

TFG4000™

Getting Started Guide



Version 1.4

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The Fredrick Group, Inc. (TFG) welcomes your comments. Please address them to:

The Fredrick Group, Inc.
PO Box 1698
Cumming, Georgia 30028

By e-mail: Send an e-mail to tfg4000@fredrickgroup.com.

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Welcome

The TFG4000 Software Series is a set of business management software applications that offer the robust functionality of an advanced management tool, yet tailored to meet the needs and budget of your growing business. Even better – every application in the TFG4000 Software Series is sold separately as a stand-alone product, which means you buy only what you need to run your operation more efficiently. For example, companies that only need to track and manage inventory are not forced to navigate through a multitude of unnecessary screens, but rather access the specific application that they need to perform their business operation. The added bonus of having every application in the TFG4000 Software Series is that each product recognizes the others and runs in harmony to provide you the optimum benefit of business management software.

TFG4000 is an easy-to-learn, user-friendly system that requires only minimal keystrokes for entering information. There are customizable dropdowns, font sizes, and screen colors available within the applications, as well as powerful search capabilities and built-in help features to help guide you through the system. With TFG4000, you have the ability to pull up various summary screens, enter as little or as much data as you need, process a variety of reports - all of which help you save both time and money, which will add directly to your bottom line. For added convenience, TFG4000 also allows you to run the system in either single or multi-user mode, whichever works best for your business. Other features include optional security, as well as data import and export features, which save you the work of re-keying information. In all, TFG4000™ is the smart source for business management. A simple solution for a complex process.

System Requirements

Microsoft® Windows® 98, Windows NT® 4.0, Windows® 2000, Windows® ME, or Windows XP®, with the latest Service Pack applied.

Pentium® class processor, 350mhz or greater.

90MB free disk space.

128MB of RAM (256MB recommended).

Network Interface Card configured to use TCP/IP if installing in multiple user mode (client / server

TFG4000 Installation Procedures

Before installing TFG4000 you must determine your desired setup type. You may install TFG4000 for either a single user (Single) or for multiple users (Custom). The demo version of TFG4000 can be installed in single user mode only.

Note: To install the Server component of either option, Admin Privilege is needed for both Windows NT and Windows 2000.

Setup Types

Type 1: Custom (Client/Server) (Not available in the demo version)

This type should be selected if there will be multiple users on the same network. This type allows the installation of client and server on either the same or separate PCs. However, please note that the server must be installed on a network-accessible PC. For this type, select "Custom" when prompted during installation. See also "Multiple User License" requirements.

After selecting "Custom", you can then select the component you wish to install. The server component should be installed only once on your network. After installing the server component, you then just install the client component on the remaining PCs in order to use TFG4000.

Note: Remove the "-noHTTP" option from both the TFG4000.bat file and the TFGServe.bat file if the client and server are run separately over the network, and a firewall blocks non-HTTP traffic. See "Advanced Installation", "BAT File Options" for more information.

Type 2: Single

This type should be selected when TFG4000 is to be installed only once for one user, and is *not* intended to be set up in a shared network space on the same PC. Remote clients cannot access this installation. For this type, select "Single" when prompted during installation.

Auto-Loading

1. Place the TFG4000 CD in the CD ROM drive. If the installation wizard does not appear automatically, see the "Manual Loading Using Start/Run" section below.
2. Follow the directions as they are displayed on your screen. See "Setup Types" above for information on choices. Select either the "Single" or "Custom" option when prompted. If you choose "Custom", based upon your environment select either server, client, or both.

Manual Loading Using Start/Run

1. Place the TFG4000 CD in the CD ROM drive.
2. Open the "Start" menu, and select the "Run" option.
3. Type the CD drive letter (i.e. D:\, E:\, etc) in the "Open" box and then click "OK". Use the Browse button to view the file names on the CD. Select the install program "Setup.exe".
4. Follow the directions as they are displayed on your screen. See "Setup Types" above for information on choices. Select "Single" or "Custom" option when prompted. If you choose "Custom", then select either server, client, or both server and client, based upon your environment.

Installing Multiple Applications

To install multiple applications, you must purchase the additional TFG4000 CDs with serial numbers. To install your additional application, follow these steps:

1. Insert the additional TFG4000 CD into the CD ROM drive.
2. A screen will come up indicating that you already have TFG4000 installed on your PC; it will provide you two options: "Remove TFG4000 V1.4" or "Add/Update TFG4000 V1.4".
3. Select "Add/Update TFG4000 V1.4" and click "Next".
4. A screen will come up indicating User Name, Company Name, and Serial Number. Enter the provided serial number for the additional application in the "Serial Number" field. Click "Next".
5. The system will require a reboot in order to complete the installation process. Click "OK".

Multiple User License

If you are installing TFG4000 applications for multiple users, additional licenses for that application are required. Each TFG4000 application copy is designed for one user, with one license. For each additional user, you must purchase a copy of the application in order to acquire an additional license for each user.

Downloading Service Packs

You can download service packs from the TFG4000 website at www.tfg4000.com.

Simply perform the following once you enter the website:

1. Click "Help Desk" from the bottom of the left navigation bar on the screen.
2. Click "TFG4000" from the "Help Desk" menu.
3. There will be a variety of service packs available for you to download to your computer. Visit the website periodically for new updates.

Note: TFG4000 automatically performs data migration if required.

Uninstalling TFG4000

If you wish to remove TFG4000 from your system, perform the following steps:

1. Save any files that may be needed in the future before running the uninstall process (such as TFG4000.mdb database file).
2. On the "Control Panel", select "Add/Remove Programs".
3. Highlight "TFG4000 Standard V1.4" in the list, and then select "Add/Remove".
4. Follow the directions as they are displayed on your screen.

If TFG4000 is not available in the "Add/Remove" list, insert the original CD and follow the on-screen instructions for deleting.

The uninstall process removes all TFG4000 files. If installed in multiple user mode, the uninstall process will need to be run on every machine from which you would like to remove TFG4000.

Starting TFG4000

Perform the following steps to start TFG4000 in either Single or Multiple User Mode:

Single User

1. Open the "Start" menu, and then select the "Program" option.
2. Select "TFG4000 V1.4" from the program list.
3. Select "TFG4000" to start.
4. The TFG4000 "Welcome" screen is displayed with the "Tip of the Day". You can select "Close" to continue the start up process or select "Next Tip" to view more tips. You can also choose not to have the "Tip of the Day" appear by selecting the check box next to "Don't show Tip of the Day at Startup" located on the Welcome screen. Select the check box again at any time to reinstate the "Tip of the Day" feature.
5. If you see a "User" and "Password" field on your screen, enter the User ID and Password that your System Administrator provided you, and either press "Enter" or click "Sign On".
6. If your screen only displays "Welcome" without any other fields, then click the plus sign ("+") next to the application you want to perform in the "NavTree".
7. Click on the screen you would like to use.

Multiple User (Not available in the Demo Version)

Server Startup

At installation, the server component is put in the Startup folder of the Program List. It will automatically start at system start up. Perform this procedure only if necessary.

1. Open the "Start" menu, and then select the "Program" option.
2. Select "TFG4000 V1.4" from the program list.
3. Select "TFG4000 Server V1.4" to start.
4. The TFG4000 "Welcome" screen is displayed with the "Tip of the Day". You can select "Close" to continue the start up process or select "Next Tip" to view more tips. You can also choose not to have the "Tip of the Day" appear by selecting the check box next to "Don't show Tip of the Day at Startup" located on the Welcome screen. Select the check box again at any time to reinstate the "Tip of the Day" feature.

Client Startup

1. Open the "Start" menu, and then select the "Program" option.
2. Select "TFG4000 V1.4" from the program list.
3. Select "TFG4000 Client v1.4" to start.
4. The TFG4000 "Welcome" screen is displayed with the "Tip of the Day". You can select "Close" to continue the start up process or select "Next Tip" to view more tips. You can also choose not to have the "Tip of the Day" appear by selecting the check box next to "Don't show Tip of the Day at Startup" located on the Welcome screen. Select the check box again at any time to reinstate the "Tip of the Day" feature.
5. If you see a "User" and "Password" field on your screen, enter the User ID and Password that your System Administrator provided you, and either press "Enter" or click "Sign On".
6. If your screen only displays "Welcome" without any other fields, click the plus sign ("+") next to the application you want to perform in the "NavTree".
7. Click on the screen you would like to use.

Initial System Setup



System Administration



TFG4000 is installed with certain system wide features that can be changed. The features are controlled with system variables. There are three system variables you need to understand before you start using TFG4000. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows "Start" menu or from the "Documentation" menu within TFG4000. The documentation is also available online.

Security -- With this variable set to "No", anyone using the system has access to all of the applications, screens, and functions; the Windows user id is logged every time data is inserted or updated. With this variable set to "Yes", each person using the system must have a user id and password and varying degrees of access can be set for each user; the TFG4000 user id is logged every time data is inserted or updated.

TFG4000 is installed with security set to "No". A User Identification is not required when security is turned off. However, if you choose to turn security on, there are two default User Identifications installed with the system. They are "Admin" (password "Admin") and "User" (password "User"). You should change the passwords of the default User Identifications.

If you want to use security, perform the following steps:

1. Turn security on.
 1. Click the plus sign (+) next to "System Administration".
 2. Click "System Variables".
 3. Change the value of the "Security" variable to "Yes".
 4. Once finished, click the Save button  located on the toolbar.
2. Set up User Identifications.
 1. Click the plus sign (+) next to "System Administration".
 2. Click "User Control".
 3. Enter the user information in the first available row.
 4. Repeat as necessary.
 5. Once finished, click the Save button  located on the toolbar.
3. Set User Security Controls.
 1. Click the plus sign (+) next to "System Administration".
 2. Click "User Control".

3. Click the "Security Control" tab.
 4. Enter the User ID in the "User Id" field, click the Open (Display) button  located on the toolbar.
 5. Enter the appropriate security level for each screen.
 6. Once finished, click the Save button  located on the toolbar.
 7. Repeat for each user defined.
4. Restart the TFG4000 Server. Clients for the security change in step 1 will be updated.

Inventory Management

TFG4000 Inventory Management is installed with certain features that can be changed. The features are controlled with system variables. There are three system variables you need to understand before you start using Inventory Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows "Start" menu or from the "Documentation" menu within TFG4000. The documentation is also available online.

Allow_Negative_Inventory (installation default is "No") -- With this variable set to "No", on hand inventory balance cannot be negative. An inventory transaction that would cause the on hand balance to go negative will be rejected as an error. With this variable set to "Yes", on hand inventory balance can be negative. No inventory transactions will be rejected.

Inventory_Cost (installation default is "Current Cost") -- With this variable set to "Current Cost", inventory cost is calculated using the total inventory cost entered for an item on the Item Definition screen. When the inventory cost on the Item Definition screen is changed the total inventory cost is recalculated using the new value. With this variable set to "Average Cost", inventory cost is calculated using the average cost of the item. The average cost is calculated each time inventory is received. (For more details about how the average cost is calculated see the Inventory Management User Guide).

Inventory_Location_Verify (installation default is "On") -- With this variable set to "On", the system requires all inventory locations be predefined. With this variable set to "Off", inventory locations do not have to be pre-defined and any location name can be used. TFG4000 provides an inventory location called "Stock" at installation time. See "Initial Setup" in the Inventory Management section of this manual for more information about setting up inventory locations.

Job Order Management

TFG4000 Job Order Management is installed with certain features that can be changed. The features are controlled with system variables. There is a system variable you need to understand before you start using Job Order Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows "Start" menu or from the "Documentation" menu within TFG4000. The documentation is also available online.

Job_Order_Printer (installation default is "HP Laserjet Printer") – This variable indicates the default printer to be used for job order printing.

Sales Order Management

TFG4000 Sales Order Management is installed with certain features that can be changed. The features are controlled with system variables. There is a system variable you need to understand before you start using Sales Order Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows "Start" menu or from the "Documentation" menu within TFG4000. The documentation is also available online.

My_Customer_Number (installation default is 1) – This variable indicates which customer number in the customer database is your own customer number. The system uses your customer number for addresses on documents. See "Initial Setup" in the Sales Order Management section of this manual for more information about setting up your customer number and changing this variable.

Purchasing Management

TFG4000 Purchasing Management is installed with certain features that can be changed. The features are controlled with system variables. There is a system variable you need to understand before you start using Purchasing Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows "Start" menu or from the "Documentation" menu within TFG4000. The documentation is also available online.

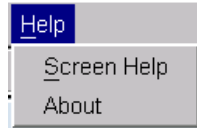
My_Supplier_Number (installation default is 1) – This variable indicates which supplier number in the supplier database is your own supplier number. The system uses your supplier number for addresses on documents. See "Initial Setup" in the Purchasing Management section of this manual for more information about setting up your supplier number and changing this variable.

Built-in Help

Help is available at the screen, field, and column level, as well as built-in tool tips.

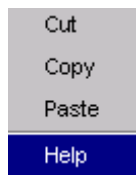
Screen Level Help

To select screen level help, click "Help" on the "Menu" bar, and then select "Screen Help". Help for the screen is then displayed.



Field Level Help

To select field level help, right click on the field, and then click "Help" from the pop-up. Help for the selected field is then displayed. You may also press the F1 key to get field help.



Column Level Help

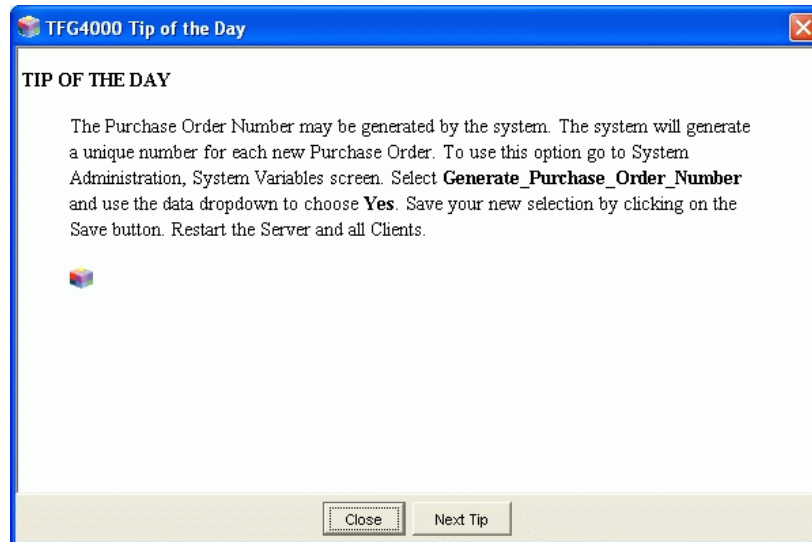
To select column level help, right click on the column heading, and then click "Help" from the pop-up. Help for the selected column is then displayed.



Tip of the Day

Each time you start TFG4000, there is a “Tip of the Day” pop-up displayed that describes some of the functionality that is available within the application. To close the “Tip of the Day” pop-up, click the “Close” button. To view another tip, click the “Next Tip” button. This feature can be turned off by clicking the box next to “Don’t Show Tip of the Day at Startup” on the Welcome screen. A check mark will appear in the box indicating the “Tip of the Day” should not be displayed during start up. To reinstate the “Tip of the Day” feature, click the box and the check mark will disappear indicating the “Tip of the Day” should be displayed during start up.

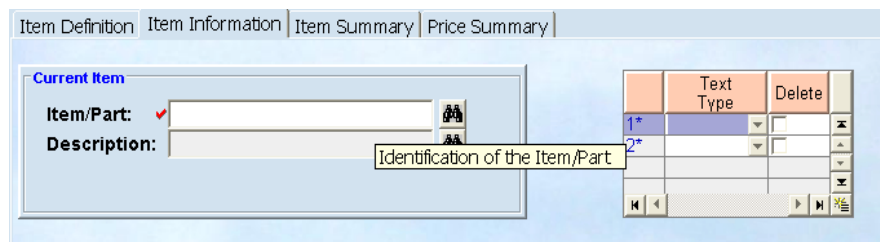
Example Only:



Tool Tips

Throughout TFG4000, there are embedded tool tips that help describe certain areas on the screen. You simply roll your mouse (cursor) over the area in question, and a pop-up will describe that specific area. The tool tip pop-up will remain visible for a few seconds, then it will disappear automatically.

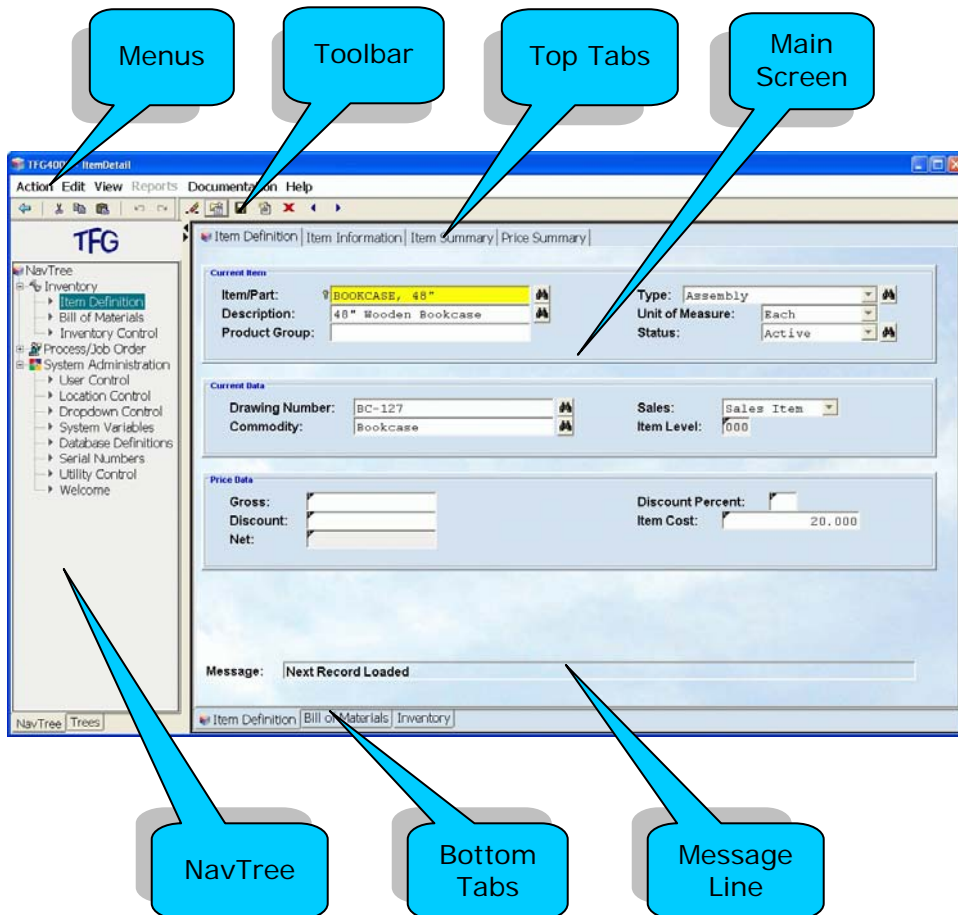
Example Only:



Using TFG4000

You can navigate through the TFG4000 screens by using the "NavTree", the "Goto Screen" section of the "View Menu", and the tabs on the top and bottom of the screen. For easy use, the toolbar provides a variety of functions for you to choose from as you use the TFG4000 applications. There are buttons located on the toolbar that allow you to perform various functions from each screen, such as opening/displaying data, saving data, etc. The "Menu" provides useful functions as well, such as printing reports, documentation, help, etc.

Sample Screen



Menus

Each screen in TFG4000 has various menus available for working with your data. The following describes the purpose of each menu and special features.

Action

This menu is for printing screens and for exiting TFG4000. It contains the following menu items:

Print	Prints the entire screen in either portrait or landscape mode.
Print Text	Prints only the text currently displayed on the screen in either portrait or landscape mode.
Exit	Terminates the TFG4000 session.

Edit

This menu is for performing cut, copy, and paste operations on data. It contains the following menu items:

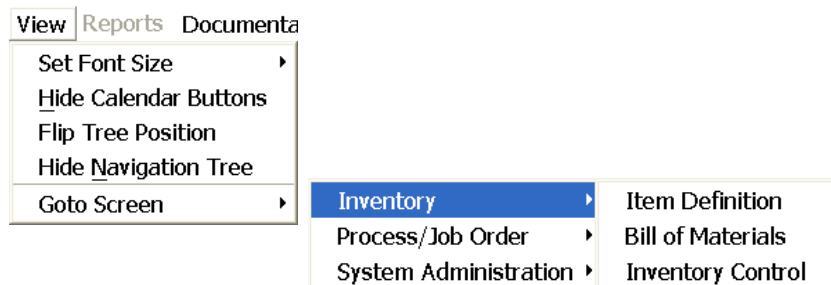
Cut	When you highlight data and use this function, the data is removed from the screen and is available in a clipboard for pasting. Holding the "Ctrl" key and pressing the "X" key will perform the same operation.
Copy	When you highlight data and use this function, the data is copied into a clipboard and is available for pasting. Holding the "Ctrl" key and pressing the "C" key will perform the same operation.
Paste	When you position your cursor in a field and use this function, data you have previously put into the clipboard using the "Cut" or "Copy" operation will be pasted after your cursor. Holding the "Ctrl" key and pressing the "V" key will perform the same operation.

Note: If your keyboard is in "insert mode" the data will not overlay data that follows, but if it is not in "insert mode" it will. Press the Insert key on your keyboard to change your insert mode to whichever way you prefer.

View

This menu allows you to change the way the TFG4000 screens are presented and how you navigate the screens. It contains the following menu items:

Set Font Size	You can choose a font size from 10 to 18. With larger font sizes you may have to scroll to see the entire screen.
Hide Calendar Buttons	Toggles whether or not a Calendar button is displayed next to the date fields.
Flip Tree Position	Changes the position of the “NavTree” to either the left or the right side of the screen.
Hide Navigation Tree	Hides the “NavTree” from the screen. Click it a second time to display the “NavTree” on the screen.
	Note: The dark arrows in the bar between the NavTree” and the main screen perform the same function.
GoTo Screen	Displays the “NavTree” in menu format. You can use this method to navigate the screens at any time but it is particularly useful if you hide the “NavTree”.



Reports

This menu is only available if there are reports available for the screen you are on. There will be various menu items depending on the screen.

Documentation

This menu lets you select the TFG4000 manuals for viewing and printing.

Help

This menu provides help about the screen you are on and information about TFG4000. It contains the following menu items:

Screen Help	Displays information about the screen you are on.
About	Displays information about TFG4000.

Buttons & Icons

Each screen in TFG4000 has various buttons available for working with your data. The following describes the purpose of each button and special features. It also explains other icons you may see on the screens.

Toolbar Buttons



Use the following buttons to perform TFG4000 application tasks. The buttons displayed change with the screen you are working with.

Previous screens

Use this button to return to your previous screen. You can go back up to ten screens.

Cutting, copying and pasting text

You can use "Cut" and "Paste" to move selected text. You can use "Copy" and "Paste" to copy selected text and paste the copy in another place. "Cut", "Copy", and "Paste" can also be selected from the "Edit" menu.

Working with data

You can erase, open, save, add, delete, get previous or next, copy, print, and refresh data by using these buttons:



Erase

This button clears data from the screen. It does not update any data; it merely clears the data away to make it easier for you to enter something else. It is particularly useful for resetting summary screens for a new search and it may be required when adding new entries on some screens.



Open (Display)

This button retrieves data that has been previously saved for viewing and/or modifying. The **Enter** key executes this button by default.



Save

This button stores new data and modified data. If you enter new data or change existing data and do not click this button, the system prompts you to do so.



Cancel

This button reduces any remaining quantities to zero and changes statuses to "Cancelled".




Delete


This button deletes previously saved data. On screens indicated as "definition" screens, the delete button deletes related data in addition to the data currently displayed. On all other screens only the data displayed is deleted.





Previous


This button retrieves data that alphabetically precedes the currently displayed data.

-  Next

This button retrieves data that alphabetically follows the currently displayed data.
-  Copy

This button copies data from one place to another. On screens indicated as “definition” screens, it copies related data in addition to the data currently displayed. On all other screens, only the data displayed is copied.
-  Print


This button sends your document to the printer to be printed.
-  Build


This button extracts eligible data from one place to create a new definition in another place. For example, it can extract customer order data to build a new invoice.
-  Refresh


This button rebuilds the data on the screen.

Screen Buttons

Throughout the screens are buttons that perform functions.

-  Search


This button is for finding data you have already entered. When you click this button a search box pops up.
-  Calendar

This button provides a pop-up calendar for selecting dates. You can choose the month and the year, and then double-click on the date you desire. Click “Today” to re-position the calendar on the current date. Click “Cancel” if you decide not to select a date. Dates can be entered without using the “Calendar” button if desired. Manually entered dates are verified so a pop-up appears prompting you to correct a date if it is invalid.
-  Dropdown

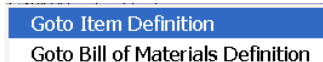
This button provides a “dropdown” list of pre-defined values from various fields that have this button next to it. If you click on one of the values from the dropdown list, that value will appear in the adjacent field.



Table Buttons

Throughout the tables are buttons that perform functions.

-  GoTo/Selection




This button is for either transferring to another screen or selecting data. When you right-click on this button, it displays a menu of related screens and/or a menu of selection activities. To transfer to another screen, click on the screen you desire and that screen is displayed with the appropriate keys already filled in. To select data, such as a component or inventory location, click the action you want.



 Properties	This button is located at the lower left corner of each table. It allows you to edit the layout of the table. You can use this button to hide or display columns in the table and to restore the original table layout.
 Add Rows	This button appears in the lower right corner of modifiable tables so that you can put more empty rows on the screen for adding data to the table. If you are trying to enter another row in a table and there are not any blank rows to use, click the "Add Rows" button.
◀ Scroll to the Left	This button allows you to scroll to the left of the table.
▶ Scroll to the Right	This button allows you to scroll to the right of the table.
▲ Scroll Up	This button allows you to scroll up the table.
▼ Scroll Down	This button allows you to scroll down the table.
⌵ Scroll Bottom	This button allows you to scroll to the very bottom of the table.
⌶ Scroll Top	This button allows you to scroll to the very top of the table.
⏪ Scroll Left	This button allows you to scroll to the very left of the table.
⏩ Scroll Right	This button allows you to scroll to the very right of the table.

Information Icons

Icons on the screen show properties about the field.

 Numeric	This icon in the upper left corner of a field indicates that the field is for a numeric value. You are able to enter only numbers, commas, and decimals in fields containing this icon.
 Key	This icon to the left of a field indicates that the field is a key field and is required for this screen.
 Required	If you try to display or save data without entering a required field, this checkmark icon is displayed next to the missing field.

Field Colors

The fields on the screens and in screen tables have three different colors that have functional significance.

Gray	A gray field is display only, no entry allowed or necessary
White	A white field is open for entering data
Yellow	A yellow field indicates where the cursor is currently positioned


Changing Screen Table Properties

Tables that appear on screens can be modified. The columns can be re-sized, re-positioned, hidden, and un-hidden.

To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.

Note: Re-sizing and re-positioning remain in effect for the duration of the current session. The default sizing and positioning is restored when TFG4000 is restarted.

To hide or unhide a column click the Properties button  located in the lower left corner of the table. A red check mark next to the column name indicates the column will be displayed. If there is not red check mark next to the column name it will not be displayed in the table. There may be multiple tabs for the table, so you must click on the tab that contains the column(s) you want. To save the changes you have made, click the "OK" button. To discard the changes you have made, click the "Cancel" button. To reset the properties back to the default properties, click the "Restore Default Visibility" button. Another pop-up will appear asking the range you wish to restore. Use the dropdown provided to select either "All Tabs", which will restore the defaults for the entire table, or "Currently Displayed Tab Only", which will restore the default properties only for the portion of the table indicated by the tab you are viewing. Once you have made your selection click "OK" or "Cancel". That pop-up will disappear and the column visibility properties are reset as requested or the reset action is cancelled. Then you may click either "OK" or "Cancel" to save or discard the property changes.

Note: Property changes remain in effect even after TFG4000 is restarted.

Performing Searches

There are two types of searches in TFG4000 that are similar in appearance, however they have different functionality. The first is a "Search" associated with a field on the screen. The second is a "Search Pop-up" which is found on tables. One of the differences between the two is that a "Search Pop-up" can load multiple table rows to the screen at one time but a "Search" will not. Another difference is that "Search" screen results can be printed but "Search Pop-up" results cannot.



Search Screen (Fields)

Below is an example of a search screen that may be used to locate information already entered into the system, and/or to automatically populate the fields on the screen that you are currently viewing or editing. When search results are displayed you can move the columns into different places on the search screen so that the values can be viewed in positions different from the default layout. Click the heading of the column you wish to move then drag and drop it into the desired position. Resize columns by moving the cursor over the heading until you see an arrow with two heads. Click, and with the mouse button still down, move the cursor right or left until the column is the desired width. The default layout is restored when the "Search" button is pressed and when you exit the search. In addition, you also have the option to retain search parameters by checking the box located next to "Retain Search Parameters". This option allows you to save the search parameters you used for future searches.

Example Only:

Item/Part	Description	Type	Unit of Measure
BOOKCASE, 48"	48" Wooden Bookcase	Assembly	Each
BOOKCASE, 60"	60" Wooden Bookcase	Assembly	Each
BOOKCASE, 84"	84" Wooden Bookcase	Assembly	Each

Using the Search Screen

1. Click the Search button  located directly next to the field you want to search.
2. Enter the maximum number of rows of data you want to display in your results. The default is "30".
3. Select one of the search choices using the dropdown. The default is "starting with".
4. Enter all or part of the value you want to search with. You may leave the search field blank to return all applicable records in the database. If there is a value in the screen field you are searching on, it will be copied to the search field. You can change the search field value on the "Search" screen.
5. Click the Search button .
6. Double click on the row you desire to load the information to the main screen.


Modifying the View of the Search Results

To modify the view of the search results, do the following:

1. To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.
2. To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.
3. To re-size the window move your cursor over the edges of the window until you see an arrow with two heads. Click, and then still holding the mouse button down, move the cursor to increase or decrease the size of the window.

Printing the Search Results

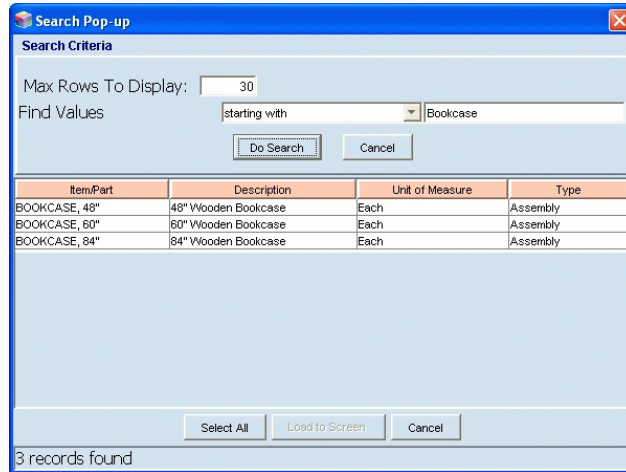
To print the search results, use these steps:

1. Click the Print button  on the "Search" screen.
2. Type or select the appropriate formatting options in the dialog box and then click "OK" to print the report.

Search Pop-Up Screen (Tables)

Below is an example of a search pop-up screen that may be used to populate columns in the table on the screen that you are currently viewing or editing. When search results are displayed you can move the columns into different places on the search pop-up screen so that the values can be viewed in positions different from the default layout. Click the heading of the column you wish to move then drag and drop it into the desired position. Resize columns by moving the cursor over the heading until you see an arrow with two heads. Click, and with the mouse button still down, move the cursor right or left until the column is the desired width. The default layout is restored when the "Do Search" button is pressed and when you exit the search pop-up.

Example Only:




The screenshot shows a 'Search Pop-up' dialog box with the following elements:

- Search Criteria:**
 - Max Rows To Display: 30
 - Find Values: starting with Bookcase
 - Buttons: Do Search, Cancel
- Table:**

Item/Part	Description	Unit of Measure	Type
BOOKCASE, 48"	48" Wooden Bookcase	Each	Assembly
BOOKCASE, 60"	60" Wooden Bookcase	Each	Assembly
BOOKCASE, 84"	84" Wooden Bookcase	Each	Assembly
- Buttons:** Select All, Load to Screen, Cancel
- Status:** 3 records found

Using the Search Pop-Up Screen

1. **Right** Click the GoTo/Selection button  in the row you want to search.
2. Enter the maximum number of rows of data you want to display in your results. The default is "30".
3. Select one of the search choices using the dropdown. The default is "starting with".
4. Enter all or part of the value you want to search with. You may leave the search field blank to return all applicable records in the database.
5. Click the "Do Search" button.
6. To select just one entry, double-click on it to populate the fields on your screen.
7. To select more than one entry, hold down the "Control" key while you click on the other selections with your mouse, then click "Load to Screen" to populate the information.
8. To load all of the entries to the screen table, click the "Select All" button and then click the "Load to Screen" button.


Modifying the View of the Search Results

To modify the view of the search results, do the following:

1. To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.
2. To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.
3. To re-size the window move your cursor over the edges of the window until you see an arrow with two heads. Click, and then still holding the mouse button down, move the cursor to increase or decrease the size of the window.

Printing the Search Results

To print the search results, use these steps:

1. Click the Print button  on the "Search" screen.
2. Type or select the appropriate formatting options in the dialog box and then click "OK" to print the report.

Working with Reports

You can view, modify, and print reports by using the "Reports" menu located just above the toolbar. If "Reports" is faded gray, then there are no reports available for that screen.

To view a report, follow these steps:

1. Click on "Reports" above the toolbar. A menu will drop down indicating which reports can be generated from that screen. Click on the report name that you want.
2. A status window will appear showing that the system is generating the report.
3. You will then see your report displayed on the screen.

To modify and/or print a report, follow these steps:

1. Click on "Reports" above the toolbar. A menu will drop down indicating which reports can be generated from that screen. Click on the report name that you want.
2. A status window will appear showing that the system is generating the report.
3. You will then see your report displayed on the screen with this toolbar at the top:



Printing Options

Allows you to set the Page Number Prefix, number of pages wide, and the Repeat Section Header/Footer settings. Adjust the settings to your specifications and then click "OK".

Page Setup

Allows you to adjust page settings. Once finished adjusting the settings, click "OK".

Print

Allows you to select printer settings and print your report. Once finished with settings, click "OK" to print the report.

Preview

Allows you to preview your report layout before you actually print. Once finished previewing, click "Close".

Excel

Allows you to save your report as an Excel document. Once finished naming and specifying where to save your report, click "Save".

Revert

Allows you to discard all layout changes and revert to default settings. Simply click either "Yes", or "No".

Help

Shows the Report Layout Instruction screen.

In some reports the selection criteria can be changed in the report window. Adjust the selection criteria as desired, and then click the "Refresh" button to reload the data. When you exit the report you will be asked if you want to update the screen with the refreshed data from the report. Click "Yes" to update the screen or "No" to leave the screen as it was when you started the report.

Report layouts can be modified. The columns can be re-sized, hidden, and un-hidden.

To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

To hide or unhide a column right click in the report area, then select the "Column Visibility" tab. A red check mark next to the column name indicates the column will be displayed. If there is not red check mark next to the column name it will not be displayed in the report. To save the changes you have made, click the "OK" button. To discard the changes you have made, click the "Cancel" button. To reset the properties back to the default properties, click the "Revert" button located on the report toolbar. A dialog box will appear asking if you want to discard changes and revert back to default settings. Click either "Yes" to restore the defaults or "No" to keep the changes.

Note: Report layout changes remain in effect even after TFG4000 is restarted.

Working with Summary Screens and Summary Reports

TFG4000 has many summary screens and reports available for locating data, listing data, and summarizing data. Each summary screen and report has various fields for search criteria that are used in combination with one another. The search criteria fields can use wildcards and other sophisticated SQL search techniques. For more information about wildcard characters that can be used for advanced searching, refer to the following Microsoft website:

<http://msdn.microsoft.com/library/default.asp?url=/library/en-us/off2000/html/acconWildcardCharactersS.asp>

Due to differences between Access and ANSI wildcard characters, when reading this website and using wildcards in TFG4000, substitute as follows:

% for *
_ for ?
is not used

Also note that these wildcards cannot be used in searches.

Inventory Management

For more assistance, please refer to the Inventory Management User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000. The documentation is also available online. See the “Documentation” section for more information.

Initial Setup


TFG4000 Inventory Management is installed with certain features that can be changed. The features are controlled with system variables. There are three system variables you need to understand before you start using Inventory Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000. The documentation is also available online.

Allow_Negative_Inventory (installation default is “No”) -- With this variable set to “No”, on hand inventory balance cannot be negative. An inventory transaction that would cause the on hand balance to go negative will be rejected as an error. With this variable set to “Yes”, on hand inventory balance can be negative. No inventory transactions will be rejected.

Inventory_Cost (installation default is “Current Cost”) -- With this variable set to “Current Cost”, inventory cost is calculated using the total inventory cost entered for an item on the Item Definition screen. When the inventory cost on the Item Definition screen is changed the total inventory cost is recalculated using the new value. With this variable set to “Average Cost”, inventory cost is calculated using the average cost of the item. The average cost is calculated each time inventory is received. (For more details about how the average cost is calculated see the Inventory Management User Guide).

Inventory_Location_Verify (installation default is “No”) -- With this variable set to “No”, inventory locations can be pre-defined, but they do not have to be pre-defined. With this variable set to “Yes”, the system requires all inventory locations be predefined. TFG4000 provides an inventory location called “Stock” at installation time.

To set up your Inventory Locations, perform the following:


1. Click the plus sign (+) next to “Common Applications”.
2. Click “Location Control”.
3. Enter the location information. Only the “Location” field is required. All other fields are optional and will default or remain blank.
4. Once finished, click the Save button  located on the toolbar.

Item Definition Tabs




Item Definition

This screen allows you to enter and maintain data for an individual item. An item can be defined as anything you want including a service, raw material, assembly, etc.

To add an item, perform the following steps:

1. Enter an item/part number in the "Item/Part" field.
2. Enter data in any of the other optional fields.
3. Once finished, click the Save button  located on the toolbar.






To edit an existing item or part, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information.
4. Once finished, click the Save button  located on the toolbar.





Item Information

This screen allows you to enter text you wish to maintain concerning an item. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter item information, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective item. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.




To edit existing item information, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.

Item Summary

This screen is used to display item or part entries for all items defined. The two tabs at the top of the table allow you to display some of the fields located on the "Item Definition" screen. Each row in the table represents one item and its associated data.




To display an item summary, perform the following steps (Step 1 is optional):

1. Enter all or part of an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number. You can also use the Erase button  to clear all of the selection fields and retrieve all items. Skip this step if you have the item number you wish to use in the "Item/Part" field already.
2. Click the Open (Display) button  located on the toolbar.
3. View the item/part summary displayed in the "Primary" and "Secondary" tabs.

Price Summary

This screen can be used to display pricing data for items. Only items with non-zero gross price are displayed. The two tabs at the top of the table allow you to display the fields located on the "Item Definition" screen. Each row in the table represents one item and its associated pricing data.

To display a price summary, perform the following steps (Step 1 is optional):




1. Enter all or part of an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number. You can also use the Erase button  to clear all of the selection fields and retrieve all items. Skip this step if you have the item number you wish to use in the "Item/Part" field already.
2. Click the Open (Display) button  located on the toolbar.
3. View the item price/discount information.

Bill of Materials Tabs




Bill of Materials

Use this screen to create the structure of a bill of materials. A bill of materials may be comprised of a series of items that are grouped together to create a larger item or service. A structure can be created from the top down starting with the highest-level item identified in the "Item/Part" field. Items that make up the product structure are then entered into the table with all relevant data. You can also build the structure by starting with the lowest level in the bill of materials and enter the items for that level in the table-building bottom up. For your convenience, there is a "Tree" that appears on the left hand side of the Bill of Materials screen so you can see the product structure as you build it. To view the application tree instead, click on the tab at the bottom that reads "NavTree".

To define a bill of materials, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. In the displayed table, enter or select the appropriate components for that item in the "Component" column.
4. Once finished, click the Save button  located on the toolbar.

To edit an existing bill of materials, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information on the screen.
4. Once finished, click the Save button  located on the toolbar.

Explosion

Use this screen to display the components from which an individual item is composed. You can display the data in two different views:



Single Explosion

Shows the first level components from which the item is composed.

Indented Explosion

Shows the components at all levels from which the item is composed.

To view an item explosion, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. Click on either "Single Explosion" or "Indented Explosion" to view the different bill of material displays.

Where Used

Use this screen to view where an item/part is used to create other items. You can display this data in two different views:



Single Where Used

Shows the first level items that use the component directly.

Indented Where Used

Shows all the items, by level, that use the component either directly or indirectly

To view where an item is used, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. Click on either "Single Where Used" or "Indented Where Used" to view the different bill of material displays.

Summary

Use this screen to display the components only once with the quantity required to build the number of units you specify. You can display the data in two different views:




Show Summarized Explosion

Shows all of the components from which this item is composed in a summarized list.

Show Summarized Where Used

Shows all of the items where the component is used in a summarized list.



To view a bill of materials summary, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. If desired, specify a quantity in the "Quantity" field.
4. Click the Open (Display) button .
5. View the bill of material summary for that particular item.

Cost

Use this screen to display an indented explosion with individual component costs. The material cost is rolled up from lower level components so the material cost displayed on this screen for a component may not match the material cost entered for that component on the Item Definition screen. The other cost is not rolled up into the next higher level component; it is displayed as it was entered on the Item Definition screen for each component. "Total Material Cost" is calculated from the rolled up material cost for Level 1 components only. "Total Other Cost" is calculated from all of the other costs displayed. "Total Cost" is the sum of "Total Material Cost" and "Total Other Cost". "Inventory Cost" is the value entered for the item on the Item Definition screen. It is the cost that will be used to calculate the on hand value of inventory. "Total Cost" and "Inventory Cost" should probably be the same. If your "Total Cost" and "Inventory Cost" are vastly different, you should examine the bill of material carefully and decide if there is an error in your bill, component costs, or the inventory cost you entered for the item.

To view a costed indented explosion, perform the following steps:



1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item/part number.
2. Click the Open (Display) button  located on the toolbar.
5. View the costed indented explosion for that particular item/part.

Inventory Control Tabs




Inventory

Use this screen to control and track the movement of your inventory in multiple stocking locations.

To view inventory for an item, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.
3. View the inventory information displayed on the screen.



To maintain inventory information, perform the following steps:

1. Enter an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item/part number.
2. Click the Open (Display) button  located on the toolbar.
3. In a row that does not already have inventory data, enter or select a storage location; for a row that already has inventory data, skip this step.
4. Select a "Transaction Type" using the dropdown provided.
5. Enter the quantity you wish to add or subtract in the "Transaction Quantity" column.
6. Type in text describing the transaction you are performing in the "Transaction Description" column if desired.
7. Click the Save button  located on the toolbar. The on-hand quantity will be calculated and the transaction you executed can be viewed with the Inventory History screen.




Location Inventory

Use this screen to control and track the movement of your inventory by stocking location.

To view inventory for a location, perform the following steps:

1. Enter a location in the "Location" field, or use the Search button  next to the "Location" field to select a location.
2. Click the Open (Display) button  located on the toolbar.



To maintain inventory information, perform the following steps:

1. Enter a location in the "Location" field, or use the Search button  next to the "Location" field to select a location.
2. Click the Open (Display) button  located on the toolbar.
3. Select a "Transaction Type" using the dropdown provided.
4. Enter the quantity you wish to add or subtract in the "Transaction Quantity" column.
5. Enter or select an item number; for a row that already has inventory data, skip this step.
6. Type in text describing the transaction you are performing in the "Transaction Description" column if desired.
7. Click the Save button  located on the toolbar. The on-hand quantity will be calculated and the transaction you executed can be viewed with the Inventory History screen.

Inventory History

Use this screen to view the movement of your inventory. The most recent activity based on the Start Date used is listed at the top of the display in the table.

To view inventory history, perform the following steps (Step 1 is optional):



1. Enter all or part of an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item/part number.
2. Enter a Start Date and End Date to specify the range to display in Inventory History.
3. Click the Open (Display) button  located on the toolbar.
4. View the Inventory History information displayed on the screen.

Note: If inventory transactions you expected to see are not displayed, check and modify the selection criteria you used. In particular, check the start and end dates you used.

Shelf-life Summary

Use this screen to view the shelf-life information for inventory items that have expiration dates.



To view shelf-life summary, perform the following steps (Step 1 is optional):

1. Enter all or part of an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item/part number.
2. Click the Open (Display) button  located on the toolbar.
3. View the Shelf-life Summary information displayed on the screen.

Inventory Summary

Use this screen to view the on-hand inventory.

To view inventory summary, perform the following steps (Step 1 is optional):

1. Enter all or part of an item number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item/part number.
2. Click the Open (Display) button  located on the toolbar.
3. View the Inventory Summary displayed on the screen.

Job Order Management

For more assistance, please refer to the Job Order Management User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu, or the “Documentation” menu within TFG4000. The documentation is also available online. See the “Documentation” section for more information.

Initial Setup

TFG4000 Job Order Management is installed with certain features that can be changed. The features are controlled with system variables. There is a system variable you need to understand before you start using Job Order Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000. The documentation is also available online.


Job_Order_Printer (installation default is “HP Laserjet Printer”) – This variable indicates the default printer to be used for job order printing.

Process Definition Tabs




Process Maintenance

Use this screen to define a process and enter the sequence of operations for the process.

To define a process, perform the following steps:

1. Enter a process name in the “Process” field.
2. Enter the various operational steps involved in the fields provided.
3. Once finished, click the Save button  located on the toolbar.






To edit an existing process, perform the following steps:

1. Enter a process name in the “Process” field, or use the Search button  next to the “Process” field to select a process.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information on the screen.
4. Once finished, click the Save button  located on the toolbar.





Process Information

Use this screen to enter text information describing the process. This data may be any information you wish to store concerning the process, and multiple types of information can be stored.

To enter process information, perform the following steps:

1. Enter a process name in the "Process" field and a process type in the "Type" field, or use the Search button  next to the "Process" field to select a process and type.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective process. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.






To edit existing process information, perform the following steps:

1. Enter a process name in the "Process" field and a process type in the "Type" field, or use the Search button  next to the "Process" field to select a process and type.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.




Operation Information

Use this screen to enter and maintain text information for operations associated with a process. This data may be any information you wish to store concerning the operations, such as safety issues, specific tools required, unique material requirements, etc.

To enter operation information, perform the following steps:

1. Enter a process name in the "Process" field, a process type in the "Type" field, and the Operation sequence number in the "Operation" field, or use the Search button  next to the "Process" field to select a process, type, and operation.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective operation. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.



To edit existing operation information, perform the following steps:

1. Enter a process name in the "Process" field, a process type in the "Type" field, and the Operation sequence number in the "Operation" field or use the Search button  next to the "Process" field to select a process, type, and operation.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Edit the desired information in the text area in the center of the screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.

Process Summary

Use this screen to view the process summary.

To view a process summary, perform the following steps (Step 1 is optional):


1. Enter all or part of a process name in the "Process" field, or use the Search button  next to the "Process" field to select a process.
2. Click the Open (Display) button  located on the toolbar.
3. View the Process Summary displayed on the screen.

Job Order Tabs




Job Order

This screen is used to enter and maintain job order data. This includes basic information about the job order, such as the description, quantity, start date, due date, status, and quantity complete. It also contains the item, job order bill of material (BOM), and the job order process.

To enter a job order, perform the following steps:

1. Enter a job order number in the "Job Order" field. If you leave this field blank a job order number will be generated for you.
2. Enter any other data you desire in the other optional fields on the screen.
3. Once finished, click the Save button  located on the toolbar.






To edit an existing job order, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for that job order on the screen.
4. Once finished, click the Save button  located on the toolbar.





Job Order Information

This screen is used to create and maintain job order text information. This data may be any information you wish to store concerning the job order.

To enter job order information, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective job order. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.




To edit existing job order information, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.




Parts

This screen is used to maintain job order bill of materials (BOM) component data. Bill of materials are used to list the parts needed to build an item in a production job order, or the items needed to complete a job order for a service. You can add components to the list, change data for existing components, and delete components from the table.

To create a job order bill of materials, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. In the displayed table, enter/edit the bill of material parts list for that particular job order.
4. Once finished, click the Save button  located on the toolbar.




To edit an existing job order bill of materials, perform the following steps:

1. Enter a job order in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information on the screen.
4. Once finished, click the Save button  located on the toolbar.

Job Order Process

This screen is used to maintain process operations for the displayed job order. You can change process information specific to the displayed job order. Operation data for the process is displayed in a table.





To view and maintain job order process, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. View and/or edit the process for the particular job order displayed in the table.
4. If anything has changed, click the Save button  located on the toolbar when finished.




Job Order Process Information


Use this screen to enter additional text information concerning the displayed job order. The data may be any information you wish to store concerning the job order process, and multiple types of information can be stored.

To enter job order process information, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. In the large, blank text area in the center of the screen, enter any information that is pertinent to the respective job order process. You may enter as much or as little information as you desire.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.

To edit existing job order process information, perform the following steps:






1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.

4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.





Job Order Operation Information

Use this screen to enter text information for operation steps associated with a job order process. This data may be any information you wish to store concerning the operation, such as safety issues, specific tools required, unique material requirements, etc.

To enter job order operation information, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Enter the Operation sequence number in the "Operation" field.
3. Click the Open (Display) button  located on the toolbar.
4. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective job order operation. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
5. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
6. Once finished, click the Save button  located on the toolbar.



To edit existing job order operation information, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Enter the Operation sequence number in the "Operation" field.
3. Click the Open (Display) button  located on the toolbar.
4. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
5. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
6. Once finished, click the Save button  located on the toolbar.

Job Order Summary

This screen is used to display a list of job orders associated with the item/part in the "Item/Part" field.

To view job order summary, perform the following steps (Step 1 is optional):




1. Enter all or part of an item/part number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item/part.
2. Click the Open (Display) button  located on the toolbar.
3. View the Job Order Summary information displayed in the table on the screen.

Job Activity Tabs

Picking

This screen is used to issue the quantity of a component used for the job order. Each component needed in the job order is displayed in a table. The "Quantity Required" field shows the remaining quantity needed for the job order.



To view and/or edit a job order pick list, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.
3. View and/or edit the pick list for that job order by first printing the "Pick List"; then either select "PICK ALL" or adjust the "Issue Quantity" field in the table. The quantity required will be updated automatically on the screen, but will not be permanent until the data is saved.
4. Once finished, click the Save button  located on the toolbar.

History

This screen is used to display the history information for components used in a job order.



To view job order component history, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.

Shortage

This screen is used to display the shortage information for components used in a particular job order.



To view job order shortage information, perform the following steps:

1. Enter a job order number in the "Job Order" field, or use the Search button  next to the "Job Order" field to select a job order.
2. Click the Open (Display) button  located on the toolbar.

Item Shortage

This screen is used to display the shortage information for components used on all job orders.

To view item shortage information, perform the following steps:

1. Enter an item number in the "Item/Part" field, or use the Search button  next to the "Item/Part" field to select an item number.
2. Click the Open (Display) button  located on the toolbar.

Note: To view shortages for all items, run the "Job Order Item Shortage Summary Report" available under the Reports menu on this screen.

Sales Orders Management


For more assistance, please refer to the Sales Orders Management User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu, or the “Documentation” menu within TFG4000. The documentation is also available online. See the “Documentation” section for more information.

Initial Setup

TFG4000 Sales Order Management is installed with certain features that can be changed. The features are controlled with system variables. There is a system variable you need to understand before you start using Sales Order Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000. The documentation is also available online.

`My_Customer_Number` (installation default is 1) – This variable indicates which customer number in the customer database is your own customer number. The system uses your customer number for addresses on documents.

Follow the instructions for defining a customer in this section and define your company. Make note of your customer number, then do the following to set the system variable:


1. Click the plus sign (+) next to “System Administration”.
2. Click “System Variables”.
3. Change the value of the “`My_Customer_Number`” variable to your customer number.
4. Once finished, click the Save button  located on the toolbar.

Customer Tabs




Customer

Use this screen to define a customer and their basic information.

To define a customer, perform the following steps:

1. Enter a customer number in the "Customer" field. If you leave this field blank a customer number is generated for you.
2. Enter any other data you desire in the other optional fields on the screen.
3. Once finished, click the Save button  located on the toolbar.






To edit an existing customer, perform the following steps:

1. Enter a customer number in the "Customer" field, or use the Search button  next to the "Customer" field to select a customer.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information on the screen.
4. Once finished, click the Save button  located on the toolbar.


Address




This screen is used to enter and maintain customer address data. This includes basic address and contact information about the customer. It also contains whether this address is a "Customer", "Invoice", "Shipping" or "Acknowledgement" address for this customer.

To enter customer address information, perform the following steps:

1. Click the Erase button  then enter a customer number in the "Customer" field; or use the Search button  next to the "Customer" to select a customer, then use the GoTo/Selection button  next to "Search for Address" to select an address that can be used as the basis for the new address.
2. Enter the address in the fields provided.
3. Enter the contact information for this address in the contact table at the bottom of the screen. Add blank rows if necessary with the Add Rows button  located in the lower right corner of the table.
4. Once finished, click the Save button  located on the toolbar.

To edit customer address information, perform the following steps:






1. Enter a customer number in the "Customer" field, or use the Search button  next to the "Customer" field to select a customer address.

2. Click the Open (Display) button  located on the toolbar. The first address is displayed.
3. If necessary click the GoTo/Selection button  next to "Search for Address" and select the address you want to edit.
4. Edit the desired information on the screen and in the contact table.
5. Once finished, click the Save button  located on the toolbar.





Information

Use this screen to enter and maintain text information associated with a customer. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter customer information, perform the following steps:

1. Enter a customer number in the "Customer" field, or use the Search button  next to the "Customer" field to select a customer.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective customer. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.



To edit existing customer information, perform the following steps:

1. Enter a customer number in the "Customer" field, or use the Search button  next to the "Customer" field to select a customer.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.

Summary

Use this screen to view a list of the customers you have entered.

To view a customer summary, perform the following steps (Step 1 is optional):



1. Click the Erase button  to display all customers (up to the limit in the "Number of Rows to Display" field) or enter selection criteria by doing any of the following: enter all or part of a customer number in the "Customer" field; enter all or part of a customer name in the "Customer Name" field; select a type; select a status.
2. Click the Open (Display) button  located on the toolbar.
3. View the customer summary displayed on the screen.

Order Tabs




Order

This screen is used to enter and maintain customer order data. This includes basic information about the customer order, such as the description, type, order date, requested date, status, customer and name. It also contains the line items, shipping, and line item descriptions for the customer order.

To enter a customer order, perform the following steps:

1. Enter a customer order number in the "Customer Order" field. If you leave this field blank a customer number is generated for you. Customer order numbers can have any combination of numbers and letters up to a length of 15 characters but the order number must be unique.
2. Enter a customer number in the "Customer" field, or use the left Search button  next to the "Customer" field to select a customer. (The right Search button is for finding customer orders by customer number).
3. Enter any other data you desire in the other optional fields on the screen including line items in the table at the bottom of the screen.
4. Once finished, click the Save button  located on the toolbar.




To edit an existing customer order, perform the following steps:

1. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer order. You can select a customer order using the right search button next to "Customer" or customer "Name" too.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for that customer order on the screen.
4. Once finished, click the Save button  located on the toolbar.


Address

This screen is used to enter and maintain customer order address data. This includes which address is to be used for the shipping address and the billing address on this customer order.





To enter customer order address information, perform the following steps:

1. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer order.
2. Click the Open (Display) button  located on the toolbar.
3. Enter customer order address data in the fields provided, or use the GoTo/Selection button  next to "Search for Shipping Address" and "Search for Billing Address" to select the shipping and billing addresses for the customer.

(Note: If you select an address the change will be saved automatically).

4. Once finished, click the Save button  located on the toolbar.






To edit customer order address information, perform the following steps:

1. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer order.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for the order on the screen; use the "Clear" button in the "Shipping Address" and "Billing Address" sections to erase all fields for those addresses; or use the GoTo/Selection button  next to "Search for Shipping Address" and "Search for Billing Address" to select the shipping and billing addresses for the customer. (Note: If you clear or select an address the change will be saved automatically). If necessary, edit the desired address information for the customer order on the screen.
4. Once finished, click the Save button  located on the toolbar.



Information


Use this screen to enter and maintain text information associated with a customer order. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.


To enter customer order information, perform the following steps:

1. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer order.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective order. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.

To edit existing customer order information, perform the following steps:

1. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the






GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.

4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.





Line Information

Use this screen to enter and maintain text information for a specific line associated with a customer order. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter customer order line information, perform the following steps:

1. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer order.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective order line. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
5. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
6. Once finished, click the Save button  located on the toolbar.



To edit existing customer order line information, perform the following steps:

1. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
5. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
6. Once finished, click the Save button  located on the toolbar.

Summary

Use this screen to view a list of the customer orders in the system.

To view a customer order summary, perform the following steps (Step 1 is optional):



1. Click the Erase button  to display all customers (up to the limit in the “Number of Rows to Display” field) or enter selection criteria by doing any of the following: enter all or part of a customer number in the “Customer” field; enter all or part of a customer name in the “Customer Name” field; select a type; select a status.
2. Click the Open (Display) button  located on the toolbar.
3. View the customer order summary displayed on the screen.

Packing Tabs


Customer Packing

This screen is used to enter and maintain packing slip data. This includes basic information about the packing slip, such as the packing slip number, customer order number, customer number, status, total price and packing slip date. It also contains line item information.




To build a packing slip from an existing customer order, perform the following steps:

1. Enter a packing slip number in the "Packing Slip" field. If you leave this field blank a packing slip number is generated for you.
2. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer order.
3. Click the Build button . The system builds a packing slip from customer order lines eligible for shipping and a packing slip number is generated automatically. If no lines on the order are eligible for packing you will see a message to that effect and a packing slip will not be built.

To enter an ad hoc packing slip, perform the following steps:

1. Enter a packing slip number in the "Packing Slip" field. If you leave this field blank a packing slip number is generated for you.
2. Enter any other data you desire in the other optional fields on the screen.
3. Once finished, click the Save button  located on the toolbar.


To edit an existing packing slip, perform the following steps:


1. Enter a packing slip number in the "Packing Slip" field or use one of the following Search buttons  to select a packing slip: Search button next to "Packing Slip", "Description", "Type", "Status", or "Total Value"; the second Search button next to "Customer Order"; the third Search button next to "Customer #" or "Name".
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for that packing slip on the screen.
4. Once finished, click the Save button  located on the toolbar.

Address



This screen is used to enter and maintain packing slip address data for shipping and billing.

To enter packing slip address information, perform the following steps:

1. Enter a packing slip number in the "Packing Slip" field.
2. Click the Open (Display) button  located on the toolbar.

3. Enter the address in the fields provided.
4. Once finished, click the Save button  located on the toolbar.






To edit packing slip address information, perform the following steps:

1. Enter a packing slip number in the “Packing Slip” field.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the address as needed.
4. Once finished, click the Save button  located on the toolbar.




Information


Use this screen to enter and maintain text information associated with a packing slip. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter packing slip information, perform the following steps:

1. Enter a packing slip number in the “Packing Slip” field, or use the Search button  next to the “Packing Slip” field to select a packing slip.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an “Info Type” from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective packing slip. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a “Reference Type” from the dropdown menu. Enter the reference in the “Reference” field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.

To edit existing packing slip information, perform the following steps:






1. Enter a packing slip number in the “Packing Slip” field, or use the Search button  next to the “Packing Slip” field to select an invoice.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the “Info Type” row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.

4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.





Line Information

Use this screen to enter and maintain text information for a specific line associated with a packing slip. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter packing slip line information, perform the following steps:

1. Enter a packing slip number in the "Packing Slip" field, or use the Search button  next to the "Packing Slip" field to select a packing slip.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective invoice line. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
5. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
6. Once finished, click the Save button  located on the toolbar.



To edit existing packing slip line information, perform the following steps:

1. Enter a packing slip number in the "Packing Slip" field, or use the Search button  next to the "Packing Slip" field to select a packing slip.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
5. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
6. Once finished, click the Save button  located on the toolbar.

History

Use this screen to view packing slip history.



To view packing slip history, perform the following steps:

1. Enter a packing slip number in the "Packing Slip" field or select a packing slip using one of the Search buttons  on the screen.
2. Click the Open (Display) button  located on the toolbar.
3. View the packing slip history displayed on the screen.

Summary

Use this screen to view a packing slip summary.

To view a packing slip summary, perform the following steps (Step 1 is optional):



1. Enter all or part of a packing slip number in the "Packing Slip" field or use the Search button  next to the "Customer Name" field to select a packing slip.
2. Click the Open (Display) button  located on the toolbar.
3. View the packing slip summary displayed on the screen.

Invoicing Tabs


Customer Invoice

This screen is used to enter and maintain invoice data. This includes basic information about the invoice, such as the invoice #, customer order number, customer number, status, total price and invoice date. It also contains line item information.




To build an invoice from an existing customer order, perform the following steps:

1. Enter an invoice number in the "Invoice #" field. If you leave this field blank an invoice number is generated for you.
2. Enter a customer order number in the "Customer Order" field, or use the Search button  next to the "Customer Order" field to select a customer.
3. Click the Build button . The system builds an invoice from customer order lines eligible for invoicing. If no lines on the order are eligible for invoicing you will see a message to that effect and an invoice will not be built.

To enter an ad hoc invoice, perform the following steps:

1. Enter an invoice number in the "Invoice #" field. If you leave this field blank an invoice number is generated for you.
2. Enter any other data you desire in the other optional fields on the screen.
3. Once finished, click the Save button  located on the toolbar.


To edit an existing invoice, perform the following steps:


1. Enter an invoice number in the "Invoice #" field or use one of the following Search buttons  to select an invoice: Search button next to "Invoice #", "Description", "Type", "Status", or "Total Value"; the second Search button next to "Customer Order"; the third Search button next to "Customer #" or "Name".
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for that invoice on the screen.
4. Once finished, click the Save button  located on the toolbar.

Address



This screen is used to enter and maintain invoice address data for shipping and billing.

To enter invoice address information, perform the following steps:

1. Enter an invoice number in the "Invoice #" field.
2. Click the Open (Display) button  located on the toolbar.
3. Enter address data in the fields provided.

4. Once finished, click the Save button  located on the toolbar.






To edit invoice address information, perform the following steps:

1. Enter an invoice number in the "Invoice #" field.
2. Click the Open (Display) button  located on the toolbar.
3. Edit address data as needed.
4. Once finished, click the Save button  located on the toolbar.





Information

Use this screen to enter and maintain text information associated with an invoice. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter invoice information, perform the following steps:

1. Enter an invoice number in the "Invoice #" field, or use the Search button  next to the "Invoice #" field to select an invoice.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective invoice. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.






To edit existing invoice information, perform the following steps:

1. Enter an invoice number in the "Invoice #" field, or use the Search button  next to the "Invoice #" field to select an invoice.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.





Line Information

Use this screen to enter and maintain text information for a specific line associated with an invoice. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter invoice line information, perform the following steps:

1. Enter an invoice number in the "Invoice #" field, or use the Search button  next to the "Invoice #" field to select an invoice.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective invoice line. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
5. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
6. Once finished, click the Save button  located on the toolbar.



To edit existing invoice line information, perform the following steps:

1. Enter an invoice number in the "Invoice #" field, or use the Search button  next to the "Invoice #" field to select an invoice.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
5. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
6. Once finished, click the Save button  located on the toolbar.

History

Use this screen to view invoice history.



To view invoice history, perform the following steps:

1. Enter an invoice number in the "Invoice #" field or select an invoice using one of the Search buttons  on the screen.
2. Click the Open (Display) button  located on the toolbar.
3. View the invoice history displayed on the screen.

Summary

Use this screen to view an invoice summary.

To view a customer summary, perform the following steps (Step 1 is optional):

1. Enter all or part of an invoice number in the "Invoice #" field or use the Search button  next to the "Customer Name" field to select an invoice.
2. Click the Open (Display) button  located on the toolbar.
3. View the invoice summary displayed on the screen.

Purchasing Management


For more assistance, please refer to the Purchasing Management User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu, or the “Documentation” menu within TFG4000. The documentation is also available online. See the “Documentation” section for more information.

Initial Setup

TFG4000 Purchasing Management is installed with certain features that can be changed. The features are controlled with system variables. There is a system variable you need to understand before you start using Purchasing Management. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000. The documentation is also available online.

`My_Supplier_Number` (installation default is 1) – This variable indicates which supplier number in the supplier database is your own supplier number. The system uses your supplier number for addresses on documents.

Follow the instructions for defining a supplier in this section and define your company. Make note of your supplier number, then do the following to set the system variable:


1. Click the plus sign (+) next to “System Administration”.
2. Click “System Variables”.
3. Change the value of the “`My_Supplier_Number`” variable to your supplier number.
4. Once finished, click the Save button  located on the toolbar.

Supplier Tabs




Supplier

Use this screen to define a supplier with their basic information.

To define a supplier, perform the following steps:

1. Enter a supplier number in the "Supplier" field. If you leave this field blank a supplier number is generated for you.
2. Enter any of the optional supplier data in the fields provided.
3. Once finished, click the Save button  located on the toolbar.






To edit an existing supplier, perform the following steps:

1. Enter a supplier number in the "Supplier" field, or use the Search button  next to the "Supplier" field to select a supplier.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information on the screen.
4. Once finished, click the Save button  located on the toolbar.





Address

This screen is used to enter and maintain supplier address data. This includes basic address and contact information about the supplier. It also contains whether this address is a "Supplier", "Payment", or "Return" address for this supplier.

To enter supplier address information, perform the following steps:

1. Click the Erase button  then enter a supplier number in the "Supplier" field; or use the Search button  next to the "Supplier" to select a supplier, then use the GoTo/Selection button  next to "Search for Address" to select an address that can be used as the basis for the new address.
2. Enter the address in the fields provided.
3. Enter the contact information for this address in the contact table at the bottom of the screen. Add blank rows if necessary with the Add Rows button  located in the lower right corner of the table.
4. Once finished, click the Save button  located on the toolbar.






To edit supplier address information, perform the following steps:

1. Enter a supplier number in the "Supplier" field, or use the Search button  next to the "Supplier" field to select a supplier address.
2. Click the Open (Display) button  located on the toolbar. The first address is displayed.
3. If necessary click the GoTo/Selection button  next to "Search for Address" and select the address you want to edit.
4. Edit the desired information on the screen and in the contact table.
5. Once finished, click the Save button  located on the toolbar.





Information

Use this screen to enter and maintain text information associated with a supplier. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter supplier information, perform the following steps:

1. Enter a supplier number in the "Supplier" field, or use the Search button  next to the "Supplier" field to select a supplier.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective supplier. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.

To edit existing supplier information, perform the following steps:



1. Enter a supplier number in the "Supplier" field, or use the Search button  next to the "Supplier" field to select an invoice.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.

Purchase Order Tabs




Order

This screen is used to enter and maintain purchase order data. This includes basic information about the purchase order, such as the description, due date, close date, status, total cost and supplier. It also contains line items, quantity & price as well as further item description information.

To enter a purchase order, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field. If you leave this field blank a purchase order number is generated for you. Purchase order numbers can have any combination of numbers and letters up to a length of 15 characters but the order number must be unique.
2. Enter a supplier number in the "Supplier" field, or use the left Search button  next to the "Supplier" field to select a supplier. (The right Search button is for finding purchase orders by supplier number).
3. Enter any other data you desire in the other optional fields on the screen including line items in the table at the bottom of the screen.
4. Once finished, click the Save button  located on the toolbar.




To edit an existing purchase order, perform the following steps:


1. Enter a purchase order number in the "Purchase Order" field, or use the Search button  next to the "Purchase Order" field to select a purchase order. You can select a purchase order using the right search button next to "Supplier" or supplier "Name" too.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for that customer order on the screen.
4. Once finished, click the Save button  located on the toolbar.

Address





This screen is used to enter and maintain purchase order address data. This includes which supplier address and which shipping address is to be used for this purchase order.

To enter purchase order address information, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field, or use the Search button  next to the "Purchase Order" field to select a purchase order address.
2. Click the Open (Display) button  located on the toolbar.
3. Enter address data in the fields provided in the appropriate sections or use the GoTo/Selection button  in the "Supplier Address" and "Shipping Address" sections to search for an existing address.

4. Once finished, click the Save button  located on the toolbar.






To edit an existing address, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field, or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for that purchase order on the screen; use the "Clear" button in the "Supplier Address" and "Shipping Address" sections to clear all fields and enter the address in the fields provided; or use the GoTo/Selection button  in the "Supplier Address" and "Shipping Address" sections to search for an existing address.
4. Once finished, click the Save button  located on the toolbar.




Information


Use this screen to enter and maintain text information associated with a purchase order. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter purchase order information, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field, or use the Search button  next to the "Purchase Order" field to select an invoice.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective purchase order. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.

To edit existing purchase order information, perform the following steps:






1. Enter a purchase order number in the "Purchase Order" field, or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.

4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.





Line Information

Use this screen to enter and maintain text information on a specific line associated with a purchase order. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter purchase order line information, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field, or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective purchase order line. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
5. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
6. Once finished, click the Save button  located on the toolbar.


To edit existing purchase order line information, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field, or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Enter a line number in the "Line Number" field.
3. Click the Open (Display) button  located on the toolbar.
4. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
5. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
6. Once finished, click the Save button  located on the toolbar.

Summary

Use this screen to view a purchase order summary list.



To view a supplier summary, perform the following steps (Step 1 is optional):

1. Enter all or part of a purchase order number in the "Purchase Order" field to select a purchase order.
2. Click the Open (Display) button  located on the toolbar.
3. View the purchase order summary displayed on the screen.




Receipt

Use this screen to view receipt data and to perform receipts against a purchase order.

To view receipt data, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Click the Open (Display) button  located on the toolbar.
3. View the purchase order receipt information displayed on the screen



To perform receipts, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Click the Open (Display) button  located on the toolbar.
3. Enter the receipt quantity and enter or select an inventory location where the inventory will be stored.
4. Once finished, click the Save button  located on the toolbar.




Return

Use this screen to view return data and to perform returns against a purchase order.

To view return data, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Click the Open (Display) button  located on the toolbar.
3. View the purchase order return information displayed on the screen

To perform returns, perform the following steps:

1. Enter a purchase order number in the "Purchase Order" field or use the Search button  next to the "Purchase Order" field to select a purchase order.
2. Click the Open (Display) button  located on the toolbar.
3. Enter the return quantity and enter or select an inventory location where the inventory will come from.
4. Once finished, click the Save button  located on the toolbar.


Common Applications

For more assistance, please refer to the Common Application User Guide included on the TFG4000 Professional Edition CD, which is available from the Windows "Start" menu, or the "Documentation" menu within TFG4000 Professional Edition. The documentation is also available online. See the "Documentation" section for more information.


Calendar Screen

This screen is used to enter and maintain your calendar. Only days you do not work are entered.

To enter a calendar, perform the following steps:

1. Enter data in the Date, Day, and Type columns in the first available row of the table.
2. Once finished, click the Save button  located on the toolbar.

To edit a calendar, perform the following steps:


1. Make the changes desired for the date. To delete a row click the box in the "Delete" column for that date. A check mark will appear in the box indicating that the date will be deleted when the Save button is clicked. Click the box again to remove the check mark.
2. Once finished, click the Save button  located on the toolbar.

Employee Tabs




Employee

This screen allows you to enter and maintain employee data.

To define an employee, perform the following steps:

1. Enter an employee number in the "Employee" field.
2. Enter data in any of the other optional fields.
3. Once finished, click the Save button  located on the toolbar.




To edit an existing employee, perform the following steps:

1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee number.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information.
4. Once finished, click the Save button  located on the toolbar.




Contact

This screen is used to enter and maintain data employee contact data.

To enter an employee contact, perform the following steps:

1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.
3. Enter data in any of the other optional fields.
4. Once finished, click the Save button  located on the toolbar.






To edit an existing employee contact, perform the following steps:

1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information for that employee on the screen.
4. Once finished, click the Save button  located on the toolbar.





Information

Use this screen to enter and maintain text information associated with an employee. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

To enter employee information, perform the following steps:

1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.
3. To enter information, select an "Info Type" from the dropdown menu. Use the GoTo/Selection button  in the table to open an edit window. Enter any information that is pertinent to the respective carrier. You may enter as much or as little information as you desire. Once finished, click the OK button to return to the main screen.
4. To enter an external reference, select a "Reference Type" from the dropdown menu. Enter the reference in the "Reference" field, or use the GoTo/Selection button  in the table to select an electronic external file.
5. Once finished, click the Save button  located on the toolbar.



To edit existing employee information, perform the following steps:


1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.
3. To edit information, click the "Info Type" row you wish to edit. Use the GoTo/Selection button  in the table to open an edit window. Once finished, click the OK button to return to the main screen.
4. To edit external references, click the "Reference Type" row you wish to edit. Edit the desired reference in the reference table.
5. Once finished, click the Save button  located on the toolbar.

Skills




This screen allows you to enter and maintain data for an employee skill.

To enter an employee skill, perform the following steps:

1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.

3. In the displayed table, enter/edit the skills for this employee.
4. Once finished, click the Save button  located on the toolbar.




To edit an existing employee skill, perform the following steps:

1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information on the screen.
4. Once finished, click the Save button  located on the toolbar.




Schedule

This screen allows you to enter and maintain data for an employee schedule.

To enter an employee schedule, perform the following steps:

1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.
3. Enter data in any of the other optional fields.
4. Once finished, click the Save button  located on the toolbar.

To edit an existing employee schedule, perform the following steps:


1. Enter an employee number in the "Employee" field, or use the Search button  next to the "Employee" field to select an employee.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information.
4. Once finished, click the Save button  located on the toolbar.

Location Control Tabs




Location

The screen allows you to enter and maintain inventory location definitions.

To enter a location, perform the following steps:

1. Enter a location name in the "Location" field.
2. Enter data in any of the other optional fields.
3. Once finished, click the Save button  located on the toolbar.


To edit an existing location, perform the following steps:

1. Enter a location name in the "Location" field, or use the Search button  next to the "Location" field to select a location name.
2. Click the Open (Display) button  located on the toolbar.
3. Edit the desired information.
4. Once finished, click the Save button  located on the toolbar.

Location Summary

Use this screen to view a location summary list.


To view a location summary, perform the following steps (Step 1 is optional):

1. Enter all or part of a location name in the "Location" field.
2. Click the Open (Display) button  located on the toolbar.

Location Generation

Use this screen to generate location names with the same information.

To generate locations, perform the following steps:

1. Enter your generation parameters in the top section for the screen.
2. Enter data in any of the other optional fields.
3. Click the Build button  located on the toolbar.

System Administration

For more assistance, please refer to the System Administration User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu, or the “Documentation” menu within TFG4000. The documentation is also available online. See the “Documentation” section for more information.



Initial Setup



TFG4000 Professional Edition is installed with certain features that can be changed. The features are controlled with system variables. There are some system variables you need to understand before you start using TFG4000 Professional Edition. See the System Variables screen in the System Administration section of this manual for more information about changing the settings for system variables or see the System Administration User Guide included on the TFG4000 Professional Edition CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000 Professional Edition. The documentation is also available online.

Security -- With this variable set to “No”, anyone using the system has access to all of the applications, screens, and functions; the Windows user id is logged every time data is inserted or updated. With this variable set to “Yes”, each person using the system must have a user id and password and varying degrees of access can be set for each user; the TFG4000 Professional Edition user id is logged every time data is inserted or updated.

TFG4000 Professional Edition is installed with security set to “No”. A User Identification is not required when security is turned off. However, if you choose to turn security on, there are two default User Identifications installed with the system. They are “Admin” (password “Admin”) and “User” (password “User”). You should change the passwords of the default User Identifications.

If you want to use security, perform the following steps:

1. Set up User Identifications.
 1. Click the plus sign (+) next to “System Administration”.
 2. Click “User Control”.
 3. Enter the user information in the first available row.
 4. Repeat as necessary.
 5. Once finished, click the Save button  located on the toolbar.
2. Set User Security Controls.
 1. Click the plus sign (+) next to “System Administration”.
 2. Click “User Control”.
 3. Click the “Security Control” tab.
 4. Enter the User ID in the “User Id” field, click the Open (Display) button  located on the toolbar.

5. Enter the appropriate security level for each screen.
 6. Once finished, click the Save button  located on the toolbar.
 7. Repeat for each user defined.
3. Turn security on.
 1. Click the plus sign (+) next to "System Administration".
 2. Click "System Variables".
 3. Change the value of the "Security" variable to "Yes".
 4. Once finished, click the Save button  located on the toolbar.
 4. Restart the TFG4000 Server. Clients for the security change in step 3 will be updated.


User Control Tabs

The User Control screens allow you to add and maintain user information along with the security authorizations for each user in the system.


User Control

User Control allows you to add and maintain user information.

To enter a user, perform the following steps:

1. Enter a User ID in the "User" column and a Password in the "Password" column in the first available row of the table.
2. Enter data in any of the other optional columns.
3. Once finished, click the Save button  located on the toolbar.



To edit a user, perform the following steps:

1. Make the changes desired for the user. To delete the user click the box in the "Delete" column for that user. A check mark will appear in the box indicating that the user will be deleted when the Save button is clicked. Click the box again to remove the check mark.
2. Once finished, click the Save button  located on the toolbar.

Security Control

Security Control screen allows you to enter and display security authorizations for each user in the system.



To enter or display security controls for a user, perform the following steps:

1. Enter a User ID in the "User Id" field.
2. Click the Open (Display) button  located on the toolbar.
3. You will see a display of security controls for that user by Screen Name with the type of Authority (Full Authorization, Not Authorized, Display Only) for that user. If necessary, you can edit the Authority type for that user.
4. Once finished editing, click the Save button  located on the toolbar.


Dropdown Control

Many screens have pre-defined values that can be selected when you click on a little arrow next to the field. This is called a dropdown. A list of values appears and you can click on one so the value you selected appears in the field. Some of the dropdown lists can be customized; you can add, change, and delete values. You must restart the client component after you have finished changing dropdowns. The changes you make will subsequently change occurrences for all users.

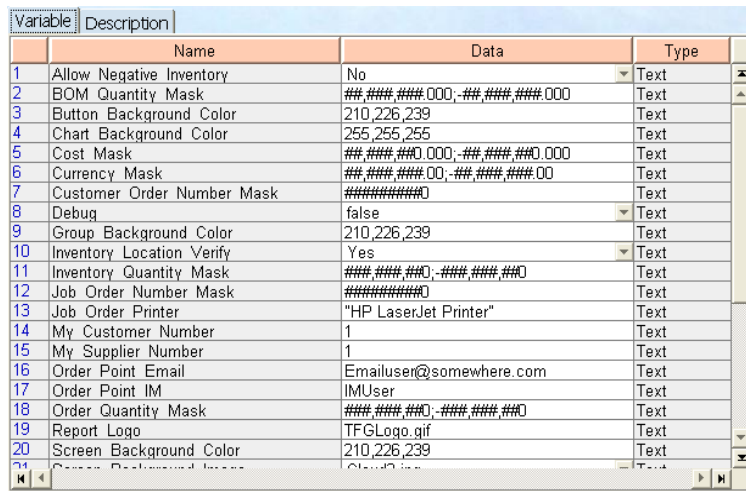
To change a dropdown, perform the following steps:

1. From the left table "Dropdown Name", select the dropdown you wish to edit.
2. In the right table "Text to Display to User", edit the desired dropdown entry.
3. To add a new entry, click the Add Rows button  located in the lower right corner of the table, then key the new entry in one of the new rows.
4. Once finished, click the Save button  located on the toolbar.

System Variables

TFG4000 uses variables, such as screen colors, which you may change if you wish by changing the values on the System Variables screen. You may edit the system variables by clicking in the "Data" field of the chosen variable, changing the value as desired, and then clicking the Save button  located on the toolbar once you are finished. The changes you make will subsequently change occurrences for all users.

Example Only:



Variable	Description	Name	Data	Type
1		Allow Negative Inventory	No	Text
2		BOM Quantity Mask	##,###,###.000;-##,###,###.000	Text
3		Button Background Color	210,226,239	Text
4		Chart Background Color	255,255,255	Text
5		Cost Mask	##,###,###.000;-##,###,###.000	Text
6		Currency Mask	##,###,###.00;-##,###,###.00	Text
7		Customer Order Number Mask	#####0	Text
8		Debug	false	Text
9		Group Background Color	210,226,239	Text
10		Inventory Location Verify	Yes	Text
11		Inventory Quantity Mask	###,###,###0;-###,###,###0	Text
12		Job Order Number Mask	#####0	Text
13		Job Order Printer	"HP LaserJet Printer"	Text
14		My Customer Number	1	Text
15		My Supplier Number	1	Text
16		Order Point Email	Emailuser@somewhere.com	Text
17		Order Point IM	IMUser	Text
18		Order Quantity Mask	###,###,###0;-###,###,###0	Text
19		Report Logo	TFGLogo.gif	Text
20		Screen Background Color	210,226,239	Text

Database Definitions

There are many tables in the TFG4000 database. The Database Definitions screen displays a list of these tables with help text that describes each one. It also displays the columns within each table. Click on a Table Name to view the columns in that table. Right click a Table Name, and then choose "Show Database Help" to view the help text for the table.

Serial Numbers

The TFG4000 Software Series contains several different applications. Each application must have a serial number entered before it can be used. The Serial Numbers screen displays applications and the serial numbers that have already been entered.

Utility Control

TFG4000 provides four data utilities: database backup, database restore, data export, and data import.

Please refer to the System Administration User Guide for more information.

Advanced Installation

TFG4000 provides some advanced installation functionality such as: font sizes, system variables, server start up options, BAT file options for single user and multi user modes.

Please refer to the System Administration User Guide for more information.

Documentation

TFG4000 documentation (in PDF format) is available online at www.tfg4000.com, through the "Documentation" menu on each screen, or from the Windows "Start" menu. Simply click "Start", then "Programs", then "TFG4000 V1.4", and then "Documentation".

Note: PDF files require Adobe® Acrobat® Reader. The reader is available at www.adobe.com free of charge.

Registration

Quick & Easy Online: After installation, you can go to our web page at www.tfg4000.com to register the product. Click on "Register" and follow the instructions.

Suggestions

We are eager to improve TFG4000, and we urge you to tell us what you think of the software and how it could be improved to better suit your needs. We have taken many suggestions from our customers and incorporated them into our products. If you have suggestions or comments, please send an e-mail to tfg4000@fredrickgroup.com. We want to hear from you!

Services

The Fredrick Group, Inc. offers assistance in data conversion. For more information, contact The Fredrick Group, Inc. directly by either:

E-mail Send an e-mail to tfg4000@fredrickgroup.com, with 'Services' in the subject line.

Phone Call **770-844-8516** between 8:30 AM - 5:00 PM ET.

Support

Note: You must be registered in order to receive support.

Initial Installation Support

The Fredrick Group, Inc. provides free initial installation support via e-mail. Installation support is available for 30 days, and is activated when you send your first message. You may also receive installation support by calling, but you must pay the cost of the call. Technicians are available on a limited basis Monday through Friday from 8:30 am to 5:00 pm Eastern time. The TFG4000 product technical support number is **770-844-8516**.

Pay-As-You-Go Support

Additional fee-based support is available. You pay the cost of the call plus an additional fee. Credit card information must be provided and confirmed before a call is accepted. Technicians are available on a limited basis Monday through Friday from 8:30 am to 5:00 pm Eastern time. The TFG4000 product technical support number is **770-844-8516**.

Contact The Fredrick Group, Inc. at tfg4000@fredrickgroup.com for more details.

Other Support Options

Other support options are available.

Contact The Fredrick Group, Inc. at tfg4000@fredrickgroup.com for more details.

Note: Support plans and fees are subject to change without notice.

TFG4000 Software Series

You can obtain the following TFG4000 applications by visiting your nearest retailer:

- Inventory Management
- Job Order Management
- Sales Order Management
- Purchasing Management

For more information go to www.tfg4000.com.