

ORDER PROCESSING OPTIONS2

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ORDER PROCESSING OPTIONS

Master Purchase Orders

Sometimes customers have an inbound PO that is spread out over multiple trucks/containers, especially when they deal with import containers or manufacturing companies. Also, customers may use a blanket PO concept, where there is one PO and multiple inbound shipments against that PO. The Master PO function allows you to create a Master PO and child receipts that will update the master.

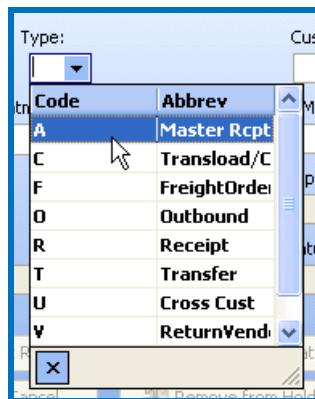
When a Master PO is created:

- A PO is required
- The Master PO order cannot be taken off of hold. The order can only be closed.
- The order can be used as a direct receipt order.

Entering a Master PO

To create a Master PO:

- Select Edit from the menu bar. Click the Orders and Order Maintenance options.
- Click the insert record button and select Order Type A - Master Rcpt.



- Enter a Customer ID and the Cust PO. These are required fields.

The screenshot shows the 'Order 370239-1' window. At the top, there's a toolbar with buttons for Save Changes (checkmark), Cancel, and other functions. Below the toolbar, the 'Order Info' tab is selected, displaying fields for Order ID (370239), Ship ID (1), Type (A), Customer ID (INA), Cust PO (M18999), Reference, To Facility (ZET), Appointment Date/Time, RMA, Bill of Lading, Status (Hold), Status by (ANN), Status Update, Priority (Normal), Supplier (D8837175), and One-Time checkbox. Buttons for Print Receiver, Reprint PO Confirmation, Print Order Check, Print Pack List, Print COA, View Attachment Tab, View Plates, and Create Overs are also present. A legend at the bottom includes Hazardous, Over, Short, and Cancelled. A message 'Drag a column header here to group by that column' is displayed above the grid. The grid itself has columns for Item, Lot Number, Order Qty., UOM, Rcvd Qty., Ship Qty., Entered UOM, Entered Qty, and Ordered Item. A message '<No data to display>' is shown in the grid area. At the bottom, a status bar shows 'LINUX2TEST Facility ZET (Last Update by at)'.

- Enter any other applicable fields and click the save changes button . The Item Info screen appears:

The screenshot shows the 'Order 370239-1 Item' window. It features a toolbar with buttons for Order..., Cancel, and others. The 'Item Info' tab is selected, showing fields for Ordered Item, Lot #, Quantity, UOM, Lbs., and Kgs. Below this, there are fields for Item, Description, and UOM. Status fields show Active and ANN. A timestamp of 10/10/2013 10:24:21 AM is displayed. Buttons for Inventory and Plates are available. A 'Receipt' tab is selected, showing a grid for Received - Total, Received - Good, and Received - Damaged. The grid includes columns for Ordered, Quantity, Lbs., Kgs., Cube, and Amount. At the bottom, fields for Consignee SKU, Child Work Order ID, Overpick Quantity, Minimum Days to Expiration, and a status bar showing 'LINUX2TEST Facility ZET (Last Update by at)' are visible.

- Enter the items that will be received on the Master PO. When you are finished entering items, close the window.

Note: The Release from Hold button as well as several other of the usual order receipt buttons and fields don't appear on the Master PO order.

The screenshot shows the Zethcon Order Processing software interface. The main window title is "Order 370239-1 for Customer INA". The top menu bar includes tabs for Order Info, Summary, Comments, Addl. Info, Receiving, History, and Billing. The Order Info tab is selected. The main area contains fields for Order ID (370239), Ship ID (1), Type (A), Customer ID (INA), Cust PO (M18999), Reference, To Facility (ZET), Appointment Date/Time, RMA, Bill of Lading, Status (Hold), Status by (ANN), Status Update (10/10/2013 10:24:21 AM), Priority (Normal), Supplier (08837175), One-Time checkbox, Load, Stop, Shipment, Load Status, Load Appointment Date/Time, and Wave. Below these are buttons for Print Receiver, Reprint PO Confirmation, Print Order Check, Items..., Cancel, Print COA, View Attachment Tab, View Plates, and Create Overs. A legend at the bottom indicates Hazardous, Over, Short, and Cancelled status indicators. A grid table below lists received items with columns for Item, Lot Number, Order Qty., UOM, Rcvd Qty., Ship Qty., Entered UOM, Entered Qty, Ordered Item, and Status. The grid shows entries for PEANUT TAFFY, PINK TAFFY, PURPLE TAFFY, and TAFFY. At the bottom of the grid, summary values are shown: 4, 1600, 0, 0. A status message at the bottom states "LINUX2TEST Facility ZET (Last Update by ANN at 10/10/2013 10:24:21 AM)".

Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item	Status
PEANUT TAFFY		300	Case			Case	300	PEANUT TAFFY	Active
PINK TAFFY		300	Case			Case	300	PINK TAFFY	Active
PURPLE TAFFY		400	Case			Case	400	PURPLE TAFFY	Active
TAFFY		600	Case			Case	600	TAFFY	Active

Entering a Child Receipt for a Master PO

- Select Edit from the menu bar. Click the Orders and Order Maintenance options.
- Click the insert record button and select Order Type R - Receipt. Enter the customer ID. These fields are required.
- Enter the Master Receipt order number in the Master Receipt field. You can double click in the field or click the ellipsis button [...] to access the Order Lookup feature.
- Click the save changes button [checkmark]. The Customer PO is automatically populated with the Master PO number.

The screenshot shows the Zethcon Order Processing software interface. The main window title is "Order 370240-1". The top menu bar includes "Order Info", "Summary", "Comments", "Ship To", "Addl. Info", "Receiving", "Ship Dates", "History", and "Billing". Below the menu is a toolbar with various icons for printing and managing the order. The main data entry area contains fields for Order ID (370240), Ship ID (1), Type (R), Customer ID (INA), Cust PO (M18999), Reference, To Facility (ZET), Appointment Date/Time (10/11/2013), RMA, Bill of Lading (BL0757502), Master Receipt (370239-1), Status (Hold), Status by (ANN), Status Update, Priority (Normal), Supplier, and Load, Stop, Shipment, Load Status, Load Appointment Date/Time. There are also buttons for "Print Receiver", "Reprint PO Confirmation", "Print Order Check", "Print COA", "Cancel", "Remove from Hold", "Print Pack List", "View Attachment Tab", "View Plates", and "Create Overs". A legend at the bottom left shows "Hazardous" (yellow), "Over" (green), "Short" (red), and "Cancelled" (grey). A message "Drag a column header here to group by that column" is displayed above the grid. The grid itself has columns for Item, Lot Number, Order Qty., UOM, Rcvd Qty., Ship Qty., Entered UOM, Entered Qty, Ordered Item, and Status. A message "<No data to display>" is shown in the grid area. At the bottom, there is a status bar with "LINUX2TEST Facility ZET (Last Update by at)".

Note: Once the child receipt has been taken off hold, its master receipt can no longer be changed.

- The Item Info screen appears. Enter the items for the receipt.

If an item is entered on the child receipt and it does not exist on the master receipt, a warning message appears.



- Click Yes to add the item to the order.

Note: The line items will not automatically be added to the master receipt during order entry. They will be added when the order is received.

Receiving an Order with a Master PO

When a receipt order that has a Master PO is received, during receiving:

- Quantity/weight/cube changes which occur on the child receipt are reflected in the master receipt, i.e., item quantities received on a child order get posted to both the master and child.
- New line items added to the child receipt are added to the master. These changes can occur in either 1-Step receiving, ASN receiving, Damaged Items, Receive Load, Receive Order and Inventory Adjustments.

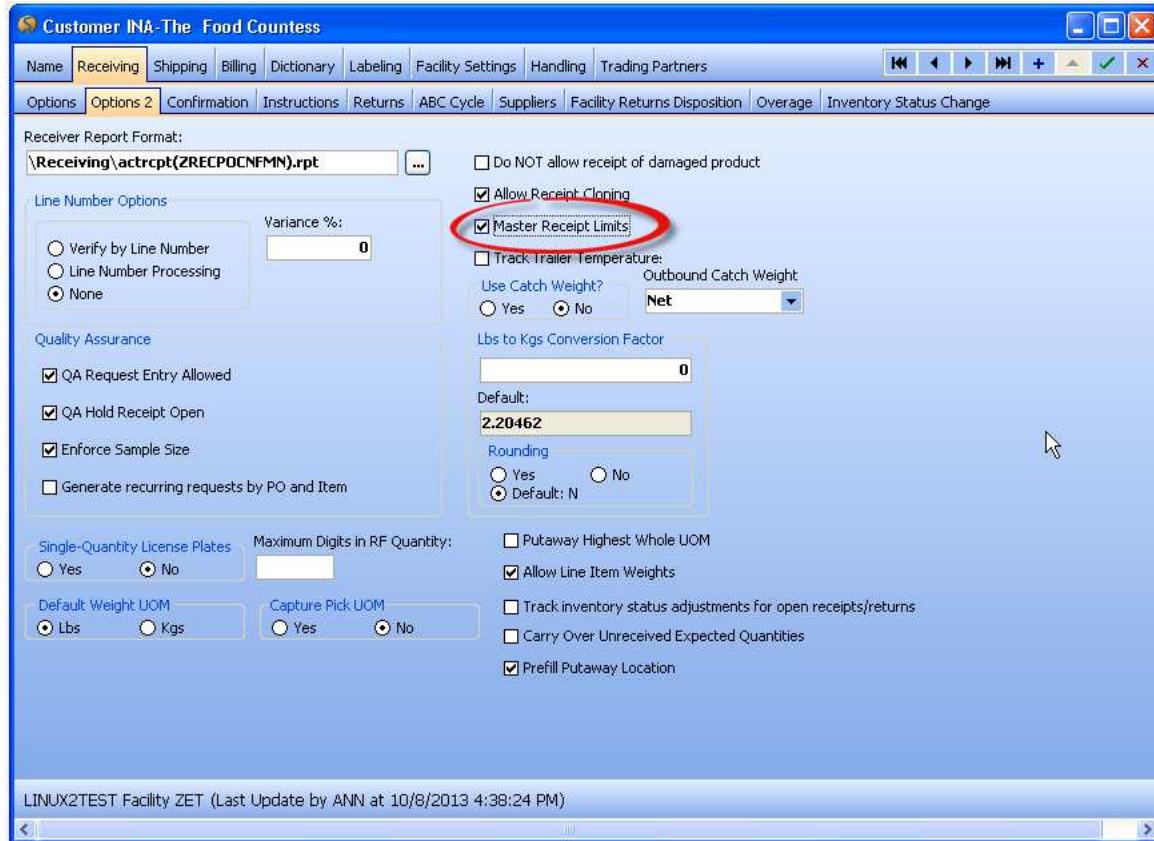
Setting a Master Receipt Limit

You can configure the system so that the sum of the quantities received on the child receipts doesn't exceed the quantities on the master PO.

To do this:

- Select the Setup option from the menu bar and select Customer and Customer Maintenance.
- Make sure that the customer you want to edit is selected and click the Receiving Options - 2 tab.
- Click the Master Receipt Limits check box. Click the save changes button .

All cloned receipts are children of the master receipt and the sum of received inventory cannot exceed the master receipt totals. The master limit can only be overridden by special security authorized user.



Billing

Billing for the child receipts works the same as a regular receipt. No billing is generated for the Master Receipt.

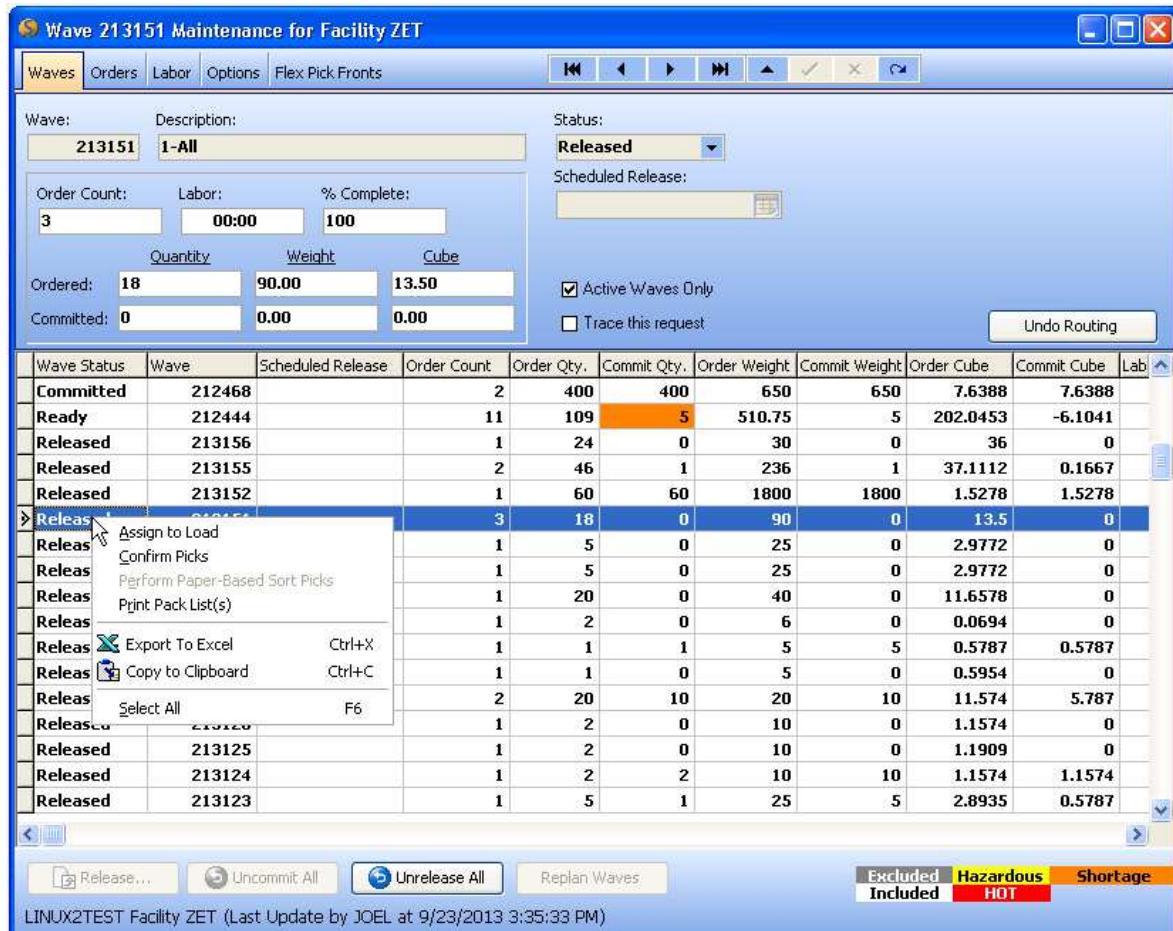
Pick Confirmation by Wave

The Pick Confirmation by Wave Release functionality provides a method to confirm all the picks in a wave without using the RF interface. This functionality is needed in cases where installing an RF network is not realistic (temporary storage facility) and a wave needs to be picked without RF intervention. This process automatically creates plates as needed.

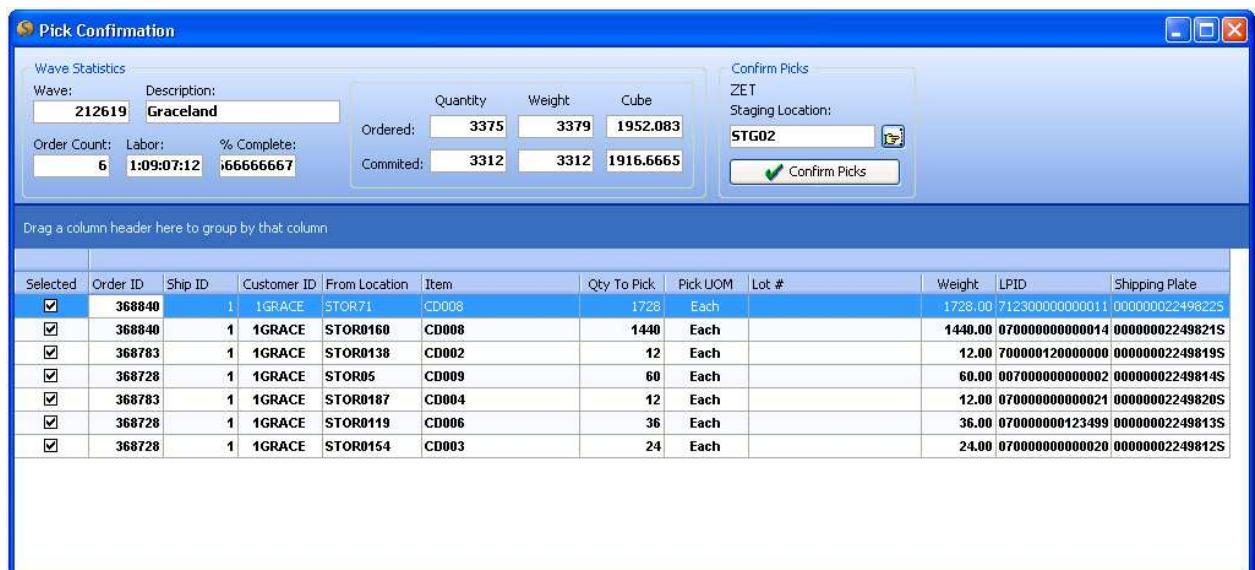
Note: This function is not applicable for Aggregate Inventory Customers or Consolidated Orders.

Pick Confirmation

- On the Wave Release screen, right click on the released wave that you want to process. Only waves in Released status may be selected. A pop-up appears:

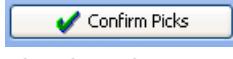


- Click Confirm Picks. The Pick Confirmation screen appears:



- Click on the check boxes in the Selected column to include/exclude specific orders in this process.

- Enter a Staging Location if a location hasn't been entered. You can double click on the field or use the Lookup button  to select a staging location from a list.

- Click the Confirm Picks button . The selected picks are performed. The picks are staged in the staging location you entered.

The system displays the Pick Confirmation Results screen that details the picks and their status.

Pick Confirmation Results						
Wave: 212619						
Tasks Picked & Staged = 6						
Order ID	Customer	Item	Qty	UOM	Location	Status
✓ 368840-1	1GRACE	CD008	1728	Each	STOR71	Picked & Staged.
✓ 368840-1	1GRACE	CD008	1440	Each	STOR0160	Picked & Staged.
✓ 368783-1	1GRACE	CD002	12	Each	STOR0138	Picked & Staged.
✓ 368728-1	1GRACE	CD009	60	Each	STOR05	Picked & Staged.
✓ 368783-1	1GRACE	CD004	12	Each	STOR0187	Picked & Staged.
✓ 368728-1	1GRACE	CD006	36	Each	STOR0119	Picked & Staged.

Tasks with Errors = 1						
Order ID	Customer	Item	Qty	UOM	Location	Status
✖ 368728-1	1GRACE	CD003	24	Each	STOR0154	Plate not picked: Lot Number Required.

Any short picks, overrides, incorrect locations, lot entry etc. will have to be performed by the normal CRT Paper Picking function. See User Manual Chapter 12 for more information.

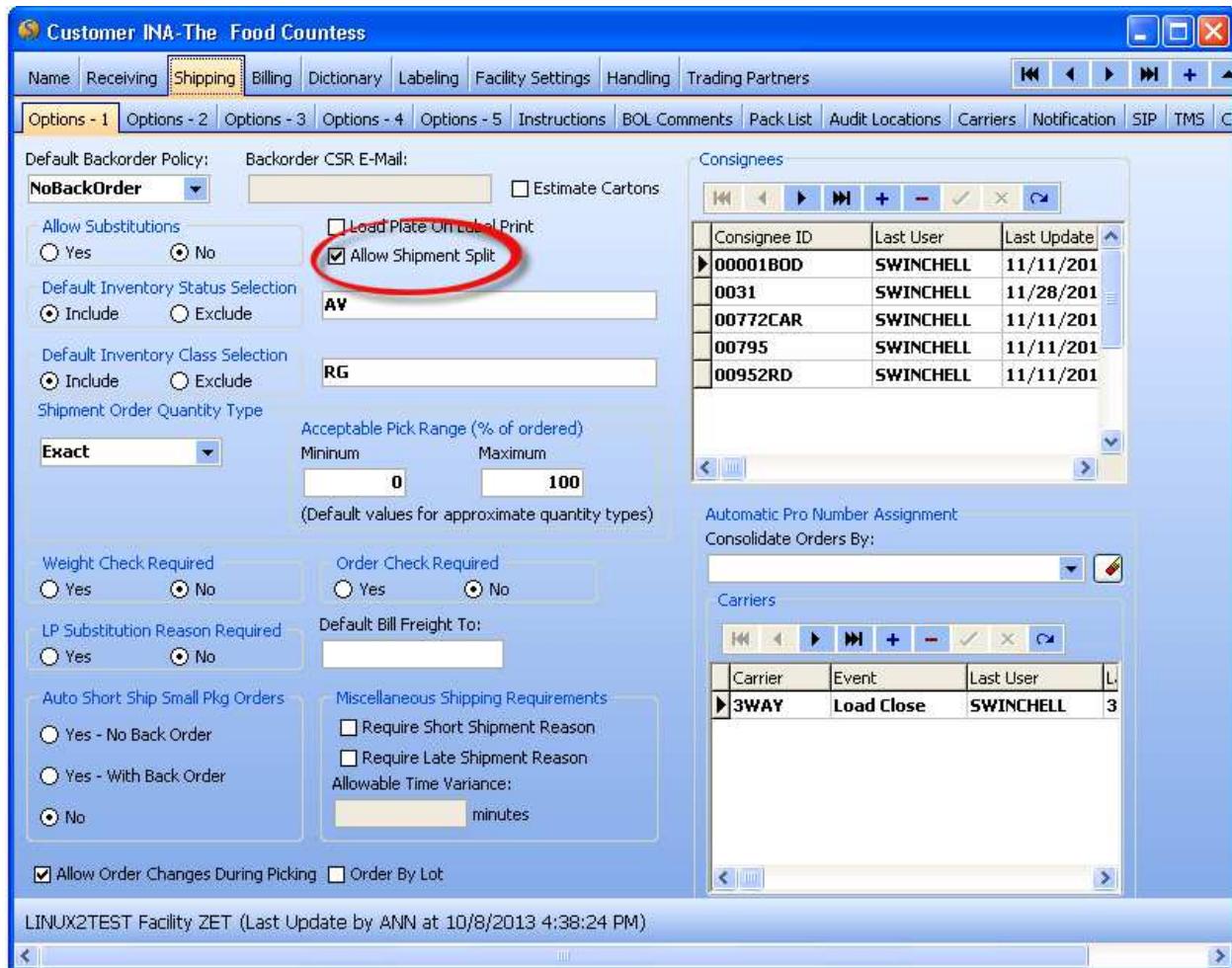
Shipment Splitting

Synapse allows you to split an outbound order into multiple shipments. Only orders that are in Committed status or less and haven't been assigned to a load can be split. This function is customer specific.

Customer Set Up

- Select Setup from the menu bar and click on Customer and Customer Maintenance.

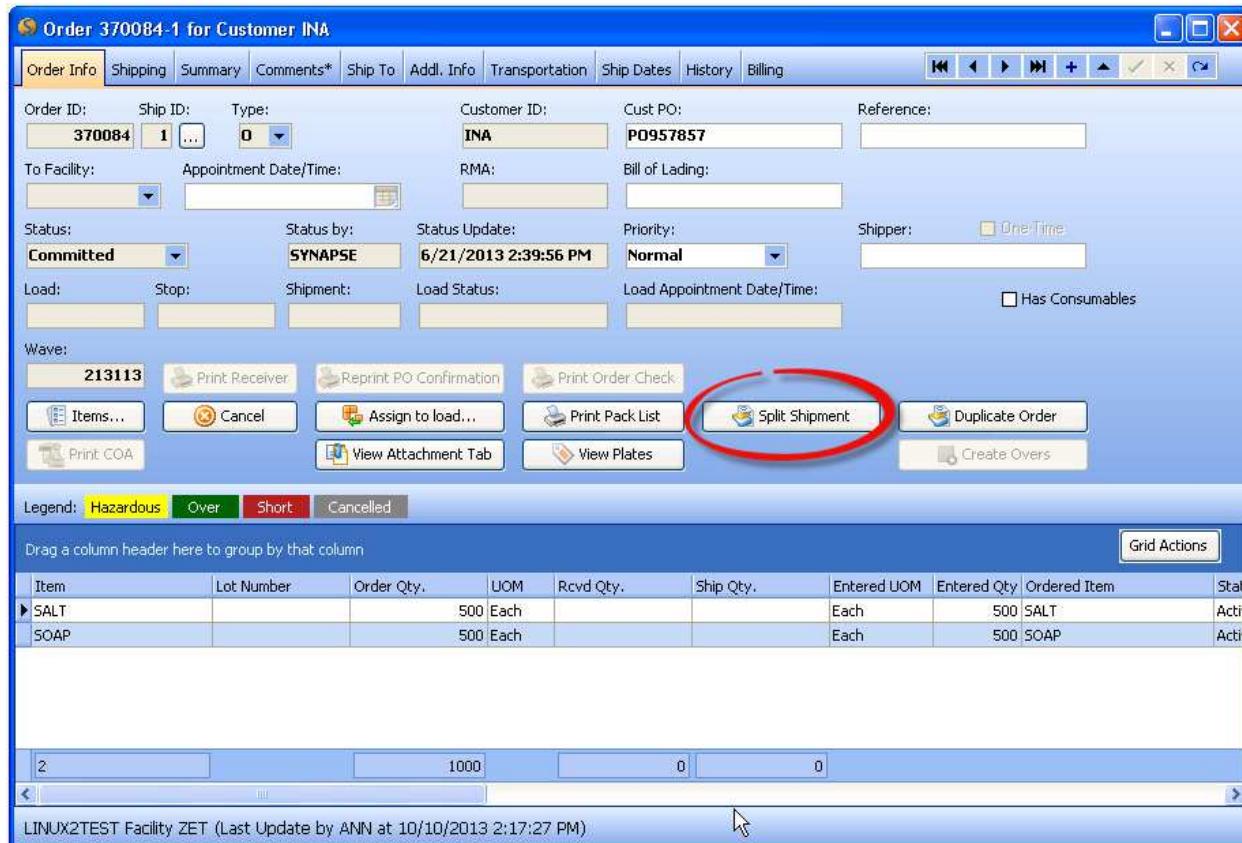
- Make sure you have selected the customer that you want to edit and select the Shipping Options – 1 tab.



- Check the Allow Shipment Split check box. Click the save changes button .

Splitting a Shipment

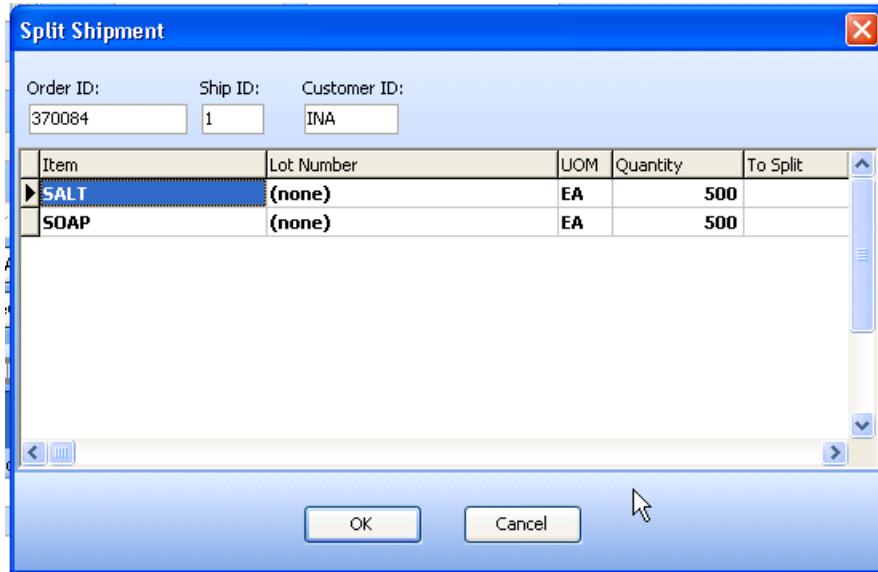
On the Order Screen, a button Split Shipment button is available when the feature is activated for the customer and you have security to perform the function.



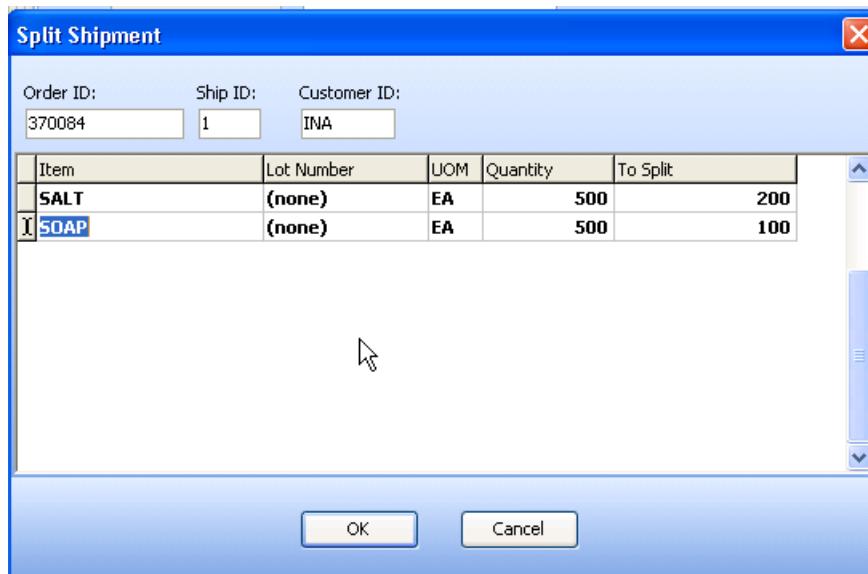
- Click the Split Shipment button . A confirmation window appears:



- Click Yes to split the order. The Split Shipment window displays:



- Enter the quantities for each item that you want to split to the new shipment in the To Split field. The original order lines will be reduced by the split quantity. If the entire line is split, the order shipment quantity changes to zero.



- Click OK. A confirmation window appears:



- Click Yes. A new shipment (with the next incremental number) for the order is created. The new order shipment status is Hold and any cancelled order lines are made active.

Order 370084-3 for Customer INA

Order Info		Shipping	Summary	Comments*	Ship To	Addl. Info	Transportation	Ship Dates	History	Billing
Order ID:	Ship ID:	Type:		Customer ID:	INA	Cust PO:	P0957857		Reference:	
370084	3	0								
To Facility:		Appointment Date/Time:		RMA:		Bill of Lading:				
Status:		Status by:	ANN	Status Update:	10/10/2013 2:31:20 PM	Priority:	Normal	Shipper:	One-Time	
Hold										
Load:	Stop:	Shipment:		Load Status:		Load Appointment Date/Time:				<input type="checkbox"/> Has Consumables
Wave:										
<input type="button" value="Print Receiver"/> <input type="button" value="Reprint PO Confirmation"/> <input type="button" value="Print Order Check"/> <input type="button" value="Items..."/> <input type="button" value="Cancel"/> <input type="button" value="Remove from Hold"/> <input type="button" value="Print Pack List"/> <input type="button" value="Split Shipment"/> <input type="button" value="Duplicate Order"/> <input type="button" value="Change Order Type"/> <input type="button" value="Print COA"/> <input type="button" value="View Attachment Tab"/> <input type="button" value="View Plates"/> <input type="button" value="Create Overs"/>										
Legend: Hazardous Over Short Cancelled										
<input type="button" value="Grid Actions"/>										
Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item	Stat	
SALT		200	Each			Each	200	SALT	Activ	
SOAP		100	Each			Each	100	SOAP	Activ	

LINUX2TEST Facility ZET (Last Update by ANN at 10/10/2013 2:31:19 PM)

Security

The security must be defined for you to be able to clone or split an order. The minimum setting of security for these features is Edit.

Split Orders

This feature allows partially loaded orders to be split into another shipment. The new shipment then can be placed on a second load.

Split Order Setup

The system default option, SPLITORDERS must be set to a 'Y' for the split order option to be in effect.

- Select Setup from the menu bar and select Default Values. The Default Values screen appears.
- Use the navigation bar or scroll bar to locate the SPLITORDERS parameter.
- Update the value to Y and click the save changes button .

Default Values

Parameter: SPLITORDERS Value: Y

Parameter	Value	Last User	Last Update
SMTP_DOMAIN	zethcon.com	SWINCHELL	3/17/2010 3:46:21 PM
SMTP_HOST	smtp.zethcon.com	ZETHCON	7/26/2010 1:45:31 PM
SMTP_PASS	zethcon	ZETHCON	7/26/2010 1:47:02 PM
SMTP_PORT	25	SWINCHELL	3/17/2010 3:48:10 PM
SMTP_USER	synapse@zethcon.com	ZETHCON	7/26/2010 1:46:30 PM
SPLITORDERS	Y	DJ	6/11/2013 7:55:48 AM
SPOILAGEREASON	WD	SUP	6/8/2013 7:24:12 PM
SUMMARIZEACCESSORIALIMIT	100	SYSTEM	1/1/2000
SUPPRESSANNIVERSARYDATE	N	SUP	6/8/2013 7:24:12 PM
TRACEFREIGHTBILLING	N	SUP	11/17/2011 3:25:35 PM
TRAILERLOOKUPDATE1	EXPECTED_TIME_IN	SYNAPSE	3/21/2011 5:35:08 AM
TRAILERLOOKUPDATE2	GATE_TIME_IN	SYNAPSE	3/21/2011 5:35:08 AM
TRAILERLOOKUPDATE3	EXPECTED_TIME_OUT	SYNAPSE	3/21/2011 5:35:08 AM
TRAILERLOOKUPDATE4	GATE_TIME_OUT	SYNAPSE	3/21/2011 5:35:08 AM
UPGRADEREPLONRELEASE	Y	SYSTEM	1/1/2000
VICSBNNUMBERAUTOGEN	N	SUP	4/14/2010 10:19:58 AM
WEBPDFPATH	F:\Synapse2\qa 2.5\PDFBOL	ZETHCON	4/20/2012 4:43:19 PM
invoicer	65008	1011EMR	1/31/2012 10:09:10 AM

LINUX2TEST Facility ZET (Last Update by DJ at 6/11/2013 7:55:48 AM)

Splitting an Order

When an outbound load is closed, the system verifies that each order on the load is fully picked and loaded. If it is not all loaded and the split orders option is enabled:

- A split order confirmation window appears:

Load 201644

Load Info Comments Summary Pallet Tracking Pro Numbers Addl Info Load Tracking

Load:	201644	Carrier:	AANM	Trailer:		Stage Location:		Appointment Date/Time:				
Type:	OutCustomer	Bill of Lading:		Seal:		Door Location:	DR44	Shipment Type:				
Receipt Date/Time:		Pro Number:		Shipment Terms:		Late Shipment Reason:						
Status:	Loading	Status by:	ANN	Status Update:	10/10/2013 3:44:03							
<input type="button" value="View Stops"/> <input type="button" value="Close"/>			<input type="button" value="View"/> <input type="button" value="Cancel Load"/>									
<table border="1"> <tr> <td>Cancelled</td> <td>Hazardous</td> </tr> <tr> <td>Variance</td> <td>HOT</td> </tr> </table>									Cancelled	Hazardous	Variance	HOT
Cancelled	Hazardous											
Variance	HOT											
Orders		Stops										
Stop	Shipment	Stop Status	Stop Stage Loc.	Order ID	ShipID	Order Status	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	To Facility	Order Sh.
1	1	Loading		369291	1	Loading	INA	19	0	11		00001B

LINUX2TEST Facility ZET (Last Update by ANN at 10/10/2013 3:44:03 PM)

Confirm

Not fully loaded. Split orders for another load?

- Click Yes to split the order.

A new shipment is created for the order and all the remaining unloaded demand is moved to the new shipment. This following is included in the move to the new shipment:

- Plates
- Shipping Plates
- Commitments
- Tasks
- Subtasks
- Batch Tasks

Split Order History

The order history for the original order shipment shows that it was split. The order history for the new order shipment shows that it was created from splitting the original order.

The original order shipment's history:

The screenshot displays a software application window titled "Order 369291-1 for Customer INA". The window has a toolbar with various icons and tabs including "Order Info", "Shipping", "Summary", "Comments", "Ship To", "Addl. Info", "Transportation", "Ship Dates", "History" (which is selected), and "Billing". Below the toolbar is a grid of historical data entries:

Change Date	User ID	Action	Plate	Item	Lot	Short Message
10/10/2013 3:45:36 PM	ANN	CHANGE				Change order fields: prono=[(null)]->[98689798595]
10/10/2013 3:46:03 PM	3TRF1	Quantity Change		CAKE	777	Quantity decrease from 1 to 0 (-1)
10/10/2013 3:46:03 PM	3TRF1	CHANGE DTL		CAKE	777	Change order detail fields: weightorder=[12]->[0]
10/10/2013 3:46:03 PM	ANN	Quantity Change		CAKE	876	Quantity decrease from 8 to 1 (-7)
10/10/2013 3:46:03 PM	ANN	CHANGE DTL		CAKE	876	Change order detail fields: weightorder=[96]->[0]
10/10/2013 3:46:03 PM	ANN	CHANGE				Change order fields: orderstatus=[7]->[8]
10/10/2013 3:46:03 PM	ANN	Split Order				Order Split to 369291/2
10/10/2013 3:46:25 PM	ANN	CHANGE				Change order fields: orderstatus=[8]->[9], dateshipp
10/10/2013 3:46:25 PM	ANN	Order Closed				Order Closed

Below the grid, a message states "Count = 31" and "Order Split to 369291/2". A legend at the bottom indicates: Hazardous (yellow), Over (green), Short (red), and Cancelled (grey). A "Grid Actions" button is also present.

At the bottom of the screen, a status bar displays "LINUX2TEST Facility ZET (Last Update by ANN at 10/10/2013 3:46:25 PM)".

The new order shipment's history:

Order 369291-2 for Customer INA

Change Date	User ID	Action	Plate	Item	Lot	Short Message
10/10/2013 3:46:03 PM	ANN	ADD				Add Order Header source: CRT
10/10/2013 3:46:03 PM	ANN	CHANGE				Change order fields: stopno=[1]->[(null)], shipno-
10/10/2013 3:46:03 PM	ANN	ADD DTL		CAKE	777	Add Order Detail, Qty:1
10/10/2013 3:46:03 PM	ANN	ADD DTL		CAKE	876	Add Order Detail, Qty:8
10/10/2013 3:46:03 PM	ANN	Quantity Change		CAKE	876	Quantity decrease from 8 to 7 (-1)
10/10/2013 3:46:03 PM	ANN	CHANGE DTL		CAKE	876	Change order detail fields: weightorder=[96]->[8]
10/10/2013 3:46:03 PM	ANN	CHANGE				Change order fields: orderstatus=[7]->[6]
10/10/2013 3:46:03 PM	ANN	Split Order				Order Split from 369291/1

Count = 8

Order Split from 369291/1

Legend: Hazardous Over Short Cancelled

Drag a column header here to group by that column

Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item
► CAKE	876	7	Case		0	Case	8	CAKE
CAKE	777	1	Case		0	Case	1	CAKE

2 8 0 0

LINUX2TEST Facility ZET (Last Update by ANN at 10/10/2013 3:46:03 PM)