vehicle In bitmap if SEQ.WorkOrderType = 02 (Pickup) Trailer Up bitmap if SEQ.WorkOrderType = 03 (Hook) Trailer Down bitmap if SEQ.WorkOrderType = 04 (Spot/.Drop) Mix bitmap if SEQ.WorkOrderType = 05 (Mix of jobs)
CST.CustomerName or CST.CustomerAddress1	AN 01/40	I	Default to display CST.CustomerName, user may toggle display by checking/unchecking the Show Name box; Override CST.CustomerName with SEQ.Name if it exists Override with SEQ.Address1 if it exists
SEQ.WorkOrderNumber	AN 01/18	I	
CST.CustomerAddress1 or CST.CustomerName	AN 01/40	I	Default to display CST.CustomerAddress1, user may toggle display by checking/unchecking the Show Name box. Use larger font. Override CST.CustomerAddress1 with SEQ.Address1 if it exists Override CST.CustomerName with SEQ.Name if it exists

CST.CustomerContactName	AN 01/30	I	
CST.CustomerPhoneNumber	AN 01/20	I	
SEQ.StartTime+SEQ.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM
Show Name checkbox		I	Defaults to checked. When checked, the grid will display CST.CustomerName in the grid & CST.CustomerAddress1 below. When not checked, the grid will display CST.CustomerAddress1 in the grid and CST.CustomerName below.

3010 Work Order Selection

Process

Populate table with all Work Sequence records sorted first in SEQ.SequenceNumber order and then in SEQ.StartTime order (earliest to latest). Highlight initially positioned on first unserved work order.

If RCT.EnableJobBitmap = 0 (disabled) then grid has 2 columns:

Display Status Indicator in column 1

Display CST.CustomerName or CustomerAddress1 in column 2

Else (RCT.EnableJobBitmap = 1 (enabled), grid has 3 columns)

Display Status Indicator in column 1

Display associated bitmap for SEQ.WorkOrderType in column 2

Display CST.CustomerName or CustomerAddress1 in column 3

If no resource status found (STS.StatusType= 0) then

Disable the [Stoplight] button and enable the [Select] button

Else if resource status found (STS.StatusType = 0) AND is inactive (STS.StatusAction = 3) then

Display "Start" on the [Stoplight] button, use green light bitmap, and disable the [Select] button

Else (resource status found (STS.StatusType = 0) AND is active (STS.StatusAction = 0))

Display "Stop" on the [Stoplight] button, use red light bitmap, and enable the [Select] button

Disable [Select] button if:

no SEQ Work Sequence records found OR

the currently highlighted work order is padlocked OR

the currently highlighted work order is checkmarked & SEQ.WorkOrderType is NOT = 00 (Service)

Navigation

[Exit] or  [Esc] Return to 0000 Main Menu

[More] Perform 3013 More Icons

[Stoplight] button Perform 3001 Status Change

[Mail] Perform 9020 Mail

[Select] If RCT.StartDayWarningTime <> 0 and Industrial Route (MSG.MessageTypeCode = 4 and MSG.MessageText <> "Healthcare" or "Medigas") then
Stop the timer.

If the timer > RCT.StartDayWarningTime then Perform 9150 List Selection (SEL.ListTypeCode = 38 (SOD Time Reason))

If RCT.PromptOdomInput = 2 then perform 9080 Odometer Input

If messages exist for this customer then perform 9060 Customer Messages

If STS.StatusType = 3 (work order flow status) records exist then

Perform 3011 Work Order Selected

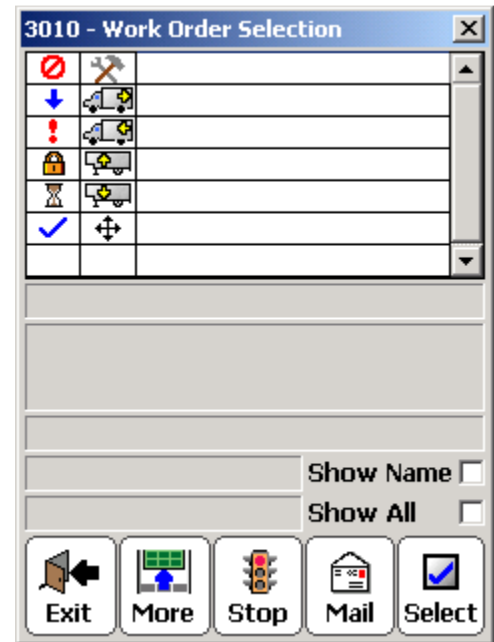
Else

If RCT.EnableJobSelection = 0 AND only 1 job exists for the selected work order then

If STS.StatusType = 2 (job flow status) records exist then perform 3000 Service Cust

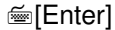
Else

Get JOB information for the selected work order



If job level comments exist for this job then perform 9060 Customer Messages
 If JOB.JobType = 00 (Service) then perform 3300 Customer Invoice
 Else if JOB.JobType = 01 (Delivery) then perform 3017 Delivery Job
 Else if JOB.JobType = 02 (Pickup) then perform 3018 Pickup Job
 Else if JOB.JobType = 03 (Hook) then perform 3019 Hook Job
 Else (JOB.JobType = 04 (Spot/Drop)) perform 3020 Spot/Drop Job

Else perform 3012 Job Selection



Do [Select] for the currently highlighted work order

File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	NoSvc bitmap if work order marked as a no service transaction Down Arrow bitmap if low priority work order Exclamation Point bitmap if high priority work order Padlock bitmap if work order already marked as a no service transaction and then received a file maintenance deletion Blank if normal priority work order Note that if a work order also has associated job(s) then: If at least one job has begun but is not yet complete then Mark work order with Hourglass bitmap Else if any one job is unserviced (with any priority) then Mark work order with it's own priority bitmap Else if any one job is marked as a no service transaction then Mark work order with NoSvc bitmap Else (all jobs are serviced) Mark work order with Checkmark bitmap
Work Order Type Indicator	bitmap	L	Only displayed if RCT.EnableJobBitmap = 1 Service bitmap if SEQ.WorkOrderType = 00 (Service) Vehicle Out bitmap if SEQ.WorkOrderType = 01 (Delivery) Vehicle In bitmap if SEQ.WorkOrderType = 02 (Pickup) Trailer Up bitmap if SEQ.WorkOrderType = 03 (Hook) Trailer Down bitmap if SEQ.WorkOrderType = 04 (Spot/Drop) Mix bitmap if SEQ.WorkOrderType = 05 (Mix of jobs)
CST.CustomerName or CST.CustomerAddress1	AN 01/40	I	Default to display CST.CustomerName, user may toggle display by checking/unchecking the Show Name box; Override CST.CustomerName with SEQ.Name if it exists Override CST.CustomerAddress1 with SEQ.Address1 if it exists.
SEQ.WorkOrderNumber	AN 01/18	I	
CST.CustomerAddress1 or CST.CustomerName	AN 01/40	I	Default to display CST.CustomerAddress1, user may toggle display by checking/unchecking the Show Name box. Use larger font. Override CST.CustomerAddress1 with SEQ.Address1 if it exists Override CST.CustomerName with SEQ.Name if it exists
CST.CustomerContactName	AN 01/30	I	
CST.CustomerPhoneNumber	AN 01/20	I	
SEQ.StartTime+SEQ.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM
Show Name checkbox		I	Defaults to checked. When checked, the grid will display CST.CustomerName in the grid & CST.CustomerAddress1 below. When not checked, the grid will display CST.CustomerAddress1 in the grid and CST.CustomerName below.
Show All checkbox		I	Defaults to not checked. When not checked, the grid will display all unserviced stops. When checked, the grid will display unserviced stops AND serviced stops.
STD.WarningTimeReasonCode	N0 01/14	I	The ListIDCode from the SEL file for the reason that was selected by the user on 9150 if RCT.StartDayWarningTime <> 0 and Industrial Route (MSG.MessageTypeCode = 4 and MSG.MessageText <> "Healthcare" or "Medigas")
STD.DriverWarningTime	N0 01/04	I	The amount of time the driver took from start of day until selecting a customer, if RCT.StartDayWarningTime <> 0 and Industrial Route (MSG.MessageTypeCode = 4 and MSG.MessageText <> "Healthcare" or "Medigas")

3011 Work Order Selected**Process**

This screen displays customer details about the currently selected work order. All fields are display-only.

If no resource status found (STS.StatusType= 0) then

Disable [Stoplight] button and enable [Checkbox] button

Else if resource status found AND is inactive then

Display "Start" on [Stoplight] button and use green light bitmap

Disable [Select] button

Else (resource status found AND is active)

Display "Stop" on [Stoplight] button and use red light bitmap

Enable [Select] button

[Checkbox] button will look ahead to next work order flow status and display that status' text from STS.StatusDescriptionButton.

Navigation

[Exit] or  [Esc]

Return to 3010 Work Order Selection

[More]

Perform 3013 More Icons

[Stoplight] button

Perform 3001 Status Change

[Mail]

Perform 9020 Mail

[Checkbox] button

Get the next work order flow status

(STS.StatusType = 3)

If STS.StatusAction = 0 then

Update Current Status

Display the next work order flow status' STS.StatusDescriptionButton

Write SCD Status Change Detail

If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND

RTM.MessageType = 1 (status change message) record found then

Perform 7000 Transmit Data in real-time and only send SCD records where the associated STS.SendStatusOption = 1

Else (STS.StatusAction = 2)

Update Current Status and write SCD Status Change Detail

If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND

RTM.MessageType = 1 (status change message) record found then

Perform 7000 Transmit Data in real-time and only send SCD records where the associated STS.SendStatusOption = 1

If RCT.EnableJobSelection = 0 AND only 1 job exists for selected work order then

If STS.StatusType = 2 (job flow status) records exist then perform 3000 Svc Cust

Else get JOB information for the selected work order

If job level comments exist for this job then perform 9060 Customer Messages

If JOB.JobType = 00 (Service) then perform 3300 Customer Invoice

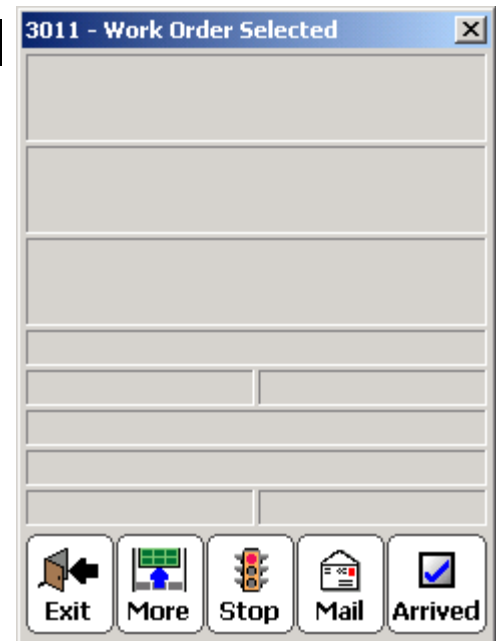
Else if JOB.JobType = 01 (Delivery) then perform 3017 Delivery Job

Else if JOB.JobType = 02 (Pickup) then perform 3018 Pickup Job

Else if JOB.JobType = 03 (Hook) then perform 3019 Hook Job

Else (JOB.JobType = 04 (Spot/Drop)) perform 3020 Spot/Drop Job

Else perform 3012 Job Selection



File.Field Name	Format	C	Instructions
CST.CustomerName	AN 01/40	I	Use larger font; override with SEQ.Name if it exists
CST.CustomerAddress1	AN 01/40	I	Use larger font; override with SEQ.Address1 if it exists
CST.CustomerAddress2	AN 01/40	I	Use larger font; override with SEQ.Address2 if it exists
CST.CustomerCity	AN 01/30	I	Override with SEQ.City if it exists
CST.CustomerState	AN 01/10	I	Override with SEQ.State if it exists
CST.CustomerPostalCode	AN 01/15	I	Override with SEQ.PostalCode if it exists
CST.CustomerContactName	AN 01/30	I	
CST.CustomerPhoneNumber	AN 01/20	I	
SEQ.StartTime+SEQ.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM
STS.StatusLongDescription	AN 01/20	I	If resource is active, then display the job flow status. Otherwise (resource is inactive), display the resource status.

3012 Job Selection**Process**

Table displays jobs associated with the current work order sorted first in JOB.SequenceNumber order and then in JOB.StartTime order (earliest to latest). Highlight initially positioned on first unserved job.

If RCT.EnableJobBitmap = 0 (disabled) then grid has 2 columns:

Display Status Indicator in column 1

Display JOB.JobDescription in column 2

Else (RCT.EnableJobBitmap = 1 (enabled), grid has 3 columns)

Display Status Indicator in column 1

Display associated bitmap for JOB.JobType in column 2

Display JOB.JobDescription in column 3.

If no resource or job statuses found (STS.StatusType = 0 or 1) then

Disable the [Stoplight] button and enable the [Select] button

Else if either resource or job statuses found (STS.StatusType = 0 or 1) AND either is inactive (STS.StatusAction = 3) then

Display "Start" on [Stoplight] button and use green light bitmap

Disable [Select] button

Else (resource or job statuses found & are active (STS.StatusAction=0))

Display "Stop" on [Stoplight] button and use red light bitmap

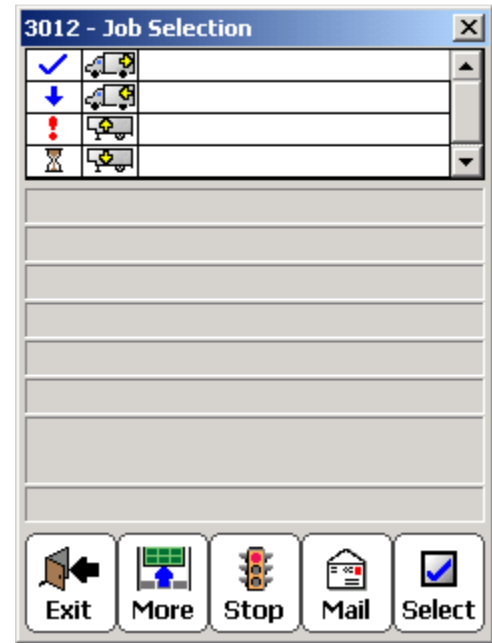
Enable [Select] button

Disable the [Select] button if:

no jobs exist for the current work order OR

the currently highlighted job is padlocked OR

the currently highlighted job is checkmarked and JOB.JobType is not equal to 00 (Service)

**Navigation**

- [Exit] or [Esc] Return to calling dialog
- [More] Perform 3013 More Icons
- [Stoplight] button Perform 3001 Status Change
- [Mail] Perform 9020 Mail
- [Select] If selected job has a Checkmark, NoSvc, or Hourglass bitmap associated with it then
 - Void the previous invoice/order and restore any associated inventory
 - If RCT.GenerateHTMLInv = 1 then also remove the associated HTML invoice
 Endif
- If STS.StatusType = 2 (job flow status) records exist then
 - Perform 3000 Service Customer for selected job
- Else
 - If job level comments exist for this job then perform 9060 Customer Messages
 - If JOB.JobType = 00 (Service) then perform 3300 Customer Invoice
 - Else if JOB.JobType = 01 (Delivery) then perform 3017 Delivery Job
 - Else if JOB.JobType = 02 (Pickup) then perform 3018 Pickup Job
 - Else if JOB.JobType = 03 (Hook) then perform 3019 Hook Job
 - Else (JOB.JobType = 04 (Spot/Drop)) perform 3020 Spot/Drop Job
- Upon return from performing job
 - If all jobs for selected Work Order have been completed then
 - Return to 3010 Work Order Selection
 - Else (there are uncompleted jobs remaining for this Work Order)
 - Redisplay this dialog
- [Enter] Do [Select] for the currently highlighted job

File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	Checkmark bitmap if job is serviced with transaction NoSvc bitmap if job marked as a no service transaction Down Arrow bitmap if job unserviced with low priority Exclamation Point bitmap if job unserviced with high priority Hourglass bitmap if service begun and not yet complete Padlock bitmap if work order already marked as a no service transaction and then received a file maintenance deletion Blank if job unserviced with normal priority
Job Type Indicator	bitmap	L	Only display this column if RCT.EnableJobBitmap = 1 (enabled) Service bitmap if JOB.JobType = 00 (Service) Vehicle Out bitmap if JOB.JobType = 01 (Delivery) Vehicle In bitmap if JOB.JobType = 02 (Pickup) Trailer Up bitmap if JOB.JobType = 03 (Hook) Trailer Down bitmap if JOB.JobType = 04 (Spot/Drop)
JOB.JobDescription	AN 01/40	I	
CST.CustomerName	AN 01/40	I	Override with SEQ.Name if it exists
CST.CustomerAddress1	AN 01/40	I	Override with SEQ.Address1 if it exists
JOB.Contact	AN 01/40	I	
CST.CustomerPhoneNumber	AN 01/20	I	
JOB.Location	AN 01/20	I	
SEL.ListText	AN 01/20	I	Keyed from JOB.TroubleCode = SEL.ListIDCode and SEL.ListTypeCode = 22 (trouble code)
JOB.Comments	AN 01/40	I	
JOB.StartTime+JOB.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM

3013 More Icons

Process

[Edit] button will be disabled under any of the following conditions:

- 1) If called from 3010 Work Order Selection or 3012 Job Selection and no Work Orders/Jobs exist
- 2) If called from 3010 Work Order Selection and a work order was highlighted/selected and CST.EnableWorkOrderMaintenance = 0.
- 3) If called from 3011 Work Order Selected
- 4) If called from 3012 Job Selection and CST.EnableWorkOrderMaintenance=0 or JOB.JobType>0.

[Add] button will be disabled under any of the following conditions:

- 1) If called from 3010 Work Order Selection (No customers exist in database with CST.EnableWorkOrderMaintenance = 0)
- 2) If called from 3011 Work Order Selected
- 3) If called from 3012 Job Selection and CST.EnableWorkOrderMaintenance = 0.
- 4) If current resource status is inactive.

[NoSvc] button will be disabled under any the following conditions:

- 1) If RCT.EnableNoService = 0
- 2) If a work order/job was highlighted/selected and has already been serviced or marked as No Service
- 3) If called from 3010 Work Order Selection and no work orders exist.

[Msgs] button will be disabled under any of the following conditions:

- 1) I if called from 3010 Work Order Selection and no work orders exist
- 2) If no customer display messages exist (MSG.MessageTypeCode = 02) for the currently selected customer

[Sched] button will be disabled under any of the following conditions:

- 1) If called from anywhere except 3010 Work Order Selection
- 2) If less than two unserviced Work Orders exist



Navigation

[Edit] If called from 3010 Work Order Selection then perform 6320 Work Order Maintenance
 Else (called from 3012 Job Selection) perform 6420 Job Maintenance

[Add] If called from 3010 Work Order Selection then
 If no Work Orders exist then
 Perform 9000 Find (Customer)
 If return with null index (no customer selected) then redisplay this dialog
 Else Perform 6320 Work Order Maintenance
 Else perform 6320 Work Order Maintenance
 Else (called from 3012 Job Selection)
 If CST.EnableWorkOrderMaintenance = 1 then perform 6420 Job Maintenance
 Else (CST.EnableWorkOrderMaintenance = 2, 3, 4, or 5) perform 6421 Job Type Selection

[NoSvc] Perform 9150 List Selection (with SEL.ListTypeCode = 6, no service reason)
 If not canceled then
 Write a Customer Operations Control (COC) record and an associated Customer Transaction
 Header (CTH) record with a "no service" transaction type²
 Write a Non-Serviced Work Order (NSC) record
 Update customer status
 If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
 RTM.MessageType = 3 (non-serviced work order message) record found then
 Perform 7000 Transmit Data in real-time
 Return

[Back] Return

[Msgs] Perform 9060 Customer Messages

[Notes] Perform 9120 Route Notebook

[Sched] Perform 3030 Work Order Scheduler

File.Field Name	Format	C	Instructions
(none)			

² Write record with COC.CustomerNumber = current Customer Number and CTH.NoSaleReasonCode = SEL.ListIDCode corresponding to reason selected by user. If processing a work order, then also create individual COC and CTH records for any associated jobs.

3017 Delivery Job

PRAXAIR IS NOT USING THIS SCREEN CURRENTLY.

Process

This screen displays details of a delivery job.

The scanner is enabled at this dialog.

If processing a downloaded delivery job then

Populate appropriate fields with downloaded values from the JOB file

User can overwrite the downloaded PRO# by either scanning the

PRO# being delivered or manually inputting it

Pieces, Weight, and Comment fields are display-only

Else (adding a new delivery job)

All fields will initially be blank

User can either scan PRO# being delivered or manually input it

Comment field will be display-only

If all pieces are delivered as displayed then press the [Finish] button.

If an Accessorial Code is desired then the user can select one from the drop down list.


If there is an exception to the delivery and it cannot be delivered as is, the driver selects an exception from the drop-down list box in the first column of the grid shown at right. The first line in the exceptions list box is blank signifying that no exception has been selected.

The second column in the grid shown at right allows entry of a package code pertaining to the exception selected. The third column allows entry of a quantity for the exception/package code.

Navigation

scan If scanned code > 10 characters then MsgBox "Scanned code exceeds field length.", OK*

[keyboard] Perform 9010 Keyboard

[Exit] or [Esc] Perform 9110 Exit Function

If not canceled then return

Else remain at current dialog

[More] Perform 3002 More Icons

[Finish] If PRO# blank then MsgBox "Must enter PRO number", OK*; redisplay this dialog

If PRO# has been downloaded as a job number for a different job then

MsgBox "This PRO number is assigned to another job.", OK*; redisplay this dialog

If not adding a delivery job AND PRO# changed (not = downloaded JOB.JobNumber) then

MsgBox "PRO number entered does not match downloaded PRO number. Override with new value?", Yes, No*

If Yes response then accept new value and continue

Else repopulate PRO# with downloaded JOB.JobNumber and redisplay this dialog

Endif

If Pieces not > 0 then MsgBox "Pieces must be greater than 0", OK*; redisplay this dialog

MsgBox "OK to complete?", Yes*, No

If YES response then

If uncompleted, mandatory job or customer surveys exist then

MsgBox "Please complete survey before proceeding", OK*

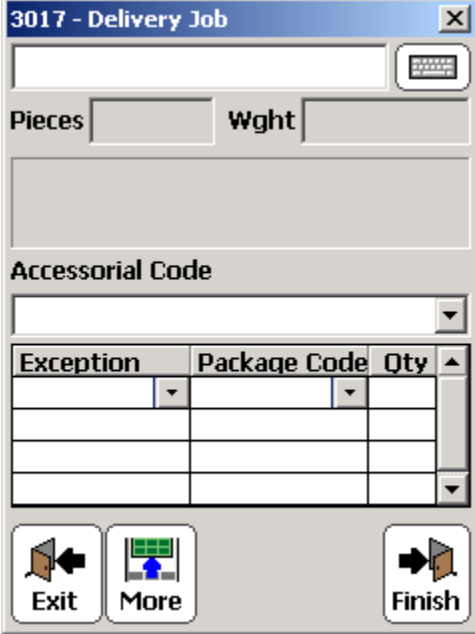
Perform 3520A Survey & Audit Processing and upon return redisplay this dialog

Record delivery job details

Perform 3050A Finalize Transactions

Else

Remain at current dialog



File.Field Name	Format	C	Instructions
JOB.JobNumber	AN 01/18	I	If processing downloaded delivery job then populate with contents of JOB.JobNumber. Allow scan/input to overwrite displayed value. If adding a new delivery job then this field remains blank. Use larger font.
LTD.PRONumber	AN 01/18	O	Upload with inputted PRO#
CTH.JobNumber	AN 01/18	O	Upload with JOB.JobNumber
JOB.Pieces	N0 01/05	I	If processing a downloaded delivery job then this is a display-only field. Use larger font.
LTD.Pieces	N0 01/05	O	
JOB.Weight	N0 01/07	I	If processing a downloaded delivery job then this is a display-only field. Use larger font.
LTD.Weight	N0 01/07	O	
JOB.Comments	AN 01/40	I	This is a display-only field. Use larger font.
Accessorial Code	AN 01/20	I	Populate drop down from SEL.ListTypeCode = 31
LTD.AccessorialCode	N0 01/02	O	
Delivery Exceptions	AN 01/20	I	Populate drop down from SEL.ListTypeCode = 02
OCM.ResolutionCode	N0 01/02	O	
Package Code	AN 01/20	I	Populate drop down from SEL.ListTypeCode = 30
OCM.PackageCode	N0 01/02	O	
Package Quantity	N0 01/05	I	
OCM.PackageQuantity	N0 01/05	O	

3018 Pickup Job**PRAXAIR IS NOT USING THIS SCREEN CURRENTLY****Process**

This screen displays details of a pickup job. The scanner is enabled at this dialog. PRO#, Pieces, Weight, and Destination Zip are required entries.

If processing a downloaded pickup job then

Populate Pieces and Weight fields with downloaded values from the JOB file

User can input the PRO# by either scanning the PRO# being picked up or by manually keying it in

Else (adding a new pickup job or from 3019 Hook Job)

All fields will be initially blank

User can either scan PRO# being picked up or manually key it in

The user enters all required and any non-required fields.


Press [Finish] to complete the pickup.

The [Clear] button clears all fields on the screen for re-entry.

None of the previously displayed information is saved.

[Add PRO] is used to record the current pickup details and then clear all entry fields to allow for another pickup to be recorded. Note: When [Add Pro] is pressed and all fields are cleared, then [Finish] is pressed without entering any pickup details, proceed with the [Finish] logic and discard the empty pickup details. [Prev] button disabled when displaying first pickup detail record (LTD Less Than Load Transaction Detail). [Next] button disabled when displaying last record.

Navigation

<i>scan</i>	If scanned code > 10 characters then MsgBox "Scanned code exceeds field length.", OK*
[keyboard]	Perform 9010 Keyboard
[Prev]	Get previous record; remain at current dialog
[Next]	Get next record; remain at current dialog
[Add PRO]	If PRO Number blank then MsgBox "Must enter PRO number.", OK*; redisplay this dialog If PRO# has been downloaded as a job number for a different job then MsgBox "This PRO number is assigned to another job.", OK*; redisplay this dialog If Pieces not > 0 then MsgBox "Pieces must be greater than 0.", OK*; redisplay this dialog If Weight not > 0 then MsgBox "Weight must be greater than 0.", OK*; redisplay this dialog If Destination Zip is < 5 alpha-numeric characters then MsgBox "Zip must be 5 or more characters.", OK*, place cursor on Dest. Zip for re-entry If Destination State has not been selected yet then MsgBox "State must be selected.", OK*, place focus on Dest. State for entry Record pickup job upload details (LTD Less Than Load Transaction Detail) Perform 3050A Finalize Transactions Clear all fields Remain at current dialog
[Exit] or  [Esc]	Perform 9110 Exit Function If not canceled then return Else remain at current dialog
[More]	Perform 3002 More Icons
[Clear]	Clears all fields

[Finish]

If [1 or more pickups recorded] AND [entry fields blank (except PRO Number)] then

 If uncompleted, mandatory job or customer surveys exist then

 MsgBox "Please complete survey before proceeding", OK*

 Perform 3520A Survey & Audit Processing and upon return redisplay this dialog

 If RCT.EnableLinearDistance = 1 then display 9087 Enter Linear Distance

 Perform 3050A Finalize Transactions

Else

 If PRO Number blank then

 MsgBox "Must enter PRO number", OK*; redisplay this dialog

 If Pieces not > 0 then

 MsgBox "Pieces must be greater than 0", OK*; redisplay this dialog

 If Weight not > 0 then

 MsgBox "Weight must be greater than 0", OK*; redisplay this dialog

 If Destination Zip is < 5 alpha-numeric characters then

 MsgBox "Zip must be 5 or more characters", OK*; place cursor on Dest. Zip for re-entry

 If Destination State has not been selected yet then

 MsgBox "State must be selected.", OK*, place focus on Dest. State for entry

 If uncompleted, mandatory job or customer surveys exist then

 MsgBox "Please complete survey before proceeding", OK*

 Perform 3520A Survey & Audit Processing and upon return redisplay this dialog

 Record pickup job upload details (LTD Less Than Load Transaction Detail)

 If RCT.EnableLinearDistance = 1 then display 9087 Enter Linear Distance

 Perform 3050A Finalize Transactions

File.Field Name	Format	C	Instructions
PRO Number	AN 01/18	I	Use larger font.
LTD.PRONumber	AN 01/18	O	
CTH.JobNumber	AN 01/18	O	Upload with JOB.JobNumber
JOB.Pieces	N0 01/05	I	Use larger font.
LTD.Pieces	N0 01/05	O	
JOB.Weight	N0 01/07	I	Use larger font.
LTD.Weight	N0 01/07	O	
Destination Zip	AN 05/15	I	Entry field is blank, awaiting required input.
LTD.DestinationZip	AN 05/15	O	
Destination State	AN 01/20	I	Populate drop down from SEL.ListTypeCode = 24
LTD.DestinationState	N0 01/02	O	
Hazmat	N0 01/20	I	Populate drop down from SEL.ListTypeCode = 26
LTD.Hazmat	N0 01/02	O	
Service Level	N0 01/20	I	Populate drop down from SEL.ListTypeCode = 32
LTD.ServiceLevel	N0 01/02	O	
Package Code	AN 01/20	I	Populate drop down from SEL.ListTypeCode = 30
OCM.PackageCode	N0 01/02	O	
Package Quantity	N0 01/05	I	
OCM.PackageQuantity	N0 01/05	O	
Head Load	N0 01/01	I	Default to unchecked.
LTD.HeadLoad	N0 01/01	O	Set to '1' if checked.
LTD.EquipmentNumber	AN 01/09	O	Upload with the trailer currently attached to the truck. If this screen is called from 3019 Hook Job screen, then populate with the trailer (Equipment number) entered on 3019.
LTD.EquipmentStatus	N0 01/01	O	If called from 3019 Hook Job then upload with 2 (pickup)

3019 Hook Job

PRAXAIR IS NOT USING THIS SCREEN CURRENTLY.

Process

If RCT.EquipmentNumber is non-zero then
 Msgbox "Max trailers hooked. Drop trailer before attempting
 HOOK.", OK*; Return

This screen displays the details of the hook job.

The Equipment field displays the trailer downloaded in the JOB file.
 This field can be blank. If the trailer is blank or incorrect the driver can
 modify the contents of this field.

[Empty] is pressed if the hooked trailer is empty.

[Loaded] is pressed if the hooked trailer already has pickups loaded on
 it. Pressing the [Loaded] button will navigate to 3018 Pickup Job
 screen, allowing the driver to record all pickup orders already on the
 hooked trailer.

Navigation

[Exit] or [Esc] Perform 9110 Exit Function
 If not canceled then return
 Else remain at current dialog

[More]
 Perform 3002 More Icons

[Loaded]
 If Equipment blank then
 MsgBox "Equipment must be entered.", OK*, cursor on Equipment for re-entry
 Else
 MsgBox "OK to Complete Hook?", Yes*, No
 If Yes response then
 Display 3018 Pickup Job
 If Pickup successful then set LTD.EquipmentStatus=1 (loaded) and record hook details
 Else remain at current dialog

[Empty]
 If Equipment blank then
 MsgBox "Equipment must be entered.", OK*, cursor on Equipment for re-entry
 Else
 MsgBox "OK to Complete Hook?", Yes*, No
 If Yes response then
 If uncompleted, mandatory job or customer surveys exist then
 MsgBox "Please complete survey before proceeding", OK*
 Perform 3520A Survey & Audit Processing and upon return redisplay this dialog
 Set LTD.EquipmentStatus = 0 (empty) and record the hook job details
 Perform 3050A Finalize Transactions
 Else remain at current dialog

File.Field Name	Format	C	Instructions
CST.CustomerName	AN 01/40	I	Use larger font; override with SEQ.Name if it exists
CST.CustomerAddress1	AN 01/40	I	Use larger font; override with SEQ.Address1 if it exists
CST.CustomerAddress2	AN 01/40	I	Use larger font; override with SEQ.Address2 if it exists
JOB.Comments	AN 01/40	I	Use larger font
JOB.EquipmentNumber	AN 01/09	I	Allow overwrite for correction. Use larger font.
RCT.EquipmentNumber	AN 01/09	O	Populate RCT.EquipmentNumber with accepted value.
LTD.EquipmentNumber	AN 01/09	O	Upload with accepted value.
CTH.JobNumber	AN 01/18	O	Upload with JOB.JobNumber
LTD.EquipmentStatus	N0 01/01	O	Upload with 0 if [Empty] pressed Upload with 1 if [Loaded] pressed

3020 Spot/Drop Job**PRAXAIR IS NOT USING THIS SCREEN CURRENTLY****Process**


If RCT.EquipmentNumber = 0 then
 MsgBox "No trailer exists to drop.", OK*; Return

This screen displays the details of the spot/drop job.

The Equipment field displays the trailer downloaded in the JOB file or if the Spot/Drop job was added then use RCT.EquipmentNumber. This field can be blank. If the trailer is blank or incorrect the driver can modify the contents of this field.

When [Finish] is pressed check if any deliveries exist on the trailer being dropped (this is done by searching the JOB file for records with JOB.JobType = Delivery for the current Work Order). If deliveries exist, automatically complete those deliveries in the background by marking each as serviced. A delivery record should upload for each of these dropped delivery bills.

Navigation

[Exit] or [Esc] Perform 9110 Exit Function
 If not canceled then return
 Else remain at current dialog

[More] Perform 3002 More Icons

[Finish] If Equipment blank then
 MsgBox "Equipment must be entered.", OK*
 Display cursor on Equipment field for entry
 Else
 If uncompleted, mandatory job or customer surveys exist then
 MsgBox "Please complete survey before proceeding", OK*
 Perform 3520A Survey & Audit Processing and upon return redisplay this dialog
 Record the spot/drop job details
 Find all deliveries for this work order and mark/record each delivery as serviced
 Perform 3050A Finalize Transactions



File.Field Name	Format	C	Instructions
CST.CustomerName	AN 01/40	I	Use larger font; override with SEQ.Name if it exists
CST.CustomerAddress1	AN 01/40	I	Use larger font; override with SEQ.Address1 if it exists
CST.CustomerAddress2	AN 01/40	I	Use larger font; override with SEQ.Address2 if it exists
JOB.Comments	AN 01/40	I	Use larger font
JOB.EquipmentNumber or RCT.EquipmentNumber	AN 01/09	I	Allow overwrite for correction. Use larger font. Use when Spot/Drop is added.
RCT.EquipmentNumber	AN 01/09	O	Assign value to a blank string.
LTD.EquipmentNumber	AN 01/09	O	
CTH.JobNumber	AN 01/18	O	Upload with JOB.JobNumber
If deliveries exist on the trailer when it is dropped, upload a delivery record for each bill containing the following:			
CTH.JobNumber	AN 01/18	O	Upload JOB.JobNumber
LTD.Pieces	N0 01/05	O	Upload JOB.Pieces
LTD.Weight	N0 01/07	O	Upload JOB.Weight

3030 Work Order Scheduler**Process**

Populate table with all SEQ Work Sequence records that are unserviced, sorted first in SEQ.SequenceNumber order and then in SEQ.StartTime order (earliest to latest).

If RCT.EnableJobBitmap = 0 (disabled) then grid has 2 columns:

Display Status Indicator in column 1

Display CST.CustomerName or CustomerAddress1 in column 2

Else (RCT.EnableJobBitmap = 1 (enabled), grid has 3 columns)

Display Status Indicator in column 1

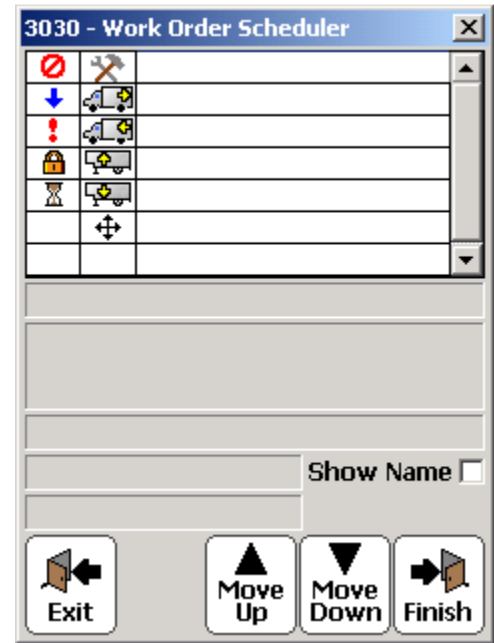
Display associated bitmap for SEQ.WorkOrderType in column 2

Display CST.CustomerName or CustomerAddress1 in column 3

If detect that new work orders have been downloaded then

Reload table; any changes that may have already been made will be lost

MsgBox "Rearranged Work Order changes are lost due to downloaded Work Orders.", OK*

**Navigation**

[Exit] or [Esc] If any Work Orders were rearranged then
 MsgBox "Rearranged Work Orders will be lost. Are you sure?"; Yes, No*
 If Yes response then discard all changes and return to 3010 Work Order Selection
 Else remain at current dialog
 Else (no rearrangements were made)
 Return to 3010 Work Order Selection

[MoveUp] Moves highlighted Work Order up one position in the list.

[MoveDn] Moves highlighted Work Order down one position in the list.

[Finish] [Enter] Save all rearrangements:
 For each SEQ Work Sequence record that has yet to be completed renumber the SEQ.SequenceNumbers starting at 0 and based on the selected order within the grid.
 For all other SEQ Work Sequence records renumber them starting where the previous renumbering left off but taking into account its original SEQ.SequenceNumber.
 Perform 3010 Work Order Selection

File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	<p>NoSvc bitmap if work order marked as a no service transaction Down Arrow bitmap if low priority work order Exclamation Point bitmap if high priority work order Padlock bitmap if work order already marked as a no service transaction and then received a file maintenance deletion Blank if normal priority work order</p> <p>Note that if a work order also has associated job(s) then: If at least one job has begun but is not yet complete then Mark work order with Hourglass bitmap Else if any one job is unserviced (with any priority) then Mark work order with it's own priority bitmap Else if any one job is marked as a no service transaction then Mark work order with NoSvc bitmap</p>

Work Order Type Indicator	bitmap	L	Only displayed if RCT.EnableJobBitmap = 1 Service bitmap if SEQ.WorkOrderType = 00 (Service) Vehicle Out bitmap if SEQ.WorkOrderType = 01 (Delivery) Vehicle In bitmap if SEQ.WorkOrderType = 02 (Pickup) Trailer Up bitmap if SEQ.WorkOrderType = 03 (Hook) Trailer Down bitmap if SEQ.WorkOrderType = 04 (Spot/Drop) Mix bitmap if SEQ.WorkOrderType = 05 (Mix of jobs)
CST.CustomerName or CST.CustomerAddress1	AN 01/40	I	Default to display CST.CustomerName, user may toggle display by checking/unchecking the Show Name box; Override CST.CustomerName with SEQ.Name if it exists Override CST.CustomerAddress1 with SEQ.Address1 if it exists.
SEQ.WorkOrderNumber	AN 01/18	I	
CST.CustomerAddress1 or CST.CustomerName	AN 01/40	I	Default to display CST.CustomerAddress1, user may toggle display by checking/unchecking the Show Name box. Use larger font. Override CST.CustomerAddress1 with SEQ.Address1 if it exists Override CST.CustomerName with SEQ.Name if it exists
CST.CustomerContactName	AN 01/30	I	
CST.CustomerPhoneNumber	AN 01/20	I	
SEQ.StartTime+ SEQ.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM
Show Name checkbox		I	Defaults to checked. When checked, the grid will display CST.CustomerName in the grid & CST.CustomerAddress1 below. When not checked, the grid will display CST.CustomerAddress1 in the grid and CST.CustomerName below.

3040 Customer Maintenance**Process**

Initially display 3041 Add/Edit Customer. If not canceled then populate dialog as described below.

If edit an existing customer was selected, then populate fields with the associated CST information. Both the "Template" drop down and "Cust #" edit boxes will be disabled (grayed out) while in edit mode. Buttons next to Name, Address 1, Address 2, City, State, Postal Code, Phone Number, and Contact Name call the pop-up keyboard for data entry.

If add a new customer was selected, then the "Template" drop down is enabled and populated with CST.CustomerName from Customer Master records with CST.TemplateIndicator = 1.

Navigation

[keyboard] button Perform 9010 Keyboard
 [Cancel] If data entered then
 Perform 9110 Exit Function
 If Yes response then go to 6100 Customer List
 Else remain at current dialog
 Else go to 6100 Customer List
 [More] Perform 3042 More Customer Maintenance
 [Done] If customer number is blank then
 MsgBox "Blank customer number is not permitted.", OK*; remain at current dialog
 If customer number found in Customer Master then
 MsgBox "Duplicate customer number.", OK*; remain at current dialog
 If customer name is blank then
 MsgBox "Blank customer name is not permitted.", OK*; remain at current dialog
 If adding a new customer then
 Append new record to CST for added customer
 Write ACC Add/Change Customer Detail upload record with TypeCode = 1
 Else (editing an existing customer)
 Update existing CST customer record
 Write ACC Add/Change Customer Detail upload record with TypeCode = 2
 If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
 RTM.MessageType = 6 (add/change customer message) record found then
 Perform 7000 Transmit Data in real-time
 Return to 6100 Customer List

File.Field Name	Format	C	Instructions
CST.CustomerName	AN 01/30	I	If add, select from Customer Master with CST.TemplateIndicator = 1
ACC.CustomerTemplate	AN 01/18	O	Output CST.CustomerNumber corresponding to selected template.
COC.CustomerNumber	AN 01/18	O	If add, set COC.EditCustomer = 1; elseif edit, set = 2
ACC.CustomerNumber		O	
ACC.CustomerName	AN 01/40	O	
ACC.CustomerAddress1	AN 01/40	O	
ACC.CustomerAddress2	AN 01/40	O	
ACC.CustomerCity	AN 01/30	O	
ACC.CustomerState	AN 01/10	O	
ACC.CustomerPostalCode	AN 01/15	O	
ACC.CustomerPhoneNumber	AN 01/20	O	
ACC.CustomerContactName	AN 01/30	O	

3041 Add/Edit Customer**Process**

This dialog allows users to select which type of customer file maintenance to perform. The default selection is to edit an existing customer.

Navigation

[OK] Perform 3040 Customer Maintenance for selected option
 [Cancel] Return to calling function

File.Field Name	Format	C	Instructions
(none)			

3042 More Customer Maintenance**Process**

If editing an existing customer then populate fields with the associated CST information. The button next to the Tax ID field calls the pop-up keyboard for alphanumeric data entry.

If adding a new customer then the Price List and Tax Code fields will be populated from the selected template.

Navigation

[keyboard] button Perform 9010 Keyboard
 [Back] Return to 3040 Customer Maintenance

File.Field Name	Format	C	Instructions
ACC.CustomerTaxID	AN 01/20	O	
ACC.PricingKey	N0 01/09	O	
ACC.CustTaxKey[1]	N0 01/15	O	
ACC.CustTaxKey[2]	N0 01/15	O	
ACC.CustTaxKey[3]	N0 01/15	O	

3050 Transaction Completion**Process**

Tabs vary based on transaction(s), in following order: Order, Invoice [Net], Credit Invoice, Debit Invoice, A/R. Tabs will only display if corresponding transactions exist. Also, the A/R tab will only display if RCT.EnableCollections = 1.

Order tab will display Quantity, Amount, Delivery Date, Purchase Order Release, and Purchase Order Number fields.

All invoice tabs (Invoice, Credit Invoice, and Debit Invoice) will display Quantity, Amount, Start Service, End Service, Resolution Code (disabled if CST.EnableResolutionCode = 0), Invoice Comments (disabled if CST.EnableInvoiceComment = 0), Purchase Order Number, and Billable fields.

A/R tab will only display the Amount field, with no [Detail] button.

If no transactions exist, then clear dialog of all tabs/fields and display a static text field that contains: "No transactions exist!"

Navigation

[Detail] button	Perform 3055 Transaction Detail
[calendar] button	Perform 9040 Calendar
[keyboard] buttons	If on Order tab then Perform 9010 Keyboard Else (on Invoice tab) Perform 9400 Multi-Line Edit Box
[Back] or [Esc]	Return to 3300 Customer Invoice
[Report]	Perform 3051 Print Reports
[Final]	If any tab present with Purchase Order Number field AND CST.EnablePurchaseOrderRequired = 1 AND Purchase Order Number not entered yet then MsgBox "Purchase Order number must be entered!", OK*; close MsgBox and remain at current dialog with focus placed on the Purchase Order Number field

Else
Perform 3050A Finalize Transactions

The screenshot shows the '3050 - Transaction Completion' dialog box with the 'Order' tab selected. The 'Invoice' tab is also visible. Fields include Quantity, Amount, Delivery (with a calendar icon), Purchase Order Release (with a keyboard icon), and Purchase Order Number (with a keyboard icon). At the bottom are buttons for Back (with a yellow arrow icon), Report (with a document icon), and Final (with a lock icon). A 'Detail' button with a magnifying glass icon is next to the Amount field.

The screenshot shows the '3050 - Transaction Completion' dialog box with the 'Invoice' tab selected. Fields include Quantity, Amount, Start, End, Resolution Code (with a dropdown arrow and keyboard icon), Invoice Comments (with a dropdown arrow and keyboard icon), Purchase Order Number (with a keyboard icon), and a Billable checkbox. At the bottom are buttons for Back (with a yellow arrow icon), Report (with a document icon), and Final (with a lock icon). A 'Detail' button with a magnifying glass icon is next to the Amount field.

File.Field Name	Format	C	Instructions
CTH.TotalQuantity	S0 01/05	I	For CTH.TransactionType = 01 (Order) and 02 (Invoice) only
CTH.BalanceDueAmount	S2 01/09	I	For CTH.TransactionType = 01 (Order), 02 (Invoice), and 03 (A/R)
CTH.DeliveryDate	DT 10/10	O	For CTH.TransactionType = 01 (Order) only; formatted "mm/dd/yyyy"
CTH.PurchaseOrderRelease	AN 01/25	O	For CTH.TransactionType = 01 (Order) only
JOB.PurchaseOrderNumber	AN 01/25	I	For CTH.TransactionType = 01 (Order) and 02 (Invoice) only
CTH.PurchaseOrderNumber		O	Populate with JOB.PurchaseOrderNumber for 02 (Invoice and Debit Invoice, not for Credit Invoice) only
COC.VisitStartDateTime	DT 16/16	I	For CTH.TransactionType = 02 (Invoice) only Formatted "mm/dd/yy hh:mm"
System Date and Time	DT 16/16	I	For CTH.TransactionType = 02 (Invoice) only Formatted "mm/dd/yy hh:mm"

SEL.ListText	AN 01/20	I	For CTH.TransactionType = 02 (Invoice) only Select all with SEL.ListTypeCode = 02 + "(Keyboard Text)"
OCM.ResolutionCode	N0 01/02	O	From SEL.ListIDCode corresponding to selected description
OCM.ResolutionCodeText	AN 01/60	O	For CTH.TransactionType = 02 (Invoice) only Set OCM.ResolutionCode = 99
SEL.ListText	AN 01/20	I	For CTH.TransactionType = 02 (Invoice) only Select all with SEL.ListTypeCode = 01 + "(Keyboard Text)"
OCM.InvoiceCommentCode	N0 01/02	O	From SEL.ListIDCode corresponding to selected description
OCM.InvoiceCommentText	AN 01/60	O	For CTH.TransactionType = 02 (Invoice) only Set OCM.InvoiceCommentCode = 99
CTH.Billable	ID 01/01	I	For CTH.TransactionType = 02 (Invoice) only

3050A Finalize Transactions

Process

If [RCT.EnableCollections = 1] AND [CTH.TransactionType = 02 (invoice) and CTH.Billable = 1] then

 If JOB/CST.PaymentType = 1 or 2 then

 Perform 9310 Payment Type

 If cancelled then remain at current dialog

 If (User selected Cash (CTH.PaymentType = 0) or Credit Card (CTH.PaymentType = 1) on screen 9310 AND WorkOrder Shipped details (details on Shipped tab) have been modified (quantities changed, items added or deleted) then MsgBox "Invoice modified. Please call the store for revised pricing" OK*.

 Close MsgBox and Perform 3055 Transaction Detail Screen with Total Tax field editable.

Repeat for each CTH.TransactionType = 01 (order), 02 (invoice), and 03 (accounts receivable) to be finalized

 If RCT.RoutePrinter < 99 (printer selected) then

 Perform 9300 Print Numbered Document

 If return (Good) then finalize transaction and continue

 Else (returned Incomplete) return to 3050 Transaction Completion

 Else finalize transaction and continue

Until all CTH.TransactionTypes = 01 (order), 02 (invoice), and 03 (accounts receivable) are finalized

If RCT.EnableCollections = 1 then

 If finalized transaction exists where CTH.TransactionType = 02 (invoice) and CTH.Billable = 1 then

 If CTH.PaymentType = 0 (cash) AND CTH.BalanceDueAmount is not equal to zero then

 Perform 3090 Cash/Check Collection

 If RCT.RoutePrinter < 99 (printer selected) then

 Perform 9300 Print Numbered Document

 If return (Good) then finalize transaction and continue

 Else (returned Incomplete) return to 3090 Cash/Check Collection

 Else if CTH.PaymentType = 1 (credit card) then perform 3091 Credit Card Collection

Write/update current clock to COC.VisitEndTime

If STS Work Status file/records exist then

 Write/update SCD Status Change Detail using SCD.StatusNumber = 9999

 If RCT.EnableBackgroundTelecom = 1 (real-time messagine enabled) AND

 RTM.MessageType = 1 (status change message) record found then

 If any STS Work Status file/records exist with STS.SendStatusOption = 1 then

 Perform 7000 Transmit Data in real-time and send record with SCD.StatusNumber = 9999

If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND

RTM.MessageType = 7 (less than load message) record found AND

RTM.JobType matches the current CTH.TransactionType then

 Send associated LTD Less Than Load Transaction Details

If the workorder changed the total number of cylinders on the truck

 If MessageBox("Reprint Hazmat/TDG? Press Yes to print or No to cancel and continue", MB_YesNo) = Yes) Reprint the Hazardous Material Report

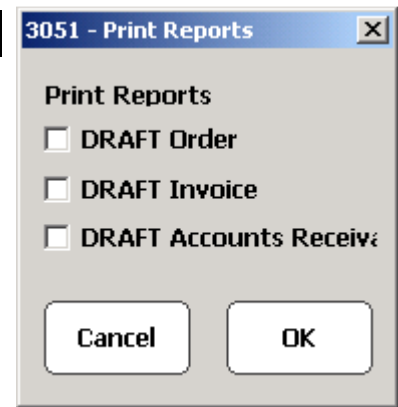
If there is more than 1 job associated with the selected work order and all of them have not been completed yet then return to 3012 Job Selection to select the next job; otherwise return to 3010 Work Order Selection

3051 Print Reports**Process**

User selected optional reports to be printed. ReportList will contain list of reports to be printed based on marked check boxes. Check boxes grayed out if no information to be printed. All selected reports print continuously, with each report starting on a new page.

Navigation

[OK] If RCT.RoutePrinter = 99 (no printer) then
 For each report selected:
 MsgBox "No printer selected.", OK*
 Close MsgBox and remain at current dialog
 Else
 Perform 9100 Print Report (ReportList)
 Return
[Cancel] Return



File.Field Name	Format	C	Instructions
(none)			

3055 Transaction Detail**Process**

This dialog allows the user to view details of the current transaction.

Navigation

[Back] Return to 3050 Transaction Completion
 [Final] MsgBox "Are the totals correct?" Yes or No
 If Yes
 Perform 3050A Finalize Transactions
 Else
 Remain on this screen and allow user to go back and make corrections.

3055 - Transaction Detail

Subtotal


Deposit

Tax

Total

Insurance

Balance due

 Back

File.Field Name	Format	C	Instructions
Parts Returns Damaged Returns Exchanges Other Labor	AN 01/20	O	If from Order, Invoice (Net), Debit Invoice (Split) If from Order, Invoice (Net), Credit Invoice (Split) If from Order, Invoice (Net), Credit Invoice (Split) If from Order, Invoice (Net), Debit Invoice (Split) If from Order, Invoice (Net), Debit Invoice (Split) If from Invoice (Net), Debit Invoice (Split) Text strings sourced from literals file, blank if quantity/amount = 0
TotalPartsQuantity or TotalReturnsQuantity or TotalDamagedQuantity or TotalExchangeQuantity or TotalOtherQuantity or TotalLaborQuantity	S0 01/06	O	If from Order, Invoice (Net), Debit Invoice (Split) If from Order, Invoice (Net), Credit Invoice (Split) If from Order, Invoice (Net), Credit Invoice (Split) If from Order, Invoice (Net), Debit Invoice (Split) If from Order, Invoice (Net), Debit Invoice (Split) If from Invoice (Net), Debit Invoice (Split) Blank if equal to zero
TotalPartAmount TotalReturnAmount TotalDamagedAmount TotalExchangeAmount TotalOtherAmount TotalLaborAmount	S2 01/09	O	If from Order, Invoice (Net), Debit Invoice (Split) If from Order, Invoice (Net), Credit Invoice (Split) If from Order, Invoice (Net), Credit Invoice (Split) If from Order, Invoice (Net), Debit Invoice (Split) If from Order, Invoice (Net), Debit Invoice (Split) If from Invoice (Net), Debit Invoice (Split) Blank if equal to zero
Subtotal	S2 01/09	O	Sum TotalAmounts
Deposit	S2 01/09	O	Sum (CTD.ItemQuantity * CTD.ItemDeposit) for all CTD.TransactionTypes. Do not display literal / field if equal to zero.
Tax	N2 01/08	O	CTH.TotalTax. If it is zero and the Invoice has not been modified from downloaded quantities, do not display if Tax amount is zero. Display literal / field if equal to zero and the invoice has been changed so the user can change it if they need to. This field is editable. Driver will call in to get ticket recalculated and will be told the new Tax amount to enter. The amount entered for the Tax will get uploaded in the CTH.TotalTax field. Per Praxair taxes are never negative.
Total	S2 01/09	O	Sum Subtotal + Deposit + Tax. Update this field if the Tax field is modified by the driver.
Insurance	S2 01/09	O	For current transaction and all CTD.TransactionType = 01 (Ships): Sum ((CTD.ItemQty * CTD.ItemPrc) * (ODM.PrimaryInsurance / 100)) + (CTD.ItemQty * CTD.ItemPrc) * (ODM.SecondaryInsurance / 100)) + (CTD.ItemQty * CTD.ItemPrc) * (ODM.TertiaryInsurance / 100)) Do not display literal / field if equal to zero
CTH.BalanceDueAmount	S2 01/09	O	Update this field if the Tax field is modified by the driver. The new amount

		will be uploaded in the CTH.BalanceDueAmount field.
--	--	---

3090 Cash/Check Collection**Process**

Amount Due field contains sum of cash invoice balance due and A/R transactions. User enters cash and/or checks; entered amounts update Amount Due field. Checks table will be disabled (grayed out) if JOB/CST.PaymentType = 5. *Send Check* check box enabled only if either of the next 2 conditions are true:

- 1) if initial amount due and current amount due are both negative; OR
- 2) if JOB/CST.PaymentType = 5 (cash only, no checks) and current amount due is negative

Navigation

[OK] If Amount Due = 0 then Return
 Else if Amount Due > 0
 MsgBox "Are you sure?"; Yes, No*
 If Yes response then write CCD type 08 record for cash not collected and return
 Else remain at current dialog
 Else (Amount Due < 0)
 If *Send Check* selected then write CCD type 04 record for overage amount
 Else write CCD type 08 record for overage amount
 Return

3090 - Cash/Chk Collection

Amount Due

Cash Amount

Checks

Number	Amount

☐ Send Check

OK

File.Field Name	Format	C	Instructions
Amount Due	S2 01/09	L	Sum(CTH.BalanceDueAmount) for CTH.TransactionType = 03 (A/R) and 02 (Invoice) if CTH.PaymentType = 0 (cash)
CCD.Amount	S2 01/09	O	For CCD.TypeCode 01 (cash)
CCD.CheckNumber	N0 01/08	O	For CCD.TypeCode 02 (check)
CCD.Amount	S2 01/09	O	For CCD.TypeCode 02 (check)

3091 Credit Card Collection**Process**

Amount Due field contains sum of cash invoice balance due and A/R transactions. User selects credit card type and then enters the credit card number and expiration date.

Navigation

[OK] If Card Number or Expiration Date not entered then
 MsgBox "Must Enter Card Number and Expiration Date.", OK*
 Remain at current dialog

Else
 If Expiration Date month is [greater than or equal to 01 and less than or equal to 12] AND year is less than 6 years ahead of the current system clock year then
 Write CCD type 03 record
 Return
 Else MsgBox "Invalid Expiration Date", OK*; remain at current dialog

The screenshot shows a Windows-style dialog box titled "3091 - Credit Card Collection". It has a close button (X) in the top right corner. The dialog contains four input fields: "Amount Due" (a text box), "Select Card Type" (a dropdown menu), "Card Number" (a text box), and "Expiration Date" (a date picker). An "OK" button is located at the bottom center of the dialog.

File.Field Name	Format	C	Instructions
Amount Due	S2 01/09	L	Sum(CTH.BalanceDueAmount) for CTH.TransactionType = 03 (A/R) and 02 (Invoice) if CTH.PaymentType = 0 (cash)
SEL.ListText	AN 01/20	I	Only for CCD.TypeCode 03 (credit card); select all with SEL.ListTypeCode = 23 (credit card type)
CCD.CreditCardType	N0 01/02	O	From SEL.ListIDCode corresponding to selected reason
CCD.CreditCardNumber	N0 03/16	O	For CCD.TypeCode 03 (credit card) The credit card number will be encrypted during the end of day processing before the uploads are sent. See appendix for encryption method.
CCD.CreditCardExpirationDate	N0 03/04	O	For CCD.TypeCode 03 (credit card)

3200 Job Order**Process**

Tab 1-5 values = Parts, Rtns, Dmgd, Exch, and Other.
 The Rtns tab is enabled only if CST.EnableReturnsTrxn = 1.
 The Dmgd tab is enabled only if CST.EnableDamagedReturns = 1.
 The Exch tab is enabled only if CST.EnableExchangeTrxn = 1.
 The Other tab is enabled only if CST.EnableOtherTrxn = 1.

All tables will initially be empty.

Part Price amount modification is password protected. If RCT.PasswordArray[02] < > 0 and RCT.Password[n] < > 0 then the password must be entered before modification is allowed. If either part of the above condition is set to zero then the password requirement is considered satisfied. Note that the password need be entered only once per access to this dialog or any of its sub-dialogs.

Navigation

- [Number/Desc.] If Number displayed and pressed then
 Display part numbers in the grid and the part description in text box below the grid
 Else display part descriptions in the grid and the part number in text box below the grid
- [Exit] If CST.EnableOrderByLot = 2 then
 For each type transacted
 If type total not multiple of order lot quantity then perform 3293 Order Lot Warning
 Next
 If any order lot warnings prompted then remain at current dialog
 Return
- [More] Perform 3002 More Icons
- [Add] If on Sales or Other page then perform 3295 Select Part—Order
 Else perform 3296 Select Part With Reason—Order
- [Detail] not implemented**
- [Price] If price password required then perform 9090 Password Input
 Else remain at current dialog
- ~~[amt entry] If price override password requirement not satisfied then do [key] button
 Else if price override password satisfied then allow user to change amount
 Else disallow entry~~
- [qty entry] If Rtns, Dmgd, or Exch page active then perform 3296 Select Part With Reason—Order
 Else allow grid edit
- [Enter] If CST.EnableOrderByLot = 1 and part quantity not multiple of order lot quantity then
 Perform 3293 Order Lot Warning
 Get next part in current transaction
- [Esc] Perform 9110 Exit Function
 If not canceled then return
 Else remain at current dialog

File.Field Name	Format	C	Instructions
ITM.ItemDescription or CTD.ItemNumber	AN 01/40	I O	Select all records for current CTD.TransactionKey and CTD.TransactionType = 01 (parts), = 02 (returns), = 03 (dmgd returns), = 04 (exchanges), and = 05 (other). Keyed from CTD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
CTD.ItemQuantity	N0 01/05	O	
CTD.ItemNumber OR ITM.ItemDescription	AN 01/ 26 AN 01/40	O I	Keyed from CTD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
CTD.ItemPrice	See Instructions	O	If RCT.PriceDecimals = 0 or 4 then Format = N4 01/10 If RCT.PriceDecimals = 2 then Format = N2 01/10 If RCT.PriceDecimals = 3 then Format = N3 01/10 Prices for downloaded exchange items will be zeroed. Prices for other items cannot be changed.
Subtotal Amount	N2 01/08	L	

3293 Order Lots

Process

If corresponding logic enabled, this dialog is displayed when the user attempts to order in quantities other than case lots. If CST.EnableOrderByLot = 2 then Part Number label changes to Type Number and Part Qty label changes to Type Total. Message text field will contain "Parts must be ordered in full Order Lot Qty increments." (if checking part) or "Type totals must be in full Order Lot Qty increments." (if checking types). Type Total field cannot be edited.

Navigation

[OK] If checking by part then
 If Part Qty not evenly divisible by Order Lot Qty then
 MsgBox "You must order this product in full increments of "n", OK*"; where "n" = Order Lot Qty value
 Remain at current dialog
 Else return selected option(s) to calling module
 [Cancel] Return null parameter to calling module

File.Field Name	Format	C	Instructions
CTD.ItemNumber Type Code	AN 01/26	I L	
ITM.ItemDescription	AN 01/40	I	Keyed from CTD.ItemNumber = ITM.ItemNumber and ITM.ItemTypeCode = 01 or Type Code = ITM.ItemNumber and ITM.ItemTypeCode = 99 Use AID.ItemDescription if exists for selected RCT.Language/item
ITM.OrderLotQuantity	N0 01/06	I	
CTD.ItemQuantity Type Total	N0 01/06	I L	= Sum(CTD.ItemQuantity) for all parts this ITM.TypeCode

3295 Select Part—Order**Process**

The scanner is enabled at this dialog. User either scans a bar code or inputs a part number; if found, string field populated with part description. If found but not found in authorized part list, then MsgBox “Not authorized.”, OK*. User then inputs quantity. Routine loops continuously until user presses [Exit] or [Esc].

The Price edit field is disabled (grayed out) until price override password requirements are satisfied. See calling dialog for additional details.

Navigation

[binoculars] button Perform 9000 Find (Part)
[key] button If price override password required then
 Perform 9090 Password Input
 Else
 Remain at current dialog
scan or If at Part Number field then
 [Enter] Search Item Master for Part Number
 If found then
 If ITM.ItemTypeCode > 02 then
 MsgBox “Invalid Entry”, OK*
 Remain at current dialog
 Else
 Populate Part Description field and advance to quantity field
 Else
 MsgBox “Not Found”, OK*; remain at current dialog
 Else
 Do [Enter]
 Perform 9000 Find (Part)
 Return to calling module
 Create temporary record for part number, quantity, and price.
 Clear dialog and position cursor at Part Number field.

File.Field Name	Format	C	Instructions
Part Number	AN 01/ 26	L	Search ITM.ItemNumber for Part Number
ITM.ItemDescription	AN 01/40	I	Keyed from Part Number Use AID.ItemDescription if exists for selected RCT.Language/item
Quantity	N0 01/05	L	User input.
Price	See Instructions	L	If RCT.PriceDecimals = 0 or 4 then Format = N4 01/10 If RCT.PriceDecimals = 2 then Format = N2 01/10 If RCT.PriceDecimals = 3 then Format = N3 01/10 Prices for downloaded exchange items will be zeroed. Prices for other items cannot be changed.

3296 Select Part With Reason—Order**Process**

Initially, only the Part Number field and the Returns and Damaged radio buttons are active.

If called from Rtms tab then Returns radio button selected

Else if called from Dmgd tab then Damaged radio button selected

Else (called from Exch tab) then neither radio button is displayed

The scanner is enabled at this dialog. User either scans a bar code or inputs part number and if found then the part description field is populated and focus is placed in the first quantity field of the grid. For damaged returns the default reason (first return/exchange reason record in the SEL file) will already be selected. Reason selection is optional for regular returns and exchanges. User inputs a quantity. Multiple reasons and quantities may exist for the selected part, new records in the grid will automatically be added at the bottom of the grid for input of additional reasons and quantities. The optional Comment and Instructions fields are tied to each respective reason and quantity entered whereas the Price field is only tied to the part number. Multiple RXD Return/Exchange Detail records for an associated CTD Customer Transaction Detail will be generated when multiple reasons and quantities are entered for a part. User must tap on fields outside the grid to access them.

When input for the currently selected part is complete, focus will be returned to the part number prompt to allow scan/entry of the next part.

The Price edit field is disabled (grayed out) until proper password requirements are satisfied. See calling dialog for additional details.

Navigation

<i>scan</i> or	If at Part Number field then
[Enter] or [Enter]	Search Item Master for Part Number
	If found then
	If ITM.ItemTypeCode > 02 then MsgBox "Invalid Entry", OK*; remain at current dialog
	Else
	Populate Part Description field and other appropriate fields
	Advance to first quantity field
	Else MsgBox "Not Found", OK*; remain at current dialog
	Else (at field within grid)
	If changes made to Reason, Quantity, Comment, or Price then
	Create record for entered data
	If on last grid record append new grid record and move to it
	Else move to next grid record
	Else
	If on last grid record then move to Part Number field and reset for new entry
	Else move to next grid record
	Else (at the Comment, Instructions, or Price field)
	If on last reason/quantity in the grid then
	Return focus to the Part Number prompt to allow entry of the next part
	Else return focus to the next record in the grid
[binoculars] button	Perform 9000 Find (Part)
[Returns] checkbox	Switch to Returns info for current part
[Damaged] checkbox	Switch to Damaged Returns info for current part
[keyboard] button	Perform 9010 Keyboard
[key] button	If price override password required then perform 9090 Password Input
	Else remain at current dialog
[Exit] or [Esc]	Return to calling module
[Find]	Perform 9000 Find (Part)

File.Field Name	Format	C	Instructions
CTD.ItemNumber & RXD.ItemNumber	AN 01/ 26	O	Search ITM.ItemNumber for Part Number. Output record with CTD & RXD.TransactionType 02, 03, or 04 depending on calling module.
ITM.ItemDescription	AN 01/40	I	Keyed by ITM.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
SEL.ListText RXD.ReasonCode	AN 01/20 N0 01/02	I O	Select all with SEL.ListTypeCode = 03 = SEL.ListIDCode corresponding to selected reason
Quantity	N0 01/05	L	user input
RXD.ManufactureCode	AN 01/12	O	
SEL.ListText RXD.InstructionCode	AN 01/20 N0 01/02	I O	Select all with SEL.ListTypeCode = 04 = SEL.ListIDCode corresponding to selected reason
Price	See Instuctions	L	If RCT.PriceDecimals = 0 or 4 then Format = N4 01/10 If RCT.PriceDecimals = 2 then Format = N2 01/10 If RCT.PriceDecimals = 3 then Format = N3 01/10 Prices for downloaded exchange items will be zeroed. Prices for other items cannot be changed.
CTD.ItemQuantity	N0 01/05	L	

3300 Customer Invoice

Process

Tab 1-6 values = Parts, Rtns, Dmgd, Exch, Other, and Labor.

The Rtns tab is enabled only if CST.EnableReturnsTrxn = 1.

The Dmgd tab is enabled only if CST.EnableDamagedReturns = 1.

The Exch tab is enabled only if CST.EnableExchangeTrxn = 1.

The Other tab is enabled only if CST.EnableOtherTrxn = 1.

The Labor tab is enabled only if CST.EnableLabor = 1.

If all 6 tabs are enabled then scroll buttons will be displayed to enable access to all tabs.

[Add] button and Price [amt entry] are disabled if processing a service order and JOB.PrepaidOrder = 1 (prepaid order; no changes allowed).

If RCT.EnableItemDetail = 0 then the first column shown in the grid at right will not display and the [Detail] button will be disabled. Otherwise (RCT.EnableItemDetail = 1) display the first column in grid as shown and also enable the [Detail] button but only when the currently highlighted item is determined to be an assembly, or has Item Details activated or Order Detail Comments exist for the item. Also, the [Detail] button will be disabled for an item where: [(the quantity = 0) AND (IDT.DetailRequired[n] > 0 AND IDT.InputType < 3) AND (no Order Detail Comments exist for the item)].

If RCT.EnableVerificationScan 0 or 1 then

Fourth column shown in grid above will not display, use extra space for Item Number/Description field

Display/toggle ItemNumbers and ItemDescriptions

Do not display Progress field & extend ItemNumber/ItemDescription field to full width of dialog

Else (RCT.EnableVerificationScan 2 or 3)

Enable the scanner at this dialog and display the fourth column in grid as shown

If CST.VerificationScanNumber = 0 (scan ItemNumbers) then

Display/toggle ItemNumbers and ItemDescriptions

Else (CST.VerificationScanNumber = 1 scan ItemSerialNumbers)

Display/toggle ORD.ItemSerialNumbers and ItemDescriptions

Endif




Display Progress field

Endif

If appropriate CST.EnableAutoFill flag = 1, then populate Rtns and *Dmgd* tables as is done for the Parts table only with all quantities = 0. If CST.EnableAutoFillReturns = 2 or 3, then populate the Rtns table with products from the sales grid with ITM.TypeCode = "1" and set all quantities = 0. Exch, Other, and Labor tables will be initially empty.

Part Price amount modification is password protected. If RCT.PasswordArray[02] <> 0 and RCT.Password[n] <> 0 then password must be entered before modification is allowed. If either part of the above condition is set to zero then the password requirement is considered satisfied. Note that the password only needs to be entered once per access to this dialog or any of its sub-dialogs. If the No Charge checkbox has been checked (on dialog 3395/3396) for the currently selected item, then the price will have been set to zero and the price input field will be disabled. Price changes for invoices are allowed for Shipped(Part), MT(Returns) and Other items.

Navigation

<i>scan</i>	If CST.VerificationScanNumber = 0 (scan ItemNumbers) then Search items contained in the grid for matching ItemNumber Else (CST.VerificationScanNumber = 1 scan ItemSerialNumbers) Search items contained in the grid for matching ItemSerialNumber If found then position highlight on item, mark as delivered, and update progress field Else if JOB.PrePaidOrder = 1 then MsgBox "Not Found.", OK*; clear MsgBox and remain at current dialog Else (JOB.PrePaidOrder = 0) MsgBox "Not Found. Deliver anyway?", Yes, No* If Yes response then Do [Add] button Position highlight on item, mark as delivered, and update progress field Else clear MsgBox and remain at current dialog
 [qty entry]	If Rtns, Dmgd, or Exch page active AND RCT.DisableMultipleReasons = 0 then Perform 3396 Select Part with Reason—Invoice Else allow grid edit If selected item is an assembly and quantity changed to zero then MsgBox "Component quantities will be zeroed.", OK* Zero out all component quantities and remain at current dialog If quantity changed and item details already exist then MsgBox "Details entered will be lost.", OK* Remove item details, reset the detail indicator bitmap, and remain at current dialog
 [Enter]	Get next item in current transaction
 [Esc]	Perform 9110 Exit Function If not canceled then Return Else remain at current dialog
[Number/Desc.]	If Number displayed and pressed then Display part numbers in the grid and the part description in text box below the grid Else (Desc. displayed and pressed) Display part descriptions in the grid and the part number in text box below the grid
[key] button	If price override password required then perform 9090 Password Input Else remain at current dialog
[Back]	Save any/all service information and return to calling dialog
[More]	Perform 3002 More Icons
[Add]	If Rtns, Dmgd, or Exch page active then perform 3396 Select Part with Reason—Invoice Else perform 3395 Select Part—Invoice If Parts (Ship) page is active, and item ITM.ItemTypeCode = 1 (part item) and ITM.TypeCode = 1 (GAS) and CST.EnableAutoFillReturns then also add item to Return(MT) page with a qty of zero.
[Detail]	If Order Detail Comment(s) exist for the selected item then Perform 3310 Order Detail Comments Else If selection is a parent assembly item then perform 3350 Assembly Detail Else perform 3397 Detail Entry

Finish]

If RCT.EnableVerificationScan 2 or 3 AND progress field < 100% then
 MsgBox "All items have not been delivered.", OK*
 Clear MsgBox and remain at current dialog

If CST.EnableAutoFillReturns = 3 AND all Return quantities not manually input then
 MsgBox "Please manually input all Return quantities, including zeroes.", OK*
 Redisplay this dialog

If (any items with IDT.DetailRequired[n] = 2 or 4) AND (details not entered) then
 MsgBox "Please enter required details before proceeding.", OK*
 Redisplay this dialog

If uncompleted, mandatory job or customer surveys exist then
 MsgBox "Please complete survey before proceeding.", OK*
 Perform 3520A Survey & Audit Processing and upon return redisplay this dialog

Else
 Perform Tax Calculation³

If (an item number in current work order contains the "OX LOX" characters) then
 Perform 3370 Home Liquid Reservoir Fill

If (any items where ITM.BulkType = 0 have a delivered qty < downloaded shipped qty)
 Perform 3320 BackOrder

Go to 3050 Transaction Completion

File.Field Name	Format	C	Instructions
Detail Indicator	bitmap	L	Assembly Detail bitmap if item is an assembly (ITM.Assembly > 0) Required Line Item Detail bitmap if IDT.DetailRequired[n] = 2 and details have not yet been entered Optional Line Item Detail bitmap if IDT.DetailRequired[n] = 1 and line item details have not yet been entered Checkmark bitmap if IDT.DetailRequired[n] > 0 and line item details have been entered Order Comment bitmap if Order Comments found for item and is the ONLY bitmap that is applicable Note: Item details cannot be collected on parent assembly items
ITM.ItemDescription or CTD.ItemNumber	AN 01/40 AN 01/26	I O	Select all records for current CTD.TransactionKey and CTD.TransactionType = 01 (parts), = 02 (returns), = 03 (damaged returns), = 04 (exchanges), = 05 (other), and = 06 (labor). Keyed by CTD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
CTD.ItemQuantity	N0 01/05 N1 01/05	O	Displayed and inputted values are always N0 01/05, except for Labor which is N1 01/05; if a non-labor quantity is downloaded via ORD.ItemQuantity (N2 01/08) & left unchanged then retain values to the right of the decimal for pricing calculations, printing (Alternate Invoice only), and upload. N2 01/08 values will be truncated as N0 01/05 for display and printing of a regular (non-Alternate) invoice. Inventory will also be affected by a truncated value.
Delivered Indicator	bitmap	L	Delivered bitmap if item scanned/delivered Non-delivered bitmap if item not delivered
Progress	"Z9 OF Z9"	O	First Z9 equals the number of items that have been successfully scanned. Second Z9 equals the total number of items to be scanned. If CST.VerificationScanNumber = 1 then do not include items with zero/blank serial numbers in these counts.
CTD.ItemNumber or ITM.ItemDescription	AN 01/ 26 AN 01/40	O I	Keyed from CTD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
CTD.ItemPrice or Calculated Item Price	See Instuctions	O L	If RCT.PriceDecimals = 0 or 4 then format = N4 01/10 If RCT.PriceDecimals = 2 then format = N2 01/10 If RCT.PriceDecimals = 3 then format = N3 01/10 If IDT.InputResult = 2 or 4 then display a calculated item price: (sum DTL.ItemDetailQuantities) / CTD.ItemQuantity. This calculated item price will not overwrite CTD.ItemPrice. Prices for downloaded exchange items will be zeroed. Prices for other items can be changed.
Subtotal Amount	N2 01/08	L	

³ For more information see the **Taxes** heading in the Appendices.

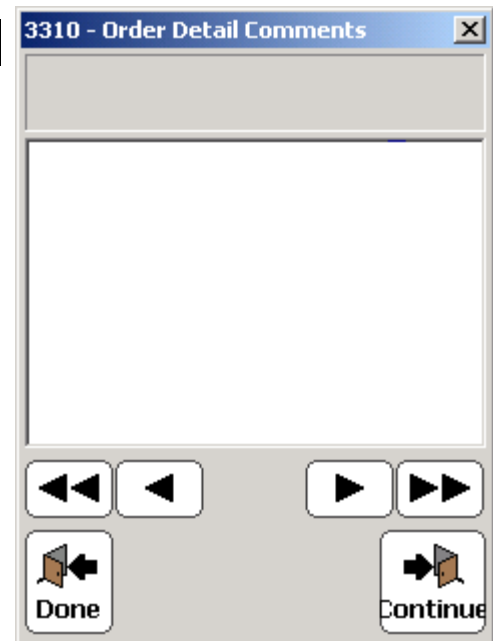
3310 Order Detail Comments**Process**

This dialog displays order detail comments.

Only enable the [Continue] button when the currently selected item is a parent assembly item or $IDT.DetailRequired[n] > 0$. However, there is one exception: the [Continue] button will be disabled when [(the quantity = 0) AND (IDT.DetailRequired[n] > 0 AND IDT.InputType < 3)].

Navigation

[Done] Return to calling dialog
 [Continue] If selection is a parent assembly item then
 Perform 3350 Assembly Detail
 Else
 Perform 3397 Detail Entry
 Endif
 Return to calling dialog



File.Field Name	Format	C	Instructions
ITM.ItemDescription	AN 01/40	I	From currently selected item Use AID.ItemDescription if exists for selected RCT.Language/item
ODC.ItemComment	AN 01/40	O	

3320 BackOrder**NEED NEW SCREENSHOT**

Screen Title 3320 BackOrder

This screen will have a grid with three columns and will display Part#, Original Order Quantity (ORD.ItemQuantity) and the third column will be editable and have the BackOrderedQuantity (actual delivered quantity – shipped quantity)

(ORD.ItemQuantity - CTD.ItemQuantity). The Item Description of the currently selected grid row will display below the grid. Buttons will be Back, Clear and Next.

Process

This dialog displays items with ITM.BulkType that the delivered quantity is less than the downloaded shipped quantity. User will be allowed to edit the back order quantity. The Clear button will zero out all the backorder quantities.

Navigation

[Back] Return to calling dialog (3300)

[Clear] Zero out all backorder quantities

[Done] Go to 3050 Transaction Completion



File.Field Name	Format	C	Instructions
CTD.ItemNumber	AN 01/26	I	Where ITM.BulkType = 0 and ORD.ItemQuantity > CTD.ItemQuantity
ORD.ItemQuantity	N0 01/05 N1 01/05	I	Original downloaded quantity before user modified.
CTD.BackOrderQuantity	N0 01/05	O	ORD.ItemQuantity -CTD.ItemQuantity is displayed initially and user can decrease, increase or zero out quantity.
ITM.ItemDescription	AN 01/40	I	From currently selected item Use AID.ItemDescription if exists for selected RCT.Language/item

3350 Assembly Detail**Process**

Table populated from associated ORD Service Order Detail File component records or from ASM Assembly File records if items are added by user on dlg3395 or dlg3396.

Price and Subtotal amount fields will only display when ITM.Assembly = 2 (assembly, priced by component items).

[Add] button and Price [amt entry] are disabled if processing a service order and JOB.PrepaidOrder = 1 (prepaid order; no changes allowed).

Only enable the [Detail] button when the currently highlighted item's IDT.DetailRequired[n] > 0 or Order Detail Comments exist.

Part Price amount modification is password protected. If RCT.PasswordArray[02] < > 0 and RCT.Password[n] < > 0 then the password must be entered before modification is allowed. If either part of the above condition is set to zero then the password requirement is considered satisfied. Note that the password need be entered only once per access to this dialog.

Navigation buttons: << < Desc. > >>

Price:

Buttons: Back Add Detail Price

Navigation

[Qty entry]	Allow grid edit If quantity changed and item details already exist then MsgBox "Details entered will be lost.", OK* Remove item details and reset the detail indicator bitmap
[Enter]	Get next item in current transaction
[Number/Desc.]	If Number displayed and pressed then Display part numbers in the grid and the part description in text box below the grid Else (Desc. displayed and pressed) Display part descriptions in the grid and the part number in text box below the grid
[Back] or [Esc]	If any items with IDT.DetailRequired[n] = 2 AND details not entered then MsgBox "Please enter required details before proceeding.", OK* Redisplay this dialog Else save information and return to calling dialog
[Add]	Perform 3395 Select Part—Invoice
[Detail]	If Order Detail Comments exist for selected item then Perform 3310 Order Detail Comments Else perform 3397 Detail Entry Redisplay this dialog
[Price]	If price override password required then perform 9090 Password Input Else remain at current dialog

File.Field Name	Format	C	Instructions
ITM.ItemDescription	AN 01/40	I	From currently selected item assembly Use AID.ItemDescription if exists for selected RCT.Language/item
Detail Indicator	bitmap	L	Required Line Item Detail bitmap if IDT.DetailRequired[n] = 2 and details have not yet been entered Optional Line Item Detail bitmap if IDT.DetailRequired[n] = 1 and details have not yet been entered Checkmark bitmap if IDT.DetailRequired[n] > 0 and details have been entered Order Comment bitmap if Order Comments found for item and is the ONLY bitmap that is applicable
ITM.ItemDescription or CTD.ItemNumber	AN 01/40 AN 01/ 26	I O	Select all records for current CTD.TransactionKey Use AID.ItemDescription if exists for selected RCT.Language/item
CTD.ItemQuantity	N0 01/05	O	Populate from ORD.ItemQuantity or ASM.ComponentQuantity; if from ORD.ItemQuantity then truncate values to the right of the decimal.
CTD.ItemNumber OR ITM.ItemDescription	AN 01/18 AN 01/ 26	O I	Keyed from CTD.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
CTD.ItemPrice	See Instructions	O	Not used for exchange or other assemblies. If RCT.PriceDecimals = 0 or 4 then Format = N4 01/10 If RCT.PriceDecimals = 2 then Format = N2 01/10 If RCT.PriceDecimals = 3 then Format = N3 01/10
Subtotal Amount	N2 01/08	L	

3370 Home Liquid Reservoir Fill

Process

If there is no Source Vessel Serial number, perform dialog 9082 entering one source vessel serial and lot number before entering this dialog.

User inputs the Container Serial number, the Container Style, Source Vessel, and Filler Initials. The scanner is enabled in this dialog for the Container Serial number. The dialog is pre-populated with values from previous entries.

When the user checks a check box, dialog 9400 pops up with a customized title and allows the user to enter the remark associated with the checkbox.

Validation includes: Container Serial number, Container Style, and Source Vessel must be filled in or selected. There must be a comment for each Unit Inspection checkbox that is checked (with a length greater than zero). The total length of all the comments must be less than or equal to 31 (the space available for remarks in the report.)

Navigation

[Container Serial Number]

Can be a scanned barcode on the home vessel or can be typed into the textbox.

[Source Vessel]

Select a value from the list. No text entry.

[Green Plus]

Perform - 9082 Source Vessel Numbers

[Checkboxes]

Uncheck checkbox – Disable the corresponding button.

Check a check box, perform 9400 Multi Line edit with configured title.

[Keyboard Buttons]


If button enabled - Perform 9400 Multi-Line edit to collect remarks corresponding to check box. Title in 9400 is now configurable by changing text in the literals file.

[OK]

If Container Serial number, the Container Style, Source Vessel, and Filler Initials have been entered, save values and go back to 3300 Customer Invoice with completed result.

[Cancel]

Return to 3300 Customer Invoice with cancel.

[Back] or [Esc] Return to 3300 Customer Invoice



CVD and CSD are Internal Files only:

File.Field Name	Format	C	Instructions
CVD.CustContainerSN	AN 01/15	I	
CVD.ContainerStyle	AN 01/10	I	Populated from SEL.ListTypeCode = 37 (Contrinaer Style)
CVD.SrcVesselIdx	N 01/01	I	Combox is filled by values in CSD.SrcVesselSerialNum 1 TO 3
CVD.UnitInspections[1]	ID 01/01	I	
CVD.Remarks[1]	AN 01/12	I	
CVD.UnitInspections[2]	ID 01/01	I	
CVD.Remarks[2]	AN 01/12	I	

CVD.UnitInspections[3]	ID 01/01	I	
CVD.Remarks[3]	AN 01/12	I	
CVD.UnitInspections[4]	ID 01/01	I	
CVD.Remarks[4]	AN 01/12	I	
CVD.UnitInspections[5]	ID 01/01	I	
CVD.Remarks[5]	AN 01/12	I	
CVD.FillerInitialsFilename	AN 01/20	I	Signature file: "sig" + timeAndDatestamp + ".bmp"

3395 Select Part—Invoice**Process**

The scanner is enabled at this dialog.

User either scans a bar code or inputs part number.

Search Item Master File, if found then

If not in authorized part list then MsgBox "Not authorized.", OK*

If called from 3350 Assembly Detail and item is an assembly item then

MsgBox "Assembly item not allowed.", OK*

Populate description field with part description

Populate Price field with appropriate price

If RCT.EnableFindItem = 0 (always add) then

Populate Quantity field with a default quantity of 1

Else (RCT.EnableFindItem = 1 (always find))

Search through existing CTD records

If found then populate fields with existing data

Else populate Quantity field with a default quantity of 1

Else MsgBox "Not Found", OK*; remain at current dialog

Routine loops continuously until user presses [Exit] or [Esc].

Both the Price edit field and the No Charge checkbox are disabled (grayed out) until price override password requirements are satisfied. See calling dialog for additional details. If the No Charge checkbox is checked, then the price is set to zero and the price input field is disabled.

Navigation

[binoculars] button Perform 9000 Find (Part)
[key] button If price override password required then perform 9090 Password Input
Else remain at current dialog
scan or If at Part Number field then
[Enter] Search Item Master for Part Number
If found then
If ITM.ItemTypeCode > 02 then
MsgBox "Invalid Entry", OK*
Remain at current dialog
Else populate Part Description field and advance to quantity field
Else MsgBox "Not Found", OK*; remain at current dialog
Else do [Enter]
Perform 9000 Find (Part)
Return to calling module
[Find] Create temporary record for part number, quantity, and price
[Exit] or [Esc] Clear dialog and position cursor at Part Number field
[Enter]

File.Field Name	Format	C	Instructions
Part Number	AN 01/26	L	Search ITM.ItemNumber for Item Number
ITM.ItemDescription	AN 01/40	I	Keyed from Item Number Use AID.ItemDescription if exists for selected RCT.Language/item
Quantity	N0 01/05	L	User input
Price	See Instructions	L	If RCT.PriceDecimals = 0 or 4 then Format = N4 01/10 If RCT.PriceDecimals = 2 then Format = N2 01/10 If RCT.PriceDecimals = 3 then Format = N3 01/10 Prices for downloaded exchange items will be zeroed. Prices for other items can not be changed.
CTD.PriceChgIndicator	ID 01/01	L	Set = 1 if price changed; set = 2 if No Charge checkbox checked

3396 Select Part With Reason—Invoice**Process**

Initially, only the Part Number field and the Returns and Damaged radio buttons are active.

If called from Rtns tab then Returns radio button selected
 Else if called from Dmgd tab then Damaged radio button selected
 Else (called from Exch tab) then neither radio button is displayed

The scanner is enabled at this dialog.

User either scans a bar code or inputs a part number.

Search Item Master File, if found then

Populate description field with part description

Place focus in the first quantity field of the grid

For damaged returns the default reason (first return/exchange reason record in the SEL file) will already be selected

Reason selection is optional for regular returns and exchanges

If RCT.EnableFindItem = 0 (always add) then

Populate Quantity field in with a default quantity of 1

Else (RCT.EnableFindItem = 1 (always find))

Search through existing CTD records

If found then populate fields with existing data

Else populate Quantity field with a default quantity of 1

Multiple reasons and quantities may exist for the selected part. If RCT.DisableMultipleReasons = 0, then new records in the grid will automatically be added at the bottom of the grid for input of additional reasons and quantities. If RCT.DisableMultipleReasons = 1, then only allow entry of ONE reason.

The optional Comment and Instructions fields are tied to each respective reason and quantity entered whereas the Price field is only tied to the part number. Multiple RXD Return/Exchange Detail records for an associated CTD Customer Transaction Detail will be generated when multiple reasons and quantities are entered for a part. User must tap on fields outside the grid to access them.

When input for the currently selected part is complete, focus will be returned to the part number prompt to allow scan/entry of the next part.

Else MsgBox "Not Found", OK*; remain at current dialog

Both the Price edit field and the No Charge checkbox are disabled (grayed out) until price override password requirements are satisfied. See calling dialog for additional details. If the No Charge checkbox is checked, then the price is set to zero and the price input field is disabled.

Navigation

scan or

 [Enter] or

[Enter]

If at Part Number field then

Search Item Master for Part Number

If found then

If ITM.ItemTypeCode > 02 then

MsgBox "Invalid Entry", OK*; remain at current dialog

Else

Populate Part Description field and other appropriate fields

Advance to first quantity field

Else MsgBox "Not Found", OK*; remain at current dialog

Else (at field within grid)

If changes made to Reason, Quantity, Comment, or Price then

Create record for entered data

If on last grid record append new grid record and move to it


Else move to next grid record

Else

If on last grid record then move to Part Number field and reset for new entry

Else move to next grid record



	Else (at the Comment, Instructions, or Price field)
	If on last reason/quantity in the grid then
	Return focus to the Part Number prompt to allow entry of the next part
	Else return focus to the next record in the grid
[binoculars] button	Perform 9000 Find (Part)
[Returns] checkbox	Switch to Returns info for current part
[Damaged] checkbox	Switch to Damaged Returns info for current part
[keyboard] button	Perform 9010 Keyboard
[key] button	If price override password required then perform 9090 Password Input
	Else remain at current dialog
[Exit] or  [Esc]	Return to calling module
[Find]	Perform 9000 Find (Part)

File.Field Name	Format	C	Instructions
CTD.ItemNumber & RXD.ItemNumber	AN 01/ 26	O	Search ITM.ItemNumber for Item Number. Output record with CTD. & RXD.TransactionType 02, 03, or 04 depending on calling module.
ITM.ItemDescription	AN 01/40	I	Keyed by ITM.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 03
RXD.ReasonCode	N0 01/02	O	= SEL.ListIDCode corresponding to selected reason
Quantity	N0 01/04	L	user input
RXD.ManufactureCode	AN 01/12	O	
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 04
RXD.InstructionCode	N0 01/02	O	= SEL.ListIDCode corresponding to selected reason
CTD.ItemQuantity	N0 01/05	L	
Price	See Instructions	L	If RCT.PriceDecimals = 0 or 4 then Format = N4 01/10 If RCT.PriceDecimals = 2 then Format = N2 01/10 If RCT.PriceDecimals = 3 then Format = N3 01/10 Prices for downloaded exchange items will be zeroed. Prices for other items can not be changed.
CTD.PriceChgIndicator	ID 01/01	L	Set = 1 if price changed; set = 2 if No Charge checkbox checked

3397 Detail Entry**Process**

This dialog allows input of additional item level details.
Only tabs with enabling data will be displayed.

If IDT.InputType = 0 then

Display only one column in the table for alphanumeric field input

Else if IDT.InputType = 1 then

Display only one column in the table for numeric quantity input

Else if IDT.InputType = 2 then

Display two columns in the table, one for alphanumeric field input
and the other for numeric quantity input

Else (IDT.InputType = 3)

Display two rows with both columns in the table

Populate row 1, column 1 field with "METER START" and

row 2, column 1 field with "METER END" (fields are read-only)

Disable both input fields below grid and [Delete] & [Enter] buttons

Input for both quantities is required and made directly within the grid

Else (IDT.InputType = 4)

Display x rows with both columns in table where x = number
of associated, non-blank literals found in the literals file;

Populate each row's column 1 field with the associated, non-blank
literal sourced from the literals file

(column 1 fields are read-only)

Disable both input fields below the grid as well as the [Delete] and [Enter] buttons

Input for all column 2 quantities is required and made directly within the grid

If IDT.DetailRequired[n] = 3 or 4 then

If IDT.InputControl = 0 then initially display only 1 row in the grid

If IDT.InputControl = 1 then initially display the number of rows = to the qty entered on dialog 3300 Cust Invoice

Prefill all displayed quantity fields with the same value from the associated item's ITM.DefaultVolume field

Else

Table is initially empty.

Populate table as field values and/or qtys are inputted/scanned

[Del] button only enabled when details exist for currently highlighted item.

[Calc] button only enabled when IDT.InputType = 4 AND "ItemDetailCalculation.exe" found AND input for all
column 2 quantities have been completed.

[Enter] and [Enter] only enabled when non-blank/non-zero values have been inputted/scanned.

If IDT.InputControl = 1 then

Enable the Nbr of Entries literal and textbox as read-only..

For every entry in the grid, increment the Nbr of Entries textbox and show the total number of entries.

Elseif IDT.InputControl = 0 or 2 then

Disable the Nbr of Entries literal and textbox (not used)

Navigation

[Done] or [Esc] Check data from all tabs

If IDT.InputControl criteria not yet met then

MsgBox "Input requirements not yet satisfied for <> tab.", OK*

Redisplay this dialog

Elseif [Calc] button enabled and not yet pressed for currently inputted values

MsgBox "Inputted values have not yet been calculated for <> tab.", OK*

Redisplay this dialog


Else

Write DTL Item Detail record(s) including any calculated results

If IDT.InputType = 3 AND IDT.InputResult = 3 then

Calculate difference between METER START quantity and METER END quantity
Use rounded result to populate CTD.ItemQuantity
If IDT.InputType = 3 AND IDT.InputResult = 4 then
Calculate difference between METER START quantity and METER END quantity
Use actual result to multiply by CTD.ItemPrice to obtain extended amount
If IDT.InputType = 1 AND IDT.InputControl = 1 AND IDT.InputResult = 2 then
Sum all entered quantities
Use result to multiply by CTD.ItemPrice to obtain extended amount
Return to calling dialog

[Del] MsgBox "Are you sure you want to delete this item?", Yes, No*
If Yes response then discard record and remain at current dialog
Else retain record and remain at current dialog

[Enter]
or [Enter]
or scan
If both Field and Quantity entries required and at Field entry then advance to Qty entry
Else if two Quantity entries required then advance to next/previous Qty entry
Else populate table with inputted/scanned data

File.Field Name	Format	C	Instructions
SEL.ListText	AN 01/20	I	Keyed from SEL.ListTypeCode = 28 (item detail description) AND SEL.ListIDCode = IDT.DetailDescription where IDT.ItemDetailKey = DTL.ItemDetailKey
DTL.ItemDetailField[n]	AN 01/40	O	
DTL.ItemDetailQuantity[n]	N0 01/06	O	IF IDT.DetailRequired[n] = 3 or 4 then fill with ITM.DefaultVolume
Nbr of Entries	N2 01/08	O	If IDT.InputControl = 1 then enable this field as read-only. Show the number of entries in the grid.
CTD.ItemDescription	AN 01/40	O	Use ORD.ItemSerialNumber if exists OR Use AID.ItemDescription if exists for selected RCT.Language/item
CTD.ItemQuantity	N2 01/08	L	If IDT.InputType = 3 AND IDT.InputResult = 3 AND once both Start and End quantities have been entered then show difference between Qty1 and Qty2
DTL.ItemDetailField[n]	AN 01/40	O	Allow scan or manual input, populates associated field in table
DTL.ItemDetailQuantity[n]	N2 01/08 S0 01/08	O O	Populates associated field in table For IDT.InputType = 4

3400 A/R Collection

Process

User inputs or edits reference numbers and amounts in table.

Navigation

[Exit] Return
 [Add] Perform 9290 Add A/R Item
 [Del] MsgBox "Are you sure you want to delete this item?",
 Yes, No*
 If Yes response then discard record
 Else retain record
 Remain at current dialog
 [Esc] MsgBox "Do you want to discard changes?", Yes, No*
 If Yes response then discard changes, return
 Else remain at current dialog

File.Field Name	Format	C	Instructions
ARD.InvoicePrefix +	N0 01/08	O	Concatenated for input and display
ARD.InvoiceSequence	N0 01/04	O	
ARD.AmountPaid	S2 01/09	O	
Total Amount Due	S2 01/09	L	Sum(ARD.AmountPaid)

3520A Survey & Audit Processing**Process**

If survey categories exist for selected survey type then
 Perform 3522 Select Survey Category
Else if multiple surveys exist for selected survey type then
 Perform 3521 Select Survey/Audit
Else perform 3520 Survey & Audit
Return to calling module

File.Field Name	Format	C	Instructions
(none)			

3520 Survey & Audit**Process**

Survey form created dynamically based on customer options. Up to 10 survey records may appear on each page of the survey. Multiple pages may exist within a single survey form. Page numbers are displayed within the title bar immediately following the survey title in X/Y format where X = current survey page and Y = total number of pages for this survey. See dialogs 3528 and 3529 for examples and layouts of each survey line type.

[Prev] button disabled when displaying first page of survey form.

[Next] button disabled when displaying last page of survey form.

[Done] button enabled only when displaying last page of survey.

Navigation

[Exit] MsgBox "The information you have just entered will be lost! Continue to exit?", Yes, No*

If Yes response then return to calling dialog

Else remain at current dialog

[Clear] MsgBox "Clear this survey?", Yes*, No

If Yes response then clear all fields on current survey page

Remain at current dialog

[Prev] Go to previous survey page

[Next] Go to next survey page

[Done] If all fields for this survey form with SRV.MandatoryFlag = 1 have been responded to then

MsgBox "Save this survey?", Yes*, No

If Yes response then

Create survey data

Search SRL Survey Lookup file for currently selected CustomerNumber/SurveyLookupKey

If SRL.LookupIndex=99 found then populate SRL.SurveyFieldText with SVD.SurveyResponse

If SRL.LookupIndex=98 found then populate SRL.SurveyFieldText with SVD.SurveyResponse

If SRL.LookupIndex=97 found then populate SRL.SurveyFieldText with SVD.SurveyResponse

If SRL.LookupIndex=96 found then populate SRL.SurveyFieldText with SVD.SurveyResponse

If SRL.LookupIndex=95 found then populate SRL.SurveyFieldText with SVD.SurveyResponse

If SRL.LookupIndex=94 found then populate SRL.SurveyFieldText with SVD.SurveyResponse

If SRC.EnablePrint > 0 then

If this is the only survey that exists for the selected survey type then

If SRC.EnablePrint = 1 then

MsgBox "Would you like to print the survey?", Yes*, No

If Yes response then

Perform 9100 Print Report

MsgBox "Print duplicate copy?", Yes, No*

If Yes response then perform 9100 Print Report and redisplay MsgBox

Else (SRC.EnablePrint = 2)

MsgBox "This survey must be printed!, OK*

Perform 9100 Print Report

MsgBox "Print duplicate copy?", Yes, No*

If Yes response then perform 9100 Print Report and redisplay MsgBox

Return to calling dialog

Else (multiple surveys exist for the selected survey type)

MsgBox "Would you like to print the survey?", Yes*, No

If Yes response then

Perform 9100 Print Report

MsgBox "Print duplicate copy?", Yes, No*

If Yes response then perform 9100 Print Report and redisplay MsgBox

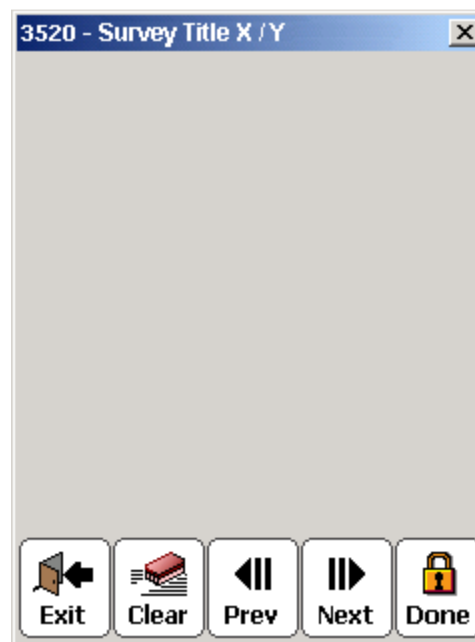
Return to calling dialog

IF RCT.HTMLVehInspect = 1 and the SRC.VehicleInspectionSurvey = -1 then print an HTML Vehicle Inspection Survey report.

Return to calling dialog

Else remain at current dialog

Else MsgBox "Survey has not been completed!", OK*; redisplay first page of survey form





File.Field Name	Format	C	Instructions
none)			

3521 Select Survey/Audit**Process**

User selects survey form to be loaded.

Navigation

[Exit] or  [Esc] If unprinted surveys exist where SRC.EnablePrint =2 AND there are NO survey categories that exist for the selected survey type then
 MsgBox "A survey exists that must be printed before exiting!", Yes*; Clear MsgBox and then perform 9261 Print Survey Reports
 Else if any unprinted surveys exist where SRC.EnablePrint = 1 then
 MsgBox "Surveys exist that have not been printed and will not be available to print after exiting. Are you sure you want to exit?, Yes, No*
 If Yes response then return to calling dialog
 Else perform 9261 Print Survey Reports
 Else
 Return to calling dialog
 Endif
 [Select] or  [Enter] Perform 3520 Survey & Audit with selected survey parameter
 [Print] Perform 9261 Print Survey Reports

File.Field Name	Format	C	Instructions
Survey Type	AN 01/20	I	Start Day Surveys if SRC.SurveyTypeCode = 01 Load Surveys if SRC.SurveyTypeCode = 02 Job Surveys if SRC.SurveyTypeCode = 03 Customer Surveys if SRC.SurveyTypeCode = 04 Job and Customer Surveys if both SRC.SurveyTypeCodes 03 and 04 exist End Day Surveys if SRC.SurveyTypeCode = 05 Item Surveys if SRC.SurveyTypeCode = 06
or			
SEL.ListText			Keyed from SRC.SurveyCategory = SEL.ListIDCode and SEL.ListTypeCode = 25 (survey category description)
Status Indicator	bitmap	L	Exclamation Point bitmap if SRC.SurveyMandatory = 1 Checkmark bitmap if survey completed
SRV.SurveyPrompt	AN 01/20	I	Select all records with SRV.SurveyIndex = CSC.SurveyIndex and SRV.SurveyRecType = 00 for current CSC.CustomerNumber

3522 Select Survey Category**Process**

User selects survey category.

Navigation

[Exit] or  [Esc]

If any unprinted surveys exist where
SRC.EnablePrint = 2 then
MsgBox "A survey exists that must be
printed before exiting!", Yes*
Clear MsgBox
Perform 9261 Print Survey Reports
Else if any unprinted surveys exist where
SRC.EnablePrint = 1 then
MsgBox "Surveys exist that have not
been printed and will not be available
to print after exiting. Are you sure you
want to exit?, Yes, No*
If Yes response then
Return to calling dialog
If No response then
Perform 9261 Print Survey Reports

Else

Return to calling dialog

[Select] or  [Enter]

If multiple surveys exist for the selected survey type then

Perform 3521 Select Survey/Audit

Else (only one survey exists for the selected survey type)

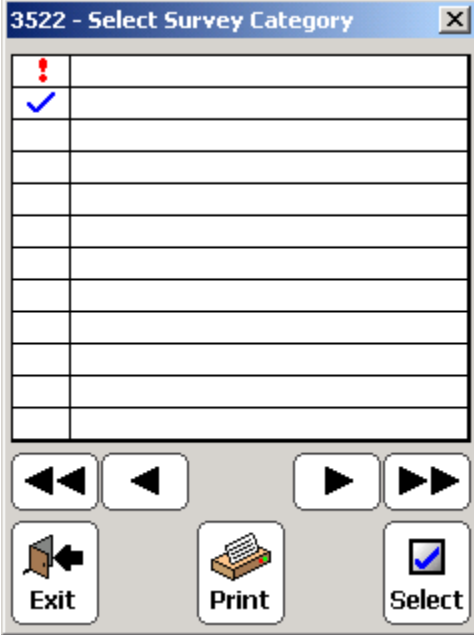
Perform 3520 Survey & Audit

Return to calling dialog

[Print]

Perform 9261 Print Survey Reports

Return to calling dialog



File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	Exclamation point bitmap if any uncompleted mandatory surveys exist within the category Checkmark bitmap if survey completed within the category AND all mandatory surveys completed within the category
SEL.ListText	AN 01/20	I	Keyed from SRC.SurveyCategory = SEL.ListIDCode and SEL.ListTypeCode = 25 (survey category description)

3528 Survey Example – Page 1 of 2**Process**

This dialog illustrates how each response type will appear to the user. This dialog is not part of the application. This example shows page 1 of a 2 page survey.

Navigation

[keyboard] button (Type 02, 03) Perform 9010 Keyboard
 [calendar] button (Type 06) Perform 9040 Calendar
 [clock] button (Type 07) Perform 9050 Set Time
 [binoculars] button (Type 10) Perform 9000 Find

3529 Survey Example – Page 2 of 2**Process**

This example shows page 2 of a 2 page survey.

Navigation

[keyboard] button (Type 12) Perform 9400 Multi-Line Edit Box
 [signature] button (Type 15) Perform 9340 Signature Capture

File.Field Name	Format	C	Instructions
SRV.SurveyPrompt	AN 01/20 or AN 01/40	I	Title text (Type 00), prompt (Types 01 – 12, 15 ,16) Title text (Type 13))
SEL.ListText	AN 01/20	I	List selection (Types 04, 05, 11). Select all SEL records with SEL.ListTypeCode = 21 and SEL.ListIDCode = SRV.LookupIndex
ITM.ItemDescription	AN 01/40	I	Lookup (Type 10) only Use AID.ItemDescription if exists for selected RCT.Language/item
SRL.SurveyFieldText	AN 01/40	I	For populated customer survey fields (Types 02, 03, 12, & 16) use currently selected customer number and work order number as a key into the SRL Survey Lookup File and populate with field identified by SRV.LookupIndex

End Day

The End Day function supports route settlement and end-of-route reporting. If any work orders remain unserved, the user may optionally enter reason codes before continuing. End Day processing may be abandoned (and all data discarded) up until entry into End Day Done.

4000 End Day Menu

Process

Initially display 9090 Password Input
 If not canceled and RCT.PromptOdomInput > 0 then
 Perform 9080 Odometer Input

User must perform functions in order listed in table below.

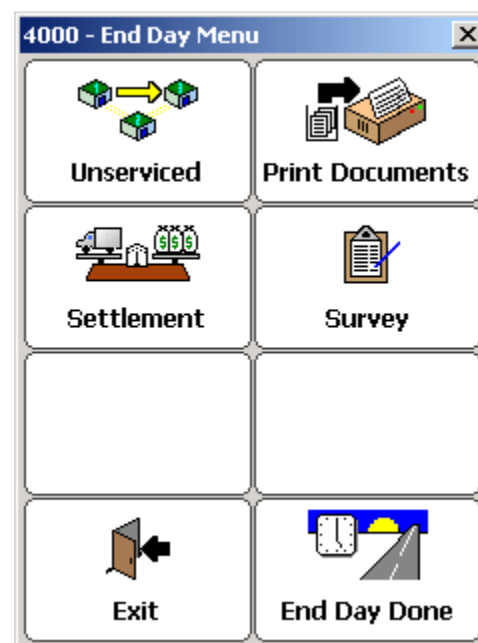
[Unserviced], [Print Documents], and [Settlement] are disabled (grayed out) after completion of Settlement.

[Print Documents] disabled if RCT.DepotPrinter = 99 (no printer).

[Settlement] disabled if RCT.EnableCollections = 0.

[Survey] disabled if no end day surveys exist.

Function	Accessibility Requirement
Unserviced	Any work orders remain unserved ⁴
Print Documents	Documents queued for printing
Settlement	
Survey	Anytime before End Day Done and only if end day surveys exist
End Day Done	Settlement function complete OR RCT.EnableCollections = 0



Navigation

[Unserviced] Perform 4100 Unserviced Work Orders
 [Print Documents] Perform 9260 Print Documents
 [Settlement] Perform 4200 Cash Balance
 [Survey] Perform 3520A Survey & Audit Processing
 [Exit] or [Esc] MsgBox "Are you sure you wish to abandon End Day Settlement?", Yes, No*
 If Yes response then void all end day data, return
 Else remain at current dialog

⁴ See instructions for populating table on 4100 Unserviced Work Orders for selection criteria. If no records to be selected (empty table), then disable button.

[End Day Done] If RCT.ReqUnservicedReasons = 1 and unserviced work orders without reason codes exist
 MsgBox "Unserviced work orders must have a reason code.", OK*
 Perform 4100 Unserved Workorders
 If uncompleted, mandatory end day surveys exist then
 MsgBox "Please complete survey before proceeding", OK*
 Perform 3520A Survey & Audit Processing and upon return redisplay this dialog
 MsgBox "End Day Settlement cannot be abandoned beyond this point. Do you wish to continue?", Yes*, No
 If Yes response then
 Update STD Start/End Day file
 Write SCD Status Change Detail upload record with StatusNumber = 9910
 If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
 RTM.MessageType = 1 (status change message) record found then
 Perform 7000 Transmit Data in real-time
 If RCT.EnableInventory = 1 (perpetual inventory) AND
 SCT.ApplicationState < 3 (unload vehicle has not been done) then
 Write ITC Inven Transaction Ctrl record with TransactionType = 03 (unload)
 Write ITD Inven Transaction Dtl records with appropriate
 TransactionTypeCode = 05 (unload Ending Inven),
 = 06 (unload Return to Stock), = 07 (unload Dmgd Rtns),
 = 09 (unload variance), and = 10 (unload Damaged Returns variance)
 Update INV Route Inventory records
 Set SCT.ApplicationState = 3 (unload vehicle done)
 For each work order that remains unserviced AND
 for which a No Service Reason has not been selected then
 Write an NSC Non-Serviced Work Order record with NSC.ReasonCode = 0
 If RCT.DepotPrinter < 99 (printer selected) then perform 4700 End Day Reports
 Remove all work orders from the SEQ Work Sequence File as well as all the associated
 records from the following files:
 JOB Job Sequence File,
 ORD Service Order Detail File,
 ODC Order Detail Comment File,
 ODM Order Detail Medical File, and
 SRL Survey Lookup File
 Disable 7000A Real-Time Incoming Messages
 Perform 7000 Transmit Data
 If user control active then logout current user and write ULD User Log Detail
 Else remain at current dialog

File.Field Name	Format	C	Instructions
(none)			

4100 Unserviced Work Orders**Process**

Populate table with work order sequence records with unserviced or in progress status.

If RCT.EnableJobBitmap = 0 (disabled) then grid has 2 columns:

- Display Status Indicator in column 1
- Display CST.CustomerName in column 2


Else (RCT.EnableJobBitmap = 1 (enabled), grid has 3 columns)

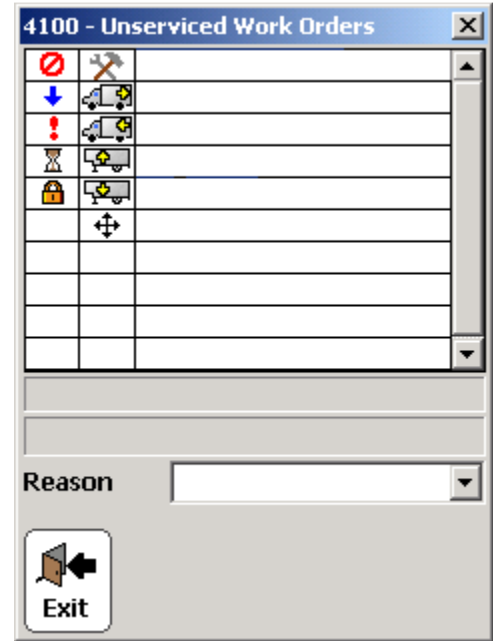
- Display Status Indicator in column 1
- Display associated bitmap for SEQ.WorkOrderType in column 2
- Display CST.CustomerName in column 3

If a no service reason has previously been entered for a selected work order then default to that reason, otherwise reason will be blank.

Reason drop down populated with SEL.ListTypeCode = 06 (no service reasons).

Navigation

- [Exit] Return
-  [Esc] Perform 9110 Exit Function
- If not canceled then Return
- Else remain at current dialog



File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	NoSvc bitmap if work order marked as a no service transaction Down Arrow bitmap if low priority work order Exclamation Point bitmap if high priority work order Padlock bitmap if work order already marked as a no service transaction and then received a file maintenance deletion Blank if normal priority work order Note that if a work order also has associated job(s) then: If at least one job has begun but is not yet complete then Mark work order with Hourglass bitmap Else if any one job is unserviced (with any priority) then Mark work order with it's own priority bitmap Else (any one job is marked as a no service transaction) Mark work order with NoSvc bitmap
Work Order Type Indicator	bitmap	L	Only displayed if RCT.EnableJobBitmap = 1 Service bitmap if SEQ.WorkOrderType = 00 (Service) Vehicle Out bitmap if SEQ.WorkOrderType = 01 (Delivery) Vehicle In bitmap if SEQ.WorkOrderType = 02 (Pickup) Trailer Up bitmap if SEQ.WorkOrderType = 03 (Hook) Trailer Down bitmap if SEQ.WorkOrderType = 04 (Spot/Drop) Mix bitmap if SEQ.WorkOrderType = 05 (Mix of jobs)
CST.CustomerName	AN 01/40	I	Keyed from SEQ.CustomerNumber Override with SEQ.Name if it exists
SEQ.WorkOrderNumber	AN 01/18	I	
NSC.WorkOrderNumber	AN 01/18	O	
CST.CustomerAddress1	AN 01/40	I	Keyed from SEQ.CustomerNumber Override with SEQ.Address1 if it exists
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 06 (no service reason)
NSC.ReasonCode	N0 01/02	O	From SEL.ListIDCode corresponding to selected reason

4200 Cash Balance**Process**

Tabs: *Cash*, *Checks*, and *Expenses*. *Checks* page shown at right.
Cash and *Expenses* pages have only two columns.

Expenses page enabled only if RCT.EnableEODExpenses = 1.

[+/-] button enabled only if *Cash* or *Expenses* page displayed.

[Add] button enabled only if *Checks* page displayed and
 RCT.EnableEODAddChecks = 1.

[Del] button enabled only if *Checks* page displayed and
 RCT.EnableEODAdjChecks = 1.

Checks page editable only if RCT.EnableEODAdjChecks = 1.

Navigation

- [Done] If Balance Due < > 0 then
 MsgBox "Balance due must equal zero to
 complete settlement.", OK*
- Return
- [Add] Perform 9270 Add Check
 If not canceled then add record with type code 06
- [Del] MsgBox "Are you sure you want to delete this check?",
 Yes*, No
 If Yes response then update record to type code 07
- [Enter] If on *Checks* page then
 MsgBox "Are you sure you want to change the amount?", Yes*, No
 If Yes response then update amount in record; change type code to 04
- [Esc] MsgBox "Are you sure you want to discard changes?", Yes, No*
 If Yes response then discard changes, Return
 Else remain at current dialog

File.Field Name	Format	C	Instructions
<i>Cash Tab</i>			
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 19 (cash description)
EOD.ListTypeCode	N0 01/02	O	From SEL.ListIDCode corresponding to selected description
EOD.Amount	S2 01/09	O	
<i>Checks Tab</i>			
CST.CustomerName	AN 01/40	I	Keyed from COC.CustomerNumber corresponding to CCD record (blank if CCD record added at end day) Override with SEQ.Name if it exists
CCD.CheckNumber	N0 01/08	I	Select all for CCD.TypeCode = 02 (check), 05 (end day changed check), or 06 (end day added check)
CCD.CheckAmount	S2 01/09	O	
<i>Expenses Tab</i>			
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 17 (expense description)
EOD.ListTypeCode	N0 01/02	O	From SEL.ListIDCode corresponding to selected description
EOD.Amount	S2 01/09	O	
<i>Common Section</i>			
Page Total	S2 01/09	L	If <i>Cash</i> page displayed then Sum(EOD.Amount) for all EOD.DetailTypeCode = 1 Else if <i>Checks</i> page displayed then Sum(CCD.CheckAmount) for CCD.TypeCode = 02, 05, and 06) Else Sum(EOD.Amount) for all EOD.DetailTypeCode = 2
Balance Due	S2 01/09	L	Sum(CCD.CheckAmount) for CCD.TypeCode = 01 (cash), 02 (check), and 04 (send check) - (cash entered + checks entered - expenses). Send check amounts are negative, which will increase total cash due.

4700 End Day Reports**Process**

User selects reports and options for printing. Report check boxes display checkmark and are grayed out (inaccessible) if corresponding RCT.RegEOD... = 1. *Other* check box displays gray checkmark if at least one but not all reports in 4710 Other Reports dialog selected; no checkmark if no reports selected, black checkmark if all reports selected. If *Save Selections* box is checked, then all check box settings should be saved to an internal file and used to populate this dialog on subsequent accesses. If any of RCT.RegEOD... = 1, then the [Exit] button is disabled (grayed out) until required reports have been printed.

Navigation

[List] Perform 4710 Other Reports
 [Exit] Return
 [Print] Perform 9100 Print Report (<selected list>)

File.Field Name	Format	C	Instructions
DCT.RegEODDepositReport	ID 01/01	I	Sets Expense / Deposit check box
DCT.RegEODSalesReport	ID 01/01	I	Sets Sales Summary check box
DCT.RegEODRteActivReport	ID 01/01	I	Sets Route Activity check box
DCT.RegEODRteStlmtReport	ID 01/01	I	Sets Route Settlement check box

4710 Other Reports

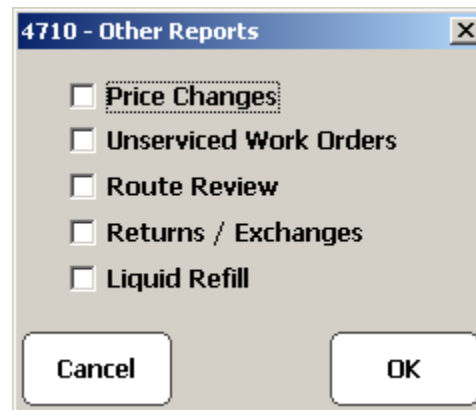
Process

User selects reports and options for printing. Report check boxes display checkmark and are grayed out (inaccessible) if corresponding RCT.RegEOD... = 1. Note: There is no ReqEOD... flag for the Liquid Refill report. Praxair does not want to modify the server for this report. This option is always shown.

If data for a liquid fill report exists, (see screen 3300 for report conditions) the Liquid Refill report selection will initially display as checked. The user can deselect the option to print this report.

Navigation

[OK] Return, retaining changes
[Cancel] Return, discarding changes



File.Field Name	Format	C	Instructions
RCT.RegEODPrcChgReport	ID 01/01	I	Sets Price Changes check box
RCT.RegEODNoSaleReport	ID 01/01	I	Sets Unserviced Work Orders check box
RCT.RegEODRouteReview	ID 01/01	I	Sets Route Review check box
RCT.RegEODRtnExchReport	ID 01/01	I	Sets Returns / Exchanges check box

Information

The Information function provides the user with a variety of views into many database files. Information is arranged to allow quick access to pertinent data about customers, work orders, parts, etc. with a minimum of keystrokes or button presses. Following are brief overviews of the Information subfunctions.

Customer / Work List allows the user to access information about the customers, work orders, jobs, and service orders on the route. The *Today's Unserviced* option provides a quick look at the remaining stops on the route; the *All Customers* view presents the entire customer database with searching and sorting options for fast access. The Customer Detail view allows direct access to messages, notes, and work orders for each customer without having to access the individual dialogs. The Customer / Work List report includes user-selectable parameters to control the amount of information it contains.

Part List provides a sorted list of all parts in the Item Master file. The list may be arranged alphabetically by description or numerically by part number, and may be printed for reference.


6000 Information Menu

Process

User selects desired function from menu.

[Print Documents] disabled if RCT.RoutePrinter = 99 (no printer).

Navigation

[Customer / Work] Perform 6100 Customer List
 [Part List] Perform 6200 Part List
 [Return/Exch] Perform 6600 Returns/Exchanges
 [Print Reports] Perform 6700 Print Reports
 [Exit] or  [Esc] Return
 [Print Documents] Perform 9260 Print Documents



File.Field Name	Format	C	Instructions
(none)			

6100 Customer List**Process**

Initially display 6101 Customer List Select. If not canceled, then populate table with Customer Master file records based on user selection. If "Today's Unserviced" or "Today's Schedule" selected, then the displayed (and printed) customer list will be sorted first in ascending SEQ.SequenceNumber order and then in ascending SEQ.StartTime order (earliest to latest). If "All Customers" selected, then sort the list in ascending CST.CustomerNumber order.



If *Today's Unserviced* selected and multiple unserviced work orders found for a customer, then only display one customer record. Unserviced includes customers who have work orders marked as "in progress" (service begun and not yet complete).

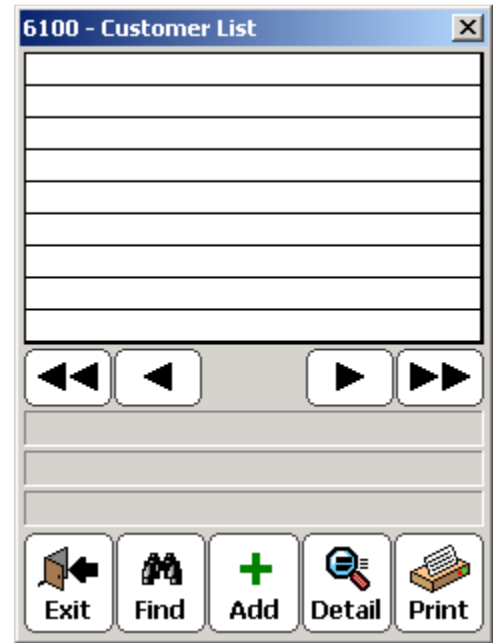
[Find] button enabled only if *All Customers* selected on 6101 Customer List Select.

[Add] button enabled only if RCT.EnableAddCustomer = 1.

[Print] button disabled if RCT.RoutePrinter = 99 (no printer).

Navigation

[Exit] or  [Esc] Return
 [Find] Perform 9000 Find (Customer)
 [Add] Perform 3040 Customer Maintenance
 [Detail] Perform 6110 Customer Detail using the currently selected customer
 [Print] Perform 6102 Customer / Work List Print
 If not canceled then Return
 [Enter] same as [Detail]



File.Field Name	Format	C	Instructions
CST.CustomerName	AN 01/40	I	Per CST.CustomerNumber If user selects "Today's Unserviced" then Only display the appropriate unserviced SEQ records Else all records in the Customer Master will be displayed
CST.CustomerAddress1	AN 01/40	I	Per CST.CustomerNumber for currently highlighted table record
CST.CustomerContactName	AN 01/30	I	Per CST.CustomerNumber for currently highlighted table record
CST.CustomerPhoneNumber	AN 01/20	I	Per CST.CustomerNumber for currently highlighted table record

6101 Customer List Select**Process**

User selects option for list display.

Navigation

[OK] Return selection parameter to calling module
 [Cancel] Return null parameter to calling module

File.Field Name	Format	C	Instructions
(none)			

6102 Customer / Work List Print**Process**

User selects options for printing Customer / Work List report. The main Customer Information check box will always be selected and cannot be de-selected (grayed out). Appropriate main check boxes will also be automatically selected (and grayed out) depending upon which subfunction this dialog is being called from.

If a user selects a main (non-indented) check box, then the other main check boxes above it will automatically be selected as well. Indented check boxes that are selected will also select the main check box above it.

Navigation

[Print] Perform 9100 Print Report (Customer / Work List)
 Return
 [Cancel] Return


File.Field Name	Format	C	Instructions
(none)			

6110 Customer Detail**Process**

[Prev] and [Next] enabled only if called from 6100 Customer List.

[Msgs] button disabled if no customer display messages exist
(MSG.MessageTypeCode = 02) for the currently selected customer.

Navigation

[Prev] Get previous record; remain at current dialog
 [Next] Get next record; remain at current dialog
 [Exit] or  [Esc] Return
 [Msgs] Perform 9060 Customer Messages
 [Notes] Perform 9120 Route Notebook
 [Wk Ordr] Perform 6300 Work Order List using the currently selected customer



File.Field Name	Format	C	Instructions
CST.CustomerNumber	AN 01/18	I	
CST.CustomerName	AN 01/40	I	
CST.CustomerAddress1	AN 01/40	I	
CST.CustomerAddress2	AN 01/40	I	
CST.CustomerContactName	AN 01/30	I	
CST.CustomerPhoneNumber	AN 01/20	I	
CST.CustomerTaxID	AN 01/20	I	


6200 Part List**Process**

Tabs: Parts and Labor. Parts table is populated from Item Master File (ITM) records of type 01 (part), 02 (empty), and 03 (other). Labor table is populated from Item Master File (ITM) records of type 04 (labor).

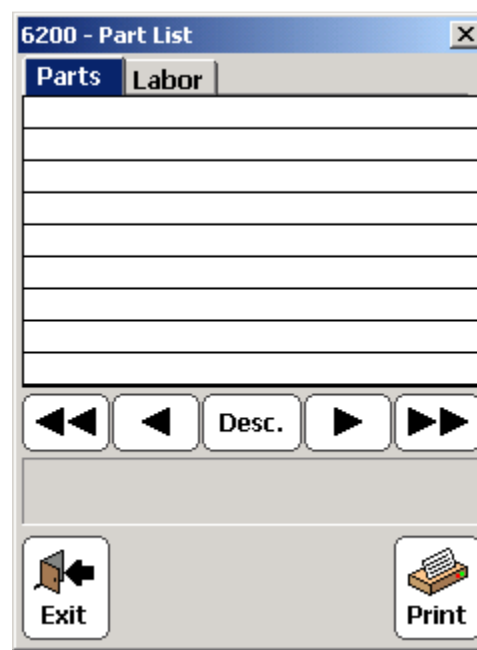
Items displayed in the grid will be sorted alphabetically.

Navigation

[Number/Desc.] If Number displayed and pressed then
 Display part numbers in the grid and the part description in the text box below the grid
 Else (Desc. displayed and pressed)
 Display part descriptions in the grid and the part number in the text box below the grid

[Exit] or [Esc] Return

[Print] If RCT.RoutePrinter = 99 (no printer) then
 MsgBox "No printer selected.", OK*
 Close MsgBox and remain at current dialog
 Else
 Perform 9100 Print Report (Part List)
 Return



File.Field Name	Format	C	Instructions
ITM.ItemDescription or ITM.ItemNumber	AN 01/40 AN 01/ 26	I I	Select all appropriate records for currently selected tab Use AID.ItemDescription if exists for selected RCT.Language/item
ITD.ItemNumber or ITM.ItemDescription	AN 01/ 26 AN 01/40	I I	Use AID.ItemDescription if exists for selected RCT.Language/item

6300 Work Order List**Process**

Populate table with all Work Sequence file record(s) for currently selected customer sorted first in SEQ.SequenceNumber order and then in SEQ.StartTime order (earliest to latest).

If RCT.EnableJobBitmap = 0 (disabled) then grid has 2 columns:

Display Status Indicator in column 1

Display CST.CustomerName or CustomerAddress1 in column 2

Else (RCT.EnableJobBitmap = 1 (enabled), grid has 3 columns)

Display Status Indicator in column 1


Display associated bitmap for SEQ.WorkOrderType in column 2

Display CST.CustomerName or CustomerAddress1 in column 3

[Detail] button disabled if no work orders are found.

[Print] button disabled if RCT.RoutePrinter = 99 (no printer).

Navigation

[Exit] or  [Esc] Return to 6110 Customer Detail

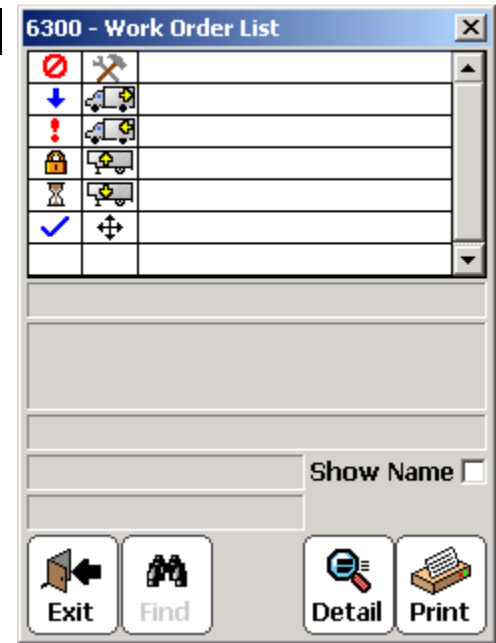
[Find] *not implemented*

[Detail] Perform 6310 Work Order Detail for the currently selected (highlighted) work order

[Print] Perform 6102 Customer / Work List Print

If not canceled then Return

 [Enter] same as [Detail]




File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	<p>NoSvc bitmap if work order marked as a no service transaction Down Arrow bitmap if low priority work order Exclamation Point bitmap if high priority work order Padlock bitmap if work order already marked as a no service transaction and then received a file maintenance deletion Blank if normal priority work order</p> <p>Note that if a work order also has associated job(s) then: If at least one job has begun but is not yet complete then Mark work order with Hourglass bitmap Else if any one job is unserved (with any priority) then Mark work order with it's own priority bitmap Else if any one job is marked as a no service transaction then Mark work order with NoSvc bitmap Else (all jobs are serviced) Mark work order with Checkmark bitmap</p>
Work Order Type Indicator	bitmap	L	<p>Only displayed if RCT.EnableJobBitmap = 1 Service bitmap if SEQ.WorkOrderType = 00 (Service) Vehicle Out bitmap if SEQ.WorkOrderType = 01 (Delivery) Vehicle In bitmap if SEQ.WorkOrderType = 02 (Pickup) Trailer Up bitmap if SEQ.WorkOrderType = 03 (Hook) Trailer Down bitmap if SEQ.WorkOrderType = 04 (Spot/Drop) Mix bitmap if SEQ.WorkOrderType = 05 (Mix of jobs)</p>
CST.CustomerName or CST.CustomerAddress1	AN 01/40	I	<p>Default to display CST.CustomerName, user may toggle display by checking/unchecking the Show Name box; Override CST.CustomerName with SEQ.Name if it exists Override CST.CustomerAddress1 with SEQ.Address1 if it exists</p>
SEQ.WorkOrderNumber	AN 01/18	I	
CST.CustomerAddress1 or CST.CustomerName	AN 01/40	I	<p>Default to display CST.CustomerAddress1, user may toggle display by checking/unchecking the Show Name box. Use larger font. Override CST.CustomerAddress1 with SEQ.Address1 if it exists Override CST.CustomerName with SEQ.Name if it exists</p>

CST.CustomerContactName	AN 01/30	I	
CST.CustomerPhoneNumber	AN 01/20	I	
SEQ.StartTime+SEQ.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM
Show Name checkbox		I	Defaults to checked. When checked, the grid will display CST.CustomerName in the grid & CST.CustomerAddress1 below. When not checked, the grid will display CST.CustomerAddress1 in the grid and CST.CustomerName below.

6310 Work Order Detail**Process**

View currently selected work order details.

Navigation

[Exit] or  [Esc]	Return
[Prev]	Get previous work order for the currently selected customer; remain at current dialog
[Next]	Get next work order for the currently selected customer; remain at current dialog
[Job]	Perform 6400 Job List using the current work order



File.Field Name	Format	C	Instructions
CST.CustomerNumber	AN 01/18	I	
SEQ.WorkOrderNumber	AN 01/18	I	
SEQ.Name	AN 01/40	I	Default to CST.CustomerName if blank
SEQ.Address1	AN 01/40	I	Default to CST.CustomerAddress1 if blank
SEQ.Address2	AN 01/40	I	Default to CST.CustomerAddress2 if blank
CST.CustomerContactName	AN 01/30	I	
CST.CustomerPhoneNumber	AN 01/20	I	
Sequence Day	AN 01/09	I	Convert from SEQ.SequenceDay which will always = 0 for "All Days"
Service Priority	AN 03/06	I	Sourced from SEQ.ServicePriority (Low, Norm, or High)
SEQ.StartTime+SEQ.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM

6320 Work Order Maintenance**Process**

If editing an existing work order then

Populate Cust #, WO Number, WO Type, and Survey Lookup fields with current CST/SEQ information

Disable (gray out) the Cust #, WO Number, and WO Type fields

Else (adding a new work order)

Cust # field will default to currently selected customer where focus will initially be set.

Application will automatically generate a work order number by starting with RCT.WorkOrderNumberPrefix, then add on the five least-significant digits of SID.SessionID, and then add on a 3-digit numeric counter; this creates up to an 18-digit number used to populate the Work Order Number field. This field will be disabled (grayed out).

Work Order Type will default to the type defined by CST.EnableWorkOrderMaintenance

If CST.EnableWorkOrderMaintenance = 1 then

Only Work Order Type available in drop down list is Service

Else (CST.EnableWorkOrderMaintenance = 2, 3, 4, or 5)

Only Work Order Types available in drop down list are

Delivery, Pickup, Hook, and Spot/Drop

Request Date will be populated with the current system date

Search the SRL Survey Lookup file for all unique SRL.SurveyLookupKeys for this customer number

If no matches found then Survey Lookup field will be blank; the field & [binoculars] button will be disabled

If one or more matches found then populate the Survey Lookup field with the first value found in the file; field entry and the [binoculars] button will both be enabled

Endif

Populate Name field with SRL.SurveyFieldText from Survey Lookup file with SRL.LookupIndex = 99 for the currently selected customer/survey lookup (if found); otherwise use non-blank SEQ.Name; otherwise use CST.CustomerName

Populate Address 1 field with SRL.SurveyFieldText from Survey Lookup file with SRL.LookupIndex = 98 for the currently selected customer/survey lookup (if found); otherwise use non-blank SEQ.Address1; otherwise use CST.CustomerAddress1

Populate Address 2 field with SRL.SurveyFieldText from Survey Lookup file with SRL.LookupIndex = 97 for the currently selected customer/survey lookup (if found); otherwise use non-blank SEQ.Address2; otherwise use CST.CustomerAddress2

Populate City field with SRL.SurveyFieldText from Survey Lookup file with SRL.LookupIndex = 96 for the currently selected customer/survey lookup (if found); otherwise use non-blank SEQ.City; otherwise use CST.CustomerCity

Populate State field with SRL.SurveyFieldText from Survey Lookup file with SRL.LookupIndex = 95 for the currently selected customer/survey lookup (if found); otherwise use non-blank SEQ.State; otherwise use CST.CustomerState

Populate Postal Code field with SRL.SurveyFieldText from Survey Lookup file with SRL.LookupIndex = 94 for the currently selected customer/survey lookup (if found); otherwise use non-blank SEQ.PostalCode; otherwise use CST.CustomerPostalCode

Disable the [Select] button under any of the following conditions:

- 1) If CST.EnableWorkOrderMaintenance = 0
- 2) If SEQ.WorkOrderType > 0 and editing an existing work order
- 3) If SEQ.WorkOrderType > 0 and Request Date > system date

Navigation

[binoculars] button If on Cust # field then perform 9000 Find (Customer)
Else (on Survey Lookup field) perform 6325 Survey Lookup Selection

[clock] button Perform 9040 Calendar

[keyboard] button Perform 9010 Keyboard

[Done] Do [Data Validation]
 If adding a new work order then
 Append new record to SEQ for added work order
 Write ACW Add/Change Work Order Detail upload record with TypeCode = 1
 Else if editing an existing work order and data changed then
 Update existing SEQ Work Order record
 Write ACW Add/Change Work Order Detail upload record with TypeCode = 2
 Endif
 If ACW record written AND
 RCT.EnableBackgroundTelecom = 1 (real time messaging enabled) AND
 RTM.MessageType = 4 (add/change work order message) record found then
 Perform 7000 Transmit Data in real-time
 Search SRL Survey Lookup file for currently selected CustomerNumber/SurveyLookupKey
 If SRL.LookupIndex = 99 found then populate SRL.SurveyFieldText with ACW.Name
 If SRL.LookupIndex = 98 found then populate SRL.SurveyFieldText with ACW.Address1
 If SRL.LookupIndex = 97 found then populate SRL.SurveyFieldText with ACW.Address2
 If SRL.LookupIndex = 96 found then populate SRL.SurveyFieldText with ACW.City
 If SRL.LookupIndex = 95 found then populate SRL.SurveyFieldText with ACW.State
 If SRL.LookupIndex = 94 found then populate SRL.SurveyFieldText with ACW.PostalCode
 Return to 3010 Work Order Selection

[Cancel] If data entered then
 Perform 9110 Exit Function
 If Yes response then return to 3010 Work Order Selection
 Else remain at current dialog
 Else return to 3010 Work Order Selection

[Select] Do [Data Validation]
 If adding a new work order then
 Append new record to SEQ for added work order
 Write ACW Add/Change Work Order Detail upload record with TypeCode = 1
 Else (editing an existing work order)
 Update existing SEQ Work Order record
 Write ACW Add/Change Work Order Detail upload record with TypeCode = 2
 If RCT.EnableBackgroundTelecom = 1 (real time messaging enabled) AND
 RTM.MessageType = 4 (add/change work order message) record found then
 Perform 7000 Transmit Data in real-time
 Search SRL Survey Lookup file for currently selected CustomerNumber/SurveyLookupKey
 If SRL.LookupIndex = 99 found then populate SRL.SurveyFieldText with ACW.Name
 If SRL.LookupIndex = 98 found then populate SRL.SurveyFieldText with ACW.Address1
 If SRL.LookupIndex = 97 found then populate SRL.SurveyFieldText with ACW.Address2
 If SRL.LookupIndex = 96 found then populate SRL.SurveyFieldText with ACW.City
 If SRL.LookupIndex = 95 found then populate SRL.SurveyFieldText with ACW.State
 If SRL.LookupIndex = 94 found then populate SRL.SurveyFieldText with ACW.PostalCode
 If SEQ.WorkOrderType = 00 (Service) then perform 6420 Job Maintenance
 Else
 Create new JOB record for an added job:
 Automatically generate a new JOB.SequenceNumber
 Use SEQ.WorkOrderNumber to populate JOB.WorkOrderNumber
 Automatically generate a new JOB.JobNumber: start with RCT.JobNumberPrefix,
 then add on the five least-significant digits of SID.SessionID, and then add on
 a 3-digit numeric counter
 Use SEQ.WorkOrderType to populate JOB.JobType
 Use SEQ.StartTime and EndTime to populate JOB.StartTime and EndTime
 Use JOB.JobNumber to populate JOB.Description
 Write ACJ Add/Change Job Detail upload record with TypeCode = 1
 If RCT.EnableBackgroundTelecom = 1 (real time messaging enabled) AND
 RTM.MessageType = 5 (add/change job message) record found then
 Perform 7000 Transmit Data in real-time

If STS.StatusType = 2 (job flow status) records exist then

Perform 3000 Service Customer for selected job

Else

If messages exist for this customer then perform 9060 Customer Messages

If SEQ.WorkOrderType = 01 (Delivery) then perform 3017 Delivery Job

Else if SEQ.WorkOrderType = 02 (Pickup) then perform 3018 Pickup Job

Else if SEQ.WorkOrderType = 03 (Hook) then perform 3019 Hook Job

Else (SEQ.WorkOrderType = 04 (Spot/Drop)) perform 3020 Spot/Drop Job

[Data Validation]: If customer number is blank then
 MsgBox "Blank customer number is not permitted.", OK*; remain at current dialog
 If customer number is not found then
 MsgBox "Customer number is not found.", OK*; remain at current dialog
 If Survey Lookup is not found then
 MsgBox "Survey Lookup is not found.", OK*; remain at current dialog
 Continue (if no MsgBoxes encountered)

File.Field Name	Format	C	Instructions
ACW.CustomerNumber	AN 01/18	O	Field will be disabled if editing an existing work order
ACW.WorkOrderNumber	AN 01/18	O	See Process notes above for how this number is generated Field is view only.
ACW.WorkOrderType	N0 01/02	O	Text for drop down list sourced from the literals file, disallow WorkOrderType = 05 (mix of jobs). Field will be disabled if editing an existing work order.
ACW.DeliveryDate	DT 10/10	O	Default to current system date
ACW.SurveyLookupKey	N0 01/08	O	
ACW.Name	AN 01/40	O	
ACW.Address1	AN 01/40	O	
ACW.Address2	AN 01/40	O	
ACW.City	AN 01/30	O	
ACW.State	AN 01/10	O	
ACW.PostalCode	AN 01/15	O	

6325 Survey Lookup Selection

Process

Initially populate grid with first record(s) found that contains the same SRL.SurveyLookupKey for this customer.

[Prev] button disabled when displaying first record(s) found.

[Next] button disabled when displaying last record(s) found.

Navigation

[Back] Return to 6320 Work Order Maintenance
 [Prev] Get previous SRL Survey Lookup record(s) for the currently selected customer;
 Remain at current dialog
 [Next] Get next SRL Survey Lookup record(s) for the currently selected customer;
 Remain at current dialog
 [Select] Return to 6320 Work Order Maintenance and populate Survey Lookup field with selection and repopulate Name/Address fields with any associated SRL file lookups found

File.Field Name	Format	C	Instructions
SRL.SurveyFieldText	AN 01/40		Select all with same SRL.SurveyLookupKey for this customer
SRL.SurveyLookupKey	N0 01/08		

6400 Job List**Process**

Populate table with Job Sequence file record(s) for the current work order sorted first in JOB.StartTime order (earliest to latest) and then in JOB.SequenceNumber order.

[Detail] disabled if no jobs are found.

[Print] button disabled if RCT.RoutePrinter = 99 (no printer).

Navigation

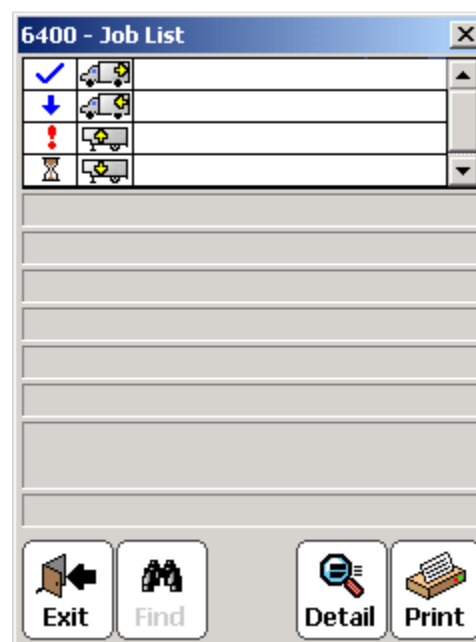
[Exit] or  [Esc] Return to 6310 Work Order Detail

[Find] *not implemented*

[Detail] Perform 6410 Job Detail for the currently selected (highlighted) job

[Print] Perform 6102 Customer / Work List Print
If not canceled then Return

 [Enter] same as [Detail]




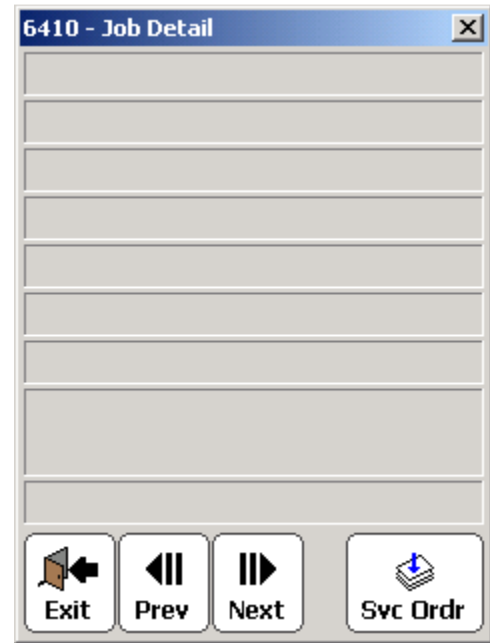
File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	Checkmark bitmap if job is serviced with transaction NoSvc bitmap if job marked as a no service transaction Down Arrow bitmap if job unserviced with low priority Exclamation Point bitmap if job unserviced with high priority Hourglass bitmap if service begun and not yet complete Padlock bitmap if work order already marked as a no service transaction and then received a file maintenance deletion Blank if job unserviced with normal priority
Job Type Indicator	bitmap	L	Only display this column if RCT.EnableJobBitmap = 1 (enabled) Service bitmap if JOB.JobType = 00 (Service) Vehicle Out bitmap if JOB.JobType = 01 (Delivery) Vehicle In bitmap if JOB.JobType = 02 (Pickup) Trailer Up bitmap if JOB.JobType = 03 (Hook) Trailer Down bitmap if JOB.JobType = 04 (Spot/Drop)
JOB.JobDescription	AN 01/40	I	
CST.CustomerName	AN 01/40	I	Override with SEQ.Name if it exists
CST.CustomerAddress1	AN 01/40	I	Override with SEQ.Address1 if it exists
JOB.Contact	AN 01/40	I	
CST.CustomerPhoneNumber	AN 01/20	I	
JOB.Location	AN 01/20	I	
SEL.ListText	AN 01/20	I	Keyed from JOB.TroubleCode = SEL.ListIDCode and SEL.ListTypeCode = 22 (trouble code)
JOB.Comments	AN 01/40	I	
JOB.StartTime+JOB.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM

6410 Job Detail**Process**

[Svc Ordr] enabled only if service order(s) exist for the current job.

Navigation

[Exit] or  [Esc] Return
 [Prev] Get previous job for the current work order; remain at current dialog
 [Next] Get next job for the current work order; remain at current dialog
 [Svc Ordr] Perform 6510 Service Order Detail



File.Field Name	Format	C	Instructions
CST.CustomerName	AN 01/30	I	Override with SEQ.Name if it exists
CST.CustomerAddress1	AN 01/40	I	Override with SEQ.Address1 if it exists
JOB.Contact	AN 01/40	I	
CST.CustomerPhoneNumber	AN 01/20	I	
JOB.JobDescription	AN 01/40	I	
JOB.Location	AN 01/20	I	
SEL.ListText	AN 01/20	I	Keyed from JOB.TroubleCode = SEL.ListIDCode and SEL.ListTypeCode = 22 (trouble code)
JOB.Comments	AN 01/40	I	
JOB.StartTime+JOB.EndTime	TM 08/08 TM 08/08	I	Formatted "hh:mm X – hh:mm X" where X = "A" for AM or "P" for PM

6420 Job Maintenance**Process**

If called from 6320 Work Order Maintenance and job(s) found for the selected Work Order OR called from 3013 More Icons and chose to edit an existing job then

Populate fields with current JOB information

Disable (gray out) the Job # field

Else (called from 6320 Work Order Maintenance and job(s) not found for the selected Work Order OR called from 3013 More Icons and chose to add a new job)

Automatically generate a new JOB.SequenceNumber

Use SEQ.WorkOrderNumber to populate JOB.WorkOrderNumber

Automatically generate a new JOB.JobNumber by starting with RCT.JobNumberPrefix, then add on the five least-significant digits of SID.SessionID, and then add on a 3-digit numeric counter; this creates up to an 18-digit number used to populate the Job Number field. This field will be disabled (grayed out).

Populate JOB.JobType = 00 (service)

Use SEQ.StartTime/EndTime to populate JOB.StartTime/EndTime

Use JOB.JobNumber to populate JOB.Description

[Prev] button disabled when displaying first JOB record where JOB.JobType = 00 (Service).

[Next] button disabled when displaying last JOB record where JOB.JobType = 00 (Service).

Disable the [Select] button under any of the following conditions:

- 1) If SEQ.RequestDate > current system date
- 2) If current resource status is inactive

Navigation

[clock] buttons Perform 9050 Set Time

[keyboard] buttons Perform 9010 Keyboard

[Done] If Description is blank then

MsgBox "Blank Job Description is not permitted.", OK*, remain at current dialog

Repeat

If added a new job then

Append new record to JOB for added job

Write ACJ Add/Change Job Detail upload record with TypeCode = 1

Else (modified an existing job)

Update existing JOB record

Write ACJ Add/Change Job Detail upload record with TypeCode = 2

Until all jobs processed

If RCT.EnableBackgroundTelecom = 1 (real time messaging enabled) AND

RTM.MessageType = 5 (add/change job message) record found then

Perform 7000 Transmit Data in real-time

Return to 3012 Job Selection

[Prev] / [Next] If Description is blank then

MsgBox "Blank Job Description is not permitted.", OK*, remain at current dialog

Get previous / next JOB record where JOB.JobType = 00 (Service)

Remain at current dialog

[Cancel] If data entered then
 Perform 9110 Exit Function
 If Yes response then return to 3012 Job Selection
 Else remain at current dialog
 Else return to 3012 Job Selection

[Select] If Description is blank then
 MsgBox "Blank Job Description is not permitted.", OK*, remain at current dialog
 Repeat
 If added a new job then
 Append new record to JOB for added job
 Write ACJ Add/Change Job Detail upload record with TypeCode = 1
 Else (modified an existing job)
 Update existing JOB record
 Write ACJ Add/Change Job Detail upload record with TypeCode = 2
 Until all jobs where JOB.JobType = 00 (Service) have been processed
 If RCT.EnableBackgroundTelecom = 1 (real time messaging enabled) AND
 RTM.MessageType = 5 (add/change job message) record found then
 Perform 7000 Transmit Data in real-time
 If STS.StatusType = 2 (job flow status) records exist then
 Perform 3000 Service Customer for selected job
 Else
 If job level comments exist for this job then perform 9060 Customer Messages
 Perform 3300 Customer Invoice

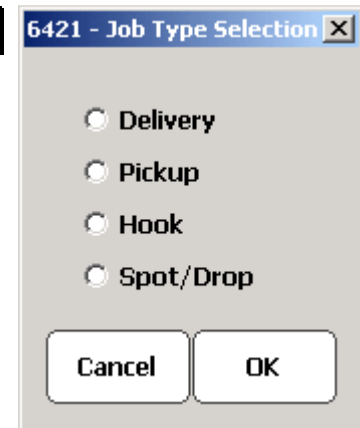
File.Field Name	Format	C	Instructions
JOB.JobNumber	AN 01/18	O	Field is view only.
JOB.ServicePriority	ID 01/01	O	Text for drop down list sourced from the literals file
JOB.StartTime	TM 08/08	O	Formatted "hh:mm AM"
JOB.EndTime	TM 08/08	O	Formatted "hh:mm AM"
JOB.JobDescription	AN 01/40	O	
JOB.Contact	AN 01/40	O	
JOB.Comments	AN 01/20	O	
JOB.Location	AN 01/20	O	For Service job types only
JOB.TroubleCode	AN 01/40	O	For Service job types only

6421 Job Type Selection**Process**

This dialog allows users to select which type of job to add.
The default selection is determined by CST.EnableWorkOrderMaintenance.

Navigation

- [OK] Create new JOB record for an added job:
 Automatically generate a new JOB.SequenceNumber
 Use SEQ.WorkOrderNumber to populate JOB.WorkOrderNumber
 Automatically generate a new JOB.JobNumber by starting with RCT.JobNumberPrefix, then add on the five least-significant digits of SID.SessionID, and then add on a 3-digit numeric counter
 Use SEQ.WorkOrderType to populate JOB.JobType
 Use SEQ.StartTime and EndTime to populate JOB.StartTime and EndTime
 Use JOB.JobNumber to populate JOB.Description
 Write ACJ Add/Change Job Detail upload record with TypeCode = 1
 If RCT.EnableBackgroundTelecom = 1 (real time messaging enabled) AND RTM.MessageType = 5 (add/change job message) record found then
 Perform 7000 Transmit Data in real-time
 If STS.StatusType = 2 (job flow status) records exist then
 Perform 3000 Service Customer
 Else
 If Delivery selected then perform 3017 Delivery Job
 Else if Pickup selected then perform 3018 Pickup Job
 Else if Hook selected then perform 3019 Hook Job
 Else (Spot/Drop selected) perform 3020 Spot/Drop Job
- [Cancel] Return to 3013 More Icons



File.Field Name	Format	C	Instructions
(none)			

6510 Service Order Detail**Process**

Tab 1-6 values = Sales, Rtns, Dmgd, Exch, Other, and Labor.

The Rtns tab is enabled only if CST.EnableReturnsTrxn = 1.

The Dmgd tab is enabled only if CST.EnableDamagedReturns = 1.

The Exch tab is enabled only if CST.EnableExchangeTrxn = 1.

The Other tab is enabled only if CST.EnableOtherTrxn = 1.

The Labor tab is enabled only if CST.EnableLabor = 1.


If all 6 tabs are enabled then scroll left/right buttons will be displayed to enable access to all tabs. Table populated from Customer Order Detail file for the current service order.

[Print] button disabled if RCT.RoutePrinter = 99 (no printer).

Navigation

[Number/Desc.] If Number displayed and pressed then
Display part numbers in the grid and the part description in the text box below the grid

Else (Desc. displayed and pressed)
Display part descriptions in the grid and the part number in the text box below the grid

[Exit] or  [Esc] Return to 6410 Job Detail

[Print] Perform 6102 Customer / Work List Print
If not canceled then Return

File.Field Name	Format	C	Instructions
ITM.ItemDescription or	AN 01/40	I	Select all for current order Keyed from ORD.ItemNumber to ITM.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
ORD.ItemNumber	AN 01/ 26	I	
ORD.ItemQuantity	N0 01/05	I	
ORD.ItemNumber or	AN 01/ 26	I	
ITM.ItemDescription	AN 01/40	I	Keyed from ORD.ItemNumber to ITM.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
CST.CustomerName	AN 01/40	I	Keyed from current JOB.JobNumber to SEQ.CustomerNumber to CST.CustomerNumber; override with SEQ.Name if it exists
Total	N0 01/06	L	Sum(ORD.ItemQuantity) for all records this order and type code

6600 Returns/Exchanges**Process**

Tabs: Returns, Exchanges, Damaged. Tables populated from Customer Transaction Detail (CTD) records of type 02 (returns), 03 (damaged returns), and 04 (exchange) for current route day. One record per transaction, containing the total quantity for all items transacted.

Navigation

[Exit] Return

File.Field Name	Format	C	Instructions
CST.CustomerName	AN 01/40	I	Keyed from COC.CustomerNumber Select if one or more associated CTD records with CTD.TransactionType = 02 (Returns page) or CTD.TransactionType = 03 (Damaged Returns page) or CTD.TransactionType = 04 (Exchanges page) Override with SEQ.Name if it exists
Transaction Quantity	N0 01/06	I	Sum (CTD.ItemQuantity) for all CTD records in current transaction with CTD.TransactionType = 02 (Returns page) or CTD.TransactionType = 03 (Damaged Returns page) or CTD.TransactionType = 04 (Exchanges page)

6700 Print Reports**Process**

User selects one or more reports to be printed, along with options to control printing. If Save Selections box is checked, then check box settings should be saved to an internal file and used to populate the dialog on subsequent accesses.

Navigation

[Exit] Return
[Print] Perform 9100 Print Report (<selected reports>)

File.Field Name	Format	C	Instructions
(none)			

Transmit Data

7000 Transmit Data

Process

If this dialog is called in order to perform communications in real-time or if NOT from the Mail function, then this dialog will not display and the logic will automatically flow to the [Start] button. Otherwise, this dialog displays status of data communications operation. List box is populated with events that occur during communications. These events/statuses are stored and uploaded in a file called toomx.log where x = a numeric counter 1 - 9.

Also, during data communications both 9998 Status and 9102 Tcom Status dialogs will be displayed.

"Transmit upload files" literal and checkbox will only be displayed for tcom sessions performed after End Day has been completed. Initially, checkbox will be checked and disabled (greyed out). Once a successful End Day telecommunication session has been performed then the checkbox will be enabled and cleared (un-checked). If a RTC Route Information Change file exists that has not yet been successfully uploaded then upload of this file will occur even if Transmit upload files is un-checked.

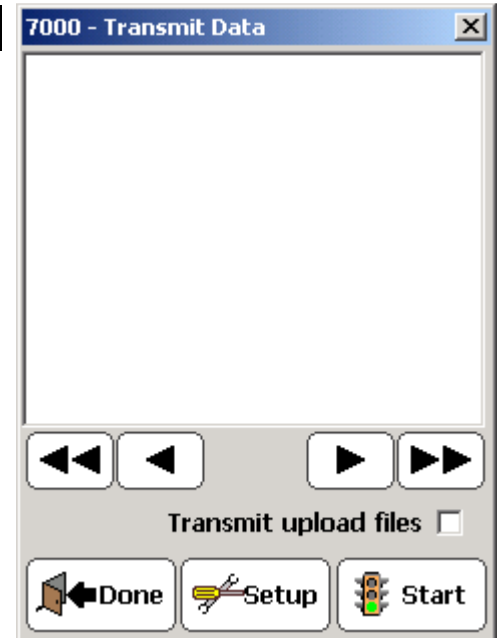
[Setup] button disabled if `RCT.EnableTelecomSetup = 0`.

Automatic Warm Boots (resets) will occur if any of the following conditions are met:

- 1) Mid Day or End Day Tcom is successful. Handheld will reset after File Maintenance.
- 2) Five Mid Day or End Day connections have been attempted since the last Warm Boot. Handheld will reset before initiating the next connection.
- 3) End Day Tcom is successful and a new program file (.CAB) has been downloaded. Handheld will reset before processing any data files downloaded.
- 4) End Day Tcom is successful and no DLY Telecom Delay File has been downloaded. Handheld will reset after File Maintenance.
- 5) 7000 Transmit Data is exited after a connection is attempted. Handheld will reset immediately. When a user cancels retry delays and then presses Done or when a user Cancels a Telecom Delay.
- 6) Start button is selected to begin a TCOM and the PxClient.ini field RebootBeforeTcom is set to Yes.

Navigation

```
[Done]      If any MMI Mail Message In records then
              MsgBox "You have received new mail messages. Would you like to read them now?", Yes*, No
              If Yes response then perform 9020 Mail
              Endif
              Return to calling dialog
[Setup]     If RTC.PasswordArray(TelecomSetup) < > 0 then
              Perform 9090 Password Input
              If PasswordStatus(Pass) then perform 7100 Telecom Setup
              Else remain at current dialog
              Else perform 7100 Telecom Setup
```



[Start] or
real-time

Initiate data communications

If performing (*user initiated mid-day* telecommunications ([Start] button)) then

- Transmit today's SID Session ID, SCT Session Control, STD Start/End Day, ITC Inventory Transaction Control, ITD Inventory Transaction Detail, COC Customer Operations Control, CTH Customer Job Transaction Header, CTD Customer Transaction Detail, LTD Less Than Load Transaction Detail, **ACC Add/Change Customer Detail, ACW Add/Change Work Order Detail, ACJ Add/Change Job Detail**, SCD Status Change Detail, NSC Non-Service Work Order, MMO Mail Message Out, and FMR File Maintenance Result upload records.
- Also transmit tcomx.log.
- Receive any MMI, NSC, or SID download files being sent from the host
- If data files were downloaded (.ASC files) but no SID Session ID file was downloaded then
 - MsgBox "Downloaded data will be removed. SID was not downloaded.", OK*
 - Remove the download data that was just received and then redisplay this dialog
- If the downloaded SID.SerialNumber is not empty AND
- is not equal to the actual serial number of the handheld computer being used then
 - MsgBox "Downloaded data will be removed.
 - Downloaded data was not for this handheld.", OK*
 - Remove the downloaded files that were just received and then redisplay this dialog
- If any file maintenance records downloaded (except CSTD Customer Master Deletion File and ITMD Item Master Deletion File) then
 - If file maintenance records exist for work already in progress or completed then
 - Do not process, delete record, and write FMR File Maintenance Result record
 - Else process all file maintenance records and then delete them once completed
- Endif
- If successful telecommunications or 5 unsuccessful attempts then reset handheld computer
- Remain at this dialog

Else if performing *real-time* telecommunications then

- Transmit today's SID Session ID, ACC Add/Change Customer Detail, ACW Add/Change Work Order Detail, ACJ Add/Change Job Detail, SCD Status Change Detail, NSC Non-Service Work Order, MMO Mail Message Out, or FMR File Maintenance Result upload records that have not already been successfully transmitted. For LTL transactions, also transmit any COC Customer Operations Control, CTH Customer Job Transaction Header, LTD Less Than Load Transaction Detail, and OCM Order Comments records
- If transmit unsuccessful then automatically retry 5 times
- If unsuccessful after 5 attempts then save transmission records and attempt to send again during next telecommunications session; reset & return (abort telecommunications)
- If SID Session ID file was not downloaded then
 - MsgBox "Downloaded data will be removed. SID was not downloaded.", OK*
 - Remove the download data that was just received and then redisplay this dialog
- Receive/process any of the following 6920 file type 5 download files sent from host:
 - CSTU Cust Master Update, SEQU Work Seq Update, SEQD Work Seq Deletion, JOBU Job Seq Update, JOBBD Job Seq Deletion, ORDU Service Order Detail Update, ORDD Service Order Detail Deletion, and MMI Mail Message In
- If any MMI Mail Message In records downloaded then
 - MsgBox "You have received new mail messages.
 - Would you like to read them now?", Yes*, No
 - If Yes response then perform 9020 Mail
- Endif

```
If any file maintenance records downloaded (except CSTD Customer Master Deletion
File and ITMD Item Master Deletion File) then
  If file maintenance records exist for work that is already in progress,
  or is completed, or that does not exist then
    Do not process it, delete the record, and then immediately
    send FMR File Maintenance Result notification to the host
  Else
    Process file maintenance recs upon next navigation to dialog 3010 Work Order
    Selection or 3012 Job Selection, or from dialog 0000 Main Menu
  Endif
Endif
Reset handheld computer and return
Else (not a mid-day telecommunication)
  Transmit all existing upload records as well as tcomx.log.
  If RCT.GenerateHTMLInv = 1 then only transmit valid HTML invoice image files
  Else if RCT.GenerateHTMLInv = 2 then transmit all HTML invoice image files
  Receive any download files being sent from the host
  If data files were downloaded (.ASC files) but no SID Session ID file was downloaded then
    MsgBox "Downloaded data will be removed. SID was not downloaded.", OK*
    Remove the download data that was just received and then redisplay this dialog
  If performing an Initial DownLoad (IDL) then
    If the downloaded SID.SerialNumer is not empty then
      MsgBox "Downloaded data will be removed.
        Downloaded data was not for this handheld.", OK*
      Remove the downloaded files that were just received and then redisplay this dialog
    Else
      If the downloaded SID.SerialNumer is not empty AND
      is not equal to the actual serial number of the handheld computer being used then
        MsgBox "Downloaded data will be removed.
          Downloaded data was not for this handheld.", OK*
        Remove the downloaded files that were just received and then redisplay this dialog
      If any .CAB files downloaded then perform a warm boot so that the CAB(s) can be extracted
      If any file maintenance files downloaded then
        Process all file maintenance records and then delete them once completed
      Endif
      If DLY Telecom Delay file is present then
        Repeat
          Perform 7001 Telecom Delay
          Initiate data communications
          If telecom unsuccessful then perform 7002 Retry Delay
        Until DLY Telecom Delay file is not present
      Endif
    Endif
  Endif
Endif
```

7000A Real-Time Incoming Messages

Process

This process is enabled once Start Day has been completed and subsequently disabled after End Day has been completed (SCT.Application State <> 0, 4 or 5). It is also disabled when any Mid Day Tcom is started and is then enabled after Mid Day Tcom is exited.

The Connection Indicator will only display when this process is enabled.

Navigation

```

If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
a valid connection value is set in IQUEUE.INI then
  Repeat (from Start Day until End Day)
    Continuously check for incoming real-time messages
  Until message received
  If not in the process of printing or of performing telecommunications then
    If not in the middle of a database transaction then
      If a new MMI Mail Message In record is received then
        MsgBox "New mail received.", OK*
        Perform 9020 Mail
      Elseif a CST Customer Master File update record received and auto rejected by the HHT then
        Send a FMR File Maintenance Result message (with FMR.TransactionType = 0)
      Elseif a SEQ Work Sequence File update record received for an EXISTING Work Order AND
      it was not automatically rejected then
        MsgBox "Work Order: 99999999 for customer: x---customer #---x was changed.", OK*
        Send a FMR File Maintenance Result message (with FMR.TransactionType = 1)
      Elseif a SEQ Work Sequence File update record received and auto rejected by the HHT then
        Send a FMR File Maintenance Result message (with FMR.TransactionType = 2)
      Elseif a SEQ Work Sequence File deletion record received and auto rejected by the HHT then
        Send a FMR File Maintenance Result message (with FMR.TransactionType = 3)
      Elseif a JOB Job Sequence File update record received and auto rejected by the HHT then
        Send a FMR File Maintenance Result message (with FMR.TransactionType = 4)
      Elseif a JOB Job Sequence File deletion record received and auto rejected by the HHT then
        Send a FMR File Maintenance Result message (with FMR.TransactionType = 5)
      Elseif a SEQ Work Sequence File update record received for a NEW Work Order then
        Perform 3007 New Work Orders Received
      Elseif a SEQ Work Sequence File deletion record received and NOT automatically rejected then
        MsgBox "Work Order: 99999999 for customer: x---customer #---x was removed.", OK*
        Send a FMR File Maintenance Result message (with FMR.TransactionType = 8)
    Else (currently in the middle of a database transaction)
      If a new MMI Mail Message In record is received then
        MsgBox "You've got mail! Complete the current transaction to view mail.", OK*
        Clear MsgBox and redisplay current dialog
      Else
        MsgBox "You've got work order changes!
        Complete the current transaction to process work orders.", OK*
        Clear MsgBox and redisplay current dialog
      Endif
    Endif
  Endif
Endif
Endif

```


7001 Telecom Delay**Process**

This dialog will display when a DLY Telecom Delay file has been downloaded. This dialog will continue to display until the start time is reached, at which point the application will return to dialog 7000 Transmit Data and automatically initiate data communications.

Delay stop time is saved for use by the 7002 Retry Delay process if needed. All other DLY Telecom Delay File information is discarded.

Navigation

- [Cancel] MsgBox "Are you sure you want to cancel?", Yes, No*
 If Yes response then
 Discard DLY Telecom Delay File information and close this dialog
 Return to 7000 Transmit Data and wait for user input
 Else remain at current dialog
- [Start] MsgBox "Are you sure you want to start telecom now?", Yes, No*
 If Yes response then
 DLY Telecom Delay File information and close this dialog
 Return to 7000 Transmit Data and initiate data communications
 Else remain at current dialog



File.Field Name	Format	C	Instructions
Start time	TM 05/05	L	If DLY.DelayType = 1, then display DLY.DelayStart If DLY.DelayType = 2, then add DLY.DelayStart to current clock time and display result Formatted "hh:mm" (24 hour time)
Time remaining	TM 05/05	L	If DLY.DelayType = 1, then determine how many minutes from current clock time until DLY.DelayStart and display result in hours/minutes. Update once per minute If DLY.DelayType = 2, then initially display DLY.DelayStart and update once per minute Formatted "hh:mm" (24 hour time)

7002 Retry Delay**Process**

This dialog will appear when telecommunications is initiated and for some reason becomes unsuccessful. A retry will automatically begin a short delay. Each time the retry delay start time is reached this dialog closes and data communications is initiated. A successful connection at any point will end this process.

If the connection was attempted automatically as a result of reaching the delay tcom start time on 7001 Telecom Delay then retry attempts will continue until the current time plus the retry delay value is greater than the designated time to quit. At this point the application will clear this dialog and return to 7000 Transmit Data and wait for user input.

If a DLY Telecom Delay File is not present then retry attempts will be counted and will continue until the retry count reaches the MaxRetries value defined in PXClient.INI. At this point the application will clear this dialog and return to 7000 Transmit Data and wait for user input.

Navigation

- [Cancel] MsgBox "Are you sure you want to cancel?", Yes, No*
If Yes response then close this dialog and return to 7000 Transmit Data and wait for user input
Else remain at current dialog
- [Start] Bypasses automatic retry delay and initiates data communications immediately



File.Field Name	Format	C	Instructions
Time Until Retry	TM 05/05	L	Add the RetryDelay value (in seconds) from PXCLIENT.INI to the current time to get the Retry Delay start time. Calculate the difference between the current time and the Retry Delay Start Time. Display the difference. Update once per minute.

7100 Telecom Setup

NOTE: Need new screenshot. Area field which displays the route number will be expanded to fit 12 characters

Process

User may update route identification information. A Route Information Change (RTC) record will be written to document any changes to fields in this dialog.

Navigation

[keyboard] button Perform 9010 Keyboard
 [OK] If one or more fields changed then
 If (Location field changed AND RCT.EnableLocationEdit = 3) OR
 (Area field changed AND RCT.EnableRouteEdit = 3) then
 Remove all download and upload files by initializing the database
 Elseif (Location field changed AND RCT.EnableLocationEdit = 2) OR
 (Area field changed AND RCT.EnableRouteEdit = 2) then
 Remove SEQ, JOB, ORD, ODC, and ODM download files, the SID file, and
 previous day's upload files including INV Route Inventory
 Endif
 Update RCT record and write RTC record to upload database
 Return
 [Advanced] Perform 7110 Advanced Telecom Setup (external program - WinConfig)
 [Cancel] Abort input and return

File.Field Name	Format	C	Instructions
RCT.LocationNumber	AN 01/06	I	Editable only if (not performing a Mail telecommunications) AND [(SCT.ApplicationState = 0) OR (SCT.ApplicationState = 5 AND RCT.EnableLocationEdit > 0)]
RCT.RouteNumber	AN 01/12	I	Editable only if (not performing a Mail telecommunications) AND [(SCT.ApplicationState = 0) OR (SCT.ApplicationState = 5 AND RCT.EnableRouteEdit > 0)]

7110 Advanced Telecom Setup**Process**

Dialogs 7110 through 7113 are supplied from an external program called WinConfig and may vary from the dialogs shown depending on which version of WinConfig is being utilized.

This dialog allows the user to configure advanced telecom settings.

Navigation

[Advanced] (DUN)	Perform 7111 Dial-Up Networking
[ABC] buttons	Display pop-up keyboard from appropriate operating system (similar to 9010 Keyboard)
[Advanced] (Wired)	Perform 7112 Wired Network
[Advanced] (Client)	Perform 7113 Client Setup
[Cancel]	Abort input and return
[OK]	Accept input and return

File.Field Name	Format	C	Instructions
NCS.RASDialPrefix	AN 01/32	I	Provides the dial prefix for Remote Access Server (RAS) connections
NCS.RASPhoneNumber	AN 01/32	I	Provides the phone number to be used for RAS connections

7111 Dial-Up Networking**Process**

This dialog allows the user to configure dial-up networking.

Navigation

[ABC] buttons	Display pop-up keyboard from appropriate operating system (similar to 9010 Keyboard)
[Cancel]	Abort input and return
[OK]	Accept input and return

File.Field Name	Format	C	Instructions
NCS.RASUserName	AN 01/32	I	Dialup PPP server with "UserName" required to connect
NCS.RASPassword	AN 01/32	I	Dialup PPP server with "Password" required to connect
NCS.RASDomain	AN 01/32	I	Dialup PPP server with a Windows NT Domain name, "" defines any local domain (default)
NCS.IPAddress	AN 01/15	I	IP Address of the client device for direct network connections, ignored if EnableDHCP is set to 1
NCS.ServerPort	AN 01/64	I	TCP/IP port number, or the service entry name in the services file, on which the 6920 Communications Server is configured, default = 44965
NCS.SessionTimeout	N0 01/03	I	Time to wait for activity from the 6920 Communications Server before declaring a server timeout error, defaults to 30 minutes
NCS.RASModemName	AN 01/128	I	Name of the modem to be used for RAS connections

7112 Wired Network**Process**

This dialog allows the user to configure a wired network.

Navigation

[ABC] buttons Display pop-up keyboard from appropriate operating system (similar to 9010 Keyboard)
 [Cancel] Abort input and return
 [OK] Accept input and return

File.Field Name	Format	C	Instructions
NCS.IPAddress	AN 01/15	I	IP Address of the client device for direct network connections, ignored if EnableDHCP is set to 1
NCS.ServerPort	AN 01/64	I	TCP/IP port number, or the service entry name in the services file, on which the 6920 Communications Server is configured, default = 44965
NCS.SessionTimeout	NO 01/03	I	Time to wait for activity from the 6920 Communications Server before declaring a server timeout error, defaults to 30 minutes

7113 Client Setup**Process**

This dialog allows the user to configure a client.

Navigation

[ABC] buttons Display pop-up keyboard from appropriate operating system (similar to 9010 Keyboard)
 [Cancel] Abort input and return
 [OK] Accept input and return

File.Field Name	Format	C	Instructions
NCS.IPAddress	AN 01/15	I	IP Address of the client device for direct network connections, ignored if EnableDHCP is set to 1
NCS.SubnetMask	AN 01/15	I	Subnet mask of the client device for direct network connections, ignored if EnableDHCP is set to 1
NCS.DefaultGateway	AN 01/15	I	IP Address of default gateway to be used for direct network connections
NCS.DNS	AN 01/12	I	Name of Domain Name Server used for direct network connections

Setup

8000 Setup Menu

Process


User may access various information about how the route is set up and its present status.

[Telecom Setup] button disabled if `RCT.EnableTelecomSetup = 0`.

[User Logout] button disabled if user not logged in or if both `RCT.PasswordArray(6)` and `(7)` are blank/zero.

[Initialize Data] button will only be displayed and active if appropriate `PXClient.ini` file settings have been set. This functionality is not to be used in production systems and is only intended for demo and testing purposes.

Navigation

[Route Setup]	If <code>RCT.PasswordArray(RouteSetup) < > 0</code> then Perform 9090 Password Input If <code>PasswordStatus(Pass)</code> then Perform 8100 Route Setup—Identification Else remain at current dialog
[Telecom Setup]	Else Perform 8100 Route Setup—Identification If <code>RCT.PasswordArray(TelecomSetup) < > 0</code> then Perform 9090 Password Input If <code>PasswordStatus(Pass)</code> then Perform 7110 Advanced Telecom Setup (external program) Else remain at current dialog Else perform 7110 Advanced Telecom Setup (external program)
[System Info]	<i>not implemented</i>
[Pen Alignment]	Perform <code>PENALIGN.EXE</code> (external program)
[User Logout]	MsgBox "Are you sure you want to logout?", Yes*, No If Yes then Write ULD User Log Detail, <code>ULD.DetailTypeCode = 1</code> (logout) Perform 9095 User Login Else do not log user out and remain at current dialog
[Exit] or  [Esc]	Return
[About]	Perform 9999 Copyright



File.Field Name	Format	C	Instructions
(none)			


8100 Route Setup—Identification


NOTE: Need new screenshot. Area field which displays the route number will be expanded to fit 12 characters

Process

User may update route identification and document numbering information. A Route Information Change (RTC) record will be written to document any changes to fields in this dialog.

Navigation

[keyboard] button Perform 9010 Keyboard
 [Exit] or  [Esc] If one or more fields changed then
 MsgBox "Route ID settings updated. Save changes?", Yes*, No
 If No response then discard field changes and redisplay this dialog
 Else
 If (Location field changed AND RCT.EnableLocationEdit = 3) OR (Area field changed AND RCT.EnableRouteEdit = 3) then
 Remove all download and upload files by initializing the database
 Elseif (Location field changed AND RCT.EnableLocationEdit = 2) OR (Area field changed AND RCT.EnableRouteEdit = 2) then
 Remove SEQ, JOB, ORD, ODC, and ODM download files, the SID file, and previous day's upload files including INV Route Inventory
 Endif
 Update RCT record and write RTC record to upload database
 Endif
 Return
 [Next] Go to 8110 Route Setup—Date/Time, Printer



File.Field Name	Format	C	Instructions
RCT.LocationNumber	AN 01/06	I	Editable only if (SCT.ApplicationState = 0) OR (SCT.ApplicationState = 5 AND RCT.EnableLocationEdit > 0)
RCT.RouteNumber	AN 01/12	I	Editable only if (SCT.ApplicationState = 0) OR (SCT.ApplicationState = 5 AND RCT.EnableRouteEdit > 0)
RCT.SalesRepNumber	AN 01/10	I	
RCT.SalesRepName	AN 01/30	I	
RCT.VehicleNumber	N0 01/06	I	
RCT.VehicleOdometer	N0 01/06	I	
RCT.DocumentPrefix	N0 01/08	I	
RCT.DocumentNumber	N0 01/04	I	


8110 Route Setup—Date/Time, Printer**Process**

User may update date/time and printer information.

Navigation

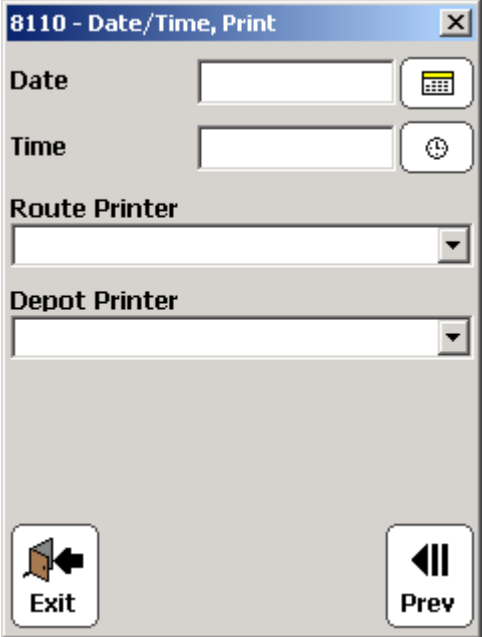
[calendar] button If RTC.PasswordArray(DateTimeChange) < > 0 then
 Perform 9090 Password Input
 If PasswordStatus(Pass) then
 Perform 9040 Calendar

[clock] button If RTC.PasswordArray(DateTimeChange) < > 0 then
 Perform 9090 Password Input
 If PasswordStatus(Pass) then
 Perform 9050 Set Time

[Exit] or  [Esc] If one or more fields changed then
 MsgBox "Route ID settings updated. Save changes?", Yes*, No
 If No response then discard field changes and redisplay this dialog
 Else
 If (Location field changed AND RCT.EnableLocationEdit = 3) OR
 (Area field changed AND RCT.EnableRouteEdit = 3) then
 Remove all download and upload files by initializing the database
 Elseif (Location field changed AND RCT.EnableLocationEdit = 2) OR
 (Area field changed AND RCT.EnableRouteEdit = 2) then
 Remove SEQ, JOB, ORD, ODC, and ODM download files, the SID file, and previous day's upload files including INV Route Inventory
 Endif
 Update RCT record and write RTC record to upload database
 Endif

Endif
 Return

[Prev] Go to 8100 Route Setup—Identification



File.Field Name	Format	C	Instructions
System Date	DT 10/10	I	Formatted "mm/dd/yyyy"
System Time	TM 08/08	I	Formatted "hh:mm AM"
RCT.RoutePrinter PrinterXX	ID 02/02 AN 01/20	I O	Sourced from the [Printing] section of PXCLIENT.INI
RCT.DepotPrinter PrinterXX	ID 01/01 AN 01/20	I O	Sourced from the [Printing] section of PXCLIENT.INI

Common Routines

The following dialogs are called from various modules throughout the application. When terminated, all common routines return to the dialog or function from which they were called.

9000 Find

Process

Dialog shown with 9010 Keyboard superimposed. Table populated with field (listed in chart below) as specified by calling module. Calling inventory modules may specify part number lookup limited to ITM.ItemTypeCode = 99 or 02 (type definition or empties) if RCT.InventoryInput = 1 (input by type). Table sorted based on search field indicated by radio buttons. *Name* option initially selected. User inputs search string; as each character is entered, highlight record in file that most closely corresponds to search string. If called from dialog 3013 More Icons or 6320 Work Order Maintenance then filter out customers with CST.EnableWorkOrderMaintenance = 0.

Navigation

[Exit]	Return null index to calling module
[Clear]	Reset search string field to blank.
[Select]	Return index of highlighted table record to calling module
[Enter]	same as [Select]
[Esc]	Return null index to calling module


File.Field Name	Format	C	Instructions
<i>If calling module specifies search on Item Master file:</i>			
ITM.ItemDescription	AN 01/40	I	Use AID.ItemDescription if exists for selected RCT.Language/item
<i>If Inventory calling module specifies search on Item Master file and RCT.InventoryInput = 1:</i>			
ITM.ItemDescription	AN 01/40	I	Use AID.ItemDescription if exists for selected RCT.Language/item
<i>If calling module specifies search on Customer Master file:</i>			
CST.CustomerName	AN 01/40	I	
<i>All search types:</i>			
ITM.ItemNumber or ITM.ItemNumber or CST.CustomerNumber	AN 01/26 AN 01/26 AN 01/18	I	Select all records Select records with ITM.ItemTypeCode = 02 or 99 Select all records User may toggle display of this field with contents of the table by selecting the desired radio button. If the "Name" radio button is selected (default), then display ItemDescription/CustomerName in the table and the ItemNumber/CustomerNumber in this field. If the "Number" radio button is selected, then display ItemNumber/CustomerNumber in the table and ItemDescription/CustomerName in this field.
Search String	AN 01/30	L	user input

9010 Keyboard**Process**

User presses on-screen buttons and/or keypad keys to edit text contained in field with focus on calling dialog. Keyboard should be positioned on screen by application so as not to obscure target field.

Unshifted and shifted states shown

Navigation

[alpha keys]	Echo caption to calling module field with focus
[CAP]	Toggle shift state and keyboard legends
[SPACE]	Echo [space] to calling module field with focus
[BKSP]	Echo [backspace] to calling module field with focus
[CR]	Echo [CR/LF] to calling module field with focus
[DONE]	Return to calling module
 [Esc]	Return to calling module



File.Field Name	Format	C	Instructions
(none)			

9020 Mail**Process**

Populate table with all mail messages received (MMI records) sorted in Date/Time order (newest to oldest). Highlight initially positioned on first unread mail message. If no unread mail messages then position highlight on the latest message.

[Outbox] button disabled if no queued mail messages exist (MMO.TransmitIndicator = 0) or if realtime messaging is enabled.

[Delete] and [Reply] buttons disabled if no mail messages in table.

[Delete] button disabled if currently selected mail message has not been read.

[Reply] and [New] buttons disabled when SCT.ApplicationState = 0 (power up) or = 4 (end day done) or = 5 (end day telecom done).

If real-time work order message received then
MsgBox "New work order(s) received.", OK*

Navigation

[Exit] or  [Esc] Return to calling dialog

[Outbox] Perform 9022 Outbox

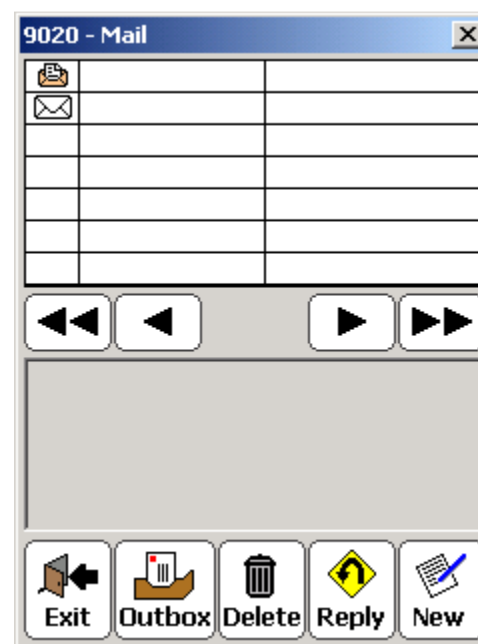
[Delete] MsgBox "Are you sure you want to delete this mail message?", Yes, No*

If Yes response then delete record

Else retain record, remain at current dialog

[Reply] Perform 9021 New Mail Message with currently selected MMI.Sender as mail message recipient

[New] Perform 9021 New Mail Message




File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	Opened mail bitmap if message read (in view for > 2 secs) Unopened mail bitmap if message has not been read yet
Date and Time	DT 16/16	I	System date and time the mail message was received
MMI.Sender	AN 01/20	I	Sender of mail message
MMI.MessageText	AN 01/256	I	Display message text of currently highlighted mail message

9021 New Mail Message**Process**

If called from 9020 Mail [Reply] then populate Recipient appropriately, else Recipient will be blank. Initially default to Fixed mail message type with a blank selection (Freehand will be grayed out). If Freehand selected then overlay 9010 keyboard over lower half of dialog and allow user to manually key in message text (Fixed will be grayed out).

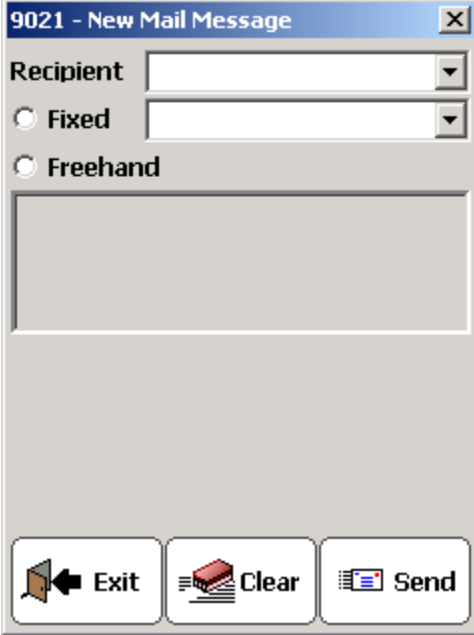
[Clear] and [Send] buttons disabled if either recipient or message text is blank.

Navigation

[Exit] or [Esc] If data entered then
 MsgBox "Message will be lost! Are you sure you want to cancel?", Yes, No*
 If Yes response then
 Abort message, return to 9020 Mail
 Else remain at this dialog
 Else return to 9020 Mail

[Clear] Clear all fields to initial default values
 Remain at the current dialog

[Send] If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND
 RTM.MessageType = 0 (mail message) record found then
 Perform 7000 Transmit Data in real-time
 If telecom was successful then set MMO.TransmitIndicator = 1 (mail message sent)
 Else set MMO.TransmitIndicator = 0 (mail message not sent)
 Return to 9020 Mail
 Else
 MsgBox "Send mail message now?", Yes*, No
 If Yes response then
 Perform 7000 Transmit Data as a MAIL telecom
 If telecom was successful then
 Set MMO.TransmitIndicator = 1 (mail message sent)
 Return to 9020 Mail
 Else
 Set MMO.TransmitIndicator = 0 (mail message not sent)
 MsgBox "Unable to send mail message. Would you like to retry now?", Yes*, No
 If Yes response then repeat [Send] logic
 Else return to 9020 Mail
 Endif
 Else
 Set MMO.TransmitIndicator = 0 (mail message not sent) and return to 9020 Mail
 Endif
 Endif




File.Field Name	Format	C	Instructions
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 18 (mail message recipient)
MMO.Recipient	AN 01/20	O	From SEL.ListIDCode corresponding to selected recipient
MSG.MessageKey	N0 01/04	I	Select all with MSG.MessageTypeCode = 07 (fixed mail message)
MSG.MessageText or MMO.MessageText	AN 01/40 AN 01/256	I O	If Fixed message type selected then Display MSG.MessageText for selected fixed message Do not allow modification of message text Else allow MMO.MessageText entry via 9010 Keyboard

9022 Outbox**Process**

Populate table with all mail messages with MMO.TransmitIndicator = 0 sorted in Date/Time order (newest to oldest).

[Delete] button disabled if RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND RTM.MessageType = 0 (mail message) record found.

Navigation

[Exit] or  [Esc] Return to 9020 Mail

[Delete] MsgBox "Are you sure you want to delete this mail message?", Yes, No*

If Yes response then

 Delete current record

 If last mail message then return to 9020 Mail

 Else remain at current dialog

Else retain record and remain at current dialog

[Send All] If RCT.EnableBackgroundTelecom = 1 (real-time messaging enabled) AND RTM.MessageType = 0 (mail message) record found then

 Perform 7000 Transmit Data in real-time

 If telecom was successful then

 Set MMO.TransmitIndicator = 1 (message sent) for all queued mail messages

 Else

 Set MMO.TransmitIndicator = 0 (message not sent) for all queued mail messages

 Endif

 Return to 9020 Mail

Else

 MsgBox "Send mail message now?", Yes*, No

 If Yes response then

 Perform 7000 Transmit Data

 If telecom was successful then

 Set MMO.TransmitIndicator = 1 (message sent) for all queued mail messages

 Return to 9020 Mail

 Else

 Set MMO.TransmitIndicator = 0 (message not sent) for all queued mail messages

 MsgBox "Unable to send mail message. Would you like to retry now?", Yes*, No

 If Yes response then repeat [Send] logic

 Else return to 9020 Mail

 Endif

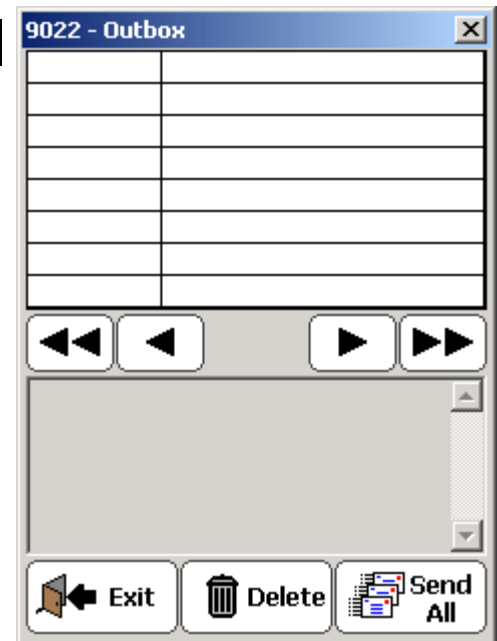
 Else

 Set MMO.TransmitIndicator = 0 (message not sent) for all queued mail messages

 Return to 9020 Mail

 Endif

Endif



File.Field Name	Format	C	Instructions
MMO.DateTime	DT 16/16	I	System date and time the mail message was queued
MMO.Recipient	AN 01/20	I	Recipient of mail message to be sent
MMO.MessageText	AN 01/256	I	Display message text of currently highlighted mail message

9030 Select Part**Process**

The scanner is enabled at this dialog. User either scans a bar code or inputs a part number; if found, string field populated with part description. If found but not found in authorized part list, then MsgBox "Not authorized.", OK*. User then inputs quantity. Routine loops continuously until user presses [Exit] or [Esc].

Navigation

[binoculars] button Perform 9000 Find (Part)
 [Find] Perform 9000 Find (Part)
 [Exit] or [Esc] Return to calling module
 [Enter] or Create temp record for part # and quantity⁵
[Enter] at Quantity Clear screen, position cursor at part # field
 scan or Search Item Master for Part Number
[Enter] at If found then
 Part Number If ITM.ItemTypeCode > 02 then MsgBox "Invalid Entry", OK*; remain at current dialog
 Else populate Part Description field
 Else MsgBox "Not Found", OK*; remain at current dialog

File.Field Name	Format	C	Instructions
Part Number	AN 01/26	L	search ITM.ItemNumber for Item Number
ITM.ItemDescription	AN 01/40	I	keyed from Item Number Use AID.ItemDescription if exists for selected RCT.Language/item
Quantity	N0 01/05	L	user input

9040 Calendar**Process**

Date may be passed from calling module. Year displayed in edit box; may be edited by user or arrow buttons used to decrement/increment by one. Month names (three letter abbreviated, mixed case) populate upper table in Z-order. Populate lower table with calendar days corresponding to highlighted month and year. Cells not occupied by valid dates for displayed month should be left blank. User taps or scrolls using arrow keys to move highlight to desired date.

If called from 3520 Survey & Audit then

Valid date range is 1/1/100 – 12/31/9999

Else

If using 7xx mono HHC then valid date range is 1/1/1970 – 12/31/2037

Else (using 7xx color HHC) valid date range is 1/1/1980 – 12/31/2037

Navigation

[OK] Return highlighted date to calling module

[Cancel] Return null value to calling module

File.Field Name	Format	C	Instructions
Year	N0 04/04	L	4 digit year; increment by 1
Month Name	AN 08/08	L	3 char alpha month abbreviation, e.g., "Jan"
Date (42)	N0 01/02	L	user selected date [no editing]

⁵ Quantity (case) saved as integer portion, Quantity (each) saved as decimal portion of output field.

9050 Set Time**Process**

Fields initially set to system time or values passed by calling module. User may enter hours and/or minutes and select *AM/PM* radio buttons. Entries validated.

Navigation

[OK] Return time value to calling module
 [Cancel] Return null value to calling module

File.Field Name	Format	C	Instructions
Hour	N0 01/02	L	range = 01-12
Minute	N0 01/02	L	range = 00 - 59

9060 Customer Messages**Process**

Display all records in format:

Message# 9999 (MSG.MessageKey)

[MSG.MessageText] for MSG.MessageSequence = 1

[MSG.MessageText] for MSG.MessageSequence = 2...

leaving 1 blank line between messages, until all records are displayed.

If called from 1000 Start Day and SCT.ApplicationState < 1 (Start Day not done), then the [Done] button will be initially disabled; enabled when last record of last message appears in text box. Text box displays records from Message Master file with MSG.MessageTypeCode = 01.

If called directly from 3010 Work Order Selection, 3011 Work Order Selected, 6110 Customer Detail, or from pressing the [Msgs] button on 3013 More Icons (via the [More] button on dialogs 3010 or 3011) then the text box displays records from the Message Master file with MSG.MessageTypeCode = 02 and MSG.MessageKey keyed to current customer. The [Done] button will be enabled when the last record of the last message appears in text box.

If called directly from 3012 Job Selection, 3000 Service Customer, or from pressing the [Msgs] button on 3013 More Icons (via the [More] button on dialog 3012) then the text box displays records from the Order Detail Comments file with ODC.ItemDetailTieLine = 000 for the currently selected job. The [Done] button will be enabled when the last record of the last message appears in text box.

If called from pressing the [Msgs] button on 3002 More Icons (via the [More] button on dialogs 3017, 3018, 3019, 3020, 3000, 3200, and 3300) then the text box displays records from the Message Master file with MSG.MessageTypeCode = 02 and MSG.MessageKey keyed to current customer AS WELL AS records from the Order Detail Comments file with ODC.ItemDetailTieLine = 000 for the currently selected job. The [Done] button will be enabled when the last record of the last message appears in text box.

Navigation

[Done] Return to calling module

File.Field Name	Format	C	Instructions
MSG.MessageText	AN 01/40	I	See Process notes above. If the MessageText is too long to fit on the display, then add a horizontal scroll bar so it can be viewed.

9080 Odometer Input**Process**

User inputs vehicle odometer reading. Entry is validated.

Navigation

- [OK] If entry => RCT.VehicleOdometer then return
 Else
 MsgBox "Odometer less than previous entry. Is this OK?", Yes*, No
 If Yes response, then record new value and return
 Else remain at current dialog
- [Cancel] Return to calling module

File.Field Name	Format	C	Instructions
Odometer Entry	N0 01/06	O	Compare user input to RCT.VehicleOdometer

9082 Source Vessel Numbers**Process**

Enter the serial number for source vessel(s) and the lot number(s). Entry is validated as follows: If the dialog is displayed at a customer stop, the first Source Vessel serial number and lot number are required. If the context is beginning of day, the Source Vessel serial number and lot number are not required. In all cases if a serial number has been entered, a corresponding lot number must be entered. The reverse is also true. Examples: If the first vessel number was entered, then the first lot number must be entered. If there is a value for the second lot number, then the second vessel number must be entered.

The Vessel numbers are saved from one day to the next and are used to pre-populate the vessel numbers in this dialog.

Navigation

- [Keyboard] (all 6) Perform 9010 Keyboard and overlay on dialog.
 Overlay goes below the edit box for the top 3 buttons and above the edit box for the bottom three buttons.
- [Lot # <Number>] Can be a scanned barcode or typed into the textbox.
- [OK] If valid entries
 Then return to calling dialog with OK result
 Else
 Remain at current dialog
- [Cancel] Return to calling module with Cancel result

Internal File only:

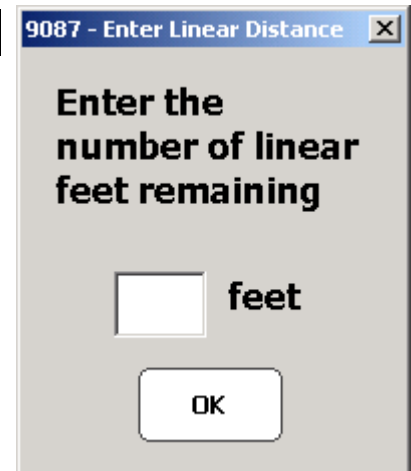
File.Field Name	Format	C	Instructions
CSD.SrcVesselSerialNum[1]	AN 01/15	I	
CSD.SrcVesselSerialNum[2]	AN 01/15	I	
CSD.SrcVesselSerialNum[3]	AN 01/15	I	
CSD.LotNumber [1]	AN 01/15	I	
CSD.LotNumber [2]	AN 01/15	I	
CSD.LotNumber [3]	AN 01/15	I	

9087 Enter Linear Distance**Process**

This screen is called from 3018 Pickup Job to capture the remaining distance on the trailer. This field can be zero, but not blank.

Navigation

[OK] If linear distance is blank then
MsgBox "Linear distance remaining must be >= 0.", OK*
Display cursor in linear distance field for re-entry
Else save value entered and return to 3018 Pickup Job flow



File.Field Name	Format	C	Instructions
Linear Distance Remaining	N0 01/02	I	Entry field is blank, awaiting required input. Use larger font.
LTD.LinearDistanceRemaining	N0 01/02	O	

9090 Password Input**Process**

User inputs password. Asterisks are echoed. Password is validated.

If the user inputs an incorrect password more than the attempts allowed in the downloaded RCT.PasswordRetry, an application lockout will occur

Navigation

[OK] If password is validated
 Return to calling module (see instructions)
Else
 Remain on this screen.

[Cancel] Return (Fail) to calling module

The screenshot shows a dialog box titled "9090 - Password". It contains a text input field labeled "Enter Password". Below the input field is a grid of buttons for letters (a-z), numbers (0-9), and symbols (comma, period, slash, hash, ampersand, apostrophe). There are also buttons for "CAP", "SPACE", "BKSP", and "DONE". At the bottom of the dialog are "Cancel" and "OK" buttons.

File.Field Name	Format	C	Instructions
Password	AN 01/10	L	Compare user input to RCT.Password(n), where n = value of RCT.PasswordArray(InputParameter). If entry matches designated password or RCT.Password(5) then Return (Pass) Else MsgBox "Incorrect password", OK*, remain at current dialog

9092 Unlock Login**Process**

User inputs lockout code. Asterisks are echoed. Lockout code is validated.

- Allow only the lockout code to get the user out of the lockout dialog.
- After the configured MaxLockoutCodeAttempts from the pxclient.ini has been reached, the application is frozen for the number of minutes specified by MinutesFrozen.
- After an hour has elapsed from the "Code expires at" time displayed, the lockout code expires and a new Code key is displayed. The user is required to call the Dispatcher for a lockout code using the new key.

Navigation

[OK] If a valid lockout code is entered
Return to calling module (see instructions)
Else
Display an error message "Incorrect lockout code."
Remain on this screen

9092 - Unlock Login

Call your Dispatcher for a lock out code. Give the Dispatcher this number:

Code key: 31492

Enter lockout code: [password field with asterisks]

Code expires at: 2:14 PM

OK

File.Field Name	Format	C	Instructions
Code Key	AN 01/10	L	Application calculates a code key. This key is used as the basis for generating the lockout code.
Lockout code	AN 01/10	L	Application calculates a lockout code based on the code key. The user will call the dispatcher and give him/her the code key. The dispatcher then gives the user the generated lockout code.

9095 User Login**Process**

Select User and input a case-sensitive password.
Password is validated.

Initially only the User and Password fields are enabled along with with [OK] button. The New Password field as well as the [Exit] and [Change] buttons will be disabled (greyed out).

Once a valid password has been entered then enable the [Exit] and [Change] buttons and disable the [OK] button.

Navigation

[Exit] Perform 9997 Legal Disclaimer
Return to calling dialog

[Change] Enable the New Password field
Enable [OK] button and disable [Change] button

[OK] If entering Password then
 For Primary user selection compare input to
 RCT.Password(6)
 For Alternate user selection compare input to
 RCT.Password(7)
 If entry matches designated password or RCT.Password(5) then
 Write ULD User Log Detail
 Disable User, Password, and New Password input fields
 Disable the [OK] button and enable the [Exit] and [Change] buttons
 Remain at current dialog
 Else
 If RCT.PasswordRetry not exceeded OR entered invalid Supervisor password then
 MsgBox "Incorrect password!", OK*
 Remain at current dialog
 Else
 MsgBox "Retry limit exceeded. Administrative password required." OK*
 Remain at current dialog
 Populate User field with Supervisor and disable selection
 (Supervisor password must be entered to continue)
 Else (entering New Password)
 Update appropriate RCT.Password
 Write RTC Route Information Change record
 Disable User, Password, and New Password input fields
 Disable the [Change] and [OK] buttons and enable the [Exit] button
 Remain at current dialog

File.Field Name	Format	C	Instructions
ULD.UserType	ID 01/01	O	Populate first item (default selection) in drop down list with RCT.SalesRepNumber [for Primary user]. Popluate remainder of drop down list from the literals file with "Alternate" and then "Supervisor".
Password	AN 01/10	L	Echo an asterisk in place of each inputted character.
RTC.NewPassword	AN 01/10	O	

9097 User Login

Process:

Select User and input a case-sensitive password.
Password is validated.

RCT.Password[5], RCT.Password[6] and RCT.Password[7] may be used for entry based on the user that is selected.

If no password has been entered and user presses the OK or Exit buttons, display “the old password is required before the password can be changed.”

If the user saves a new password, only the employee password, RCT.Password[6], will be updated.

User will be required to change password every 90 days. The application tracks the last ten passwords used. The new password cannot be the same as any of the last ten.

Navigation

[Exit] If this screen is not invoked due to idle time
Perform 9997 Legal Disclaimer
Return to calling dialog

[OK] Validate the current user / password combination.
If valid
If user is not Supervisor
Enable the NewPswrd and Confirm fields
Allow user to change the password
If number of characters entered is less than six characters
Display “The new password must be at least six alpha numeric characters.”
Else
If user responds ‘Yes’ to ‘Change the password?’ message box
If the new password and the confirmed password match
Store new password if the RCT password is not empty
Return to calling dialog
Else
Display “The confirmation password is not the same as the new password.
Please re-enter the new password.”
Remain on current screen
Else
Remain on current screen
Else
Do not allow changes
If this screen is not invoked due to idle time
Perform 9997 Legal Disclaimer
Return to calling dialog
Else
If the number of attempts to enter a valid password exceeds RCT.PasswordRetry
Perform 9092 Unlock Login
Else
Display “Incorrect password” and remain on this screen.

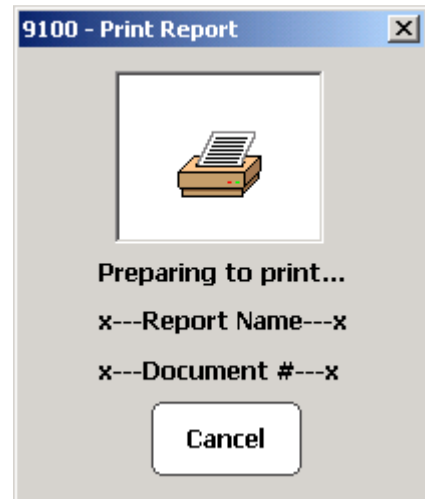
9100 Print Report**Process**

If telecommunications session in progress then
 MsgBox "Telecommunication session in progress.
 Printing not allowed!", OK*; return (incomplete)

Else
 Display 9100 Print Report where
 "x---Report Name---x" = the name of the current report being printed and
 if applicable "x---Document #---x" = DocumentPrefix + DocumentNumber.
 If errors during printing and using NPCP printer then go to 9101 NPCP Printer
 Error Recovery.
 If printing completed successfully then
 If CTH.TransactionType = 02 (Invoice) AND printing FINAL invoice AND
 RCT.GenerateHTMLInv > 0 then
 Generate HTML image of the invoice where filename =
 CTH.DocumentNumber + ".html"
 Return (Good)
 Else Return (Incomplete)

Navigation

[Cancel] Return (Incomplete)

**9101 NPCP Printer Error Recovery****Process**

MsgBox "Printer Error" or "FATAL Printer Error" & %t & "Error Number" & %n, Retry*, Cancel
 where %t = text of printer error message, %n = error number

Navigation

[Retry] Go to 9100 Print Report (<current report>)
 [Cancel] Return (Incomplete)

NPCP Error Handling

Printer Errors are classified as either fatal or non-fatal. Fatal errors are defined as those with error numbers 222-227 and 242-247 inclusive. All other errors are defined as non-fatal. The application produces two classes of reports: secured reports, which have an associated document number, and unsecured reports, which do not. Secured reports have three modes: draft, final, and duplicate. Draft and duplicate copies of secured reports are treated as unsecured; only final, original copies of numbered documents are considered secured. (Although duplicate secured reports have document numbers, they repeat the value of the original document number and are not unique).

In the event of a fatal error, the document will be reprinted from the first page upon selection of the [Retry] option by the user. Note that the document number, transaction date and time are controlled by the calling module and are not modified when the document is retried following a fatal error. Thus, it is possible to have the same document number, date and time appear on multiple reports but only one report will include the word "ORIGINAL".

If a non-fatal error occurs, then printing resumes from the point on the current page where the error occurred upon selection of the [Retry] option by the user. The NPCP protocol assures that no data is lost in the event of a non-fatal error.

If the user presses [Cancel] at the Printer Error Recovery dialog, then the report will be deemed incomplete. The calling module will handle this situation. For secured reports returned as incomplete, the calling module will generally revert to the same status as prior to printing. Most unsecured reports are optionally printed, and as such, the calling module may allow the user to continue without printing. (Exceptions exist for some End Day reports.) When printing of a report is mandatory, such as with an Invoice, the application will provide a method for queuing (delaying) the report until such time that the user can access a working printer. Queued reports are automatically finalized; the user cannot alter the report at the time it is printed. The report queue must be cleared prior to completing End Day Settlement by printing out all queued reports.

9102 Tcom Status**Process**

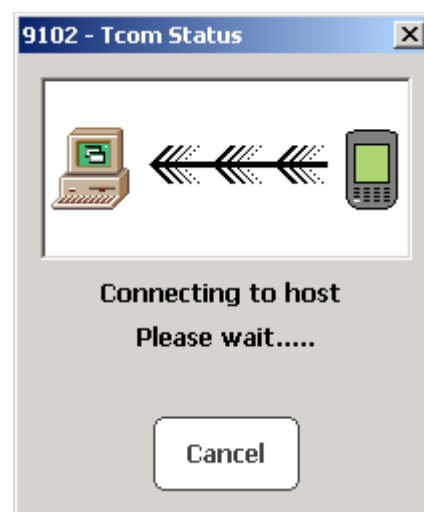
Bitmap shown at right is displayed when exporting. When importing, bitmap will be the same only with the arrows pointing to the handheld. A clock bitmap will be shown when waiting.

At completion of tcom, return to calling module.

If tcom completed successfully then Return (Good)
Else Return (Incomplete)

Navigation

[Cancel] Return (Incomplete)

**9110 Exit Function****Process**

MsgBox "The information you have just entered will be lost! Continue to exit?", Yes, No*

Navigation

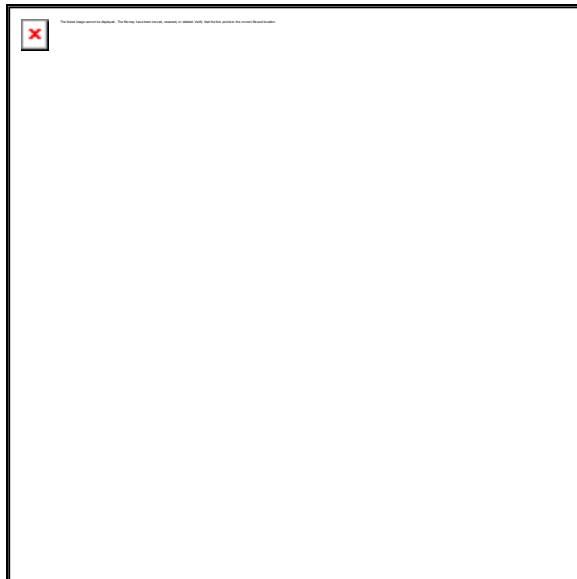
[Yes] Delete pending information, do not update completion status
[No] Remain at current dialog

9120 Route Notebook**Process**

Five pages; all identical. Tabs 1-5 labeled "1"... "5" respectively.
Scroll buttons will be displayed to enable access to all tabs.
Store user input as ink; no recognition. Contents of pages are not transmitted between handheld and host.

Navigation

[Exit] Return
[Width] Allows user to select width of ink line
[Erase] Change ink color to white, width = 4 pixels
[Color] Allows user to select ink color
[Clear] MsgBox "Clear this page?", Yes*, No
 If Yes response then
 Clear ink from page
 Remain at current dialog



File.Field Name	Format	C	Instructions
Internal Object (1..5)	binary	L	binary large objects for ink storage

9150 List Selection**Process**

x-----x literal = "Location" if called from 2200 Parts Transfer.

x-----x literal = "Reason" if called from 3007 New Work Orders Received, or 3013 More Icons NoSvc button, **or from 3002 More Icons NoDlv button.**

List populated with all records from List Selection (SEL) corresponding to ListTypeCode passed by calling module. User selects one item from list. For SEL.ListTypeCode = 6 (no service reasons) **and 33 (non-delivered reasons)**; if a reason has previously been entered then default to that reason, otherwise the first record in the list will be initially selected.

For SEL.ListTypeCode = 38 (SOD Time Reasons), then disable the [Cancel] button.

Navigation

[OK] Return ListIDCode for selected item to calling module

[Cancel] Return null parameter to calling module

File.Field Name	Format	C	Instructions
SEL.ListText	AN 01/20	I	Keyed from SEL.ListTypeCode passed from calling module

9230 Oversell Warning**Process**

Dialog called if transaction quantity greater than current route inventory (stock quantity). Transaction Qty field initially contains quantity entered by user in calling module.

Navigation

[OK] Write ITD or CTD record as appropriate, using Transaction Qty for output; Return

[Cancel] Return

File.Field Name	Format	C	Instructions
ItemNumber ITD.ItemNumber (or) CTD.ItemNumber	AN 01/-26	I O	Parameter passed from calling module
ITM.ItemDescription	AN 01/40	I	Keyed by ItemNumber to ITM.ItemNumber Use AID.ItemDescription if exists for selected RCT.Language/item
Quantity in Stock	N0 01/05	L	
ITD.ItemQuantity (or) CTD.ItemQuantity	N0 01/05	O O	Displayed and inputted values are always N0 01/05; if a quantity was downloaded via ORD.ItemQuantity (N2 01/08) then it will be truncated and displayed as N0 01/05


9260 Print Documents**Process**

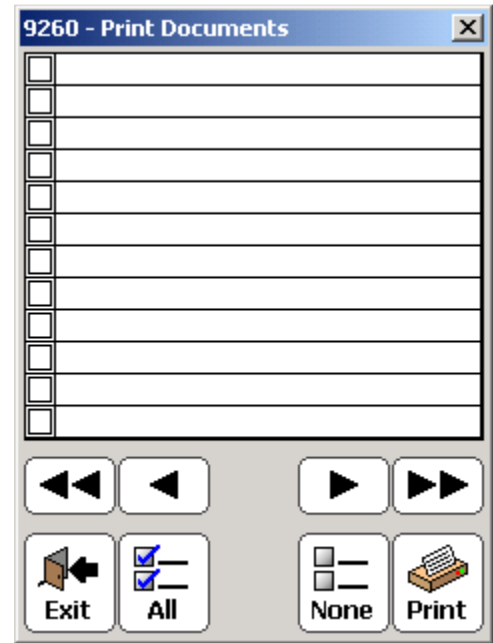
Populate table from list of all printed and/or delayed (queued) documents. Check boxes will initially be set for all documents marked as delayed and not yet printed. Check boxes will initially be cleared for all documents that have been printed. The user may print any combination of documents from this dialog by changing the check box settings.

If called from End Day then print using RCT.DepotPrinter value
Else use RCT.RoutePrinter value

Note: Arrow buttons/keys scroll table instead of moving highlight bar.

Navigation

[Exit] or [Esc] Return
[All] Set all Selection check boxes
[None] Clear all Selection check boxes
[Print] Perform 9100 Print Report (<selected list>)
Redisplay this dialog



File.Field Name	Format	C	Instructions	
Transaction Type	AN 01/20	L	Load Vehicle Report	if ITC.TransactionType = 01
			Transfer Report	if ITC.TransactionType = 02
			Unload Vehicle Report	if ITC.TransactionType = 03
			Parts Request Report	if ITC.TransactionType = 04
			Order	if CTH.TransactionType = 01
			Invoice Report	if CTH.TransactionType = 02
			Accounts Receivable	if CTH.TransactionType = 03
			Pickup Receipt	if CTH.TransactionType = 06 or 07
			Cash Receipt	if CTH.TransactionType = 09
Document Number	N0 12/12	I	From queued reports Concatenate CTH.DocumentPrefix + CTH.DocumentNumber	


9261 Print Survey Reports**Process**

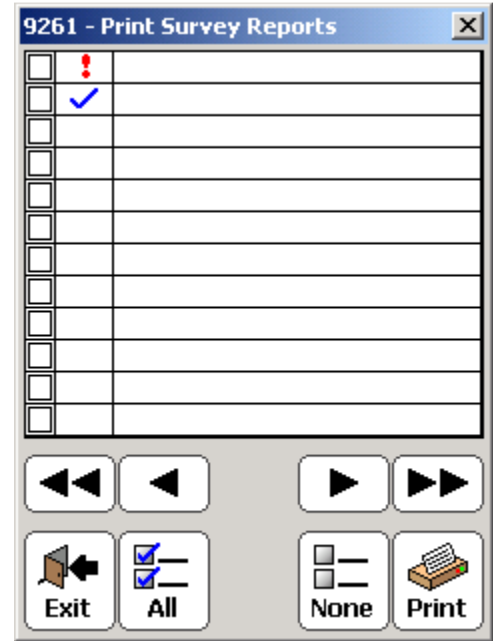
Populate table from list of all printed and/or delayed (queued) Survey Reports in ascending timestamp order (earliest to latest). This list will only contain Survey Reports for the current Survey call/session. Check boxes will initially be set for all surveys marked as delayed and not yet printed. Check boxes will initially be cleared for all Surveys that have been printed. The user may print any combination of Surveys from this dialog by changing the check box settings.

If called from End Day then print using RCT.DepotPrinter value
Else use RCT.RoutePrinter value

Note: Arrow buttons/keys scroll table instead of moving highlight bar.

Navigation

[Exit] or [Esc] Return
[All] Set all Selection check boxes
[None] Clear all Selection check boxes
[Print] Perform 9100 Print Report (<selected list>)
Redisplay this dialog



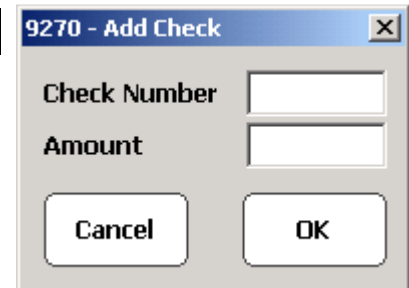
File.Field Name	Format	C	Instructions
Status Indicator	bitmap	L	Exclamation point bitmap if SRC.EnablePrint = 2 Checkmark bitmap if survey has been printed
SRV.SurveyPrompt	AN 01/20	I	Title text (SRV.SurveyRecType = 00)

9270 Add Check**Process**

User inputs check number and amount. No validation.

Navigation

[OK] Return, retaining changes
[Cancel] Return, discarding changes



File.Field Name	Format	C	Instructions
Check Number	N0 01/08	L	user input
Check Amount	S2 01/09	L	user input

9290 Add A/R Item**Process**

User inputs reference number (not validated) and amount.

Navigation

[OK] Return, retaining changes
 [Cancel] Return, discarding changes

File.Field Name	Format	C	Instructions
Reference Number	N0 01/12	L	user input
A/R Amount	S2 01/09	L	user input

9300 Print Numbered Document**Process**

If CTH.TransactionType = 05 (Delivery), 07 (Hook), or 08 (Spot/Drop) then bypass this popup and perform 9300A logic.

User may print a draft copy or print/delay a final report. If errors occur during printing, control automatically passes from 9100 Print Report to 9101 NPCP Printer Error Recovery. If called from the Customer Operations function, then the DELAY option is only enabled if CST.EnableDelayPrint = 1.

Navigation

[OK] Perform 9300A Print Numbered Document
 Return
 [Cancel] Return (Incomplete)

File.Field Name	Format	C	Instructions
ITC.DocumentPrefix + ITC.DocumentNumber (or) CTH.DocumentPrefix + CTH.DocumentNumber	N0 08/08 N0 04/04	I	Keyed from ITC.TransactionType; concatenate fields for display Keyed from CTH.TransactionType; concatenate fields for display
Document Name	AN 01/31	I	Load Vehicle Report Parts Transfer Report Unload Vehicle Report End of Day Truck Reconciliation Parts Request Report Order Invoice Credit Invoice Debit Invoice Accounts Receivable Pickup Receipt Cash Receipt

9300A Print Numbered Document**Process**

If CTH.TransactionType = 05 (Delivery) then
 If CST.EnableSigCaptureDelivery > 0 then perform 9330 Signature Name
 Return (Good)

Else if CTH.TransactionType = 07 (Hook) then
 If CST.EnableSigCaptureHook > 0 then perform 9330 Signature Name
 Return (Good)

Else if CTH.TransactionType = 08 (Spot/Drop) then
 If CST.EnableSigCaptureSpotDrop > 0 then perform 9330 Signature Name
 Return (Good)

Else if *PRINT Final Copy* option selected then
 If [CTH.TransactionType = 01 or 02 AND CST.EnableSigCaptureService = 2, 3, 4, or 5] OR
 [CTH.TransactionType = 06 AND CST.EnableSigCapturePickup = 2 or 3] then
 Perform 9330 Signature Name
 If returned (incomplete) then return (incomplete)
 MsgBox "Ready to Print", OK*
 Perform 9100 Print Report
 If return (Good) then
 If [CTH.TransactionType = 01 or 02 AND CST.EnableSigCaptureService = 1] OR
 [CTH.TransactionType = 06 AND CST.EnableSigCapturePickup = 1] then
 Perform 9330 Signature Name
 MsgBox "Print Duplicate Copy?", Yes, No*
 If Yes response then perform 9100 Print Report and remain at current dialog (MsgBox)
 Add report to Print Documents table marked as *PRINTED* and return (Good)
 Else return (Incomplete)

Else If *DELAY Final Copy* option selected then
 MsgBox "Are you sure you want to Delay Final Copy?", Yes, No*
 If Yes response then
 If [CTH.TransactionType = 01 or 02 AND CST.EnableSigCaptureService = 1, 2, 3, 4, or 5] OR
 [CTH.TransactionType = 06 AND CST.EnableSigCapturePickup = 1, 2, or 3] then
 Perform 9330 Signature Name
 Add report to Print Documents table marked as *DELAYED*
 If CTH.TransactionType = 02 (Invoice) AND RCT.GenerateHTMLInv > 0 then
 Generate HTML image of the invoice where filename = CTH.DocumentNumber + ".html"
 Return (Good)
 Else remain at current dialog


Else (*PRINT Draft Copy* option selected)
 Perform 9100 Print Report and return (Incomplete)

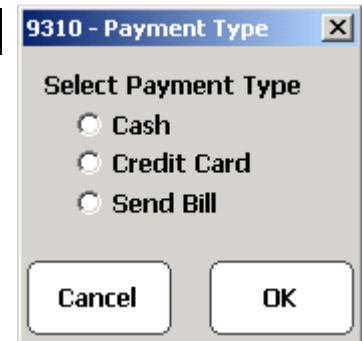
9310 Payment Type**Process**

User selects desired payment type. If JOB/CST.PaymentType = 1, then Cash radio button is pre-selected. If JOB/CST.PaymentType = 2, then Send Bill radio button is pre-selected.

Navigation

[OK] If JOB/CST.PaymentType = 1 and Send Bill selected then
 Perform 9090 Password Input (PayTypeChange)
 If PasswordStatus(Pass) then Return
 Else remain at current dialog
 Else Return

[Cancel] or [Esc] Return



File.Field Name	Format	C	Instructions
(none)			

9330 Signature Name

NEW SCREENSHOT NEEDED _ADD RADIO BUTTON for “No Customer Signature”

Process

This dialog allows the user to enter the name of the person whose signature will be captured on dialog 9340 Signature Capture. The default name displayed will be the Job contact. The user may optionally select the Customer contact or manually key in another name. If the Job contact name is blank then default to Customer contact name, if that is blank too then default to Other.

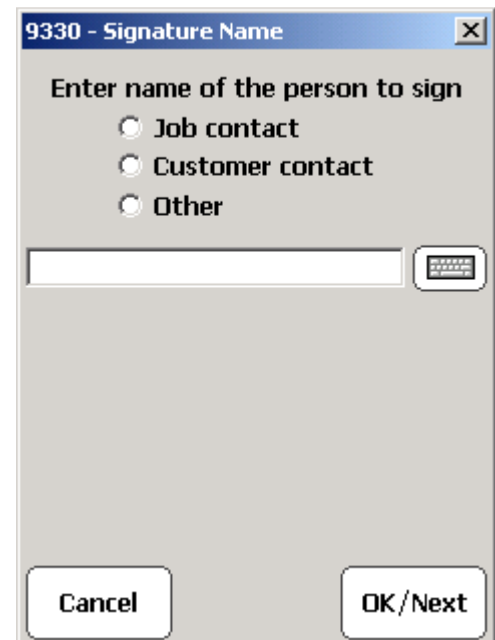
[Cancel] button enabled for service transaction types only.

If (CTH.TransactionType = 01 or 02) AND
 (CST.EnableSigCaptureService > 1) AND
 ("Job contact" has not been selected) then
 Display [Next] button

Else
 Display [OK] button

Navigation

[keyboard] Perform 9010 Keyboard and overlay on dialog
 [Cancel] Return (incomplete)
 [OK] Perform 9340 Signature Capture
 [Next] Perform 9331 Signature Information



File.Field Name	Format	C	Instructions
JOB.Contact or CST.CustomerContactName	AN 01/40 AN 01/30	I O	If “No Customer Signature” radio button is selected. “NCSA” is uploaded in the CTH.SignatureName field.
CTH.SignatureName			

9331 Signature Information**Process**

This dialog allows the user to enter additional information about the person signor. This information is printed on Invoice/Order Reports and Alternate Invoice/Order Reports, but will not be uploaded.

If Customer contact selected then populate address fields with associated SEQ Work Sequence File fields. If the SEQ data is blank then use the associated CST Customer Master File fields. User will have the option to update populated fields, but the updates will only be retained for printing purposes (they will not be uploaded.)

If Other selected then address/phone fields will initially be blank.

Navigation

[keyboard] (top 6) Perform 9010 Keyboard and overlay on dialog
 [keyboard] (btm 2) Perform 9400 Multi-Line Edit box
 [Cancel] Return to 9330 Signature Name (incomplete)
 [OK] If CST.EnableSigCaptureService = 4 or 5 AND
 signor relationship or reason not selected yet then
 MsgBox "Signor relationship or reason not selected yet!", OK*
 Remain at current dialog
 Else
 Perform 9340 Signature Capture

File.Field Name	Format	C	Instructions
CST.CustomerContactName or Entered text	AN 01/40 AN 01/30 AN 01/20	O	
SEQ.Address1 or CST.CustomerAddress1	AN 01/40	O	See process notes above
SEQ.Address2 or CST.CustomerAddress2	AN 01/40	O	See process notes above
SEQ.City or CST.CustomerCity	AN 01/30	O	See process notes above
SEQ.State or CST.CustomerState	AN 01/10	O	See process notes above
SEQ.PostalCode or CST.CustomerPostalCode	AN 01/15	O	See process notes above
CST.CustomerPhoneNumber	AN 01/20	O	
SEL.ListText	AN 01/20	I O	Populate drop down list from SEL.ListTypeCode=34 (signor relationship).
SEL.ListText	AN 01/20	I O	Populate drop down list from SEL.ListTypeCode=35 (signor reason)

9340 Signature Capture**Process**

Prior to allowing access to this dialog:

If [NOT called from Survey] AND
 [if SEL.ListTypeCode = 29 (signature cond.) records exist] then
 Perform 9341 Signature Capture
 If return (Good) then allow access to this dialog
 Else return (Incomplete)

Sign on bitmap positioned within child window. [Flip] button allows positioning of signature window for left or right handed signing. Accepted signature data stored in database as binary large object. Disable [Back] button if transaction already printed and confirmed.

If called from Survey then only display the signature window, Date and Time fields, and the navigation buttons.

If "No Customer Signature" was selected on screen 9330, then display "NCSA" on ink to indicate no customer signature is available. The Flip and Clear buttons will not be available. Allow them to move forward in flow without signing. Upload bmp with "NCSA" for the signature. This will also print on reports that require the signature to print.

Navigation

[Back] Return to 9330 Signature Name
 [Flip] Move child window to opposite side of dialog; **Not available if "NCSA" is displayed on ink capture area.** reposition bitmap (with "X" at top if window positioned on left or with "X" at bottom if window positioned on right); remain at current dialog
 [Clear] Remove all ink; remain at current dialog **Not available if "NCSA" is displayed on ink capture area.**
 [OK] If CST.EnableSigCapture... = 3 or 5 AND ink not present then
 MsgBox "Signature capture is required!", OK*
 Clear MsgBox and remain at current dialog
 Else save ink to database; return (Good)
 [Esc] Return (Incomplete)

File.Field Name	Format	C	Instructions
CTH.SignatureFileName or SVD.SurveyResponse	AN 11/11 AN 16/16	O	For Invoice signature: "sig" + CTH.DocumentNumber + ".bmp" For Survey signature: "sig" + "yymmddhhmmss" + ".bmp"
CTH.TransactionDate or SVD.SurveyDate	DT 10/10	I O	
CTH.TransactionTime or SVD.SurveyTime	TM 08/08	I O	
CTH.DocumentPrefix + CTH.DocumentNumber	N0 08/08 N0 04/04	I O	Concatenate fields for display. Not used if from Survey.
CTH.BalanceDueAmount	S2 01/09	I O	Do not display literal and field if CTH.TransactionType = 05 or if from Survey
Transaction Type	AN 01/14	L	"ORDER" if CTH.TransactionType = 01 "INVOICE" if CTH.TransactionType = 02 and CTH.SplitTransaction = 0 "CREDIT INVOICE" if CTH.TransactionType = 02 and CTH.SplitTransaction = 1 "DEBIT INVOICE" if CTH.TransactionType = 02 and CTH.SplitTransaction = 2 "A/R RECEIPT" if CTH.TransactionType = 03 "DELIVERY" if CTH.TransactionType = 05 "PICKUP" if CTH.TransactionType = 06 "HOOK" if CTH.TransactionType = 07 "SPOT/DROP" if CTH.TransactionType = 08

			Not used if from Survey
Non-Billable	AN 01/12	L	"NOT BILLABLE" if CTH.Billable = 0 blank if CTH.Billable = 1 Do not display if CTH.TransactionType = 05 or if from Survey
PRO Number	AN 01/18	I	Only display if CTH.TransactionType = 05 Populated from CTH.JobNumber.
Delivery Exception	AN 01/20	I	Only display if CTH.TransactionType = 05 and an exception exists. Populated from OCM.ResolutionCode, converting the exception code to its corresponding text phrase.
CTH.SignatureName	AN 01/20	O	Not used if from Survey

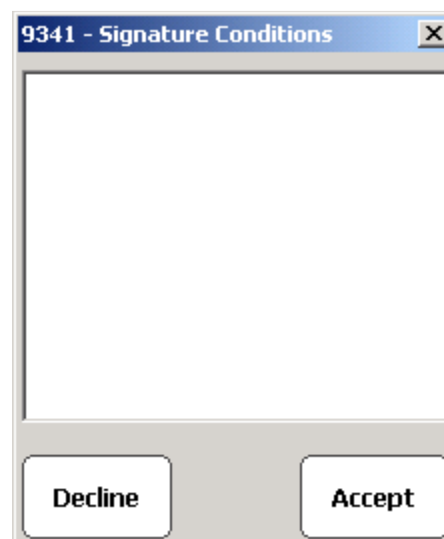
9341 Signature Conditions

Process

User views signature conditions and either accepts or declines them.

Navigation

- [Accept] Clear this dialog from the display; return (Good)
Allow access to 9340 Signature Capture
- [Decline] Clear this dialog from the screen; return (Incomplete)
Disallow access to 9340 Signature Capture



File.Field Name	Format	C	Instructions
SEL.ListText	AN 01/20	I	Select all with SEL.ListTypeCode = 29 (signature conditions)

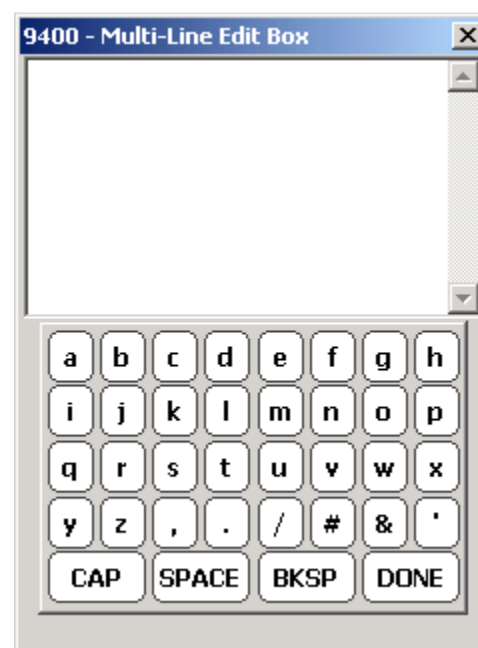
9400 Multi-Line Edit Box

Process

Used in conjunction with 9010 Keyboard to allow user input of longer messages. Calling module controls maximum length of response field. Input text field passed back to calling module.

Navigation

None (Navigation controlled by 9010 Keyboard.)



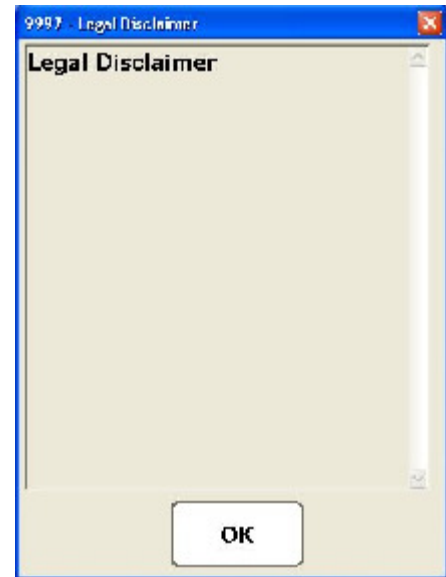
File.Field Name	Format	C	Instructions
Input Text	AN 01/??	O	Field length determined by parameter passed from calling module.

9997 Legal Disclaimer**Process**

Display Legal Disclaimer

Navigation

[OK] Return (Return to what called 9095 User Login)



9998 Status

Process

Navigation

None

