

# TFG4000™

Professional Edition

## Getting Started Guide



Version 1.4.5

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## Welcome

The TFG4000 Professional Edition 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. Each TFG4000 Professional Edition application is integrated with other TFG4000 Professional Edition applications to provide you the optimum benefits of business management software.

TFG4000 Professional Edition 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, as well as powerful search capabilities and built-in help features to help guide you through the system. With TFG4000 Professional Edition, 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 Professional Edition 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 Professional Edition is the smart source for business management. A simple solution for a complex process.

## System Requirements

Microsoft Windows XP<sup>®</sup>, Microsoft Windows 2003 Server<sup>®</sup>, or Microsoft Windows 2000 Server<sup>®</sup>, with the latest Service Pack applied.

Pentium<sup>®</sup> class processor, 1 ghz or greater.

100MB free disk space.

256MB of RAM (512MB or more recommended).

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

# TFG4000 Professional Edition Installation Procedures

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

**Note:** To install the Server component of either option, Administrative Privileges are needed for Windows 2003 Server, Windows NT and Windows 2000 Server.

## 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 Professional Edition.

**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 the "System Administration Users Guide", "Advanced Installation", "BAT File Options" for more information.

### **Type 2: Single**

This type should be selected when TFG4000 Professional Edition 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 Professional Edition 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 server, client, or both.

## Manual Loading Using Start/Run

1. Place the TFG4000 Professional Edition 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 Professional Edition CDs with serial numbers. To install your additional application, follow these steps:

1. Insert the additional TFG4000 Professional Edition CD into the CD ROM drive.
2. A screen will come up indicating that you already have TFG4000 Professional Edition installed on your PC; it will provide you two options: "Remove TFG4000 Professional V1.4" or "Add/Update TFG4000 Professional V1.4".
3. Select "Add/Update TFG4000 Professional 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".

## Firewall Considerations

If you are using a local firewall on the machine that your server component is installed on then you will need to allow access to TFG4000 Professional Edition. Do not block access to "javaw" on the machine that the server component is running on. This also applies to single user installations. See the "System Administration Users Guide" for more information on setting up your firewall.

## Multiple User License

If you are installing TFG4000 Professional Edition applications for multiple users, additional licenses for that application are required. Each TFG4000 Professional Edition 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 Professional Edition website at [www.tfg4000.com](http://www.tfg4000.com).

Simply perform the following once you enter the website:

1. Click "Support" from the top navigation bar on the screen.
2. 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 Professional Edition automatically performs data migration if required.

## Uninstalling TFG4000 Professional Edition

If you wish to remove TFG4000 Professional Edition 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 Professional V1.4" in the list, and then select "Add/Remove".
4. Follow the directions as they are displayed on your screen.

If TFG4000 Professional Edition 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 Professional Edition 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 Professional Edition.

# Starting TFG4000 Professional Edition

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

## Single User

1. Open the "Start" menu, and then select the "Program" or "All Programs" option.
2. Select "TFG4000 Professional V1.4" from the program list.
3. Select "TFG4000 Professional Single V.1.4" to start.
4. The TFG4000 Professional Edition "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 Users** (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" or "All Programs" option.
2. Select "TFG4000 Professional V1.4" from the program list.
3. Select "TFG4000 Professional Server V1.4" to start.
4. The "TFG Web Server" screen is displayed. It will display the INI file and the TCP/IP port number being used for the server. This window will display other server messages as needed.

### **Client Startup**

1. Open the "Start" menu, and then select the "Program" or "All Programs" option.
2. Select "TFG4000 Professional V1.4" from the program list.
3. Select "TFG4000 Professional Client V1.4" to start.
4. The TFG4000 Professional Edition "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

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.

## System Administration

**Security** (installation default is "No") -- 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. 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.

**Form\_Logo** (installation default is **Cubelcon.gif**) – This variable contains the name of the logo file to use on special forms such as Customer Order Forms, Purchase Order Forms, Job Order forms, Packing Slips, and Invoices. The recommended logo size is 50x50 pixels. The logo can be smaller or larger and the system will size it to fit. If you want your company logo to appear on forms, place your logo in .gif format in the \\Server\Images directory and set this variable to the name of the logo. (**Note:** The Report\_Logo variable was used in previous releases of TFG4000 for forms, so you may need to check this variable).

**Report\_Logo** (installation default is **Cubelcon.gif**) – This variable contains the name of the logo file to use on reports. The recommended logo size is 50x50 pixels. The logo can be smaller or larger and the system will size it to fit. If you want your company logo to appear on reports, place your logo in .gif format in the \\Server\Images directory and set this variable to the name of the logo.

**Screen\_Logo\_Image** (installation default is **Cubelcon.gif**) – This variable contains the name of the logo file to use above the navigation tree (NavTree) on the left side of the screen. The recommended logo size is 50x50 pixels. The logo can be smaller or larger and the system will size it to fit. If you would like your company logo to appear above the NavTree, place your logo in .gif format in the \\Server\Images directory and set this variable to the name of the logo.

**TFGTriggerController** (installation default is "1") – This variable indicates the interval in minutes between general trigger processing. With this variable set to 0, background utilities, Preventive Maintenance scheduling, and certain Warehousing processes will not run. Set it to 1 or higher to allow trigger processing.

**Welcome\_Logo** (installation default is **Cubes.gif**) – This variable contains the name of the logo file to use on the Welcome screen. The recommended logo size is 300x300 pixels. The logo can be smaller or larger and the system will size it to fit. If you would like your company logo to appear on the Welcome screen, place your logo in .gif format in the \\Server\Images directory and set this variable to the name of the logo.

## Inventory Management

**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 are 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 Cost and Price screen. When the inventory cost on the Cost and Price 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).

**Order\_Point\_Email** (installation default is blank) – Order Point processing will send email notification when the order point for an item has been reached. Normally the notification would be sent to the order point email address on the Order Point Item screen for the item, but if no email address was defined for the item, the system will send the notification to the default email address defined with the Order\_Point\_Email system variable. If you do not want a notification sent to a default email address, leave this variable blank.

**Order\_Point\_IM** (installation default is blank) – Order Point processing will send instant messenger notification when the order point for an item has been reached. Normally the notification would be sent to the order point IM address on the Order Point Item screen for the item, but if no IM address was defined for the item, the system will send the notification to the default IM address defined with the Order\_Point\_IM system variable. If you do not want a notification sent to a default IM address, leave this variable blank.

**User\_Image\_Directory** (installation default is “UserImages”) – This variable allows you to define the directory where you store digital images of items. Images can be viewed with the Item Definition screen under Shared Applications. The UserImages directory is located under the Server directory where you installed TFG4000. If you want to store your images elsewhere you must enter the full directory path in this variable. Please make sure the path is accessible to anyone who needs to view item images.

## Job Order Management

**Job\_Order\_Full\_BOM** (default is “Yes”) – With this variable set to “Yes”, job orders will be built using a summarized bill of materials, i.e. all components at every level of the bill will be used on the job order bill of material. With this variable set to “No”, only the components on the first level of the bill will be used in the job order bill of materials.

**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

**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.

## Material Scheduling

**Material\_Scheduling** (default is "Yes") – With this variable set to "Yes", Material Scheduling will run regularly to process item supply and demand. With this variable set to "No", material scheduling will not run.

**TFGMaterial\_Schedule\_Trigger** (Default is 5) – Indicates the number of minutes between automatic material scheduling processing.

## Purchasing Management

**Allow\_PO\_Over\_Receipt** (default is "No") – With this variable set to "No", purchase order receiving will not allow you to receive a quantity greater than the quantity on the purchase order line. With this variable set to "Yes", purchase receiving will allow you to receive a quantity that greater than the quantity on the purchase order line.

**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.

## Preventive Maintenance

**Job\_Order\_Printer** (installation default is "HP Laserjet Printer") – This variable indicates the default printer to be used for job order printing.

**Default\_City** (installation default is "Cumming" where The Fredrick Group, Inc. is located) – This variable defines the default city used when defining machines. You should change this to your city or blank it out if you do not want a default city.

**Default\_State** (installation default is "Georgia" where The Fredrick Group, Inc. is located) – This variable defines the default state used when defining machines. You should change this to your state or blank it out if you do not want a default state.

**Default\_ZipCode** (installation default is "30040" where The Fredrick Group, Inc. is located) – This variable defines the default zip code used when defining machines. You should change this to your zip code or blank it out if you do not want a default zip code.

## Warehouse Management

**PreDefine\_Lots** (installation default is "Yes") – With this variable set to "Yes", a lot number must be pre-defined before inventory can be received for that lot. With this variable set to "No", a lot can be received without pre-defining the lot number, but lots can be pre-defined if desired.

**WMS\_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.

**WMS\_Allow\_PO\_Over\_Receipt** (default is "No") – With this variable set to "No", purchase order receiving will not allow you to receive a quantity greater than the quantity on the purchase order line. With this variable set to "Yes", purchase receiving will allow you to receive a quantity that greater than the quantity on the purchase order line.

**WMS\_Automatic\_Replenishment\_List** (default is "Yes") – With this variable set to "Yes", warehouse replenishment lists will be generated automatically base on item replenishment levels. With this variable set to "No", replenishment lists must be generated manually. The system will still determine where inventory will come from, but the process will not happen automatically as with "Yes".

**WMS\_Consolidation\_Percentage** (default is 10) – Indicates the Percentage of the maximum pallet quantity that will be used to select locations to use during Consolidation. 10 means inventory should be considered for consolidation when the inventory for an item falls below 10 percent of the maximum capacity for that location, i.e. is the inventory low enough to consider moving it to another location so it can be combined (consolidated) with other inventory.

**WMS\_Merge\_Lots** (default is "Yes") – Indicates if inventory with different lot numbers can be stored in the same inventory location. With this variable is set to "Yes", inventory with different lots can be stored in the same location. With this variable set to "No", inventory with different lots cannot be store in the same location

**WMS\_Merge\_Pools** (installation default is "Restricted" – This variable controls how inventory is selected for system generated lists. Pools can have one of three types – Unique, Shared, and General. This variable has three different values "No" select inventory only if the pool is the same; "Restricted" look for same pool first, then if type is Shared check other Shared pools, then check for pool type General, then check for no pool at all; "Yes" select inventory regardless of pool.

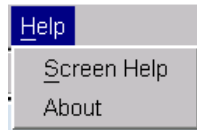
**WMS\_Replenish\_Percentage** (installation default is "50") – This variable indicates the percentage of inventory that will trigger replenishment orders for replenish locations. When on hand quantity as a percentage of the maximum quantity that can be stored in a location falls below this percentage, a replenishment order is triggered.

## Built-in Help

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

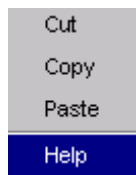
### Screen Level Help

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.

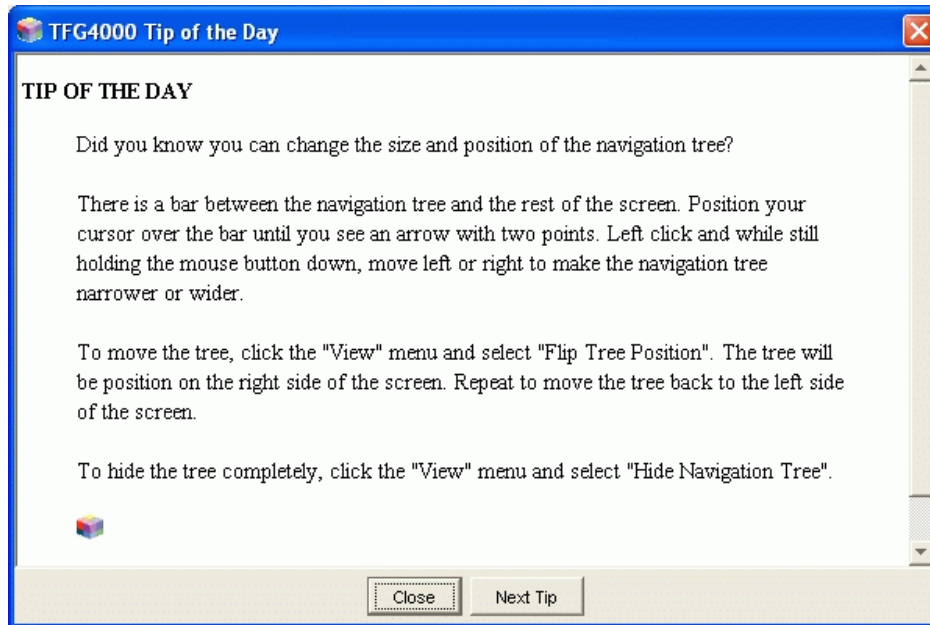




## Tip of the Day

Each time you start TFG4000 Professional Edition, 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.

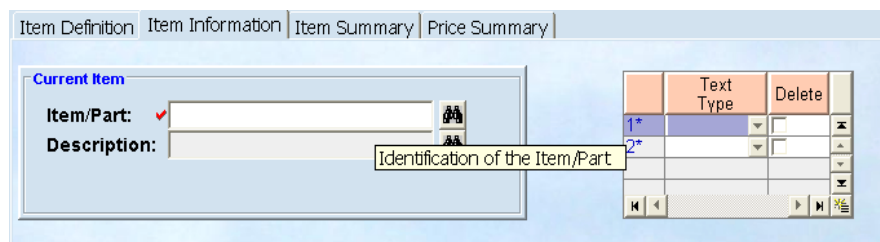
Example Only:



## Tool Tips

Throughout TFG4000 Professional Edition, 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.

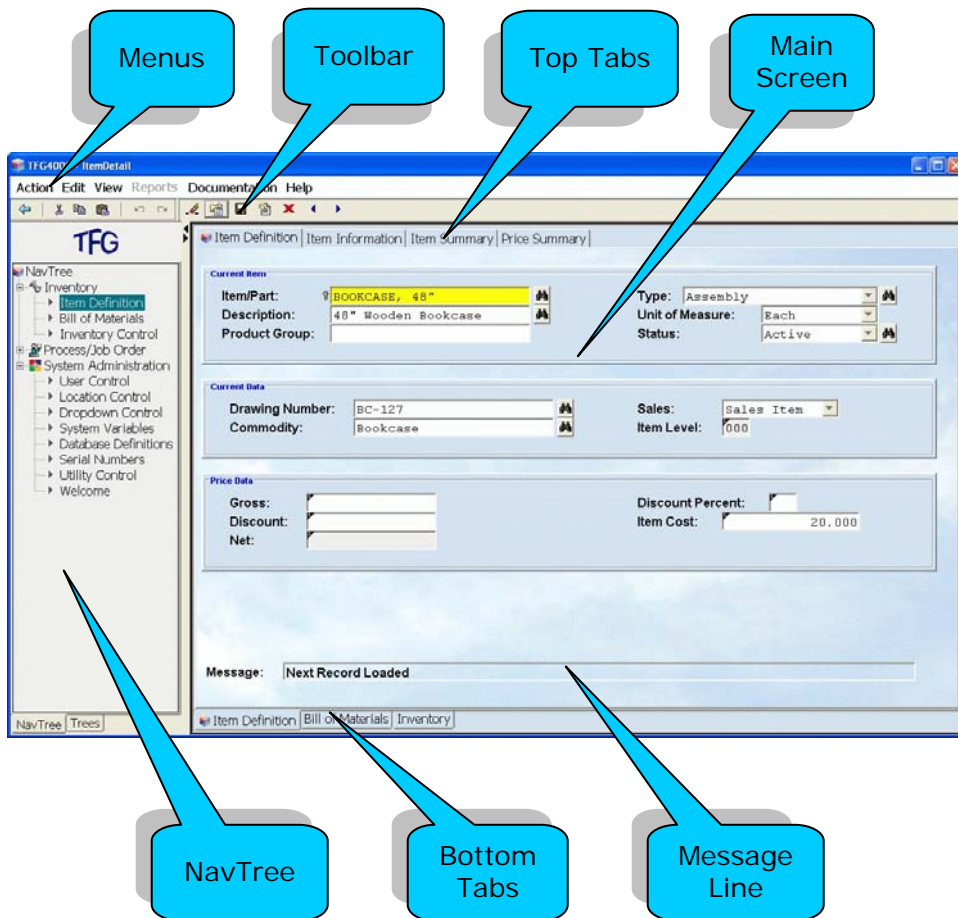
Example Only:



# Using TFG4000 Professional Edition

You can navigate through the TFG4000 Professional Edition 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 Professional Edition 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 Professional Edition 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 Professional Edition. It contains the following menu items:

<b>Print</b>	Prints the entire screen in either portrait or landscape mode.
<b>Print Text</b>	Prints only the text currently displayed on the screen in either portrait or landscape mode.
<b>Exit</b>	Terminates the TFG4000 Professional Edition session.

### Edit

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

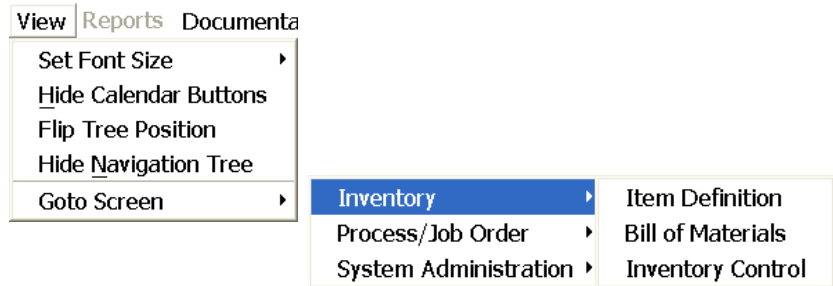
<b>Cut</b>	When you highlight data and use this function, the data is removed from the screen and is available in a clipboard for pasting. Holding the "Ctrl" key and pressing the "X" key will perform the same operation.
<b>Copy</b>	When you highlight data and use this function, the data is copied into a clipboard and is available for pasting. Holding the "Ctrl" key and pressing the "C" key will perform the same operation.
<b>Paste</b>	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 Professional Edition screens are presented and how you navigate the screens. It contains the following menu items:

<b>Set Font Size</b>	You can choose a font size from 10 to 18. With larger font sizes you may have to scroll to see the entire screen.
<b>Hide Calendar Buttons</b>	Toggles whether or not a Calendar button is displayed next to the date fields.
<b>Flip Tree Position</b>	Changes the position of the “NavTree” to either the left or the right side of the screen.
<b>Hide Navigation Tree</b>	Hides the “NavTree” from the screen. Click it a second time to display the “NavTree” on the screen.  <b>Note:</b> The dark arrows in the bar between the NavTree” and the main screen perform the same function.
<b>Allow Word Wrap</b>	Determines how text may be viewed. When it is checked, text may be displayed on multiple lines and can be viewed by scrolling up and down. When it is not checked, text may be viewed by scrolling right and left. Word wrap is allowed only if the system variable <b>Allow_Wrap</b> is set to <b>Yes</b> .
<b>GoTo Screen</b>	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 shows you the reports or forms available for the screen you are on. There will be various menu items depending on the screen. There is also an "All Reports" menu available from any screen.

**Note:** Forms are structured documents such as Invoices, Packing Slips, Purchase Orders, etc. Though you will see forms in the Reports menu on some screens, you will not see forms in the All Reports menus.

**Specific Reports** Displays reports associated with the screen you are on.

**All Reports** Displays a menu of reports available for all the applications you have installed. This menu does not include Forms.



## Documentation

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

## Help

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

**Screen Help** Displays information about the screen you are on.

**About** Displays information about TFG4000 Professional Edition.

## Buttons & Icons

Each screen in TFG4000 Professional Edition 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

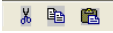


Use the following buttons to perform TFG4000 Professional Edition application tasks. The buttons displayed change with the screen you are working with.

### Previous screens

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

### Cutting, copying and pasting text

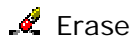


You can use "Cut" and "Paste" to move selected text. You can use "Copy" and "Paste" to copy selected text and paste the copy in another place. "Cut", "Copy", and "Paste" can also be selected from the "Edit" menu.

### Working with data



You can perform many different operations 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. It can copy related data in addition to the data currently displayed.
 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.
 Split	This button will take lines from one document to create a new document using the lines selected.


## Screen Buttons

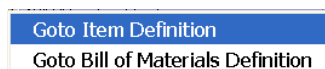
Throughout the screens are buttons that perform functions.











 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.

<b>Gray</b>	A gray field is display only, no entry allowed or necessary
<b>White</b>	A white field is open for entering data
<b>Yellow</b>	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 Professional Edition 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 Professional Edition is restarted.

## Performing Searches

There are two types of searches in TFG4000 Professional Edition 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 button down, move the column to 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

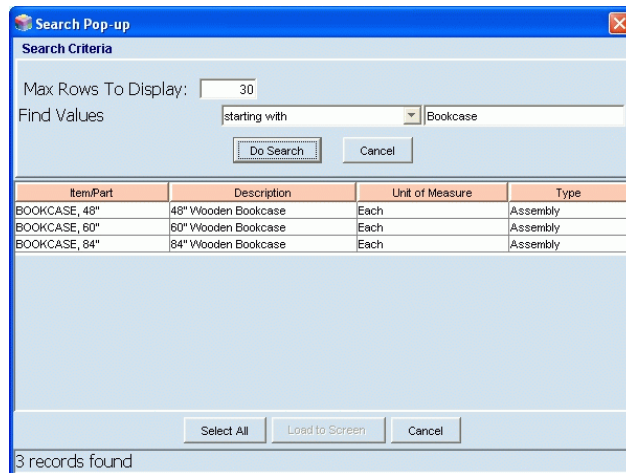
To print the search results, use these steps:

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
- Results 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
- Footer:**
  - Buttons: Select All, Load to Screen, Cancel
  - Status: 3 records found

## Using the Search Pop-Up Screen

1. 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 button down, move the column to 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.

### 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 and a selection for All Reports. 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 such as page orientation and margins. Once finished adjusting the settings, click "OK".

#### Memorize

Allows you to save report settings under a report that you name yourself so you can run the report again with the same settings. You can save settings for a report under different names so you can have multiple versions of the same report formatted different ways. The new report names appear in the Report menu at the top of the main screen (after you go to another screen and come back) and they are available only to you, other users will not be able to see reports you memorized.

#### 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".

<b>Excel</b>	Allows you to save your report as an Excel document. Once finished naming and specifying where to save your report, click "Save".
<b>Revert</b>	Allows you to discard all layout changes and revert to default settings. Simply click either "Yes", or "No".
<b>Help</b>	Shows the Report Layout Instruction screen.
<b>Close</b>	Click this button to close the report and return to the main 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. Columns can be re-sized, hidden, and un-hidden and sections can be hidden and un-hidden.

**To re-size a column do the following:**

1. Move your cursor over the column heading you want to re-size.
2. Move to the right until you see an arrow with two heads.
3. 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, do the following:**

1. Right click in the report area or the long, thin "Edit" button on the left side of the report window to get the "Report Layout Options" window.
2. Click 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 hide or unhide a report section, do the following:**

1. Click the tab for the section you want to hide or unhide.
2. Right click in the report area or the long, thin "Edit" button on the left side of the report window to get the "Report Layout Options" window.
3. Click "Do Not Print This Section".

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 Professional Edition is re-started.

### **Logos on Forms and Reports**

Special forms such as job order forms, customer order forms, packing slips, invoices, and purchase order forms have an area for a company logo. The logo is controlled by system variable **Form\_Logo**.

Reports have an area for a company logo too. The logo is controlled by system variable **Report\_Logo**.

See the System Administration Users Guide for more information about these system variables and how to set them.

### **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.



## Shared Applications




For more assistance, please refer to the Shared Applications 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. See the “Documentation” section for more information.

Shared Applications contains screens for entering and maintaining data that is used by multiple applications. For example, item numbers are used in all of the TFG4000 applications, so item data is entered and maintained under Shared Applications.


### 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.

## Carrier Tabs




### Carrier

This screen is used to enter and maintain carrier data. This includes basic information about the carrier, such as the description and status.

#### To enter a carrier, perform the following steps:

1. Enter carrier data. The carrier number is generated automatically and the remainder of the fields are optional. Some of the fields have defaults.
2. Once finished, click the Save button  located on the toolbar.




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

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





### Address

This screen is used to enter and maintain carrier address data.

#### To enter carrier address information, perform the following steps:

1. Enter a carrier number in the "Carrier" field, or use the Search button  next to the "Carrier" field to select a carrier.
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 an existing address, perform the following steps:

1. Enter a carrier number in the "Carrier" field, or use the Search button  next to the "Carrier" field to select a carrier.
2. Click the Open (Display) button  located on the toolbar.
3. Use the GoTo/Selection button  to search for an existing address.
4. 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 carrier. You can also attach references to external documents, including electronic documents such as spreadsheets and other word processing documents.

### To enter carrier information, perform the following steps:

1. Enter a carrier number in the "Carrier" field, or use the Search button  next to the "Carrier" field to select a carrier.
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 supplier. 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 Carrier information, perform the following steps:


1. Enter a carrier number in the "Carrier" field, or use the Search button  next to the "Carrier" field to select a carrier.
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.

## 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 a customer address, 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 a customer address, 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.

## Statistics

Use this screen to view statistical data about a customer.



**To view customer statistics, perform the following steps (Step 1 is optional):**

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.

## 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.




## Customer Item

Use this screen to define a customer item relationship.

**To define a customer item, perform the following steps:**

1. Enter a customer number in the "Customer" field, the customer item number in the "Cust. Item" field, and an item number in the "Item/Part" field.
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 item, perform the following steps:**

1. Use the second Search button  next to the "Customer" field to select the desired data.
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.

## Labels

Use this screen to print customer labels.

**To print customer labels, perform the following steps:**


1. Enter a customer number in the "Start Customer" field and a customer number in the "End Customer" field. You can also use the search buttons located next to these fields to select starting and ending customer numbers. If you leave the fields blank, all customer numbers will be included on the labels.
2. Click the Print 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.

## 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. You must define an item (and an inventory location) before you can start tracking inventory.

#### 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.

### Cost and Price




This screen allows you to enter and maintain cost and price for an individual item.

A **cost** is the amount you incur when you purchase or build something. There are three kinds of cost:

<b>Material Cost</b>	The amount incurred to purchase the item
<b>Other Cost</b>	The amount incurred to provide a service or fixed costs other than material cost like overhead or processing costs
<b>Inventory Cost</b>	The value of this item in inventory – <b>very important</b> – this is the cost you see on all of the inventory screens and reports.

A **price** is the amount you charge your customer when you sell something. The most important price on the Cost and Price screen is the "Net Price". The net price is the amount that appears on customer orders.






#### To define or change cost and price 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. 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 **right** click and 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.

## 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.

## Statistics

Use this screen to view statistical data about an item.


**To view item statistics, perform the following steps (Step 1 is optional):**

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.
2. Click the Open (Display) button  located on the toolbar.

## Labels

Use this screen to print item labels.

**To print an item label, perform the following steps:**


1. Enter or select values in any combination of the fields in the Selection Criteria area of the screen. If you leave the fields blank, all item numbers will be included on the labels.
2. Click the Print button  located on the toolbar.

## Location Tabs

### Location




The screen allows you to enter and maintain inventory location definitions. You must define an inventory location (and an item) before you can start tracking inventory.

#### 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.

**Note:** If you want to use warehouse and zone, you should define your warehouses first with the **Warehouse** screen under Shared Applications, then define your zones with the **Zone** screen under Shared Applications. Then you can use the warehouses and zones you defined before when you enter locations.


#### 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 you 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.

## Pool Definition Tabs




### Pool Definition

This screen allows you to enter and maintain data about a pool. Currently, pools are use only in TFG4000 Warehousing.

#### To enter a pool, perform the following steps:

1. Enter a pool name in the "Pool" 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 pool, perform the following steps:

1. Enter a pool name in the "Pool" field, or use the Search button  next to the "Pool" field to select a pool 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.

### Pool Summary

This screen is used to display entries for all pools defined. Each row in the table represents one pool and its associated data.

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


1. Enter all or part of a pool name in the "Pool" field. You can also use the Erase button  to clear all of the selection fields and retrieve all pools. Skip this step if you have the pool name you wish to use in the "Pool" field already.
2. Click the Open (Display) 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 a supplier address, 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 a supplier address, 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. 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 address as needed.
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. 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 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.

## Statistics

Use this screen to view statistical data about a supplier.



**To view supplier statistics, perform the following steps (Step 1 is optional):**

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.

## Summary

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


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

1. Click the Erase button  to display all supplier (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 supplier number in the "Supplier" field; enter all or part of a supplier name in the "Supplier Name" field; select a type; select a status.
2. Click the Open (Display) button  located on the toolbar.




## Supplier Item

Use this screen to define a supplier item relationship.

**To define a supplier item, perform the following steps:**

1. Enter a supplier number in the "Supplier" field, the supplier item number in the "Supplier Item" field, and an item number in the "Item/Part" field.
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 supplier item, perform the following steps:**

1. Use the second Search button  next to the "Supplier" field to select the desired data.
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.

## Labels

Use this screen to print supplier labels.

**To print supplier labels, perform the following steps:**


1. Enter a supplier number in the "Start Supplier" field and a supplier number in the "End Supplier" field. You can also use the search buttons located next to these fields to select a starting and ending supplier numbers. If you leave the fields blank, all supplier numbers will be included on the labels.
2. Click the Print button  located on the toolbar.

## Warehouse Tabs




### Warehouse

This screen allows you to enter and maintain data about a warehouse. A warehouse can be used as part of the key to an inventory location.

#### To add a warehouse, perform the following steps:

1. Enter a warehouse name in the "Warehouse" 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 warehouse, perform the following steps:

1. Enter a warehouse name in the "Warehouse" field, or use the Search button  next to the "Warehouse" field to select a warehouse 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.





### Information

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

#### To enter warehouse information, perform the following steps:

1. Enter a warehouse name in the "Warehouse" field, or use the Search button  next to the "Warehouse" field to select a warehouse name.
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 warehouse. 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 warehouse information, perform the following steps:**

1. Enter a warehouse name in the "Warehouse" field, or use the Search button  next to the "Warehouse" field to select a warehouse name.
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**

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

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


1. Enter all or part of a warehouse name in the "Warehouse" field, or use the Search button  next to the "Warehouse" field to select a warehouse name. You can also use the Erase button  to clear all of the selection fields and retrieve all warehouses. Skip this step if you have the warehouse name you wish to use in the "Warehouse" field already.
2. Click the Open (Display) button  located on the toolbar.

## Work Center Tabs




### Work center

This screen allows you to enter and maintain data about a work center. Work centers are used in general job orders as well as Preventive Maintenance job orders.

#### To enter a work center, perform the following steps:

1. Enter a work center name in the "Work Center" 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 work center, perform the following steps:

1. Enter a work center name in the "Work Center" field, or use the Search button  next to the "Work Center" field to select a work center 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.





### Information

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

#### To enter work center information, perform the following steps:

1. Enter a work center name in the "Work Center" field, or use the Search button  next to the "Work Center" field to select a work center name.
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 work center. 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 work center information, perform the following steps:**

1. Enter a work center name in the "Work Center" field, or use the Search button  next to the "Work Center" field to select a work center name.
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**

This screen is used to display work center entries for all work centers defined. The two tabs at the top of the table allow you to display some of the fields located on the "Work Center Definition" screen. Each row in the table represents one work center and its associated data.

### **To display a work center summary, perform the following steps (Step 1 is optional):**


1. Enter all or part of a work center name in the "Work Center" field, or use the Search button  next to the "Work Center" field to select a work center name. You can also use the Erase button  to clear all of the selection fields and retrieve all work centers. Skip this step if you have the warehouse name you wish to use in the "Work Center" field already.
2. Click the Open (Display) button  located on the toolbar.

## Zone Tabs




### Zone

This screen allows you to enter and maintain data about a zone. A zone can be used in conjunction with a warehouse as part of the key to an inventory location.

#### To add a zone, perform the following steps:

1. Enter a zone name in the "Zone" 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 zone, perform the following steps:

1. Enter a zone name in the "Zone" field, or use the Search button  next to the "Zone" field to select a zone 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.

### Information





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

#### To enter zone information, perform the following steps:

1. Enter a zone name in the "Zone" field, or use the Search button  next to the "Zone" field to select a zone name.
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 zone. 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 zone information, perform the following steps:**

1. Enter a zone name in the "Zone" field, or use the Search button  next to the "Zone" field to select a zone name.
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**

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

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

1. Enter all or part of a zone name in the "Zone" field, or use the Search button  next to the "Zone" field to select a zone name. You can also use the Erase button  to clear all of the selection fields and retrieve all zones. Skip this step if you have the zone name you wish to use in the "Zone" field already.
2. Click the Open (Display) button  located on the toolbar.

# Inventory Management

For more assistance, please refer to the Inventory Management 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. See the “Documentation” section for more information.

## Initial Setup

TFG4000 Professional Edition Inventory Management is installed with certain features that can be changed. The features are controlled with system variables. There are five 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 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.

**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 Cost and Price screen. When the inventory cost on the Cost and Price 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).

**Order\_Point\_Email** (installation default is blank) – Order Point processing will send email notification when the order point for an item has been reached. Normally the notification would be sent to the order point email address on the Order Point Item screen for the item, but if no email address was defined for the item, the system will send the notification to the default email address defined with the Order\_Point\_Email system variable. If you do not want a notification sent to a default email address, leave this variable blank.

**Order\_Point\_IM** (installation default is blank) – Order Point processing will send instant messenger notification when the order point for an item has been reached. Normally the notification would be sent to the order point IM address on the Order Point Item screen for the item, but if no IM address was defined for the item, the system will send the notification to the default IM address defined with the Order\_Point\_IM system variable. If you do not want a notification sent to a default IM address, leave this variable blank.

**User\_Image\_Directory** (installation default is “UserImages”) – This variable allows you to define the directory where you store digital images of items. Images can be viewed with the Item Definition screen under Shared Applications. The UserImages directory is located under the Server directory where you installed TFG4000. If you want to store your images elsewhere you must enter the full directory path in this variable. Please make sure the path is accessible to anyone who needs to view item images.

## 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".




**Note:** For an item with components, i.e. an item that has a bill of materials defined for it, inventory transactions **do not** affect the components. For example, if an item called Top-Item has a bill of materials with five other items as components and a Ship transaction is performed for Top-Item, inventory for Top-Item will be affected but none of the inventory for any of its components will be affected.

To process inventory for components you must enter inventory transactions for each component or use the TFG4000 Job Order Management application. See "Updating Inventory for Components on a Bill of Materials" in the Item Inventory section of the Inventory Management Users Guide for more information.

#### 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 .



## 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's Cost and Price 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's Cost and Price 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 an indented explosion with cost, 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.



## Order Point Tabs

### Order Point Item




Use this screen to set an order point quantity for an item. When inventory for the item falls below the order point quantity an order point requirement record is written and you can be notified via email or instant message that the item may need to have more inventory built or purchased.

**Note:** For notifications you must enter an email address and/or an instant message id on the Order Point Item screen. You may also define a default values in the system variables **Order\_Point\_Email** and **Order\_Point\_IM**. For more information about system variables see the System Administration Users Guide.

#### To view order point data 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.



#### To maintain order point 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. Enter or change order point information as needed.
4. Click the Save button  located on the toolbar. When the on-hand quantity for the item is falls below the order point quantity, an order point requirement will be written and notification will be sent as requested.

### Order Point Requirements

Use this screen to view order point requirements for an item.



#### To view order point requirements 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.

### Order Point Summary

Use this screen to view order point requirements for all items.

#### To view order point requirements for all items, perform the following steps:



1. Click the Erase button  located on the toolbar to clear the Item/Part field.
2. Click the Open (Display) button  located on the toolbar.

## Inventory Control Tabs




### Item Inventory

Use this screen to control and track the movement of your inventory by item in multiple stocking locations. Before you can start tracking inventory you **must** have an item and a location defined. You can define your items using the Item Definition screen under Shared Applications. If you want to use warehouses and zones you will have to define them first with the Warehouse and Zone screens under Shared Applications, then use the Location screen under Shared Applications to define your inventory 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.


#### 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. 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 a storage location; 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.

### Location Inventory




Use this screen to control and track the movement of your inventory by stocking location. Before you can start tracking inventory you **must** have an item and a location defined. You can define your items using the Item Definition screen under Shared Applications. If you want to use warehouses and zones you will have to define them first with the Warehouse and Zone screens under Shared Applications, then use the Location screen under Shared Applications to define your inventory locations.

#### 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.



**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.

## 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.

# Job Order Management

For more assistance, please refer to the Job Order Management 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.

## Initial Setup

TFG4000 Professional Edition Job Order Management is installed with certain features that can be changed. The features are controlled with system variables. There are two system variables 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 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.

**Job\_Order\_Full\_BOM** (default is “Yes”) – With this variable set to “Yes”, job orders will be built using a summarized bill of materials, i.e. all components at every level of the bill will be used on the job order bill of material. With this variable set to “No”, only the components on the first level of the bill will be used in the job order bill of materials.


**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. 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.

## 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.

## Job Order Tabs




### 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.





### 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.

## 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.




## 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 right click and 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.





## 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 **right** click and 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.



## 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.

## 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.

### Feedback

This screen is used to enter time used for a job order.




**To view and/or edit job order feedback, 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 time for that job order.
4. Once finished, click the Save button  located on the toolbar.

### Cost

This screen is used to enter material cost used for a job order.



**To view and/or edit a job order Cost, 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 cost for that job order.
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 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.

### Initial Setup

TFG4000 Professional Edition 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 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.

**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.

## 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 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.

## Shipping

This screen is used to enter and maintain ship quantities for a customer order.



### To enter customer order ship quantities, 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 the ship quantity in the "Ship quantity" column and the from location in the "From Location" column.
4. Once finished, click the Save button  located on the toolbar.

## History

Use this screen to view a list of the history of a customer order.



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

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.

## 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.





## 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. 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 a packing slip.
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.

## 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.

## 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 number, 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.

## 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.

## Material Scheduling

For more assistance, please refer to the Material Scheduling 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.

Material scheduling monitors the supply and demand along with available inventory for an item and determines if more inventory must be built or purchased.

### Initial Setup

TFG4000 Professional Edition Material Scheduling is installed with certain features that can be changed. The features are controlled with system variables. There are two system variables you need to understand before you start using Material Scheduling. 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.



**Material\_Scheduling** (default is “No”) – With this variable set to “No”, Material Scheduling will not run. With this variable set to “Yes”, Material Scheduling will process regularly.

**TK4\_MaterialScheduleTrigger** (installation default is “5”) – This variable indicates the interval in minutes between Material Scheduling processing. With this variable set to 0, material scheduling will not run. Set it to 1 or higher to begin material schedule processing.




### Item Schedule Data

Use this screen to define parameters that will be used by material scheduling.

**To view order schedule data 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.



**To maintain item schedule data, 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. Enter or change scheduling information as needed.
4. Click the Save button  located on the toolbar.

## Requirements

Use this screen to view requirements for an item.



### To view requirements 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.

## Summary

Use this screen to view requirements for all items.



### To view requirements for all items, perform the following steps:

1. Click the Erase button  located on the toolbar to clear all of the selection fields.
2. Click the Open (Display) button  located on the toolbar.






## Planned Orders

When material scheduling determines the supply for an item does not satisfy the demand for an item, it generates a planned order. Planned orders can be converted into job orders or purchase orders so more inventory can be made available to satisfy demand. Use this screen to view and process planned orders for an item.

### To view planned orders 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.



### To process planned orders 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. Click one of the build buttons  located on the toolbar (left button builds job orders, right button builds purchase orders). A pop-up screen will appear.
4. Enter selection data as needed on the pop-up screen. Verify the Start and End dates to make sure you get the planned orders you want.
5. Click the Open (Display) button  located on the pop-up's toolbar.
6. Click the "Build" column for each planned order you want.
7. Click the build button  located on the pop-up's toolbar.

## Summary

Use this screen to view planned orders for all items.


### To view planned orders for all items, perform the following steps:

8. Click the Erase button  located on the toolbar to clear all of the selection fields.
9. Click the Open (Display) button  located on the toolbar.

## Trigger Log

When changes occur to an item's inventory, supply, demand, or its scheduling data, the system writes a record into a queue. The record is called a trigger record and the queue is called the trigger log. Material scheduling uses the trigger log to know which items must be planned. Use this screen to view trigger records.

### To view trigger records, perform the following steps:

1. Click the Open (Display) button  located on the toolbar.

# Purchasing Management

For more assistance, please refer to the Purchasing Management 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.


## Initial Setup

TFG4000 Professional Edition Purchasing Management is installed with certain features that can be changed. The features are controlled with system variables. There are two system variables 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 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.

**Allow\_PO\_Over\_Receipt** (default is “No”) – With this variable set to “No”, purchase order receiving will not allow you to receive a quantity greater than the quantity on the purchase order line. With this variable set to “Yes”, purchase receiving will allow you to receive a quantity that greater than the quantity on the purchase order line.

**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.

## 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 a purchase order 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. 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.



## History

Use this screen to view purchase order history.


**To view purchase order history, perform the following steps (Step 1 is optional):**

1. Enter all or part of 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 history displayed on the screen.

## Summary

Use this screen to view a purchase order summary list.



**To view a purchase order 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.




## 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.

## Warehouse Management

For more assistance, please refer to the Warehouse Management 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. See the “Documentation” section for more information.

## Preventive Maintenance

For more assistance, please refer to the Preventive Maintenance 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.

## System Administration

For more assistance, please refer to the System Administration 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.

### 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.

**Form\_Logo** (installation default is **Cubel con.gif**) – This variable contains the name of the logo file to use on special forms such as Customer Order Forms, Purchase Order Forms, Job Order forms, Packing Slips, and Invoices. The recommended logo size is 50x50 pixels. The logo can be smaller or larger and the system will size it to fit. If you would like your company logo to appear on forms, place your logo in .gif format in the \\Server\Images directory and set this variable to the name of the logo.

**Screen\_Logo\_Image** (installation default is **Cubel con.gif**) – This variable contains the name of the logo file to use above the navigation tree (NavTree) on the left side of the screen. The recommended logo size is 50x50 pixels. The logo can be smaller or larger and the system will size it to fit. If you would like your company logo to appear above the NavTree, place your logo in .gif format in the \\Server\Images directory and set this variable to the name of the logo.





**TFGTriggerController** (installation default is “1”) – This variable indicates the interval in minutes between general trigger processing. With this variable set to **0**, background utilities, Preventive Maintenance scheduling, and certain Warehousing processes will not run. Set it to **1** or higher to allow trigger processing.

**Welcome\_Logo** (installation default is **Cubes.gif**) – This variable contains the name of the logo file to use on the Welcome screen. The recommended logo size is 300x300 pixels. The logo can be smaller or larger and the system will size it to fit. If you would like your company logo to appear on the Welcome screen, place your logo in .gif format in the \\Server\Images directory and set this variable to the name of the logo.

**Security** (installation default is “No”) – 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.

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.



## Database Definitions Screen

There are many tables in the TFG4000 Professional Edition 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.

## Dropdown Control Screen

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.

## Label Definition Screen

This screen allows you to enter and maintain data about labels. Several labels are predefined during installation of the system. You can add your own labels as needed. See the "Systems Administration User Guide" for more information on Labels.

## Serial Numbers Screen


The TFG4000 Professional Edition 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.

## System Setup Screen

TFG4000 Professional Edition uses system parameters that can be modified for your needs.

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

## System Variables Screen

TFG4000 Professional Edition 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		## ### ##0.000;-## ### ##0.000	Text
3	Button Background Color		210,226,239	Text
4	Chart Background Color		255,255,255	Text
5	Cost Mask		## ### ##0.000;-## ### ##0.000	Text
6	Currency Mask		## ### ##0.00;-## ### ##0.00	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
21	Screen Background Image		Cloud.jpg	Text

## UOM Conversion Screen



A unit of measure (UOM) defines how one unit of an item is measured, for example "Box", "Gallon", "Each". Sometimes an item is stored in inventory using one unit of measure but it must be purchased using a different unit of measure. This screen provides a way to define the conversion from one unit of measure to another.

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

## Trigger Log

The Trigger Log screens allow you to display triggers waiting to be processed. You can also re-process the triggers after an error is corrected.


### To display the trigger log, perform the following steps (Step 1 is optional):

1. Enter the trigger type in the "Type" field and/or a status in the "Status" field. You can also use the Erase button  to clear all of the selection fields and retrieve all triggers.
2. Click the Open (Display) button  located on the toolbar.

## Trigger Status

The Trigger Status allows you to start or stop a trigger process.


### To change a trigger status, perform the following steps:

1. Click the check box in the "Start or Stop Trigger" column for the trigger(s) you wish to change.
2. Once finished, click the Save button  located on the toolbar.


## 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.

## Signed on Users

Signed on Users screen allows you to display users currently connected to the server component.

### To display Signed on Users, perform the following steps:

1. Click the Open (Display) button  located on the toolbar.



## **Utility Control Screen**

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

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

## **Database Compact/Repair Screen**

TFG4000 Professional Edition provides access to a utility that compresses the database and attempts to repair data errors.

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

## **Background Utilities Screen**

TFG4000 Professional Edition provides several utilities for updating data in various applications.

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

## **Welcome Screen**

The welcome screen allows you to sign on to TFG4000 Professional Edition. If security is off then just proceed to the screen you wish to work with.

## Advanced Installation

TFG4000 Professional Edition 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](http://www.tfg4000.com), through the "Documentation" menu on each screen, and from the Windows "Start" menu. Simply click "Start", then "Programs", then "TFG4000 Professional V1.4", and then "Documentation".

**Note:** PDF files require Adobe® Acrobat® Reader. The reader is available at [www.adobe.com](http://www.adobe.com) free of charge.

## Registration

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

## Suggestions

We are eager to improve TFG4000 Professional Edition, 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](mailto: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](mailto:tfg4000@fredrickgroup.com), with 'Services' in the subject line.

**Phone** Call **770-844-8516** between 9:00 AM - 5:00 pm Eastern Time Monday through Friday (except holidays)

## 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 (except holidays) from 9:00 am to 5:00 pm Eastern time. The TFG4000 Professional Edition 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 (except holidays) from 9:00 am to 5:00 pm Eastern time. The TFG4000 Professional Edition product technical support number is **770-844-8516**.

Contact The Fredrick Group, Inc. at [tfg4000@fredrickgroup.com](mailto:tfg4000@fredrickgroup.com) for more details.

### Other Support Options

Other support options are available.

Contact The Fredrick Group, Inc. at [tfg4000@fredrickgroup.com](mailto:tfg4000@fredrickgroup.com) for more details.

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

For more information go to [www.tfg4000.com](http://www.tfg4000.com).