TFG4000™

Professional Edition

Shared Applications

Users Guide

Version 1.4.5

This product includes software developed by the Apache Software Foundation (http://www.apache.org/).

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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®, Microsoft Windows 2003 Server®, or Microsoft Windows 2000 Server®, with the latest Service Pack applied.

Pentium® 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)

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 ign (“+”) next to the application you want to perform in the “NavTree”.

7. Click on the screen you would like to use.

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.

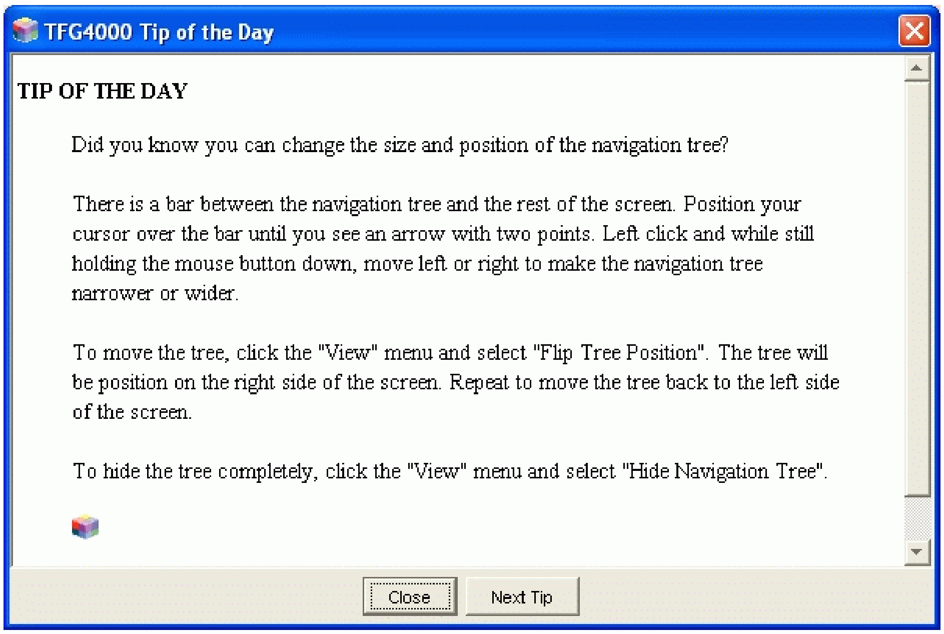
Column Level Help

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.

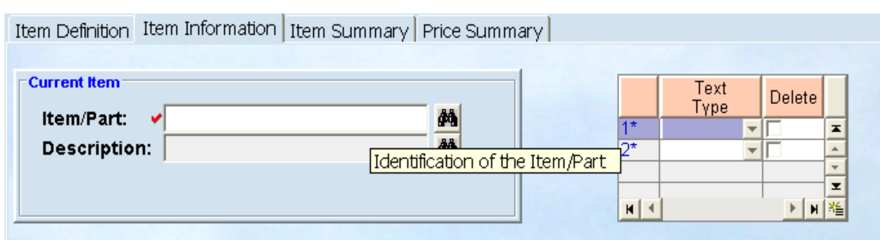
Example Only:



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.

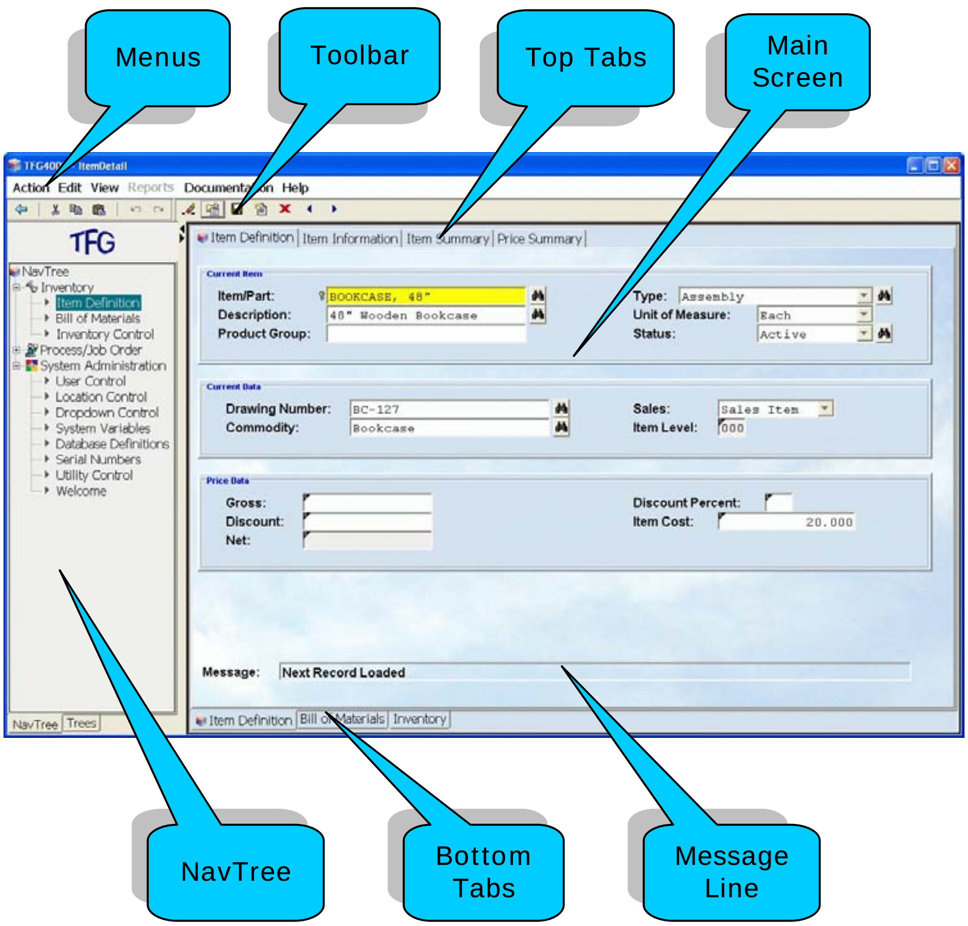
Example Only:



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:

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

Edit

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

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

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

View

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

Set Font Size — You can choose a font size from 10 to 18. With larger font sizes you may have to scroll to see the entire screen.

Hide Calendar Buttons — Toggles whether or not a Calendar button is displayed next to the date fields.

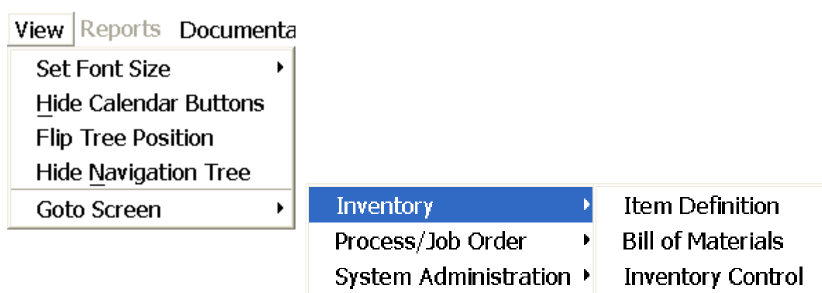
Flip Tree Position — Changes the position of the “NavTree” to either the left or the right side of the screen.

Hide Navigation Tree — Hides the “NavTree” from the screen. Click it a second time to display the “NavTree” on the screen.

Note: The dark arrows in the bar between the NavTree” and the main screen perform the same function.

Allow Word Wrap — 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 **Allow_Wrap** is set to **Yes**.

GoTo Screen — Displays the “NavTree” in menu format. You can use this method to navigate the screens at any time but it is particularly useful if you hide the “NavTree”.



Reports

This menu 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

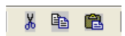
Each screen in TFG4000 Professional Edition has various buttons available for working with your data. The following describes the purpose of each button and special features. It also explains other icons you may see on the screens.

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

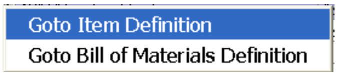
Throughout the screens are buttons that perform functions.

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.

Gray A gray field is display only, no entry allowed or necessary

White A white field is open for entering data

Yellow A yellow field indicates where the cursor is currently positioned

Changing Screen Table Properties

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

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

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

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

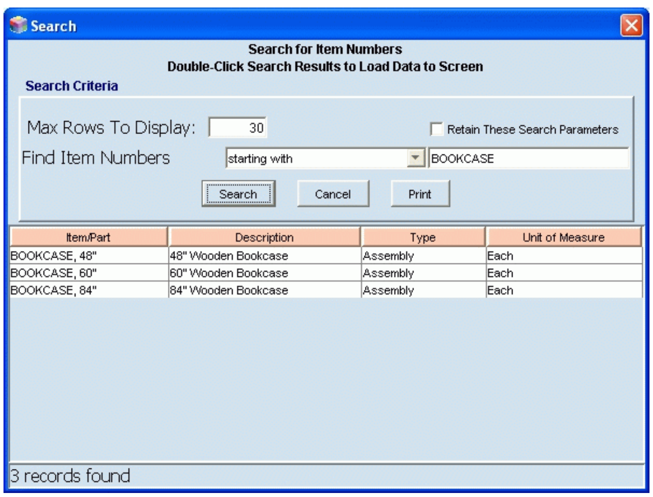
Performing Searches

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:



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:

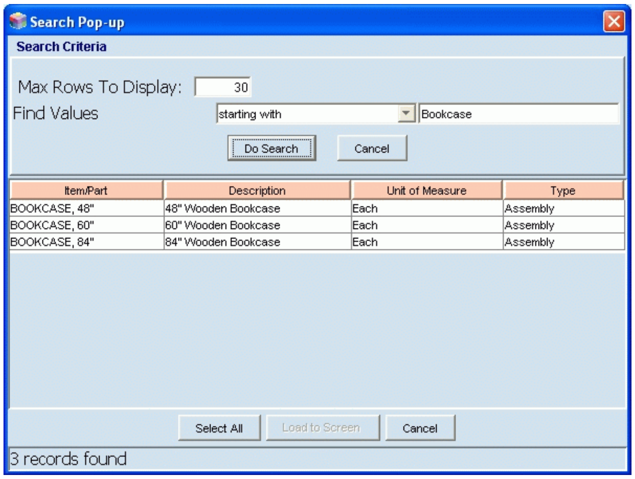
1. Click the Print button on the “Search” screen.

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:



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”.

Excel	Allows you to save your report as an Excel document. Once finished naming and specifying where to save your report, click "Save".
Revert	Allows you to discard all layout changes and revert to default settings. Simply click either "Yes", or "No".
Help	Shows the Report Layout Instruction screen.
Close	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.

Accounts

What are accounts?

Accounts are needed by TFG4000 accounting. They are used in accounts payable, accounts receivable, and general ledger. An account may be a sub-account of another and/or it may have sub-accounts.

Account Screens

There are two account screens.

Chart of Accounts

This screen allows you to define an account.

Summary

This screen is used to display a list of accounts so you can group them together based on selection criteria or so you can locate an account.

Chart of Accounts Screen Explained

Chart of Accounts Screen

This screen allows you to define an account.

Current Account

Field	**Explanation**
Account Name	Account identifier. This is the key to the account record.
Day	The day of the week of the non-working day.
Type	General Ledger account type, for example Accounts Receivable, Accounts Payable, Bank, Expense, Fixed Asset, etc.
Description	Contains information describing the account. This description can be as short as an abbreviation or a long detailed description of the account.
Status	The current status of the account – Active or Inactive.
Sub-Account of	Indicates the parent account for this account if applicable.
Option	Additional classification of the account: **Reimbursement** For reimbursements **1099** Indicates if a 1099 must be issued **None** No additional options needed

Current Data

Field	**Explanation**
Current Balance	Dollar amount of the account at this time.
Begin Balance	Dollar amount when the account was established.
Bank Account #	If the General Ledger Account Type is Bank, then this is the associated bank account number. The bank account number may be found on your bank checks.
Bank ABA #	Defines the Bank Account ABA Number when Account Type is Bank. The American Bankers Association (ABA) number is also called the Routing Number. The ABA number is nine (9) digits and may be found on your Bank Checks.
Credit Card #	If the General Ledger account type is Credit Card, then this is the credit card number for the account.

Credit Card Type	Type of credit card if the account type is Credit Card, e.g. Visa, Mastercard, Amex, Discover

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen.

Accessing the Chart of Accounts Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Accounts". The Chart of Accounts screen is displayed.

Using the Chart of Accounts Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next account.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Account

To display an account, perform the following steps:

1. Enter an account name in the “Account Name” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The account data is displayed on the main screen.

-or-

1. Use the Search button next to the “Account Name” field, the “Type” field, the “Description” field, or the “Status” field to select an account.
2. Double-click on the “Account Name” you would like to display in the “Search” screen table.
3. The account data is displayed on the main screen.

Adding a New Account

To add an account, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter an account name in the “Account Name” field. This is the only required field and it will be the key to the account.
3. Enter data in any of the other fields you desire, these fields are optional.
4. When done, click the Save button located on the toolbar.

-or-

1. Display an account. See “Displaying an Account” above.
2. Enter the new account name and change any of the other fields as you desire.
3. When done, click the Save button located on the toolbar.

Updating an Account

To update an account, perform the following steps:

1. Display the carrier data you wish to change. See “Displaying an Account” above.
2. Change the desired information on the screen.
3. When done, click the Save button located on the toolbar.

Deleting an Account

To delete an account, perform the following steps:

1. Display the account data you wish to delete. See “Displaying an Account” above.
2. Click the Delete button located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the carrier click “No” on the “Confirm Action” pop up message.

Note: Once an account is deleted, it can no longer be displayed or updated.

Displaying the Previous Account

To display the account that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.
2. The previous account data is displayed on the main screen.

Displaying the Next Account

To display the account that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next account data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Account Name” field, then click the Next button .

Calendar

What is the Calendar for?

The calendar screen is used to indicate which dates are non-working days so scheduling processes won't select a non-working date.

Calendar Screens

There is only one calendar screen.

Calendar

This screen allows you to indicate which dates are non-working days. There is a dropdown provided so you can show what type of non-working day it is: Weekend, Holiday, Vacation, or Off Day.

Calendar Screen Explained

Calendar Screen

This screen allows you to indicate which dates are non-working days.

Current Calendar

Field	Explanation
Calendar Name	Indicates the application that will use the calendar dates selected. The following calendars are available: **Material Scheduling** **Preventive Maintenance**

Calendar Table

Column	Explanation
Date	A date selected to be a non-working day.
Day	The day of the week of the non-working day.
Type	Type of non-working day: **Weekend** **Holiday** **Vacation** **Off Day**
Delete	This is a checkbox to indicate you want to delete a calendar entry.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen.

Accessing the Calendar Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Calendar". The Calendar screen is displayed.

Using the Calendar Screen

Use these procedures to erase the screen, display, and delete calendar entries.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying the Calendar

To display the calendar, perform the following steps:

1. In the “Calendar Name” field, select the calendar you want to view.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The calendar is displayed on the main screen.

Deleting a Calendar Entry

To delete an entry from the calendar, perform the following steps:

1. Display the calendar. See “Displaying the Calendar” above.
2. Click the checkbox in the “Delete” column of the Calendar table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.
3. Once finished, click the Save button located on the toolbar.

Note: Once a calendar entry is deleted, that date will be a valid date and can be used for scheduling etc.

Carrier

What is a Carrier?

A carrier is a shipping company or a freight company your company uses for sending or receiving goods and materials. For example: UPS, Fed-x, Yellow Freight, etc.

Carrier Screens

“Carrier” consists of three tabbed screens that are used to enter and maintain carrier data. Each screen is used for specific purposes to aid in the entry and maintenance of carrier information.

Carrier

The carrier screen allows you to define a carrier with basic information about the carrier such as the type of carrier, carrier code, etc.

Address

The carrier address screen allows you to enter a carrier address and if necessary, multiple addresses for a carrier based on the address usage. For example, a carrier may have an address for payment that is different from their address for returns. This screen also allows you to enter contact information for each address. You can enter as many contacts as you need for an address.

Information

This screen allows you to enter text you wish to maintain concerning a carrier. For example, you could enter text information for a carrier that describes specific details about special services provided by this carrier. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL’s for web sites.

Carrier Screens Explained

Carrier Screen

This screen is for defining a carrier with basic information about the carrier.

Current Carrier

Field	**Explanation**
Carrier	A unique identifier assigned to each carrier. It is the main key for all other carrier data. It is usually an abbreviated name for the carrier; for example, Yelo for Yellow Freight.
Type	This type helps further define a carrier by giving it a classification. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Air", “Distribution” or “Rail”.
Name	A shortened name or the full name of the carrier defined here; for example, Yellow Freight.
Status	Specifies whether the carrier is “Active” or “Inactive”.

Carrier Data

Field	**Explanation**
Description	Contains information describing the carrier. This description can be as short as an abbreviation or a long detailed description of the carrier.
Buyer	The purchasing person (buyer) responsible for this carrier.
Tax Exempt #	The “tax exempt” number assigned by the IRS to this carrier.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Carrier Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Carrier". The Carrier screen is displayed.

3. If there is a carrier number in the "Carrier" field, the data for that carrier is displayed on the main screen.

Using the Carrier Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next carrier.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Carrier

To display a carrier, perform the following steps:

1. Enter a carrier number in the “Carrier” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The carrier data is displayed on the main screen.

-or-

1. Use the Search button next to the “Carrier” field, the “Name” field, the “Type” field, or the “Status” field to select a carrier number.
2. Double-click on the “Carrier” you would like to display in the “Search” screen table.
3. The carrier data is displayed on the main screen.

Adding a New Carrier

To add a carrier, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Leave the “Carrier Number” field blank and the system will generate it for you.
3. Enter data in any of the other fields you desire, these fields are optional.
4. When done, click the Save button located on the toolbar.

-or-

1. Display a carrier. See “Displaying a Carrier” above.
2. Change any of the fields you desire. The system will generate a new carrier number automatically so you do not need to enter one.
3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy carrier data to a new carrier number; however, addresses and text are not copied with this procedure.

Updating a Carrier

To update a carrier, perform the following steps:

1. Display the carrier data you wish to change. See "Displaying a Carrier" above.
2. Change the desired information on the screen.
3. When done, click the Save button located on the toolbar.

Deleting a Carrier

To delete a carrier, perform the following steps:

1. Display the carrier data you wish to delete. See "Displaying a Carrier" above.
2. Click the Delete button located on the toolbar.
3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the carrier click "No" on the "Confirm Action" pop up message.

Note: Once a carrier is deleted, it can no longer be displayed or updated.

Displaying the Previous Carrier

To display the carrier that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.
2. The previous carrier data is displayed on the main screen.

Displaying the Next Carrier

To display the carrier that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next carrier data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Carrier" field, then click the Next button .

Address Screen

This screen is for entering and maintaining addresses for a carrier. Multiple addresses, including contact information for the address, can be defined and maintained.

Current Carrier

Field	**Explanation**
Carrier	A unique identifier assigned to each carrier. It is the main key for all other carrier data.
Name	A shortened name or the full name of the carrier.

Address Data

Field	**Explanation**
Line 1	First line of the address for this carrier.
Line 2	Second line of the address for this carrier.
City	City for this address.
State	State associated with this address.
Zip	Postal Zip Code for this address.
Country	Country associated with this address.
URL Address	URL (Universal Resource Locator) or Website address for this carrier.
Phone	Telephone number, including area code, for this carrier.
Fax	Fax telephone number, including area code, for this carrier.
E-Mail	E-Mail address for this carrier.
Carrier	Indicates if the address is a carrier address (Yes/No).
Payment	Indicates if the address is the billing address (Yes/No).
New Address	Indicates if the address is to be added as a new address (Yes/No).

Contact Table (Contact Name, Phone Numbers and Description tabs)

Column	**Explanation**
Row	The line number of the row in the table.
Name	The full name of the contact person for this carrier.

Title	The title/position of this contact person.
Department	Company department associated with this contact person.
Phone	Telephone number, including area code, for this contact person.
Fax	Fax telephone number, including area code, for this contact person.
E-Mail	E-Mail address for this contact person.
Description	This description can be as short as an abbreviation or a long detailed description of the contact person.
Delete	This is a checkbox to indicate you want to delete a contact record.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Address Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Carrier". The Carrier screen is displayed.

3. If there is a carrier number in the "Carrier" field, the information for that carrier is displayed on the main screen.

4. Click the "Address" tab at the top of the main screen.

5. If there is a carrier number in the "Carrier" field, the first address found for that carrier is displayed on the main screen.

Using the Address Screen

Use these procedures to display, add, update, delete, display the previous, and display the next address and contact information.

Displaying an Address

To display address and contact information, perform the following steps:

1. Enter a carrier number in the “Carrier” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The first address found for the carrier is displayed on the main screen.
4. The contact information is displayed in the Contact table. Use the scroll bar on the right to display more rows if necessary.
5. Use the GoTo/Selection button next to “Search for Address” to select other addresses for the carrier.

   -or-

1. Use the Search button next to the “Carrier” field, or the “Name” field to select a carrier number.
2. Double-click on the carrier you would like to display in the “Search” screen table.
3. The first address found for the carrier is displayed on the main screen.
4. The contact information is displayed in the Contact table. Use the scroll bar on the right to display more rows if necessary.
5. Use the GoTo/Selection button next to “Search for Address” to select other addresses for the carrier.

Adding a Carrier Address

To enter a carrier address, perform the following steps:

1. Enter or select the carrier number you want.
2. Enter address data in the fields provided.
3. Click the checkbox next to “New Address” to indicate you are adding the address as a new address.
4 Click an empty row in the Contact table. If there are no empty rows click the Add Rows button in the lower right corner of the table.
5 Enter the contact information in the Contact table for the row or rows you wish to add.
6 Once finished, click the Save button located on the toolbar.

Adding Contact Information

To enter contact information, perform the following steps:

1. Display the carrier address data you want to change. See “Displaying an Address” above.

2. Click an empty row in the Contact table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Enter the new information in the column of the Contact table for the row or rows you wish to add.

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

Updating Address Information

To update address and contact information, perform the following steps:

1. Display the carrier address data you want to change. See “Displaying an Address” above.

2. Change the address data as necessary.

3. Change contact data in the Contact table for the row or rows you wish to update.

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

Deleting Address Information

To delete address information, perform the following steps:

1. Display the carrier address you want to delete. See “Displaying Address Information” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the process click “No” on the “Confirm Action” pop up message.

4. The address and contacts are deleted.

Note: Once address and contact information is deleted, it can no longer be displayed or updated.

Deleting Contact Information

To delete contact information, perform the following steps:

1. Display the carrier address that contains the contact you want to delete. See “Displaying Address Information” above.

2. Click the checkbox ☐ in the "Delete" column of the Contact table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox ☐ again to remove the deletion flag.

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

Note: Once contact information is deleted, it can no longer be displayed or updated.

Displaying the Previous Address

To display the address data that precedes the one currently displayed, perform the following steps:

1. Click the Previous button ◀ located on the toolbar.

2. The previous address and contact information are displayed on the main screen.

Displaying the Next Address

To display the address data that follows the one currently displayed, perform the following steps:

1. Click the Next button ▶ located on the toolbar.

2. The next address and contact information and are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Carrier" field, then click the Next button ▶.

Information Screen

This screen allows you to enter text you wish to maintain concerning a carrier. For example, you could enter text information for a carrier that describes specific details about special services provided by this carrier. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Carrier

Field	Explanation
Carrier	A unique identifier assigned to each carrier. It is the main key for all other carrier data.
Name	A shortened name or the full name of the carrier.

Information Table

Column	Explanation
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	Explanation
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.

Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Carrier". The Carrier screen is displayed.

3. If there is a carrier number in the "Carrier" field, the information for that carrier is displayed on the main screen.

4. Click the "Information" tab at the top of the main screen.

5. If there is a carrier number in the "Carrier" field, the information text types and reference information for that carrier are displayed on the main screen.

Using the Information Screen

Use these procedures to display, update, add, delete, display the previous, and display the next information or references.

Displaying Information and References

To display information or references, perform the following steps:

1. Enter a carrier number in the "Carrier" field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the "Carrier" field, or the "Name" field to select a supplier number and double-click on the "Supplier" you would like to display in the "Search" screen table.

2. The information text types and references for the carrier are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the "Text Information" column of the Text table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

6. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

Updating Information

To update information, perform the following steps:

1. Display the carrier you want to change. See "Displaying Information" above.

2. Click the Goto/Selection button in the "Text Information" column of the Text table for the row you want to update and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click "Ok" when done.

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

Note: You can update Information and References at the same time.

Updating References

To update references, perform the following steps:

1. Display the carrier you want to change. See "Displaying Information" above.

2. Enter the new reference in the "Reference" column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose "Select External File". A standard Windows file selection dialog box is displayed so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.

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

Note: You can update Information and References at the same time.

Adding Information

To enter information, perform the following steps:

1. Display the carrier you want to change. See "Displaying Information" above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the "Info Type" column of the Information table.

4. Click the Goto/Selection button in the "Text Information" column of the Text table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click "Ok" when done.

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

Note: You can add Information and References at the same time.

Adding References

To enter references, perform the following steps:

1. Display the carrier you want to change. See “Displaying Information” above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the “Reference Type” column of the Reference table.

4. Enter the reference in the “Reference” column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog box is displayed so you can locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can add Information and References at the same time.

Deleting Information and References

To delete information and references, perform the following steps:

1. Display the carrier that has the information text and/or reference you want to delete. See “Displaying Information” above.

2. To delete text information, click the checkbox in the “Delete” column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the “Delete” column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once information and references are deleted, they can no longer be displayed or updated.

Displaying the Previous Information and References

To display the information and references that precede the information currently displayed, perform the following steps:

1. Click the Previous button ◀ located on the toolbar.

2. The previous information and references are displayed on the main screen.

Displaying the Next Information and References

To display the information and references that follow the information currently displayed, perform the following steps:

1. Click the Next button ▶ located on the toolbar.

2. The next information and references are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Carrier” field, then click the Next button ▶.

Customer

What is a Customer?

A customer is a business entity, a company, an association, an organization, or a person with whom you do business. Your customers place orders with you for products and/or services which you fulfill then bill them for payment.

The first customer you should define is your own company. TFG4000 will use your company definition for documents such as packing slips and invoices.

You may wish to define other parts of your company as separate customers so you can track the internal movement of goods, services, and money.

Initial Setup

TFG4000 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 TFG4000. See the System Variables screen in the System Administration User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000. The documentation is also available online.

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

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

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

Customer Screens

"Customer" consists of seven tabbed screens that are used to enter and maintain customer data. Each screen is used for specific purposes to aid in the entry and maintenance of customer information.

Customer

The customer screen allows you to define a customer with basic information about the customer such as the type of customer, invoicing terms etc.

Address

The customer address screen allows you to enter a customer address and if necessary multiple addresses for a customer based on the address usage. For example, a customer may have an address for invoicing that is different from their shipping address. This screen also allows you to enter contact information for each address. You can enter as many contacts as you need for an address.

Information

This screen allows you to enter text you wish to maintain concerning a customer. For example, you could enter text information for a customer that describes specific details about special products or services you provide to this customer. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Statistics

This screen displays various types of statistical information about the customer arranged by year, then month within year.

Summary

This screen is used to display a list of customers so you can group them together based on selection criteria or so you can locate a customer.

Customer Item

This screen allows you to associate customer specific information with your own items.

Labels

The label screen allows you to print customer address labels based on address type and for a range of customers. It also allows you to adjust label formats.

Customer Screens Explained

Customer Screen

This screen is for defining a customer with basic information about the customer.

Current Customer

Field	Explanation
Customer	A unique identifier assigned to each customer. It is the main key for all other customer data. The identifier can be a number, a name, or some combination of numbers and characters.
Name	A shortened name or the full name of the customer defined here.
Sales Rep	The person or department in your organization responsible for this customer.
Type	This type helps further define a customer by giving it a classification. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Dealer", "Direct", "Distributor" or "Retail".
Description	Contains information describing the customer. This description can be as short as an abbreviation or a long detailed description of the customer.
Status	Specifies whether the customer is "Active" or "Inactive".

Customer Data

Field	Explanation
Tax Exempt #	The "tax exempt" number assigned by the IRS to this customer.
Terms	The invoice payment terms. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of terms are: "1% 10 Net 30", "Due on receipt" or "Net 30".
Warehouse	The default inventory warehouse you want to use to fulfill orders for this customer.
Invoice	Specifies whether invoices for this company can be generated before the order is completely fulfilled (Partial) or if the invoice can be generated only when the order has been completely fulfilled (Complete).

Zone	The zone within the default inventory warehouse you want to use to fulfill orders for this customer.
Priority	Ranking of importance (priority) – 1 through 9 with 1 being the highest.
Ship From	The default inventory location you want to use to fulfill orders for this customer.
Account	General Ledger account for this customer.
Ship Method	Defines the how the customer wants orders shipped. Some examples of methods are: "Carrier", “UPS”, “USPS”, “Pick Up”, “Best Way” or “Our Truck”.
Freight Type	How the freight charges are to be paid.
Carrier	The carrier number of preferred freight company for the customer.
Carrier Name	The name of the preferred freight company for this customer.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Customer Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Customer”. The Customer screen is displayed.

3. If there is a customer number in the “Customer” field, the data for that customer is displayed on the main screen.

Using the Customer Screen

Use these procedures to erase the screen, display, add, copy, update, delete, display the previous, and display the next customer.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Customer

To display a customer, perform the following steps:

1. Enter a customer number in the “Customer” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The customer data is displayed on the main screen.

-or-

1. Use the Search button next to the “Customer” field, the “Name” field, the “Status” field, the “Ship From” or the “Carrier” field to select a customer number.
2. Double-click on the “Customer” you would like to display in the “Search” screen table.
3. The customer data is displayed on the main screen.

Adding a New Customer

To add a customer, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter the customer number you want to use or leave this field blank for a system generated customer number. The customer number can contain numbers and letters and it must be unique.
3. Enter data in any of the other fields you desire, these fields are optional.
4. When done, click the Save button located on the toolbar.

-or-

1. Display a customer. See “Displaying a Customer” above.
2. Enter a new customer number in the “Customer” field or blank it out so the system will generate a new customer number for you.
2\. Change any of the fields you desire.

3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy customer data to a new customer number; however, addresses and text are not copied with this procedure.

Copying a Customer

To copy a customer to a new customer, perform the following steps:

1. Display the customer you want to copy. See “Displaying a Customer” above.

2. Click the copy button located on the toolbar. A pop-up will appear.

3. Enter the new customer number in the “Copy to Customer” field or leave it blank to let the system generate the number for you.

4. Various types of customer data are listed with check boxes next to them. Click a check box to check or uncheck data to be copied. A check mark means it will be copied, No check mark means it will not be copied.

5. Click the “Copy” button to complete the copy or click “Cancel” to cancel the copy operation.

Updating a Customer

To update a customer, perform the following steps:

1. Display the customer data you wish to change. See “Displaying a Customer” above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Clearing the Ship From Location

To erase the location in the Ship From Location, perform the following steps:

1. Display the customer data you wish to change. See “Displaying a Customer” above.

2. Click the Goto/Selection button located in the “Ship From” field or double click the “Ship From” field.

3. Select “Clear Location” from the dropdown menu.

4. When done, click the Save button located on the toolbar.

Deleting a Customer

To delete a customer, perform the following steps:

1. Display the customer data you wish to delete. See “Displaying a Customer” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the customer click “No” on the “Confirm Action” pop up message.

Note: Once a customer is deleted, it can no longer be displayed or updated.

Displaying the Previous Customer

To display the customer that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous customer data is displayed on the main screen.

Displaying the Next Customer

To display the customer that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next customer data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Customer” field, then click the Next button .

Address Screen

This screen is for entering and maintaining addresses for a customer. Multiple addresses, including contact information for the address, can be defined and maintained.

Current Customer

Field	Explanation
Customer	A unique identifier assigned to each customer. It is the main key for all other customer data.
Name	A shortened name or the full name of the customer.

Address Data

Field	Explanation
Line 1	First line of the address for this customer.
Line 2	Second line of the address for this customer.
City	City for this address.
State	State associated with this address.
Zip	Postal Zip Code for this address.
Country	Country associated with this address.
URL Address	URL (Universal Resource Locator) or Website address for this customer.
Phone	Telephone number, including area code, for this customer.
Fax	Fax telephone number, including area code, for this customer.
E-Mail	E-Mail address for this customer.
Customer	Indicates if the address is a customer address (Yes/No).
Invoice	Indicates if the address is the billing address (Yes/No).
Shipping	Indicates if the address is a shipping address (Yes/No).
Acknowledge	Indicates if the address is an acknowledgement address (Yes/No).
New Address	Check box to indicate you wish to add the data displayed on the screen as a new address.

Contact Table (Contact Name, Phone Numbers, and Description tabs)

Column	Explanation
Row	The line number of the row in the table.
Contact Name	The full name of the contact person for this customer.
Contact Title	The title/position of this contact person.
Contact Department	Company department associated with this contact person.
Phone	Telephone number, including area code, for this contact person.
Fax	Fax telephone number, including area code, for this contact person.
E-Mail	E-Mail address for this contact person.
Contact Description	This description can be as short as an abbreviation or a long detailed description of the contact person.
Delete	This is a checkbox to indicate you want to delete a contact record.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Address Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Customer". The Customer screen is displayed.

3. If there is a customer number in the "Customer" field, the information for that customer is displayed on the main screen.

4. Click the "Address" tab at the top of the main screen.

5. If there is a customer number in the "Customer" field, the first address found for that customer is displayed on the main screen.

Using the Address Screen

Use these procedures to display, add, update, delete, display the previous, and display the next address and contact information.

Displaying an Address

To display address and contact information, perform the following steps:

1. Enter a customer number in the "Customer" field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The first address found for the customer is displayed on the main screen.
4. The contact information is displayed in the Contact table. Use the scroll bar on the right to display more rows if necessary.
5. Use the GoTo/Selection button next to "Search for Address" to select other addresses for the customer.

   -or-

1. Use the Search button next to the "Customer" field, or the "Name" field to select a customer number.
2. Double-click on the customer you would like to display in the "Search" screen table.
3. The first address found for the customer is displayed on the main screen.
4. The contact information is displayed in the Contact table. Use the scroll bar on the right to display more rows if necessary.
5. Use the GoTo/Selection button next to "Search for Address" to select other addresses for the customer.

Adding a Customer Address

To enter a customer address, perform the following steps:

1. Enter or select the customer number you want.
2. Enter address data in the fields provided.
3. Click the checkbox next to "New Address" to indicate you are adding a new address.
4. Click an empty row in the Contact table. If there are no empty rows click the Add Rows button in the lower right corner of the table.
5. Enter the contact information in the Contact table for the rows you wish to add.
6. Once finished, click the Save button located on the toolbar.

Adding Contact Information

To enter contact information, perform the following steps:

1. Display the customer address data you want to change. See "Displaying an Address" above.

2. Click an empty row in the Contact table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Enter the new information in the column of the Contact table for the row or rows you wish to add.

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

Updating Address Information

To update address and contact information, perform the following steps:

1. Display the customer address data you want to change. See "Displaying an Address" above.

2. Change the address data as necessary.

3. Change contact data in the Contact table for the row or rows you wish to update.

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

Deleting Address Information

To delete address information, perform the following steps:

1. Display the customer address you want to delete. See "Displaying Address Information" above.

2. Click the Delete button located on the toolbar.

3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the address click "No" on the "Confirm Action" pop up message.

4. The address and contacts are deleted.

Note: Once address and contact information is deleted, it can no longer be displayed or updated.

Deleting Contact Information

To delete contact information, perform the following steps:

1. Display the customer address that contains the contact you want to delete. See "Displaying Address Information" above.

2. Click the checkbox in the "Delete" column of the Contact table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once contact information is deleted, it can no longer be displayed or updated.

Displaying the Previous Address

To display the address data that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous address and contact information are displayed on the main screen.

Displaying the Next Address

To display the address data that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next address and contact information and are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Customer" field, then click the Next button .

Information Screen

This screen allows you to enter text you wish to maintain concerning a customer. For example, you could enter text information for a customer that describes specific details about special products or services you provide to this customer. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Customer

Field	**Explanation**
Customer	A unique identifier assigned to each customer. It is the main key for all other customer data.
Description	A shortened name or the full name of the customer.

Information Table

Column	**Explanation**
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	**Explanation**
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Customer". The Customer screen is displayed.

3. If there is a customer number in the "Customer" field, the information for that customer is displayed on the main screen.

4. Click the "Information" tab at the top of the main screen.

5. If there is a customer number in the "Customer" field, the information text types and reference information for that customer are displayed on the main screen.

Using the Information Screen

Use these procedures to display, add, update, delete, display the previous, and display the next customer information or references.

Displaying Information and References

To display information or references, perform the following steps:

1. Enter a customer number in the “Customer” field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the “Customer” field, or the “Description” field to select a customer number and double-click on the “Customer” you would like to display in the “Search” screen table.

2. The information text types and references for the customer are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the “Text Information” column of the Information table for the row you want to display and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

6. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

7. To view electronic references, right click on the reference you would like to display. Choose “Goto External Application” from the menu.

Adding Information

To enter information, perform the following steps:

1. Display the customer you want. See “Displaying Information and References” above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the “Info Type” column of the Information table.

4. Click the Goto/Selection button in the “Text Information” column of the Information table for the row you want and select “Edit Information Text” on the

menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click “Ok” when done.

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

Note: You can add customer information and references at the same time.

Adding References

To enter references, perform the following steps:

1. Display the customer you want. See “Displaying Information and References” above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the “Reference Type” column of the Reference table.

4. Enter the reference in the “Reference” column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can add customer information and references at the same time.

Updating Information

To update information, perform the following steps:

1. Display the customer data you want to change. See “Displaying Information and References” above.

2. Click the Goto/Selection button in the “Text Information” column of the Information table for the row you want to update and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click “Ok” when done.

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

Note: You can update customer information and references at the same time.

Updating References

To update references, perform the following steps:

1. Display the customer data you want to change. See “Displaying Information and References” above.

2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can update customer information and references at the same time.

Deleting Information and References

To delete information and references, perform the following steps:

1. Display the customer data that has the information text and/or reference you want to delete. See “Displaying Information and References” above.

2. To delete text information, click the checkbox in the “Delete” column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the “Delete” column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once customer information and references are deleted, they can no longer be displayed or updated. Deleting a reference to an external file does not delete the actual file; it deletes only the reference to the file.

Displaying the Previous Information and References

To display the information and references for the customer that precedes the customer currently displayed, perform the following steps:

1. Click the Previous button ◀ located on the toolbar.

2. The information and references for the previous customer are displayed on the main screen.

Displaying the Next Information and References

To display the information and references for the customer that follows the customer currently displayed, perform the following steps:

1. Click the Next button ▶ located on the toolbar.

2. The information and references for the next customer are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Customer" field, then click the Next button ▶.

Statistics Screen

This screen displays various types of statistical information about a customer.

Selection Criteria

Field	**Explanation**
Customer	A unique identifier assigned to each customer. It is the main key for all other customer data.
Customer Type	The type helps further define a customer by giving it a classification. Some examples of types are: "Dealer", "Direct", "Distributor" or "Retail".
Customer Name	A shortened name or the full name of the customer.
Customer Status	Specifies whether the customer is "Active" or "Inactive".
Year	The year for which you wish to view statistics. Leave blank for all years.
Statistics Type	The type of statistics you wish to view. Leave blank for all types.

Statistics Table (January to June and July to December tabs)

Column	**Explanation**
Row	The line number of the row in the table.
Type	Type of statistic accumulated.
Total	Yearly total of the type of statistic displayed.
January	Statistics for the month of January for the year and type indicated.
February	Statistics for the month of February for the year and type indicated.
March	Statistics for the month of March for the year and type indicated.
April	Statistics for the month of April for the year and type indicated.
May	Statistics for the month of May for the year and type indicated.
June	Statistics for the month of June for the year and type indicated.
July	Statistics for the month of July for the year and type indicated.

August	Statistics for the month of August for the year and type indicated.
September	Statistics for the month of September for the year and type indicated.
October	Statistics for the month of October for the year and type indicated.
November	Statistics for the month of November for the year and type indicated.
December	Statistics for the month of December for the year and type indicated.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Statistics Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Customer". The Customer screen is displayed.

3. If there is a customer number in the "Customer" field, the information for that customer is displayed on the main screen.

4. Click the "Statistics" tab at the top of the main screen.

5. If there is a customer number in the "Customer" field, the statistics for that customer are displayed on the main screen.

Using the Statistics Screen

Displaying Statistics

To display statistics, perform the following steps:

1. Enter or select a customer number in the “Customer” field.

2. Select a year in the “Year” field or leave it blank to select all years.

3. Enter or select a statistic type in the “Statistic Type” field or leave it blank to select all types.

4. Click the Open (Display) button located on the toolbar or hit the Enter key.

5. The customer statistics results are displayed in the Statistics table on the main screen.

-or-

1. Use the Search button next to the “Customer” field, the “Customer Name” field, the Type” field, or the “Status” field to select a “Customer Number”.

2. Double-click on the “Customer” you would like to display in the “Search” screen table.

3. The customer statistics results are displayed in the Statistics table on the main screen.

4. Enter or select values in the other selection criteria fields as desired.

5. Click the Open (Display) button located on the toolbar or hit the Enter key.

6. The new customer statistics results are displayed in the Statistics table on the main screen.

Summary Screen

This screen is for listing customers using selection criteria to group customers or to locate a customer.

Selection Criteria

Field	Explanation
Customer	Enter a customer number or partial customer number here for specific customers or leave this field blank to view all customers.
Type	Select a type or leave this field blank for all customer types.
Customer Name	Enter a customer name or partial customer name here for specific customers or leave this field blank to view all customers.
Status	Select a status or leave this field blank for all statuses.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.

Summary Table (Customer, Description and Carrier tabs)

Column	Explanation
Row	The line number of the row in the table.
Customer	A unique identifier assigned to each customer. It is the main key for all other customer data.
Customer Name	A shortened name or the full name of the customer.
Status	Specifies whether the customer is “Active” or “Inactive”.
Type	The type helps further define a customer by giving it a classification. Some examples of types are: "Dealer”, “Direct”, “Distributor” or “Retail”.
Priority	Ranking of importance (priority) -- 1, 2, or 3 with 1 being the highest.
Tax Exempt	The “tax exempt” number assigned by the IRS to this customer.
Invoice Terms	The terms define the invoice “terms”. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some

	examples of terms are: "1% 10 Net 30", "Due on receipt" or "Net 30".
Sales Representative	The person or department in your organization responsible for this customer.
Description	Contains information describing the customer. This description can be as short as an abbreviation or a long detailed description of the customer.
Carrier #	Number of the preferred freight company for this customer.
Carrier	Name of the preferred freight company for this customer.
Freight Type	How the freight charges are to be paid.
Ship From Warehouse	The default inventory warehouse you want to use to fulfill orders for this customer.
Ship From Zone	The default zone within the inventory warehouse you want to use to fulfill orders for this customer.
Ship From Location	The default inventory location you want to use to fulfill orders for this customer.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Summary Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Customer". The Customer screen is displayed.

3. If there is a customer number in the "Customer" field, the information for that customer is displayed on the main screen.

4. Click the "Summary" tab at the top of the main screen.

5. If there is a customer number in the "Customer" field, the summary information for that customer is displayed on the main screen.

Using the Summary Screen

Displaying Summaries

To display a summary, perform the following steps:

1. If desired, enter all or part of a customer number in the “Customer” field. You can leave the “Customer” field blank to select all customers.
2. Enter or select values in the other selection criteria fields as desired.
3. Click the Open (Display) button located on the toolbar or hit the Enter key.
4. The customer summary results are displayed in the Summary table on the main screen.
5. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change your selection criteria.

-or-

1. Use the Search button next to the “Customer” field, the “Customer Name” field, the Type” field, or the “Status” field to select a “Customer Number”.
2. Double-click on the “Customer” you would like to display in the “Search” screen table.
3. The customer summary results are displayed in the Summary table on the main screen.
4. Enter or select values in the other selection criteria fields as desired.
5. Click the Open (Display) button located on the toolbar or hit the Enter key.
6. The new customer summary results are displayed in the Summary table on the main screen.
7. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change your selection criteria.

Customer Item Screen

This screen allows you to associate customer specific information with your own items.

Current Customer and Customer Item

Field	**Explanation**
Customer	A unique identifier assigned to each customer. It is the main key for all other customer data. The identifier can be a number, a name, or some combination of numbers and characters.
Name	A shortened name or the full name of the customer.
Cust. Item	The customer's item number.
Type	The type of item the customer classifies this item as.
Description	The customer's description of the item.
Status	The current status of the item for the customer; the status they consider the item to be in.
Unit of Measure	How the customer measures a single unit of the item.
Gross	The price you charge your customer for this item before any discounts have been applied.
Unit Weight	The weight of a single unit of this item.
Discount	Discount amount you apply to this item for this customer.
Unit of Weight	How the customer measures the weight of a single unit of this item.
Discount Percent	Discount percentage applied to the gross price to determine the discount amount to apply to this item for this customer.
Net Price	The price charged to this customer for this item after discounts have been applied.

Our Item Data

Field	**Explanation**
Item/Part	The item as it is known to you.
Type	Classification of the item as it is known to you; how your company classifies this item.
Description	Your description of the item.

Status	The status of the item in your system.
Unit of Measure	How you measure a single unit of the item.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Customer Item Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Customer". The Customer screen is displayed.

3. If there is a customer number in the "Customer" field, the data for that customer is displayed on the main screen.

4. Click the "Customer Item" tab at the top of the main screen.

Using the Customer Item Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next customer item.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Customer Item

To display a customer item, perform the following steps:

1. Enter a customer number in the "Customer" field or use the **left** Search button next to the "Customer" field to select a customer number.
2. Use the **right** Search button next to the "Customer" field to select a customer item number.
3. Click the Open (Display) button located on the toolbar or hit the Enter key.
4. The customer item data is displayed on the main screen.

-or-

1. Enter a customer number in the "Customer" field or use the **left** Search button next to the "Customer" field to select a customer number.
2. Click the Next button located on the toolbar to display the first customer item for this customer (if one exists).

Note: Though it can be used it is better not to use the Item/Part field in the "Our Item Data" for displaying a customer item. This field is for adding or changing customer item data.

Adding a New Customer Item

To add a customer item, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter the customer number you want to use in the "Customer" field or use the **left** Search button next to the "Customer" field to select a customer number.
3. Enter an item number in the "Item/Part" field in the "Our Item Data" section of the screen or use the Search button next to the "Item/Part" field to select an item number.
4. Enter data in any of the other fields you desire or click the "Load Item Defaults" button located on the toolbar to load item data as you have it defined in TFG4000. These fields are optional.

5. When done, click the Save button located on the toolbar.

Updating a Customer Item

To update a customer item, perform the following steps:

1. Display the customer item data you wish to change. See "Displaying a Customer Item" above.

2. Change the desired information on the screen or click the "Load Item Defaults" button located on the toolbar to load item data as you have it defined in TFG4000.

3. When done, click the Save button located on the toolbar.

Deleting a Customer Item

To delete a customer item, perform the following steps:

1. Display the customer item data you wish to delete. See "Displaying a Customer Item" above.

2. Click the Delete button located on the toolbar.

3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the customer item click "No" on the "Confirm Action" pop up message.

Note: Once a customer item is deleted, it can no longer be displayed or updated.

Displaying the Previous Customer Item

To display the customer item that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous customer item data is displayed on the main screen.

Displaying the Next Customer Item

To display the customer item that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next customer item data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Customer" field, then click the Next button .

Labels Screen

This screen is for printing customer address labels.

Customer Parameters

<u>**Field**</u>	<u>**Explanation**</u>
From Customer	The customer number you want to use for specifying the beginning of a range of address labels to print. Leave this field blank to start with the first customer.
To Customer	The customer number you want to use for specifying the end of a range of address labels to print. Leave this field blank to print labels through the last customer.
Sort Labels by	Field that specifies how you want the labels sorted. The dropdown provided allows you to sort by customer name, which is the default, or customer number.
Customer Addresses	Checkbox where you indicate if you want to print addresses that are marked as customer addresses.
Billing Addresses	Checkbox where you indicate if you want to print addresses that are marked as billing addresses.
Shipping Addresses	Checkbox where you indicate if you want to print addresses that are marked as shipping addresses.
Acknowlegement Addresses	Checkbox where you indicate if you want to print addresses that are marked as acknowledgement addresses.

Label Parameters

<u>**Field**</u>	<u>**Explanation**</u>
Label Name	Field that indicates what type of label you want to print. A search button is provided so you can select from the available types.
Label Font	Size of the font to be used when the label is printed. The default is based on the label name. A dropdown is provided to indicate if you want the font to be **Bold** or Not Bold.
Print Landscape	Checkbox to indicate if you want the labels printed in landscape or portrait orientation.
Center Text Vertically Within Each Label	Should the label's text be centered vertically on the label, or should the first line of text begin at the top edge of the label? When this option is selected the label's text will be centered vertically on the label.

Allow me to Indicate Specific Labels on which nothing should be Printed	Check this box so you can get a map of the label sheet when you click the Create Labels button. Then you can indicate which labels on a sheet of labels should be bypassed during printing. You can mark as many pages as necessary. This is for using sheets of labels that may have labels that are missing or unusable.
Advanced Options (Button)	Click this button to set advanced formatting options.
Create Labels (Button)	Click this button when you are ready to print the labels.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Labels Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Customer". The Customer screen is displayed.

3. If there is a customer number in the "Customer" field, the information for that customer is displayed on the main screen.

4. Click the "Labels" tab at the top of the main screen.

Using the Labels Screen

Use these procedures to print customer address labels.

Printing Customer Address Labels

To print customer address labels, perform the following steps:

1. Enter a customer number in the “From Customer” field or use the Search button next to the “From Customer” field to select a customer number that you want to use as the beginning of a range of customer address labels to print. Leave this field blank to start with the first customer number in the database.

2. Enter a customer number in the “To Customer” field or use the Search button next to the “To Customer” field to select a customer number that you want to use as the end of a range of customer address labels to print. Leave this field blank to print customer addresses through the end of the database.

3. Select the sort sequence you want for the labels. The default is to sort them by customer name, but you can choose to sort them by customer number instead.

4. Click the checkbox next to the types of addresses you want to print. The default is to print all types. A checkmark in the checkbox indicates you want that address type, a blank box indicates you do not want that address type.

5. Use the GoTo/Selection button next to “Label Name” to select the type of label you want to print.

6. Change formatting options as desired. Click the Advanced Formatting button located on the toolbar to adjust label formatting if necessary.

7. Click the Print button located on the toolbar to generate the labels for previewing and printing.

8. If you clicked the checkbox next to “Allow me to Indicate Specific Labels on which Nothing should be Printed”, you will see a graphic representation of a sheet of labels. Click the label(s) you want to skip. They will have “Don’t Use” on them. Click again to allow them to be used. Click “Next Page” to mark additional sheets as necessary. Click “Ok” when you are ready to start printing.

Employee

What is an Employee?

An employee is any person employed by your company for whom information must be stored.

Employee Screens

“Employee” consists of five tabbed screens that are used to enter and maintain employee data. Each screen is used for specific purposes to aid in the entry and maintenance of employee information.

Employee

The employee screen allows you to define an employee with basic information about the employee such as the type of employee, status, address, etc.

Contact

The employee contact screen allows you to enter an employee contact and if necessary, multiple contacts for an employee who has more than one contact. You can enter as many contacts as you need for an employee.

Information

This screen allows you to enter text you wish to maintain concerning an employee. For example, you could enter text information for an employee that describes specific details about performance for this employee. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL’s for web sites.

Skills

This screen allows you to define the skills this employee possesses and the pay rate used when the employee is assigned a task requiring a particular skill.

Schedule

This screen allows you to designate how many shifts per day of the week and how many hours for each shift an employee may work.

Employee Screens Explained

Employee Screen

This screen is for defining an employee with basic information about the employee.

Current Employee

Field	**Explanation**
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Full Time", "Part Time" or "Contractor".
Name	The full name of the employee defined here.
Status	Specifies whether the employee is "Active" or "Inactive".
Title	The employee's title within this organization.
SSN	The employee's social security number.

Employee Data

Field	**Explanation**
Line 1	First line of the address for this employee.
Line 2	Second line of the address for this employee.
Line 3	Third line of the address for this employee.
City	City for this address.
State	State associated with this address.
Zip	Postal Zip Code for this address.
Country	Country associated with this address.
Phone	Telephone number, including area code, for this employee.
Extension	Extension number for the employee.
Fax	Fax telephone number, including area code, for this employee.

URL Address	URL (Universal Resource Locator) or Website address for this employee.
E-Mail	E-Mail address for this employee.
Hire Date	Date this employee was hired.
Term Date	Date the employee terminated employment.
Work Center	Work Center where this employee is assigned.
Default Rate	The basic pay rate for the employee.
Rate Unit	Unit of measure for the Default Rate (Hours).
Overtime Rate	Pay rate for the employee when working overtime.
Rate Unit	Unit of measure for the Overtime Rate (Hours)
Rate Factor	Multiplication factor applied to the Default Rate to determine the Overtime Rate (can be used instead of a specific Overtime Rate)
Holiday Rate	Pay rate for the employee when working on a holiday.
Rate Unit	Unit of measure for the Holiday Rate (Hours)
Rate Factor	Multiplication factor applied to the Default Rate to determine the Holiday Rate (can be used instead of a specific Holiday Rate)

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Employee Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the data for that employee is displayed on the main screen.

Using the Employee Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next employee.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Employee

To display an employee, perform the following steps:

1. Enter an employee number in the “Employee” field.

2. Click the Open (Display) button located on the toolbar or hit the Enter key.

3. The employee data is displayed on the main screen.

   -or-

1. Use the Search button next to the “Employee” field or the “Name” field, or the second Search button next to the “Work Center” field to select an employee number.

2. Double-click on the “Employee” you would like to display in the “Search” screen table.

3. The employee data is displayed on the main screen.

Adding a New Employee

To add an employee, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.

2. Enter an employee number in the “Employee Number” field. It can be any combination of numbers and letters.

3. Enter data in any of the other fields you desire, these fields are optional.

4. When done, click the Save button located on the toolbar.

   -or-

1. Display an employee. See “Displaying an Employee” above.

2. Enter a new employee number in the “Employee Number” field and change any of the fields you desire.

3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy employee data to a new employee number; however, contacts, text, skills, and schedules are not copied with this procedure.

Updating an Employee

To update an employee, perform the following steps:

1. Display the employee data you wish to change. See "Displaying an Employee" above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting an Employee

To delete an employee, perform the following steps:

1. Display the employee data you wish to delete. See "Displaying an Employee" above.

2. Click the Delete button located on the toolbar.

3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the employee click "No" on the "Confirm Action" pop up message.

Note: Once an employee is deleted, it can no longer be displayed or updated.

Displaying the Previous Employee

To display the employee that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous employee data is displayed on the main screen.

Displaying the Next Employee

To display the employee that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next employee data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Employee" field, then click the Next button .

Contact Screen

This screen is for entering and maintaining contacts for an employee. Multiple contacts can be defined and maintained.

Current Employee

Field	**Explanation**
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. Some examples of types are: "Full Time", "Part Time" or "Contractor".
Name	The full name of the employee.
Status	Specifies whether the employee is "Active" or "Inactive".
Title	The employee's title within this organization.
SSN	The employee's social security number.

Contact Data

Field	**Explanation**
Contact Name	Name of the contact.
Sequence	Number used internally to keep track of contacts.
New Contact	Indicates if you are adding this person as a new contact.
Line 1	First line of the address for this contact.
Line 2	Second line of the address for this contact.
City	City for this address.
State	State associated with this address.
Zip	Postal Zip Code for this address.
Country	Country associated with this address.
Relationship	How this contact is related to the employee.
Phone	Telephone number, including area code, for this contact.
Extension	Telephone extension.
Fax	Fax telephone number, including area code, for this contact.
E-Mail	E-Mail address for this contact.

URL Address	URL (Universal Resource Locator) or Website address for this contact.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Contact Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the information for that employee is displayed on the main screen.

4. Click the "Contact" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the first contact found for that employee is displayed on the main screen.

Using the Contact Screen

Use these procedures to display, add, update, delete, display the previous, and display the next employee contact.

Displaying a Contact

To display employee contact information, perform the following steps:

1. Enter an employee number in the “Employee” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The first contact found for the employee is displayed on the main screen.
4. Click the Next button to view the next contact for this employee or the first contact for the next employee.

   -or-

1. Use the Search button next to the “Employee” field, or the “Name” field to select an employee number.
2. Double-click on the employee you would like to display in the “Search” screen table.
3. The first contact found for the employee is displayed on the main screen.
4. Click the Next button to view the next contact for this employee or the first contact for the next employee.

Adding an employee Contact

To enter an employee contact, perform the following steps:

1. Enter or select the employee number you want.
2. Enter contact data in the fields provided.
3. Click the checkbox next to “New Contact” to indicate you are adding this person as a new contact.
4. Once finished, click the Save button located on the toolbar.

Updating Contact Information

To update contact information, perform the following steps:

1. Display the employee address data you want to change. See “Displaying a Contact” above.
2. Change the contact data as necessary.
3. Once finished, click the Save button located on the toolbar.

Deleting Contact Information

To delete contact information, perform the following steps:

1. Display the employee contact you want to delete. See "Displaying a Contact" above.

2. Click the Delete button located on the toolbar.

3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the contact click "No" on the "Confirm Action" pop up message.

4. The contact is deleted.

Note: Once contact information is deleted, it can no longer be displayed or updated.

Displaying the Previous Contact

To display the contact data that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous contact is displayed on the main screen.

Displaying the Next Contact

To display the contact data that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next contact is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Employee" field, then click the Next button .

Information Screen

This screen allows you to enter text you wish to maintain concerning an employee. For example, you could enter text information for an employee about performance. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Employee

Field	**Explanation**
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Name	The full name of the employee.
Type	The classification of the employee. Some examples of types are: "Full Time", "Part Time" or "Contractor".

Information Table

Column	**Explanation**
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	**Explanation**
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the information for that employee is displayed on the main screen.

4. Click the "Information" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the information text types and reference information for that employee are displayed on the main screen.

Using the Information Screen

Use these procedures to display, add, update, delete, display the previous, and display the next employee information or references.

Displaying Information and References

To display information or references, perform the following steps:

1. Enter an employee number in the “Employee” field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the “Employee” field, or the “Description” field to select an employee number and double-click on the “Employee” you would like to display in the “Search” screen table.

2. The information text types and references for the employee are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the “Text Information” column of the Text table for the row you want to display and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

6. To view electronic references, right click on the reference you would like to display. Choose “Goto External Application” from the menu.

Adding Information

To enter information, perform the following steps:

1. Display the employee you want. See “Displaying Information and References” above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the “Info Type” column of the Information table.

4. Click the Goto/Selection button in the "Text Information" column of the Text table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click "Ok" when done.

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

Note: You can add employee information and references at the same time.

Adding References

To enter references, perform the following steps:

1. Display the employee you want. See "Displaying Information and References" above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the "Reference Type" column of the Reference table.

4. Enter the reference in the "Reference" column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose "Select External File". A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the "Open" button.

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

Note: You can add employee information and references at the same time.

Updating Information

To update information, perform the following steps:

1. Display the employee data you want to change. See "Displaying Information and References" above.

2. Click the Goto/Selection button in the "Text Information" column of the Text table for the row you want to update and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click “Ok” when done.

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

Note: You can update employee information and references at the same time.

Updating References

To update references, perform the following steps:

1. Display the employee data you want to change. See “Displaying Information and References” above.

2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can update employee information and references at the same time.

Deleting Information and References

To delete information and references, perform the following steps:

1. Display the employee data that has the information text and/or reference you want to delete. See “Displaying Information and References” above.

2. To delete text information, click the checkbox in the “Delete” column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the “Delete” column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once employee information and references are deleted, they can no longer be displayed or updated. Deleting a reference to an external file does not delete the actual file; it deletes only the reference to the file.

Displaying the Previous Information and References

To display the information and references for the employee that precedes the employee currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The information and references for the previous employee are displayed on the main screen.

Displaying the Next Information and References

To display the information and references for the employee that follows the employee currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The information and references for the next employee are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Employee” field, then click the Next button .

Skills Screen

This screen allows you to define the skills this employee possesses and the pay rate to be used when the employee is assigned a task requiring a particular skill.

Current Employee

Field	Explanation
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. Some examples of types are: "Full Time", "Part Time" or "Contractor".
Name	The full name of the employee.
Status	Specifies whether the employee is "Active" or "Inactive".
Title	The employee's title within this organization.
SSN	The employee's social security number.

Skills Table

Column	Explanation
Row	The line number of the row in the table.
Skill	Work ability or expertise this employee possesses.
Description	Short description of the skill.
Rate	Pay rate for this particular employee skill.
Skill Time Unit	The measure of time used for the skill (Hours).
Delete	This is a checkbox to indicate you want to delete a skill from the employee's skill list.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen.

Accessing the Skills Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the information for that employee is displayed on the main screen.

4. Click the "Skills" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the skills list for that employee is displayed on the main screen.

Using the Skills Screen

Use the following procedures to erase the screen, display, update, add, delete, display the previous, or display the next employee skills list.

Note: This data is currently information only but it will be used in future enhancements.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Skills List

To display an employee's skills list, perform the following steps:

1. Enter an employee number in the "Employee" field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The skills list for the employee is displayed on the main screen.

-or-

1. Use the Search button next to the "Employee" field, or the "Description" field to select an employee number.
2. Double-click on the "Employee" you would like to display in the "Search" screen table.
3. The skills list for the employee is displayed on the main screen.

Updating and Adding Skills Data for an Employee

To edit skills data or add new skills data for an employee:

1. Display the employee you wish to change. See "Displaying a Skills List" above.
2. Change the skills data as needed. You can use the Add Rows button located on the toolbar to add additional rows for entry.
3. When all of the appropriate columns are changed, click the Save button located on the toolbar.

Deleting Skills from an Employee

Perform the following steps to delete skills from an employee:

1. Display the employee you wish to change. See "Displaying a Skills List" above.
2. Click the "Delete" checkbox next to the row(s) you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.
3. When all of the appropriate rows are selected, click the Save button located on the toolbar.

Displaying the Previous Skills List

To display the skills list that precedes the skills list currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.
2. The previous skills list is displayed on the main screen.

Displaying the Next Skills List

To display the skills list that follows the skills list currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next skills list and its operations are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

Schedule Screen

This screen allows you to designate how many shifts per day of the week and how many hours for each shift an employee may work.

Note: This data is currently information only but it will be used in future enhancements.

Current Employee

Field	Explanation
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. Some examples of types are: "Full Time", "Part Time" or "Contractor".
Name	The full name of the employee.
Status	Specifies whether the employee is "Active" or "Inactive".
Title	The employee's title within this organization.
SSN	The employee's social security number.

Shift Schedules

Field	Explanation
Monday Shifts	The number of shifts this employee works on Mondays.
Hours Per Shift	The number of hours per shift this employee works on Mondays.
Tuesday Shifts	The number of shifts this employee works on Tuesdays.
Hours Per Shift	The number of hours per shift this employee works on Tuesdays.
Wednesday Shifts	The number of shifts this employee works on Wednesdays.
Hours Per Shift	The number of hours per shift this employee works on Wednesdays.
Thursday Shifts	The number of shifts this employee works on Thursdays.
Hours Per Shift	The number of hours per shift this employee works on Thursdays.
Friday Shifts	The number of shifts this employee works on Fridays.
Hours Per Shift	The number of hours per shift this employee works on Fridays.

Saturday Shifts	The number of shifts this employee works on Saturdays.
Hours Per Shift	The number of hours per shift this employee works on Saturdays.
Sunday Shifts	The number of shifts this employee works on Sundays.
Hours Per Shift	The number of hours per shift this employee works on Sundays.
Total Shifts	The total number of shifts this employee works in a week.
Total Hours	The total number of hours this employee works in a week.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Employee Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the data for that employee is displayed on the main screen.

4. Click the "Schedule" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the schedule for that employee is displayed on the main screen.

Using the Schedule Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next employee schedule.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Employee Schedule

To display an employee schedule, perform the following steps:

1. Enter an employee number in the “Employee” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The employee schedule data is displayed on the main screen.

-or-

1. Use the Search button next to the “Employee” field, the “Name” field, the “Employee Code” field, the “Type” field, or the “Status” field to select an employee number.
2. Double-click on the “Employee” you would like to display in the “Search” screen table.
3. The employee schedule data is displayed on the main screen.

Adding a New Employee Schedule

To add an employee schedule, perform the following steps:

1. Display the employee you wish to change. See “Displaying an Employee Schedule” above.
2. Enter data in any of the other fields you desire.

3 When done, click the Save button located on the toolbar.

-or-

1. Display an employee schedule see “Displaying an Employee Schedule” above.
2. Enter another employee number in the “Employee Number” field and change any of the fields you desire.
3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy employee schedule data to another employee.

Updating an Employee Schedule

To update an employee schedule, perform the following steps:

1. Display the employee schedule data you wish to change. See “Displaying an Employee Schedule” above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting an Employee Schedule

To delete an employee schedule, perform the following steps:

1. Display the employee schedule you wish to delete. See “Displaying an Employee Schedule” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the employee click “No” on the “Confirm Action” pop up message.

Note: Once an employee schedule is deleted, it can no longer be displayed or updated.

Displaying the Previous Employee Schedule

To display the employee schedule that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous employee schedule is displayed on the main screen.

Displaying the Next Employee

To display the employee schedule that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next employee schedule is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Employee” field, then click the Next button .

Item Definition

What is an Item?

An item can be something having material existence like a piece of wood or a bookcase or a hammer. It can be a service like mowing a lawn or catering a party. It can even be something more abstract like labor. With TFG4000 you have the capability of defining each item uniquely. Unique identification of an item is possible by the use of both alphabetic and numeric characters which can be combined into discrete units.

TFG4000 allows you to create these item definitions by the use of fields that describe each item.

Note: You must define items ***before*** you can enter inventory for them.

Item Definition Screens

"Item Definition" consists of six tabbed screens that are used to enter and maintain item data. Each screen is used for specific purposes to aid in the entry and maintenance of items.

Item Definition
This screen allows you to enter and maintain data for an individual item.

Cost and Price
This screen allows you to enter and maintain cost data (what it costs you to purchase, build, or perform the activity defined by the item) and price data (what you charge your customer for this item) for an individual item.

Item Information
This screen allows you to enter text that you wish to maintain concerning an item. For example, you could enter text information for an item that is too long or detailed for the "Description" field. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Item Summary
This screen is used to display "Item/Part" entries for all items. 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 with its associated data.

Price Summary
This screen can be used to display and maintain pricing data for items that have pricing data. Items without pricing data are not displayed. Each row in the table represents one item with its associated pricing data.

Statistics
Various types of statistical information accumulated for the item. Displayed by year and month within year.

Labels

The label screen allows you to print item labels based on the selection criteria used.

Item Definition Screens Explained

Item Definition Screen

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

Note: You must define an item ***before*** you can enter inventory for it.

Current Item Group

Field	**Explanation**
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Type	The type helps further define an item by giving it a classification. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Description	Contains information describing the item. This description can be as short as an abbreviation or a long detailed description of the item.
Unit of Measure	Defines how the item is counted or measured. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of units of measure are "Ounce", "Pound", and “Hour".
Revision Level	Most current revision level for this item. Informational only.
Status	Specifies whether the item or part is active or inactive.

Current Data Group

Field	**Explanation**
Product Group	A user defined field for grouping items together. It can be used to group items together so they can be located based on their grouping.
Sales	Identifies whether or not the associated item is for sale. Some items can be a part of a larger item and are not for sale individually.

Drawing Number	This can be an engineering or design drawing associated with the item.
Item Level	The level within a Bill of Materials where an item is used. On the "Item Definition" screen, this will be the lowest level at which the item appears on any Bill of Materials.
Commodity	A term that can be applied to groups of items that are similar in some way. This field is normally used for purchasing data; for example, different types of bird seed stocked by a store.
Stock Item	Indicates if the inventory for this item is controlled by the system or not. Yes = inventory controlled item, No = not inventory controlled item. Items defined as No can have negative inventory but items defined as Yes may or may not be allowed to have negative inventory depending on the **Allow_Negative_Inventory** system variable setting.
Asset Category	Describes the kind of asset this is. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of asset categories are: Computer, Furniture, and Transportation.
Mfg Lead Time	Manufacturing lead time. The time (in days) needed to produce one unit of this item.
Asset Type	Defines the grouping of assets sometimes related to liquidity (Current/Fixed). A dropdown list of values is provided for your convenience.
Pur Lead Time	Purchasing lead time. The time (in days) needed to acquire one unit of this item.
Inspection	Should this item be inspected when manufactured or received? (Yes/No)
Percent	If an item must be inspected, what percentage of the quantity produced or received must be inspected?
Purchase UOM	The unit of measure the item must be purchased in.
BOM Reference	The Bill of Material (BOM) to be used when generating a job order for this item.
Unit Weight	How much one unit of this item weighs.
Process Reference	The Process (series of steps/operations) to be used when generating a job order for this item.
Weight UoM	Weight unit of measure. This is the name of the weight system used to measure the weight of the item. A

	dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of weight unit of measure are Pounds, Ounces, Kilograms.
Process Type	The type of process to be used when generating a job order for this item.
Sole Source	Is the item to be purchased from only one supplier/vendor? (Yes/No)
Image Name	The file name for a picture of the item. Necessary only if the file name is different from the item number or if the image is not stored in the User Image Directory. For more information about item images, see "Item Images" in the "Using the Item Definition Screen" section.
Supplier	Supplier number of the preferred supplier/vendor to be used when generating a purchase order for this item.
Image File	Button for viewing a picture of the item.
Supplier Name	Supplier name of the preferred supplier/vendor for this item.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen.

Accessing the Item Definition Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Item Definition". The Item Definition screen is displayed.

3. If there is an item or part number in the "Item/Part" field, the item definition for that item is displayed on the main screen.

Using the Item Definition Screen

Use these procedures to erase the screen, display, update, add, copy, delete, define message distribution, display the previous, and display the next item/part.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Item

To display an item, perform the following steps:

1. Enter an item or part number in the "Item/Part" field.

2. Click the Open (Display) button located on the toolbar or hit the Enter key.

3. The item or part number is displayed on the main screen.

   -or-

1. Use one of the following Search buttons to locate the item number you want:
   a) Button next to the "Item/Part" field
   b) Button next to the "Type" field
   c) Second button next to the "Description" field
   d) Button next to the "Unit Of Measure" field
   e) Button next to the "Revision Level" field
   f) Button next to the "Status" field
   g) Second button next to the "Product Group" field
   h) Button next to the "Sales" field
   i) Second button next to the "Drawing Number" field
   j) Button next to the "Item Level" field
   k) Second button next to the "Commodity" field
   l) Button next to the "Stock Item" field
   m) Button next to the "Asset Category" field
   n) Button next to the "Asset Type" field
   o) Button next to the "Weight UoM" field

2. Double-click on the "Item/Part" you would like to display in the "Search" screen table.

3. The item or part number is displayed on the main screen.

Updating an Item

To update an item or part, perform the following steps:

1. Display the item or part number you wish to change. See “Displaying an Item” above.

2. Change the desired information on the screen. You can enter data or use any of the following Search buttons to locate data to use:
   a) First button next to the “Description” field to find a description among descriptions you have already used
   b) First button next to the “Product Group” field to find a product group from among product groups you have already used
   c) First button next to the “Drawing Number” field to find a drawing number among the drawing numbers you have already used
   d) First button next to the “Commodity” field to find a commodity from among commodities you have already used

3. When done, click the Save button located on the toolbar.

Defining Message Distribution for an Item

Messages about an item may be issued by other TFG4000 applications such as material requirements planning. To define who should receive messages about this item or part, perform the following steps:

1. Display the item or part number you wish to change. See “Displaying an Item” above.

2. Click the Message button located on the toolbar. A pop-up window will appear.

3. Use the selection button to choose an employee who should receive messages about this item.

4. Click the checkbox in the “Delete” column for any rows you wish to remove.

5. When done click “Save” to store the changes or “Cancel” to discard the changes.

Adding a New Item

To add an item, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.

2. Enter a new item or part number in the “Item/Part” field. This number must be a unique item or part number. The “Item/Part” field is required.

3. Enter data in any of the other fields you desire, these fields are optional.

4. You can enter data or use any of the following Search buttons to locate data to use:
   a) First button next to the “Description” field to find a description among descriptions you have already used
   b) First button next to the “Product Group” field to find a product group from among product groups you have already used

   c) First button next to the “Drawing Number” field to find a drawing number among the drawing numbers you have already used
   d) First button next to the “Commodity” field to find a commodity from among commodities you have already used

5. When done, click the Save button located on the toolbar.

   -or-

1. Display an item or part number. See “Displaying an Item” above.

2. Change the item or part number in the “Item/Part” field to a new value.

3. Change any of the other fields you desire, these fields are optional.

4. You can enter data or use any of the following Search buttons to locate data to use:
   a) First button next to the “Description” field to find a description among descriptions you have already used
   b) First button next to the “Product Group” field to find a product group from among product groups you have already used
   c) First button next to the “Drawing Number” field to find a drawing number among the drawing numbers you have already used
   d) First button next to the “Commodity” field to find a commodity from among commodities you have already used

5. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy an item or part to a new item or part number; however, text, external references, and price data are not copied.

Copying an Item

To copy an item and related data, perform the following steps:

1. Display the item you want to copy. See “Displaying an Item” above.

2. Click the copy button located on the toolbar. A pop-up will appear.

3. Enter the new item number in the “Copy to Item/Part”.

4. Various types of item data are listed with check boxes next to them. Click a check box to check or uncheck data to be copied. A check mark means it will be copied, No check mark means it will not be copied.

5. Click the “Copy” button to complete the copy or click “Cancel” to cancel the copy operation.

Deleting an Item

To delete an item or part, perform the following steps:

1. Display the item or part number you wish to delete. See "Displaying an Item" above.

2. Click the Delete button located on the toolbar.

3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the item or part click "No" on the "Confirm Action" pop up message.

Note: Once an item or part number is deleted, it can no longer be displayed or updated.

Displaying the Previous Item

To display the item that precedes the item currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous item or part number is displayed on the main screen.

Displaying the Next Item

To display the item that follows the item currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next item or part number is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

Item Images

The Item Definition screen provides a way for you to view a thumbnail picture of an item and expand the thumbnail to a larger image. Before an image can be displayed, it must be defined. There are three ways to define access to the image:

1. Name the picture file the same as the item/part number and store the file in the User Image Directory defined in System variables (**User_Image_Directory**)

2. The If the picture file name is different from the item/part number and it is stored in the User Image Directory, enter the name of the file in the "Image Name" field.

3. If the picture file is not stored in the User Image Directory, you must enter the full directory path including the file name in the "Image Name" field. Do not use a local directory and make sure the path you choose is accessible to everyone who needs to view the image.

Note: Image files must be **.jpg** or **.gif**. For other images use the **Information** screen and attach the image as an external reference.

Viewing an Item Image

To view an item image, perform the following steps:

1. Display the item or part number you want. See "Displaying an Item" above.

2. Click the Image File button located in the "Current Data" section of the screen. A thumbnail image is displayed.

3. Double click the thumbnail image to view a larger image.

Cost and Price Screen

This screen allows you to enter and maintain cost and price data for an individual item. Cost is the amount of money incurred to manufacture, purchase or provide the service defined by the item. Price is the amount of money you charge your customers for this item.

Current Item Group

Field	Explanation
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Type	The type helps further define an item by giving it a classification. Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Description	Contains information describing the item. This description can be as short as an abbreviation or a long detailed description of the item.
Status	Specifies whether the item or part is active or inactive.

Current Price Data Group

Field	Explanation
Gross Price	Basic price for an item before any discounts or surcharges are applied.
Discount Amount	Discount amount to be subtracted from the Gross price to determine the Net price. If a value is entered in this field, it overrides the percent amount entered in the “Discount Percent” field if both are entered. If an absolute discount amount is entered the “Discount Percent” field will be set to zero.
Net Price	Net price for an item after any discount is applied. This value is calculated from the Gross amount and the Discount amount, as Gross minus Discount, and is not an input field.
Discount Percent	Discount percentage applied to the Gross price to determine the Net Price; for example, a gross price of 10.00 with a discount percent of 10 would result in a net price of 9.00 (10.00 x 10% = 1.00; 10.00 - 1.00 = 9.00). If Discount Percent is zero and Discount Amount has a value other then zero, then the “Discount Amount” field was updated directly with an absolute amount.

Current Cost Data Group

Field	**Explanation**
Material Cost	The amount required to manufacture or purchase an item.
All Other Cost	The amount associated with this item that is not a manufacturing or purchasing cost. This can be any combination of costs such as processing cost, overhead, etc.
Inventory Cost	The amount used to calculate the total on hand cost of the item.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen.

Accessing the Cost and Price Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Item Definition”. The Item Definition screen is displayed.

3. If there is an item or part number in the “Item/Part” field, the item definition for that item is displayed on the main screen.

4. Click the “Cost and Price” tab at the top of the main screen.

5. If there is an item or part number in the “Item/Part” field, the cost and price data for that item are displayed on the main screen.

Using the Cost and Price Screen

Use these procedures to erase the screen, display, update, display the previous, and display the next item/part cost and price data.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Item's Cost and Price Data

To display an item, perform the following steps:

1. Enter an item or part number in the "Item/Part" field.

2. Click the Open (Display) button located on the toolbar or hit the Enter key.

3. The item or part number is displayed on the main screen.

-or-

1. Use one of the following Search buttons to locate the item number you want:
   a) Button next to the "Item/Part" field
   b) Button next to the "Type" field
   c) Button next to the "Description" field
   d) Button next to the "Status" field

2. Double-click on the "Item/Part" you would like to display in the "Search" screen table.

3. The item or part number data is displayed on the main screen.

Updating an Item's Cost and Price Data

To update an item or part, perform the following steps:

1. Display the item or part number you wish to change. See "Displaying an Item" above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Displaying the Previous Item

To display cost and price data for the item that precedes the item currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous item or part number is displayed on the main screen.

Displaying the Next Item

To display cost and price data for the item that follows the item currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next item or part number is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button, then click the Next button.

Item Information Screen

This screen allows you to enter text that you wish to maintain concerning an item. For example, you could enter text information for an item that is too long or detailed for the “Description” field. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL’s for web sites. You can right click and use the GoTo/Selection button in the table to display an electronic external document.

Current Item Group

Field	Explanation
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Description	Contains information describing the item. This description can be as short as an abbreviation or a long detailed description of the item.

Information Table

Row	The line number of the row in the table.
Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of text types are "Note” and "Print
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	Explanation
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of reference types are "Note” and "Print".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Delete	This is a checkbox to indicate you want to delete an external reference record.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Item Information Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Item Definition". The Item Definition screen is displayed.

3. If there is an item or part number in the "Item/Part" field, the item definition for that item is displayed on the main screen.

4. Click the "Item Information" tab at the top of the main screen.

5. If there is an item or part number in the "Item/Part" field, the information text types and references for that item are displayed on the main screen.

Using the Item Information Screen

Use these procedures to display, update, add, delete, display the previous, and display the next item information or references.

Displaying Item Information and References

To display item information or references, perform the following steps:

1. Enter an item or part number in the "Item/Part" field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the "Item/Part" field, or the "Description" field to select an item number and double-click on the "Item/Part" you would like to display in the "Search" screen table.

2. The information text types and references for the item or part number are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the "Text Information" column of the Information table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

6. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

Updating Item Information

To update item information, perform the following steps:

1. Display the item or part number you want to change. See "Displaying Item Information" above.

2. Click the Goto/Selection button in the "Text Information" column of the Information table for the row you want to update and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click "Ok" when done.

5. When you have finished editing all of the entries you wish to edit, click the Save button located on the toolbar.

Note: You can update Item Information and References at the same time.

Updating Item References

To update item references, perform the following steps:

1. Display the item or part number you want to change. See "Displaying Item Information" above.

2. Enter the new reference in the "Reference" column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose "Select External File". A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the "Open" button.

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

Note: You can update Item Information and References at the same time.

Adding Item Information

To enter item information, perform the following steps:

1. Display the item or part number you want to change. See "Displaying Item Information" above.

2. Click an empty row in the Text Type table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Text Type in the "Text Type" column of the Text Type table.

4. Click the Goto/Selection button in the "Text Information" column of the Information table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click "Ok" when done.

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

Note: You can add Item Information and References at the same time.

Adding Item References

To enter item references, perform the following steps:

1. Display the item or part number you want to change. See "Displaying Item Information" above.
2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the "Reference Type" column of the Reference table.

4. Enter the reference in the "Reference" column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose "Select External File". A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the "Open" button.

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

Note: You can add Item Information and References at the same time.

Deleting Item Information and References

To delete item information and references, perform the following steps:

1. Display the item or part number that has the information text and/or reference you want to delete. See "Displaying Item Information" above.

2. To delete text information, click the checkbox in the "Delete" column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the "Delete" column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once item information is deleted, it can no longer be displayed or updated.

Displaying the Previous Item Information and References

To display the item information and references that precede the item information currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.
2. The previous item's information and references are displayed on the main screen.

Displaying the Next Item Information and References

To display the item information and references that follow the item information currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next item's information and references are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

Item Summary Screen

This screen is used to display “Item/Part” entries for all items. The four 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 with its associated data.

Selection Criteria Group

Field	Explanation
Item/Part	This field is for entering all or part of an Item Number to select the items to be displayed. Leave this field blank to select all items.
Type	This field is for choosing the type of items to be displayed. Leave this field blank to select all item types. A dropdown list of values is provided for your convenience.
Description	This field is for entering all or part of an Item Description to select the items to be displayed. Leave this field blank to select all descriptions.
Status	This field is for choosing items by status. Leave this field blank to select all statuses. A dropdown list of values is provided for your convenience.
Asset Category	This field is for choosing items by asset category. Leave this field blank to select all categories. A dropdown list of values is provided for your convenience.
Commodity	This field is for entering all or part of a commodity to select the items to be displayed. Leave this field blank to select all commodities.
Asset Type	This field is for choosing items by asset type. Leave this field blank to select all types. A dropdown list of values is provided for your convenience.
Product Group	This field is for entering all or part of a product group to select the items to be displayed. Leave this field blank to select all product groups.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.
Drawing Number	This field is for entering all or part of a drawing number to select the items to be displayed. Leave this field blank to select all drawing numbers.

Summary Table (Item tab)

Column	Explanation
Row	The line number of the row in the table.
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Description	Contains information describing the item. This description can be as short as an abbreviation or a long detailed description of the item.
Type	The type helps further define an item by giving it a classification. Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Status	Current status of the item (Active/Inactive)
Unit of Measure	Defines how the item is counted or measured. Some examples of units of measure are "Ounce", "Pound", and “Hour".

Summary Table (Cost tab)

Column	Explanation
Row	The line number of the row in the table.
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Material Cost	The amount required to manufacture or purchase an item.
Other Cost	The amount associated with this item that is not a manufacturing or purchasing cost. This can be any combination of costs such as processing cost, overhead, etc.
Inventory Cost	The amount used to calculate the total on hand cost of the item.

Summary Table (Groups tab)

Column	Explanation
Row	The line number of the row in the table.

Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Product Group	A user defined field for grouping items together. It can be used to group items together so they can be located based on their grouping.
Commodity	A term that can be applied to groups of items that are similar in some way. This field is normally used for purchasing data; for example, different types of bird seed stocked by a store.
Drawing	This can be an engineering or design drawing associated with the item.

Summary Table (Supplier tab)

<u>**Column**</u>	<u>**Explanation**</u>
Row	The line number of the row in the table.
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Supplier	The supplier number for the sole source or preferred supplier/vendor for this item.
Supplier Name	The supplier name for the sole source or preferred supplier/vendor for this item.
Sole Source	Indicates if the supplier listed is the only supplier from whom this item should be acquired.
Purchase UOM	The unit of measure used for this item when purchasing one unit of it.

Summary Table (Other tab)

<u>**Column**</u>	<u>**Explanation**</u>
Row	The line number of the row in the table.
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Sales Item	Identifies whether or not the associated item is for sale. Some items can be a part of a larger item and are not for sale individually.

Stock Item	Indicates if the inventory for this item is controlled by the system or not. Yes = inventory controlled item, No = not inventory controlled item.
Current Revision	Most current revision level for this item. Informational only.
Asset Category	Defines the grouping of assets sometimes related to liquidity. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of asset categories are: Current and Fixed.
Asset Type	Describes the kind of asset this is. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of asset types are: Computer, Furniture, and Transportation.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Item Summary Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Item Definition". The Item Definition screen is displayed.

3. If there is an item or part number in the "Item/Part" field, the item definition for that item is displayed on the main screen.

4. Click the "Item Summary" tab at the top of the main screen.

5. If there is a complete or partial Item/Part number in the "Item/Part" field, then those items matching the selection are displayed in the Summary table on the main screen.

Using the Item Summary Screen

Displaying Item Summaries

To display an item summary, perform the following steps:

1. Enter all or part of an item or part number in the “Item/Part” field. You can leave the “Item/Part” field blank to select all items.
2. Enter or select values in the other selection criteria fields as desired.
3. Click the Open (Display) button located on the toolbar or hit the Enter key.
4. The item summary results are displayed in the Summary table on the main screen.
5. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change the selection criteria.

   -or-

1. Use the Search button next to the “Item/Part” field or the “Description” field to select an item number.
2. Double-click on the “Item/Part” you would like to display in the “Search” screen table.
3. The item summary results are displayed in the Summary table on the main screen.
4. Enter or select values in the other selection criteria fields as desired.
5. Click the Open (Display) button located on the toolbar or hit the Enter key.
6. The new item summary results are displayed in the Summary table on the main screen.
7. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change the selection criteria.

Price Summary Screen

This screen can be used to display and maintain pricing data for items. Only items with pricing data 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 with its associated pricing data.

Selection Criteria Group

Field	Explanation
Item/Part	This field is for entering all or part of an Item Number to select the items to be displayed. Leave this field blank to select all items.
Type	This field is for choosing the type of items to be displayed. Leave this field blank to select all item types. A dropdown list of values is provided for your convenience.
Description	This field is for entering all or part of an Item Description to select the items to be displayed. Leave this field blank to select all descriptions.
Sales	This field is for choosing if you want sales items or non sales items to be displayed. Leave this field blank to select all sales types. A dropdown list of values is provided for your convenience.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.
Commodity	This field is for entering all or part of a commodity to select the items to be displayed. Leave this field blank to select all commodities.
Discount Percent	This field is for mass update of discount percentages. It is used to update all rows that are displayed in the Summary table below. When the Save button is clicked the percentage in this field overrides any Discount Percent and Discount Amounts that were updated in the Table rows below.
Product Group	This field is for entering all or part of a product group to select the items to be displayed. Leave this field blank to select all product groups.

Summary Table (Primary tab)

<u>**Column**</u>	<u>**Explanation**</u>
Row	The line number of the row in the table.
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Gross Price	Basic price for an item before any discounts or surcharges are applied.
Discount Percent	Discount percentage applied to the Gross price to determine the Net Price; for example, a gross price of 10.00 with a discount percent of 10 would result in a net price of 9.00 (10.00 x 10% = 1.00; 10.00 - 1.00 = 9.00). If Discount Percent is zero and Discount has a value other then zero, then the “Discount” field was updated directly with an absolute amount.
Discount Amount	Discount amount to be subtracted from the Gross price to determine the Net price. If a value is entered in this field, it overrides the percent amount entered in the “Discount Percent” field if both are entered. If an absolute discount amount is entered the “Discount Percent” field will be set to zero.
Net Price	Net price for an item after any discount is applied. This value is calculated from the Gross amount and the Discount amount, as Gross minus Discount, and is not an input field.
Commodity	A term that can be applied to groups of items that are similar in some way. This field is normally used for purchasing data; for example, different types of bird seed stocked by a store.
Product Group	A user defined field for grouping items together. It can be used to group items together so they can be located based on their grouping.

Summary Table (Secondary tab)

<u>**Column**</u>	<u>**Explanation**</u>
Row	The line number of the row in the table.
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.

Description	Contains information describing the item. This description can be as short as an abbreviation or a long detailed description of the item.
Type	The type helps further define an item by giving it a classification. Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Unit of Measure	Defines how the item is counted or measured. Some examples of units of measure are "Ounce", "Pound" and “Hour".
Sales Item	Identifies whether or not the associated item is for sale. Some items can be a part of a larger item and are not for sale individually.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Price Summary Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click  “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Item Definition”. The Item Definition screen is displayed.

3. If there is an item or part number in the “Item/Part” field, the item definition for that item is displayed on the main screen.

4. Click the “Price Summary” tab at the top of the main screen.

5. If there is a complete or partial Item/Part number in the “Item/Part” field, then those items matching the selection are displayed in the Summary table on the main screen.

Using the Price Summary Screen

Displaying Price Summaries

To display a price summary, perform the following steps:

1. Enter all or part of an item or part number in the “Item/Part” field. You can leave the “Item/Part” field blank to select all items.

2. Enter or select values in the other selection criteria fields as desired.

3. Click the Open (Display) button located on the toolbar or hit the Enter key.

4. The price summary results are displayed in the Summary table on the main screen.

5. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change your selection criteria.

   -or-

1. Use the Search button next to the “Item/Part” field or the “Description” field to select an item number.

2. Double-click on the “Item/Part” you would like to display in the “Search” screen table.

3. The price summary results are displayed in the Summary table on the main screen.

4. Enter or select values in the other selection criteria fields as desired.

5. Click the Open (Display) button located on the toolbar or hit the Enter key.

6. The new price summary results are displayed in the Summary table on the main screen.

7. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change your selection criteria. Also verify that the item has a price defined on the Item Definition screen.

Selectively Updating Price Date

To update price data selectively, perform the following steps:

1. Display the items or part numbers you want to change. See “Displaying Price Summaries” above.

2. Change Gross Price and Discount Percent or Discount Amount as desired.

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

Mass Updating Discount Percent

To execute a mass update of discount percent data, perform the following steps:

1. Display the items or part numbers you want to change. See “Displaying Price Summaries” above.

2. Enter the discount percentage you want in the “Discount Percent” field in the Selection Criteria area of the screen.

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

4. All of the items displayed in step 1 will be updated with the new Discount Percent including recalculation of the Discount Amount and Net Price.

Note: Any changes made directly in the table will be overridden by the discount percent mass update.

Statistics Screen

This screen displays various types of statistical information about an item.

Selection Criteria

Field	Explanation
Item/Part	A unique identifier assigned to each item. It is the main key for all other item data. The identifier can be a number, a name, or some combination of numbers and characters.
Description	Contains information describing the item. This description can be as short as an abbreviation or a long detailed description of the item.
Type	The type helps further define an item by giving it a classification. Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Status	Specifies whether the item or part is active or inactive.
Year	The year for which you wish to view statistics. Leave blank for all years.
Statistics Type	The type of statistics you wish to view. Leave blank for all types.

Statistics Table (January to June and July to December tabs)

Column	Explanation
Row	The line number of the row in the table.
Type	Type of statistic accumulated.
Total	Yearly total of the type of statistic displayed.
January	Statistics for the month of January for the year and type indicated.
February	Statistics for the month of February for the year and type indicated.
March	Statistics for the month of March for the year and type indicated.
April	Statistics for the month of April for the year and type indicated.
May	Statistics for the month of May for the year and type indicated.

June	Statistics for the month of June for the year and type indicated.
July	Statistics for the month of July for the year and type indicated.
August	Statistics for the month of August for the year and type indicated.
September	Statistics for the month of September for the year and type indicated.
October	Statistics for the month of October for the year and type indicated.
November	Statistics for the month of November for the year and type indicated.
December	Statistics for the month of December for the year and type indicated.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Statistics Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Item Definition". The Item Definition screen is displayed.

3. If there is an item or part number in the "Item/Part" field, the item definition for that item is displayed on the main screen.

4. Click the "Price Summary" tab at the top of the main screen.

5. If there is an Item/Part number in the "Item/Part" field, the statistics for that item will be displayed.

Using the Statistics Screen

Displaying Statistics

To display statistics, perform the following steps:

1. Enter or select an item in the “Item/Oart” field.
2. Select a year in the “Year” field or leave it blank to select all years.
3. Enter or select a statistic type in the “Statistic Type” field or leave it blank to select all types.
4. Click the Open (Display) button located on the toolbar or hit the Enter key.
5. The item statistic results are displayed in the Statistics table on the main screen.

-or-

1. Use the Search button next to the “Item/Part” field, the “Description” field, the Type” field, or the “Status” field to select an item.
2. Double-click on the “Item/Part” you would like to display in the “Search” screen table.
3. The item statistics results are displayed in the Statistics table on the main screen.
4. Enter or select values in the other selection criteria fields as desired.
5. Click the Open (Display) button located on the toolbar or hit the Enter key.
6. The new item statistics results are displayed in the Statistics table on the main screen.

Item Labels Screen

This screen is for printing item labels.

Selection Criteria

Field	Explanation
Item/Part	This field is for entering all or part of an Item Number to select the items to be printed on the labels. Leave this field blank to select all items.
Type	This field is for choosing the type of items to be printed on the labels. Leave this field blank to select all item types. A dropdown list of values is provided for your convenience.
Description	This field is for entering all or part of an Item Description to select the items to be printed on the labels. Leave this field blank to select all descriptions.
Sales	This field is for choosing if you want sales items or non-sales items to be printed on the labels. Leave this field blank to select all sales types. A dropdown list of values is provided for your convenience.
Commodity	This field is for entering all or part of a commodity to select the items to be printed on the labels. Leave this field blank to select all commodities.
Product Group	This field is for entering all or part of a product group to select the items to be printed on the labels. Leave this field blank to select all product groups.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.

Label Parameters

Field	Explanation
Label Format	Field that indicates what type of label you want to print. The label format defines what data will appear on the labels. A search button is provided so you can select from the available types.
Label Form	Field that indicates the label form (e.g. Avery 5168) you want to use when you print the labels. A search button is provided so you can select from the available types.
Label Font	Size of the font to be used when the label is printed. The default is based on the label format.

A dropdown is provided to indicate if you want the font to be **Bold** or Not Bold.

Print Landscape	Checkbox to indicate if you want the labels printed in landscape or portrait orientation.
Center Text Vertically Within Each Label	Should the label's text be centered vertically on the label, or should the first line of text begin at the top edge of the label? When this option is selected the label’s text will be centered vertically on the label.
Allow me to Indicate Specific Labels on which Nothing should be Printed	Check this box so you can get a map of the label sheet when you click the Create Labels button. Then you can indicate which labels on a sheet of labels should be bypassed during printing. You can mark as many pages as necessary. This is for using sheets of labels that may have labels that are missing or unusable.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Item Labels Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click  “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Item Definition”. The Item Definition screen is then displayed.

3. If there is an item or part number in the “Item/Part” field, the item definition for that item is displayed on the main screen.

4. Click the “Item Labels” tab at the top of the main screen.

Using the Item Labels Screen

Use these procedures to print item labels.

Printing Item Labels

To print item labels, perform the following steps:

1. Enter selection criteria to determine which items will be printed.
2. Use the GoTo/Selection button next to “Label Format” to select the type of label you want to print (label format defines the data that will appear on the label). You can use the Label Format screen (under System Administration then Label Definition) to define a label format.
3. Use the GoTo/Selection button next to “Label Form” to select the type of form you want to print the labels on e.g. Avery 5168. You can use the Label Definition screen under System Administration to define a label form.
4. Change formatting options as desired. Click the “Advanced Options” button located on the toolbar to adjust margins, etc.
5. Click the Print button located on the toolbar when you are ready to print the labels.
6. If you clicked the checkbox next to “Allow me to Indicate Specific Labels on which Nothing should be Printed”, you will see a graphic representation of a sheet of labels. Click the label(s) you want to skip. They will have “Don’t Use” on them. Click again to allow them to be used. Click “Next Page” to mark additional sheets as necessary. Click “Ok” when you are ready to start printing.

Location

What is a Location?

A location is a place where inventory is stored. It can be a physical location such as a stockroom or row/bin/aisle designation or it can be a logical location such as Stock1-Vendor1, Stock1-Vendor2, where the physical location is logically separated.

Location Screens

Location consists of four tabbed screens that are used to enter and maintain location data.

Location

The location screen allows you to define a location with basic information about the location such as the type of location, status, constraints, usage, etc.

Location Summary

The location summary screen allows you to list locations based on selection criteria entered.

Location Generation

The location generation screen allows you to specify various parameters then generate multiple location definitions based on those parameters.

Location Labels

The location labels screen allows you to specify various parameters then generate barcoded location labels based on those parameters.

Naming Your Locations

TFG4000 allows you to create stocking locations based on your business needs. By planning your location identification method, you can use locations to both identify the physical location and other identifying factors in the same data field. The physical location allows you to identify the actual shelf, bin, drawer, or other storage areas where the inventory is kept. An expiration date (shelf-life) is one way to separate the inventory logically within a specific physical location. Many products have expiration dates that indicate when that product has reached the end of its useful life. The inventory physically looks the same, but can be separated into many smaller units based upon the date. By entering the expiration date when a product is received into inventory, you can identify the product to be used before the end of its shelf-life.

When defining physical stocking locations, use a naming convention that allows you to reuse the locations with minimal confusion. Once a physical stocking location has been defined, it cannot have its name changed; however, once inventory for an item is depleted from a location, the location will no longer be associated with that item. You will not see “empty” locations for an item, only locations that have inventory.

There are several ways you can structure your physical stocking locations. The following are suggestions only and they do not represent all of the ways this can be done:

1. You can create a physical stocking location for each item and store all items of that type in the same physical location. Use this method when there are no requirements to use one particular part in that location before another due to expiration date.

2. You can create a physical stocking location with an associated expiration date as part of the location name then store items with that expiration date in the same physical location. Use this method when you want to create specific and discrete physical stocking locations for each expiration date.

3. You can create a physical stocking location then establish an expiration date as you receive inventory into the location. Unlike method 2, the expiration data is not associated with the location itself; it is associated with the inventory in that location. This allows you to use the location over and over with different expiration dates as needed. It also allows you to store items with different expiration dates in the same location.

5. You can have a single physical stocking location and name the inventory locations using suffixes such as a slash (/) or dash (-) followed by additional information to separate the items logically within the physical stocking location. You can use this method when you want to identify stock by some attribute such as color.

6. A location can be defined within a warehouse and a zone. You must define your warehouses first, then the zones within those warehouses, then the locations within the zones. A warehouse does not have to be a physical warehouse. For example, it can be a row or an aisle and the zone can be a shelf or cabinet and the location can be a bin or a drawer or whatever you decide. As you can see there are many possible ways to use this information for your individual needs.

Each physical stocking location/inventory-lot identifier can be up to 30 characters long must be created prior to the receipt of inventory.

Once you have created your physical stocking locations, you can use the TFG4000 Inventory Control screens to:

1. Receive an item into a specific physical location based on the item identifier and, if applicable, the expiration date.

2. Disburse or use inventory from stock by using the location name to determine which physical location to use (for example if you have incorporated an expiration date into the name of the location or some other identifying factor such as size or color)

3. Adjust inventory up or down as necessary for initial balances and corrections.

4. Cycle count inventory (do a physical count and update the system with the results)

5. View the activity history for each item and track the usage of the item.

6. Use the Shelf Life Summary screen to view inventory with expiration dates that have been applied to the inventory itself to determine which physical location for that item to use first. The inventory is displayed with the oldest expiration date at the top of the list.

Location Screen

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

Current Location

Field	**Explanation**
Warehouse	The physical or logical warehouse where this location is located.
Type	Information indicating the type of “Location”. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Location Types include: WIP Stores, Inventory, Finished, Warehouse and Tool Crib.
Zone	Area within the warehouse where this location is located or defined to be a part of.
Status	Information indicating the status of the Location: “Active”, “Inactive”, “Hold”, or “Quarantine”.
Location	Designates a specific inventory storage area.
Description	Brief description of the location.

Location Data

Field	**Explanation**
City	The “City” is additional, optional information about the location. If a “City” is not entered when the Location is created it will be blank.
Usage	Defines how this location is to be used. A dropdown is provided with these values: “Pallet”, “Bulk”, “Replenish”, “Packing”, “Receiving”, “Staging”, “Shipping”.
State	The “State” is additional, optional information about the location. If a “State” is not entered when the Location is created it will be blank.
Environment	Indicates any special environmental considerations for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Environments include: “Refrigerated”, “Heated”, and “Clean Room”.
Zip	The “Zip” is additional, optional information about the location. If a “Zip” is not entered when the Location is created it will be blank.

Constraint

Indicates any special constraints for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Constraints include: “Lift Truck” and “High Lift”.

Item/Part

A location can be designated as a “fixed” location for an item. When an item number is entered here the system will consider this location first for that item during processes where a location must be chosen by the system such as Warehouse processes -- Picking, Putaway, Replenishment, and Consolidation.

Note: Designating a location as a “fixed” location for an item does not prohibit adding other items to the location. Warning messages are issued if another item is added to the location, but the inventory transaction is allowed.

Max Pallets

The maximum number of standard size pallets that can be stored in this location.

MSP Usage

Indicates if inventory stored in this location should be used in Material Schedule Processing (MSP).

No Inventory stored in this location will not be used to satisfy demand during Material Schedule Processing.

Yes Inventory stored in this location will be used to satisfy demand during Material Schedule Processing unless the item or individual item inventory is designated not to be used.

Message Line

Message Displays information about the current status of the screen.

Accessing the Location Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click  “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Location”. The Location screen is displayed.

3. If there is a warehouse in the “Warehouse” field, zone in the “Zone” field and a location in the “Location” field, the data for that location is displayed on the main screen. Warehouse and zone may also be blank.

Using the Location Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next location.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Location

To display a Location, perform the following steps:

1. Enter a location in the “Location” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The location data is displayed on the main screen.

-or-

1. Use one of the Search buttons provided next to various fields on the screen to select a location.
2. Double-click on the “Location” you would like to display in the “Search” screen table.
3. The location data is displayed on the main screen.

Adding a New Location

To add a location, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter a location in the “Location” field. It can be any combination of numbers and letters.
3. Enter data in any of the other fields you desire, these fields are optional, including warehouse and zone, but if enter a warehouse and zone they must be pre-defined with the Warehouse and Zone screens. If warehouse and zone are entered they will become part of the key to this record.
4. Click the “Use Zone Defaults” button located on the toolbar to load the fields in the “Location Data” section of the screen with values defined for the zone entered in the “Zone” field at the top of the screen.
5. When done, click the Save button located on the toolbar.

-or-

1. Display a location. See “Displaying a Location” above.

2. Enter a new location in the “Location” field and change any of the fields you desire.

3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy location data to a new location.

Updating a Location

To update a location, perform the following steps:

1. Display the location data you wish to change. See “Displaying a Location” above.

2. Change the desired information on the screen.

3. Click the “Use Zone Defaults” button located on the toolbar to load the fields in the “Location Data” section of the screen with values defined for the zone entered in the “Zone” field at the top of the screen.

4. When done, click the Save button located on the toolbar.

Note: When the Usage field or the MSP Usage field is changed, item inventory for the location will be updated to reflect the changes. If the location MSP Usage is “Yes”, specific item inventory MSP Usage can be changed to “No”, but if location MSP Usage is “No” all item inventory MSP Usage will be “No” as well.

Designating a Location as “Fixed” for an Item/Part

A location can be designated as a “fixed” location for an item. When an item number is entered in the “Item/Part” field the system will consider this location first for that item during processes where a location must be chosen by the system such as Picking, Putaway, Replenishment, and Consolidation To designate a location as a fixed location for an item, perform the following steps:

1. Display the location data you wish to change. See “Displaying a Location” above.

2. Enter an item number in the “Item/Part” field or select one with the **left** search button next to the “Item/Part” field.

3. When done, click the Save button located on the toolbar.

Note: Designating a location as a “fixed” location for an item does not prohibit adding other items to the location. Warning messages are issued if another item is added to the location, but the inventory transaction is allowed.

Clearing the Item/Part

To erase the item number in the Item/Part field, perform the following steps:

1. Display the location data you wish to change. See “Displaying a Location” above.
2. Click the Goto/Selection button located in the “Item/Part” field or double click the “Item/Part” field.
3. Select “Clear Item Number” from the dropdown menu.
4. When done, click the Save button located on the toolbar.

Finding all Fixed Locations for an Item/Part

To find all locations that have been designated as “fixed” or an Item/Part field, perform the following steps:

1. Click the **left** search button next to the “Item/Part” field. A search window is displayed.
2. Use the search window to find the item you want and double-click it to load it into the “Item/Part” field.
3. Click the **right** search button next to the “Item/Part” field. A search window is displayed.
4. Click the “Search” button in the search window. All of the locations that have the item you selected are displayed. You can print the results or select a location from the results.

Note: When you select a location using these procedures you will get a message saying data has changed asking if you want to save before proceeding. You should click “No” unless you want the location you were viewing to be fixed for the item you selected.

Deleting a Location

To delete a location, perform the following steps:

1. Display the location data you wish to delete. See “Displaying a Location” above.
2. Click the Delete button located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the location click “No” on the “Confirm Action” pop up message.

Note: Once a location is deleted, it can no longer be displayed or updated.

Displaying the Previous Location

To display the location that precedes the one currently displayed, perform the following steps:

1. Click the Previous button ◄ located on the toolbar.
2. The previous location data is displayed on the main screen.

Displaying the Next Location

To display the location that follows the one currently displayed, perform the following steps:

1. Click the Next button ► located on the toolbar.
2. The next location data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Location" field, then click the Next button ►.

Location Summary Screen

The location summary screen allows you to display a list of inventory location definitions based on selection criteria entered.

Selection Criteria Group

Field	Explanation
Warehouse	Field for selecting locations based on the warehouse they are in. Leave this field blank to select locations in any warehouse.
Type	This field is for selecting what types of locations are to be displayed in the Location table. Leave this field blank to select all types of locations.
Zone	Field for selecting locations based on the zone they are in. Leave this field blank to select locations in any zone.
Status	Field for selecting locations based on status. Leave this field blank to select locations with any status.
Location	Field for entering all or part of a location name to select the locations to be displayed in the Location table. Leave this field blank to select all locations.
Usage	Field for selecting locations based on usage. Leave this field blank to select locations with all type of usage.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.
Fixed Item	Checkbox for indicating whether or not only locations designated as "fixed" locations for specific items should be displayed.

Location Table (Location, More Data, Item, Address, and Description tab)

Column	Explanation
Row	The line number of the row in the table.
Warehouse	The physical or logical warehouse where this location is located.
Zone	Area within the warehouse where this location is located or defined to be a part of.
Location	Identification of the place where inventory may be stored.

Type	Information indicating the type of “Location”. Some examples of Location Types include: WIP Stores, Inventory, Finished, Warehouse and Tool Crib.
Location Status	Information indicating the status of the Location: “Active”, “Inactive”, “Hold”, or “Quarantine”.
Usage	Defines how this location is to be used. Some examples of usage type are: “Pallet”, “Bulk”, “Replenish”, “Packing”, “Receiving”, “Staging”, and “Shipping”.
Constraint	Indicates any special constraints for this location. Some examples of Constraints include: “Lift Truck” and “High Lift”.
Environment	Indicates any special environmental considerations for this location. Some examples of Environments include: “Refrigerated”, “Heated”, and “Clean Room”.
Maximum Pallets	The maximum number of pallets that can be stored in this location.
Item/Part	Item number for which this location has been designated as “Fixed”.
Location City	City where the location is located.
Location State	State where the location is located.
Location Zip	Zip code where the location is located.
Location Description	Brief description of the location.

Message Line

Message	Displays information about the current status of the screen.

Accessing the Location Summary Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Location". The Location screen is displayed.

3. If there is a location in the "Location" field, the data for that location is displayed on the main screen.

4. Click "Summary". The Location Summary screen is displayed.

5. If there is a location in the "Location" field, the data for that location is displayed on the main screen.

Using the Location Summary Screen

Use the following procedures to display an inventory location summary list.

Displaying Inventory Locations

Perform the following steps to display inventory locations:

1. Enter all or part of a location name in the "Location" selection criteria field, and/or select a type in the "Type" selection criteria field from the dropdown, and/or select a usage type in the "Usage" selection criteria field from the dropdown, and/or select a status in the "Status" selection criteria field from the dropdown, and/or enter all or part of a warehouse in the "Warehouse" selection criteria field, and/or enter all or part of a zone in the "Zone" selection criteria field.

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

Location Generation Screen

The location control screen allows you to enter various parameters then generate location definitions using those parameters. The parameters are divided into five sections which contain six characters each.

The starting location parameters are used to determine the first location to be generated and the ending location parameters are used to determine the last location generated.

Combinations of the parameters are used to determine the location names that will be generated. The generator examines the parameters entered and attempts to increment numeric values in the parameters based on the start and end patterns to generate the new location names.

When the parameters are entered and generation is requested, the system will verify the parameters entered to determine if locations can be generated from the information entered, and if so, how many locations would be generated. If there is an error in any of the parameters, you will receive a message explaining the problem. If the parameters are good, you will receive a message explaining how many locations will be generated and you will have the option of continuing with the generation or canceling the generation process. Click “Yes” to continue the process, “No” to cancel the process.

Only the Starting Location (First) parameter and Ending Location (First) parameter are required.

Generation Parameters

Field	Explanation
Warehouse	The physical or logical warehouse where the locations will be.
Zone	Area within the warehouse where the locations will exist or defined to be a part of.
Starting Location (First)	Field for entering the first part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (First).
Starting Location (Second)	Field for entering the second part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Second).
Starting Location (Third)	Field for entering the third part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Third).

Starting Location (Fourth)	Field for entering the fourth part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Fourth).
Starting Location (Fifth)	Field for entering the fifth part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Fifth).
Ending Location (First)	Field for entering the first part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (First).
Ending Location (Second)	Field for entering the second part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Second).
Ending Location (Third)	Field for entering the third part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Third).
Ending Location (Fourth)	Field for entering the fourth part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Fourth).
Ending Location (Fifth)	Field for entering the fifth part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Fifth).

Generation Data

Field	**Explanation**
Description	Brief description of the location.
Type	Information indicating the type of “Location”. Some examples of Location Types include: WIP Stores, Inventory, Finished, Warehouse and Tool Crib.
Status	Information indicating the status of the Location: “Active”, “Inactive”, “Hold”, or “Quarantine”.

City	The “City” is additional, optional information about the location. If a “City” is not entered when the Location is created it will be blank.
Environment	Indicates any special environmental considerations for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Environments include: “Refrigerated”, “Heated”, and “Clean Room”.
State	The “State” is additional, optional information about the location. If a “State” is not entered when the Location is created it will be blank.
Usage	Defines how this location is to be used. A dropdown is provided with these values: “Pallet”, “Bulk”, “Replenish”, “Packing”, “Receiving”, “Staging”, “Shipping”.
Zip	The “Zip” is additional, optional information about the location. If a “Zip” is not entered when the Location is created it will be blank.
Constraint	Indicates any special constraints for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Constraints include: “Lift Truck” and “High Lift”.
Max Pallets	The maximum number of standard size pallets that can be stored in this location.

Message Line

Message	Displays information about the current status of the screen.

Accessing the Location Generation Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Location". The Location screen is displayed.

3. If there is a location in the "Location" field, the data for that location is displayed on the main screen.

4. Click "Generation". The Location Generation screen is displayed.

Using the Location Generation Screen

Use these procedures to erase the screen and generate new location definitions.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Generating New Location Definitions

To generate new location definitions, perform the following steps:

1. Enter or select Warehouse and/or Zone needed for the locations you are generating. Warehouse and zone are not required but must be specified before location generation if they are needed.

2. Enter the first part of the starting location in the “Starting Location” “First” field.

3. Enter the first part of the ending location in the “Ending Location” “First” field. Make sure that the pattern entered here is consistent with the pattern entered in the “Starting Location” “First” field.

4. Enter any of the other parts of the location generation parameters as needed making sure that the pattern in the Starting fields are consistent with the patterns in the corresponding ending fields.

5. Enter/select generation data in the lower half of the screen. This data will be applied to each location you generate.

6. Click the Generate Locations button located on the toolbar.

7. If there are any problems with the parameters you will receive a message explaining the problem. If the parameters are valid, you will receive a message explaining how many locations will be generated and you will be given an opportunity to continue the generation process or cancel the process. Click “Yes” to continue, “No” to cancel.

8. If you clicked “Yes” to continue the generation process the new locations will be generated and you can view them with the Location Control screen or the Location Summary screen.

Examples:

	First	Second	Third	Fourth	Fifth
Starting Location	1				
Ending Location	5				

The parameters above will generate the following locations: 1, 2, 3, 4, and 5

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1				
Ending Location	Stock5				

The parameters above will generate the following locations: Stock1, Stock2, Stock3, Stock4, and Stock5

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Bin001			
Ending Location	Stock5	Bin010			

The parameters above will generate the following locations: Stock1Bin001, Stock1Bin002... Stock1Bin010... Stock5Bin001... Stock5Bin010

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Bin001			
Ending Location	5Stock	Bin010			

The parameters above will cause an error message indicating that the pattern in the ending location is not consistent with the pattern in the starting location in the first parameter position.

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Bin010			
Ending Location	Stock5	Bin001			

The parameters above will cause an error message indicating that the pattern in the ending location is less than the pattern in the starting location in the second parameter position.

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Row001	Aisle1	Shelf1	Bin001
Ending Location	Stock1	Row001	Aisle1	Shelf1	Bin999

The parameters above will generate the following locations: Stock1Row001Aisle1ShelfBin001, Stock1Row001Aisle1ShelfBin002... Stock1Row001Aisle1ShelfBin999

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	R1	A1	S1	B1
Ending Location	Stock1	R1	A1	S10	B5

The parameters above will generate the following locations: Stock1R1A1S1B1, StockR1A1S1B2... Stock1R1A1S1B5... Stock1R1A1S2B1... Stock1R1A1S10B1... Stock1R1A1S10B5

Labels Screen

This screen is for printing inventory location labels.

Selection Fields

Field	Explanation
Warehouse	The warehouse for which you want to print labels. Leave this field blank to print labels for all warehouses.
Type	Field for specifying the location type for which you want to print labels. Leave this field blank for all types.
Zone	The zone for which you want to print labels. Leave this field blank to print labels for all zones or zones within the warehouse selected.
Status	Field for specifying the location status for which you want to print labels. Leave this field blank for all statuses.
Location	Location name for which you want to print labels. Leave this field blank for all locations or locations within the warehouse and/or zone selected.
Usage	Field for specifying the location usage for which you want to print labels. Leave this field blank to print labels regardless of location usage.
Description	Field for specifying the description on the locations for which you want to print labels. Leave this field blank to print labels regardless of description.
Environment	Field for specifying the location environment for which you want to print labels. Leave this field blank to print labels regardless of environment.
Number of Rows to Display	Limits the number of labels that will be printed.
Constraint	Field for specifying the location constraint for which you want to print labels. Leave this field blank to print labels regardless of location constraint.
City	Field for specifying the city for which you want locations printed. Leave this field blank for all cities.
State	Field for specifying the state for which you want labels printed. Leave this field blank for all states.
Item/Part	Field for specifying item number for which locations have been designated as “fixed”. Leave this field blank to print labels regardless of fixed item.
Zip	Field for specifying the zip code for which you want locations printed. Leave this field blank for all zip codes.

Label Parameters

Field	Explanation
Label Name	Field that indicates what type of label you want to print. A search button is provided so you can select from the available types.
Label Font	Size of the font to be used when the label is printed. The default is based on the label name. A dropdown is provided to indicate if you want the font to be **Bold** or Not Bold.
Print Landscape	Checkbox to indicate if you want the labels printed in landscape or portrait orientation.
Center Text Vertically Within Each Label	Should the label's text be centered vertically on the label, or should the first line of text begin at the top edge of the label? When this option is selected the label's text will be centered vertically on the label.
Allow me to Indicate Specific Labels on which nothing should be Printed	Check this box so you can get a map of the label sheet when you click the Create Labels button. Then you can indicate which labels on a sheet of labels should be bypassed during printing. You can mark as many pages as necessary. This is for using sheets of labels that may have labels that are missing or unusable.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Labels Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Location Control". The Location screen is displayed.

3. If there is a location in the "Location" field, the data for that location is displayed on the main screen.

4. Click "Labels". The Location Label screen is displayed.

Using the Labels Screen

Use these procedures to print inventory location labels.

Printing Inventory Location Labels

To print inventory location labels, perform the following steps:

1. Enter or select data in the selection fields at the top of the screen. All selection fields are optional and many have searches or dropdowns for entering data. Labels can be generated for locations that satisfy all of the selection criteria chosen.

2. Use the GoTo/Selection button next to “Label Name” to select the type of label you want to print.

3. Change formatting options as desired. Click the Advanced Formatting button located on the toolbar to adjust label formatting if necessary.

4. Click the Print button located on the toolbar to generate the labels for previewing and printing.

5. If you clicked the checkbox next to “Allow me to Indicate Specific Labels on which Nothing should be Printed”, you will see a graphic representation of a sheet of labels. Click the label(s) you want to skip. They will have “Don’t Use” on them. Click again to allow them to be used. Click “Next Page” to mark additional sheets as necessary. Click “Ok” when you are ready to start printing.

Messaging

What is a Message?

Certain processes in TFG4000 produce messages to notify responsible people of activity in the system, errors, and potential problems. Users can view messages to determine what has happened and whether or not they should take some action in response to the message. Once a message has been processed it can be deleted manually or the system will delete it automatically on a scheduled delete date.

Messaging Screens

There is only one screen for Messaging.

Message Management Screen

This screen allows you view and process messages for all users or a single user.

Message Management Screen

This screen allows you to view messages for all users or for a specific user. It also allows you to delete messages that have been processed.

Message Table (Message, Source, Description, and User tabs)

Column	**Explanation**
Row	Row number on the screen table. Used for error messages to indicate which row has an error.
Priority	Relative priority of the message. 1 is the highest priority and 9 is the lowest.
Message Date	Date the message was sent.
Message Number	This is the key to the message data and is pre-defined in TFG4000.
Text Information	The message text.
Action	Indicates if the user is required to perform some action in response to the message.
Delete	Checkbox to indicate you want to delete this message.
Message Source	Where the message is from, for example Bill of Materials or Material Scheduling
Status	Current status of this message (Active or Inactive).
Type	Indicates the type of message this is. Message types are: **Information** Indicates something has occurred but no error was detected and no action is required. **Warning** Indicates something has occurred which may require your attention **Action** Indicates something has occurred which requires immediate action
Description	Explains why the message was sent.
Date to Delete	The date on which this message will be automatically deleted.
User Id	User ID of the person to whom this message was sent.
User Name	Name of the person to whom this message was sent.

Message Line

Message	Displays information about the current status of the screen.

Accessing the Message Management Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Message Management."

3. The "Message Management" screen is then displayed.

Using the Message Management Screen

Use these procedures to erase the screen, display, delete, display the previous, and display the next message.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying Messages for a Single User

To display a message for a single 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 or hit the Enter key.

3. The messages for that user are displayed on the main screen.

   -or-

1. Use one of the following Search buttons to locate the item number you want:
   a) Button next to the “User Id” field
   b) Button next to the “User Name” field

2. Double-click on the “User ID” you would like to use in the “Search” screen table.

3. The messages for that user are displayed on the main screen.

Displaying Messages for All Users

To display a message for a single user, perform the following steps:

1. Click the Erase button located on the toolbar.

2. Click the Open (Display) button located on the toolbar or hit the Enter key.

3. The messages for all users are displayed on the main screen.

Deleting a Message

To delete a message, perform the following steps:

1. Display the message you need. See “Displaying Messages for a Single User” or “Displaying Messages for All Users” above.

2. Click the Delete checkbox for each message you want to delete. You may select more then one message to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. When done, click the Save button located on the toolbar.

Displaying the Previous Message

To display messages for the user that precedes the user currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous user's messages are displayed on the main screen.

Displaying the Next Message

To display messages for the user that follows the user currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next user's messages are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

Pool Definition

What is a Pool?

A pool is a logical designation of inventory. It can be used to keep inventory logically separated. For example, you may wish to keep inventory for distribution separate from inventory for OEM use. You can use pool to segregate inventory for specific customers too.

Pool Screens

Pool Definition consists of two tabbed screens that are used to enter and maintain pool data.

Pool Definition

The pool screen allows you to define a pool with basic information about the pool such as the type of pool, status, and a description of the pool.

Pool Summary

The pool summary screen allows you to list pools based on selection criteria entered.

Pool Definition Screen

The location screen allows you to define a pool with basic information about the pool such as the type of pool, status, and a description of the pool.

Current Pool

Field	Explanation
Pool	A unique identifier assigned to each inventory pool. It is the main key for all other pool data. The identifier can be a number, a name, or some combination of numbers and characters.
Type	The type helps further define a pool by giving it a classification. Pool types available are: "General", "Shared" and "Unique". Pool types are used by automated processes in the Warehousing Application that analyze inventory and there is a system variable called **WMS_Merge_Pools** that controls how the pool type is applied.
Description	Contains information describing the pool. This description can be as short as an abbreviation or a long detailed description of the pool.
Status	Specifies whether the pool is active or inactive.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Pool Definition Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click the "Pool Definition" tab at the top of the main screen.

3. If there is a pool number in the "Pool" field, the information for that pool is displayed on the main screen.

Using the Pool Definition Screen

Use these procedures to erase the screen, display, update, add, delete, display the previous, and display the next pool definition.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Pool Definition

To display a pool definition, perform the following steps:

1. Enter a pool number in the “Pool” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The pool data is displayed on the main screen.

-or-

1. Use the Search button next to the “Pool” field, the “Type” field, the “Description” field or the “Status” field to select a pool number.
2. Double-click on the “Pool” you would like to display in the “Search” screen table.
3. The pool data is displayed on the main screen.

Updating a Pool Definition

To update a pool definition, perform the following steps:

1. Display the pool you wish to change. See “Displaying a Pool Definition” above.
2. Change the desired information on the screen.
3. When done, click the Save button located on the toolbar.

Adding a New Pool Definition

To add a pool definition, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter a new pool number in the “Pool” field. This number must be a unique pool number. The “Pool” field is required.
4. Enter data in any of the other fields you desire, these fields are optional.
5. When done, click the Save button located on the toolbar.

Deleting a Pool Definition

To delete a pool definition, perform the following steps:

1. Display the pool definition you wish to delete. See “Displaying a Pool Definition” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the lot control click “No” on the “Confirm Action” pop up message.

Note: Once a pool is deleted, it can no longer be displayed or updated.

Displaying the Previous Pool Definition

To display the pool definition that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous pool definition is displayed on the main screen.

Displaying the Next pool Definition

To display the pool definition that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next pool definition is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Pool” field, then click the Next button .

Pool Summary Screen

The pool summary screen allows you to list pools based on selection criteria entered.

Selection Criteria

Field	Explanation
Pool	Field for entering all or part of a pool name to select the pools to be displayed in the Summary table. Leave this field blank to select all pools.
Type	Field for selecting pools based on type. Leave this field blank to select pools with any type.
Description	Field for entering all or part of a pool description to select the pools to be displayed in the Summary table. Leave this field blank to select all pools regardless of the description.
Status	Field for selecting pools based on status. Leave this field blank to select pools with any status.
Number of Rows to Display	Controls the number of database rows to retrieve during the query

Summary Table

Column	Explanation
Row	The line number of the row in the table.
Pool	A unique identifier assigned to each inventory pool. It is the main key for all other pool data. The identifier can be a number, a name, or some combination of numbers and characters.
Type	The type helps further define a pool by giving it a classification. Some examples of types are: "General", “Shared” or “Unique”.
Status	Specifies whether the pool is active or inactive.
Description	Contains information describing the pool. This description can be as short as an abbreviation or a long detailed description of the pool.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen.

Accessing the Pool Summary Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click the "Pool Definition" tab at the top of the main screen.

3. If there is a pool number in the "Pool" field, the information for that pool is displayed on the main screen.

4. Click the "Pool Summary" tab at the top of the main screen.

5. If there is a pool number in the "Pool" field, the summary information for that pool is displayed on the main screen.

Using the Pool Summary Screen

Use these procedures to display pool summaries.

Displaying Pool Summaries

To display a pool summary, perform the following steps:

1. Enter all or a portion of a pool number in the “Pool” field. You can leave the “Pool” field blank to select all pools.
2. Enter or select values in the other selection criteria fields as desired.
3. Click the Open (Display) button located on the toolbar or hit the Enter key.
4. The pool summary results are displayed in the Summary table on the main screen.
5. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change the selection criteria.

-or-

1. Use the Search button next to the “Pool” field to select a pool number.
2. Double-click on the “Pool” you would like to display in the “Search” screen table.
3. The pool summary results are displayed in the Summary table on the main screen.
4. Enter or select values in the other selection criteria fields as desired.
5. Click the Open (Display) button located on the toolbar or hit the Enter key.
6. The new pool summary results are displayed in the Summary table on the main screen.
7. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change the selection criteria.

Supplier Definition

What is a Supplier?

A supplier is the name of a business entity, company, organization, or person from whom you purchase things.

The first supplier you should define is your own company. TFG4000 will use your company definition for documents such as purchase orders.

You may wish to define other parts of your company as separate suppliers so that you can track the internal movement of goods, services, and money.

Initial Setup

TFG4000 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 TFG4000. See the System Variables screen in the System Administration User Guide included on the TFG4000 CD, which is available from the Windows “Start” menu or from the “Documentation” menu within TFG4000. The documentation is also available online.

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

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

1. Click the plus sign (+) next to “System Administration”.

2. Click “System Variables”.

3. Change the value of the “My_Supplier_Number” variable to your supplier number.

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

Supplier Definition Screens

"Supplier Definition" consists of seven tabbed screens that are used to enter and maintain supplier data. Each screen is used for specific purposes to aid in the entry and maintenance of supplier information.

Supplier

The supplier screen allows you to define a supplier (vendor) with basic information about such as the type of supplier, tax exempt number etc.

Address

The supplier address screen allows you to enter a supplier address and if necessary multiple addresses for a supplier based on the address usage. For example, a supplier may have an address for general communications that is different from their payment address. This screen also allows you to enter contact information for each address. You can enter as many contacts as you need for an address.

Information

This screen allows you to enter text you wish to maintain concerning a supplier. For example, you could enter text information for a supplier that describes specific details about special products or services you purchase from this supplier. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Statistics

This screen displays various types of statistical information about the supplier arranged by year, then month within year.

Summary

This screen is used to display a list of suppliers so you can group them together based on selection criteria or so you can locate a supplier.

Supplier Item

This screen allows you to associate supplier specific information with your own items.

Labels

This screen allows you to print supplier address labels based on address type and for a range of suppliers. It also allows you to adjust label formats.

Supplier Definition Screens Explained

Supplier Screen

This screen is for defining a supplier with basic information about the supplier.

Current Supplier

Field	Explanation
Supplier	A unique identifier assigned to each supplier. It is the main key for all other supplier data. The identifier can be a number, a name, or some combination of numbers and characters.
Name	A shortened name or the full name of the supplier defined here.
Buyer	The purchasing agent responsible for this supplier.
Type	The type helps further define a supplier by giving it a classification. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of supplier types are: "Manufacture" a supplier who builds what you purchase, "Service" for a supplier who provides services, and "Supplies" for a supplier who provides parts or other things that you use in your business.
Our Account	Your company's account number or customer number with this supplier.
Status	Specifies whether the supplier is active or inactive.

Current Data

Field	Explanation
Description	Additional information describing this supplier.
Terms	Invoice payment terms.
Tax Exempt #	The "tax exempt" number assigned by the IRS to this supplier.
Account	General Ledger account name that the purchase order should be charged to. Currently for reference only.
Inspection	The inspection criteria to be used for all incoming material from this supplier. For example, some purchased material must be inspected before it can be used while others can be used without inspection.

Ship Method	Preferred shipping method to use when ordering from this supplier.
Warehouse	Default inventory warehouse for receipts from this supplier.
Pool	Default pool number to use when ordering from this supplier.
Zone	Default zone within warehouse for receipts from this supplier.
Location	Default inventory location for receipts from this supplier.

Message Line

Field	**Explanation**
Message	Information about the current status of the screen.

Accessing the Supplier Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Supplier". The Supplier screen is then displayed.

3. If there is a supplier number in the "Supplier" field, the information for that supplier is displayed on the main screen.

Using the Supplier Screen

Use these procedures to erase the screen, display, update, add, copy, delete, display the previous, and display the next supplier.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Supplier

To display a supplier, perform the following steps:

1. Enter a supplier number in the “Supplier” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The supplier data is displayed on the main screen.

-or-

1. Use the Search button next to the “Supplier” field, the “Name” field, the “Type” field, or the “Status” field to select a supplier number. You can also use the second Search button next to the Buyer field to select a supplier number.
2. Double-click on the “Supplier” you would like to display in the “Search” screen table.
3. The supplier data is displayed on the main screen.

Updating a Supplier

To update a supplier, perform the following steps:

1. Display the supplier you wish to change. See “Displaying a Supplier” above.
2. Change the desired information on the screen.
3. When done, click the Save button located on the toolbar.

Clearing the Default Receiving Location

To erase the default receiving location in the Location field, perform the following steps:

1. Display the supplier data you wish to change. See “Displaying a Supplier” above.
2. Click the Goto/Selection button located in the “Location” field or double click the “Location” field.
3. Select “Clear Location” from the dropdown menu.

4. When done, click the Save button located on the toolbar.

Adding a New Supplier

To add a supplier, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.

2. Enter a supplier number or leave the “Supplier Number” field blank and the system will generate it for you.

3. Enter data in any of the other fields you desire, these fields are optional.
4. When done, click the Save button located on the toolbar.

   -or-

1. Display a supplier. See “Displaying a Supplier” above.

2. Enter a supplier number or leave the “Supplier Number” field blank and the system will generate it for you.

3. Change any of the fields you desire.

4. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy a supplier to a new supplier number; however, addresses and text are not copied with this procedure.

Copying a Supplier

To copy a supplier and associated data to a new supplier, perform the following steps:

1. Display the supplier you want to copy. See “Displaying a Supplier” above.

2. Click the copy button located on the toolbar. A pop-up will appear.

3. Enter the new supplier number in the “Copy to Supplier” field or leave it blank to let the system generate the number for you.

4. Various types of supplier data are listed with check boxes next to them. Click a check box to check or uncheck data to be copied. A check mark means it will be copied, No check mark means it will not be copied.

5. Click the “Copy” button to complete the copy or click “Cancel” to cancel the copy operation.

Deleting a Supplier

To delete a supplier, perform the following steps:

1. Display the supplier you wish to delete. See “Displaying a Supplier” above.
2. Click the Delete button located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the supplier click “No” on the “Confirm Action” pop up message.

Note: Once a supplier is deleted, it can no longer be displayed or updated. All data associated with this supplier (i.e. address, contacts, and information) will be deleted as well.

Displaying the Previous Supplier

To display the supplier that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.
2. The previous supplier data is displayed on the main screen.

Displaying the Next Supplier

To display the supplier that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next supplier data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Supplier” field, then click the Next button .

Address Screen

This screen is for entering and maintaining addresses for a supplier. Multiple addresses, including contact information for the address, can be defined and maintained.

Current Supplier

Field	Explanation
Supplier	A unique identifier assigned to each supplier. It is the main key for all other supplier data.
Name	A shortened name or the full name of the supplier.

Address Data

Field	Explanation
Line 1	First line of the address for this entry.
Line 2	Second line of the address for this entry.
City	City for this address.
State	State for this address.
Zip	Postal Zip Code for this address.
Country	Country for this address.
URL Address	URL (Universal Resource Locator) or Website address for this entry.
Phone	Telephone number, including area code, for this entry.
Fax	Fax telephone number, including area code, for this entry.
E-Mail	E-Mail address for this entry.
Supplier	Indicates if the address is a general supplier address; checked = yes, not checked = no.
Payment	Indicates if the address is the supplier's payment address; checked = yes, not checked = no.
Return	Indicates if the address is used for returning merchandise; checked = yes, not checked = no.
New Address	Indicates if the address is to be added as a new address; checked = yes, not checked = no
Address Search	Use this button to view all addresses for a customer and to select an address.

Contact Table (Contact Name, Phone Numbers and Description tabs)

Column	Explanation
Row	The line number of the row in the table.
Name	Full name of the contact person for this supplier.
Title	Title/position of this contact person.
Department	Company department associated with this contact person.
Phone	Telephone number, including area code, for this contact person.
Fax	Fax telephone number, including area code, for this contact person.
E-Mail	E-Mail address for this contact person.
Description	A short name /abbreviation to a more descriptive definition of this contact person.
Delete	This is a checkbox to indicate you want to delete a contact record.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Address Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Supplier". The Supplier screen is then displayed.

3. If there is a supplier number in the "Supplier" field, the information for that supplier is displayed on the main screen.

4. Click the "Address" tab at the top of the main screen.

5. If there is a supplier number in the "Supplier" field, the address information for that supplier is displayed on the main screen.

Using the Address Screen

Use these procedures to display, update, add, delete, display the previous, and display the next address and contact information.

Displaying Address Information

To display address and contact information, perform the following steps:

1. Enter a supplier number in the “Supplier” field.

   -or-

   Use the Search button next to the “Supplier” field, or the “Name” field to select a supplier number.

2. Click the Open (Display) button located on the toolbar or hit the Enter key.

3. The address information for the supplier is displayed on the main screen.

4. The contact information is displayed in the Contact table. Use the scroll bar on the right to display more rows if necessary.

5. Use the GoTo/Selection button next to “Search for Address” to select other addresses for the supplier.

Adding a Supplier Address

To enter a supplier address, perform the following steps:

1. Enter or select the supplier number you want.

2. Enter address data in the fields provided.

3. Click the checkbox next to “New Address” to indicate you are adding a new address.

4. Click an empty row in the Contact table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

5. Enter the contact information in the Contact table for the rows you wish to add.

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

Updating Address Information

To update address and contact information, perform the following steps:

1. Display the supplier address you want to change. See “Displaying Address Information” above.

2. Edit the address as needed.

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

Adding Contact Information

To enter contact information, perform the following steps:

1. Display the supplier you want to change. See "Displaying Address Information" above.

2. Click an empty row in the Contact table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Enter the new information in the column of the Contact table for the row or rows you wish to add.

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

Deleting Address Information

To delete address information, perform the following steps:

1. Display the supplier address you want to delete. See "Displaying Address Information" above.

2. Click the Delete button located on the toolbar.

3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the process click "No" on the "Confirm Action" pop up message.

4. The address and contacts are deleted.

Note: Once address and contact information is deleted, it can no longer be displayed or updated.

Deleting Contact Information

To delete contact information, perform the following steps:

1. Display the supplier address that contains the contact you want to delete. See "Displaying Address Information" above.

2. Click the checkbox in the "Delete" column of the Contact table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once contact information is deleted, it can no longer be displayed or updated.

Displaying the Previous Address Information

To display the address that precedes the address currently displayed, perform the following steps:

1. Click the Previous button ◂ located on the toolbar.
2. The previous address and contact information are displayed on the main screen.

Displaying the Next Address Information

To display the address that follows the address currently displayed, perform the following steps:

1. Click the Next button ▸ located on the toolbar.
2. The next address and contact information and references are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Supplier” field, then click the Next button ▸.

Information Screen

This screen allows you to enter text you wish to maintain concerning a supplier. For example, you could enter text information for a supplier that describes specific details about special products or services you purchase from this supplier. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Supplier

Field	Explanation
Supplier	A unique identifier assigned to each supplier. It is the main key for all other supplier data.
Name	A shortened name or the full name of the supplier.

Information Table

Column	Explanation
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	Explanation
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Reference	Full path, directory, and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.

Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Supplier". The Supplier screen is then displayed.

3. If there is a supplier number in the "Supplier" field, the information for that supplier is displayed on the main screen.

4. Click the "Information" tab at the top of the main screen.

5. If there is a supplier number in the "Supplier" field, the information text types and references for that supplier are displayed on the main screen.

Using the Information Screen

Use these procedures to display, update, add, delete, display the previous, and display the next information or references.

Displaying Information and References

To display information or references, perform the following steps:

1. Enter a supplier number in the “Supplier” field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the “Supplier” field, or the “Name” field to select a supplier number and double-click on the “Supplier” you would like to display in the “Search” screen table.

2. The information text types and references for the supplier are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the “Text Information” column of the Information table for the row you want to display and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

6. To view electronic references, right click on the reference you would like to display. Choose “Goto External Application” from the menu.

Updating Information

To update information, perform the following steps:

1. Display the supplier you want to change. See “Displaying Information” above.

2. Click the Goto/Selection button in the “Text Information” column of the Information table for the row you want to update and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click “Ok” when done.

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

Note: You can update Information and References at the same time.

Updating References

To update references, perform the following steps:

1. Display the supplier you want to change. See “Displaying Information” above.

2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog box is displayed so you can locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can update Information and References at the same time.

Adding Information

To enter information, perform the following steps:

1. Display the supplier you want to change. See “Displaying Information” above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the “Info Type” column of the Information table.

4. Click the Goto/Selection button in the “Text Information” column of the Information table for the row you want and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click “Ok” when done.

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

Note: You can add Information and References at the same time.

Adding References

To enter references, perform the following steps:

1. Display the supplier you want to change. See "Displaying Information" above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the "Reference Type" column of the Reference table.

4. Enter the reference in the "Reference" column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose "Select External File". A standard Windows file selection dialog box is displayed so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.

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

Note: You can add Information and References at the same time.

Deleting Information and References

To delete information and references, perform the following steps:

1. Display the supplier that has the information text and/or reference you want to delete. See "Displaying Information" above.

2. To delete text information, click the checkbox in the "Delete" column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the "Delete" column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once information and references are deleted, they can no longer be displayed or updated.

Displaying the Previous Information and References

To display the information and references that precede the information currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous information and references are displayed on the main screen.

Displaying the Next Information and References

To display the information and references that follow the information currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next information and references are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Supplier" field, then click the Next button .

Statistics Screen

This screen displays various types of statistical information about a supplier.

Selection Criteria

Field	Explanation
Supplier	A unique identifier assigned to each supplier. It is the main key for all other supplier data.
Supplier Type	The type helps further define a supplier by giving it a classification. Some examples of types are: "Service", "Manufacture", and "Supplies".
Supplier Name	A shortened name or the full name of the supplier.
Supplier Status	Specifies whether the supplier is "Active" or "Inactive".
Year	The year for which you wish to view statistics. Leave blank for all years.
Statistics Type	The type of statistics you wish to view. Leave blank for all types.

Statistics Table (January to June and July to December tabs)

Column	Explanation
Row	The line number of the row in the table.
Type	Type of statistic accumulated.
Total	Yearly total of the type of statistic displayed.
January	Statistics for the month of January for the year and type indicated.
February	Statistics for the month of February for the year and type indicated.
March	Statistics for the month of March for the year and type indicated.
April	Statistics for the month of April for the year and type indicated.
May	Statistics for the month of May for the year and type indicated.
June	Statistics for the month of June for the year and type indicated.
July	Statistics for the month of July for the year and type indicated.

August	Statistics for the month of August for the year and type indicated.
September	Statistics for the month of September for the year and type indicated.
October	Statistics for the month of October for the year and type indicated.
November	Statistics for the month of November for the year and type indicated.
December	Statistics for the month of December for the year and type indicated.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Statistics Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Supplier". The Supplier screen is then displayed.

3. If there is a supplier number in the "Supplier" field, the information for that supplier is displayed on the main screen.

4. Click the "Statistics" tab at the top of the main screen.

5. If there is a supplier number in the "Supplier" field, the statistics for that supplier are displayed on the main screen.

Using the Statistics Screen

Displaying Statistics

To display statistics, perform the following steps:

1. Enter or select a supplier number in the “Supplier” field.
2. Select a year in the “Year” field or leave it blank to select all years.
3. Enter or select a statistic type in the “Statistic Type” field or leave it blank to select all types.
4. Click the Open (Display) button located on the toolbar or hit the Enter key.
5. The supplier statistics results are displayed in the Statistics table on the main screen.

-or-

1. Use the Search button next to the “Supplier” field, the “Supplier Name” field, the Type” field, or the “Status” field to select a “Supplier Number”.
2. Double-click on the “Supplier” you would like to display in the “Search” screen table.
3. The supplier statistics results are displayed in the Statistics table on the main screen.
4. Enter or select values in the other selection criteria fields as desired.
5. Click the Open (Display) button located on the toolbar or hit the Enter key.
6. The new supplier statistics results are displayed in the Statistics table on the main screen.

Summary Screen

This screen is for listing suppliers using selection criteria to group suppliers or to locate a supplier.

Selection Criteria

Field	Explanation
Supplier	A unique identifier assigned to each supplier. It is the main key for all other supplier data.
Type	The type helps further define a supplier by giving it a classification. Some examples of supplier types are: "Manufacture" a supplier who builds what you purchase, "Service" for a supplier who provides services, and "Supplies" for a supplier who provides parts or other things that you use in your business.
Supplier Name	A shortened name or the full name of the supplier.
Status	Specifies whether the supplier is “Active” or “Inactive”.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.

Summary Table (Supplier and Description tabs)

Column	Explanation
Row	The line number of the row in the table.
Supplier	A unique identifier assigned to each supplier. It is the main key for all other supplier data.
Supplier Name	A shortened name or the full name of the supplier.
Status	Specifies whether the supplier is “Active” or “Inactive”.
Type	The type helps further define a supplier by giving it a classification. Some examples of supplier types are: "Manufacture" a supplier who builds what you purchase, "Service" for a supplier who provides services, and "Supplies" for a supplier who provides parts or other things that you use in your business.
Inspection	The inspection criteria to be used for all incoming material from this supplier. For example, some purchased material must be inspected before it can be used while others can be used without inspection.

Invoice Terms	The terms define the invoice “terms”. Some examples of terms are: "1% 10 Net 30”, “Due on receipt” or “Net 30”.
Buyer	The purchasing agent responsible for this supplier.
Tax Exempt #	The “tax exempt” number assigned by the IRS to this company.
Description	A short name /abbreviation to a more descriptive definition of this supplier.
Receive Warehouse	Default warehouse where inventory received from this supplier should be stored.
Receive Zone	Default zone where inventory received from this supplier should be stored.
Receive Location	Default location where inventory received from this supplier should be stored.

Message Line

<u>**Field**</u>	<u>**Explanation**</u>
Message	Displays information about the current status of the screen including error messages.

Accessing the Summary Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click  “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Supplier”. The Supplier screen is then displayed.

3. If there is a supplier number in the “Supplier” field, the information for that supplier is displayed on the main screen.

4. Click the “Summary” tab at the top of the main screen.

5. If there is a supplier number in the “Supplier” field, the summary information for that supplier is displayed on the main screen.

Using the Summary Screen

Displaying Summaries

To display a summary, perform the following steps:

1. If desired, enter all or part of a supplier number in the “Supplier” field. You can leave the “Supplier” field blank to select all suppliers.
2. Enter or select values in the other selection criteria fields as desired.
3. Click the Open (Display) button located on the toolbar or hit the Enter key.
4. The supplier summary results are displayed in the Summary table on the main screen.
5. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change your selection criteria.

-or-

1. Use the Search button next to the “Supplier” field or the “Supplier Name” field to select a “Supplier Number”.
2. Double-click on the “Supplier” you would like to display in the “Search” screen table.
3. The supplier summary results are displayed in the Summary table on the main screen.
4. Enter or select values in the other selection criteria fields as desired.
5. Click the Open (Display) button located on the toolbar or hit the Enter key.
6. The new supplier summary results are displayed in the Summary table on the main screen.
7. If the record you are looking for is not displayed in the table, either increase the “Number of Rows to Display” or change your selection criteria.

Supplier Item Screen

This screen allows you to associate supplier specific information with your own items.

Current Supplier and Supplier Item

Field	Explanation
Supplier	A unique identifier assigned to each supplier. It is the main key for all other supplier data. The identifier can be a number, a name, or some combination of numbers and characters.
Name	A shortened name or the full name of the supplier.
Supplier Item	The supplier's item number.
Type	The type of item the supplier classifies this item as.
Description	The supplier's description of the item.
Status	The current status of the item for the supplier; the status they consider the item to be in.
Commodity	The supplier's commodity for this item (commodity is a term that can be applied to groups of items that are similar in some way).
Inventory Cost	The value of one unit of this item in inventory.
Unit Weight	The weight of a single unit of this item.
Country	The country from which this item originates.
Unit of Weight	How the supplier measures the weight of a single unit of this item.
Discount Percent	Discount percentage applied to the gross price to determine the discount amount to apply to this item for this supplier.
Sole Source	Indicates if this item must be purchased from this supplier.
Purchase UOM	The unit of measure to be used when purchasing this item.
Pur Lead Time	The amount of time (in days) it takes to acquire this item.
Inspection	Indicates if this item must be inspected upon receipt.
Inspect Percent	Percentage of the item receipt quantity that must be inspected upon receipt.

Our Item Data

Field	Explanation
Item/Part	The item as it is known to you.
Type	Classification of the item as it is known to you; how your company classifies this item.
Description	Your description of the item.
Status	The status of the item in your system.
Unit of Measure	How you measure a single unit of the item.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Supplier Item Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Supplier". The Supplier screen is then displayed.

3. If there is a supplier number in the "Supplier" field, the information for that supplier is displayed on the main screen.

4. Click the "Supplier Item" tab at the top of the main screen.

Using the Supplier Item Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next supplier item.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Supplier Item

To display a supplier item, perform the following steps:

1. Enter a supplier number in the "Supplier" field or use the **first** Search button next to the "Supplier" field to select a supplier number.
2. Use the **second** Search button next to the "Supplier" field to select a supplier item number.
3. Click the Open (Display) button located on the toolbar or hit the Enter key.
4. The supplier item data is displayed on the main screen.

-or-

1. Enter a supplier number in the "Supplier" field or use the **first** Search button next to the "Supplier" field to select a supplier number.
2. Click the Next button located on the toolbar to display the first supplier item for this supplier (if one exists).

Adding a New Supplier Item

To add a supplier item, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter the supplier number you want to use in the "Supplier" field or use the **first** Search button next to the "Supplier" field to select a supplier number.
3. Enter an item number in the "Item/Part" field in the "Our Item Data" section of the screen or use the Search button next to the "Item/Part" field to select an item number.
4. Enter data in any of the other fields you desire, these fields are optional.
5. When done, click the Save button located on the toolbar.

Updating a Supplier Item

To update a supplier item, perform the following steps:

1. Display the supplier item data you wish to change. See "Displaying a Supplier Item" above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting a Supplier Item

To delete a supplier item, perform the following steps:

1. Display the supplier item data you wish to delete. See "Displaying a Supplier Item" above.

2. Click the Delete button located on the toolbar.

3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the supplier item click "No" on the "Confirm Action" pop up message.

Note: Once a supplier item is deleted, it can no longer be displayed or updated.

Displaying the Previous Supplier Item

To display the supplier item that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous supplier item data is displayed on the main screen.

Displaying the Next Supplier Item

To display the supplier item that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next supplier item data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Supplier" field, then click the Next button .

Labels Screen

This screen is for printing supplier address labels.

Supplier Parameters

<u>**Field**</u>	<u>**Explanation**</u>
From Supplier	The supplier number you want to use for specifying the beginning of a range of address labels to print. Leave this field blank to start with the first supplier.
Name	A shortened name or the full name of the “From Supplier”.
To Supplier	The supplier number you want to use for specifying the end of a range of address labels to print. Leave this field blank to print labels through the last supplier.
Name	A shortened name or the full name of the “To Supplier”.
Sort Labels by	Field that specifies how you want the labels sorted. The dropdown provided allows you to sort by supplier name, which is the default, or supplier number.
Supplier Addresses	Checkbox where you indicate if you want to print addresses that are marked as supplier addresses.
Payment Addresses	Checkbox where you indicate if you want to print addresses that are marked as payment addresses.
Return Addresses	Checkbox where you indicate if you want to print addresses that are marked as return addresses.

Label Parameters

<u>**Field**</u>	<u>**Explanation**</u>
Label Name	Field that indicates what type of label you want to print. A search button is provided so you can select from the available types.
Label Font	Size of the font to be used when the label is printed. The default is based on the label name. A dropdown is provided to indicate if you want the font to be **Bold** or Not Bold.
Print Landscape	Checkbox to indicate if you want the labels printed in landscape or portrait orientation.

Center Text Vertically Within Each Label	Should the label's text be centered vertically on the label, or should the first line of text begin at the top edge of the label? When this option is selected the label’s text will be centered vertically on the label.
Allow me to Indicate Specific Labels on which Nothing should be Printed	Check this box so you can get a map of the label sheet when you click the Create Labels button. Then you can indicate which labels on a sheet of labels should be bypassed during printing. You can mark as many pages as necessary. This is for using sheets of labels that may have labels that are missing or unusable.
Advanced Options (Button)	Click this button to set advanced formatting options.
Create Labels (Button)	Click this button when you are ready to print the labels.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Labels Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Supplier”. The Supplier screen is then displayed.

3. If there is a supplier number in the “Supplier” field, the information for that supplier is displayed on the main screen.

4. Click the “Labels” tab at the top of the main screen.

Using the Labels Screen

Use these procedures to print supplier address labels.

Printing Supplier Address Labels

To print supplier address labels, perform the following steps:

1. Enter a supplier number in the “From Supplier” field or use the Search button next to the “From Supplier” field to select a supplier number that you want to use as the beginning of a range of supplier address labels to print. Leave this field blank to start with the first supplier number in the database.

2. Enter a supplier number in the “To Supplier” field or use the Search button next to the “To Supplier” field to select a supplier number that you want to use as the end of a range of supplier address labels to print. Leave this field blank to print supplier addresses through the end of the database.

3. Select the sort sequence you want for the labels. The default is to sort them by supplier name, but you can choose to sort them by supplier number instead.

4. Click the checkbox next to the types of addresses you want to print. The default is to print all types. A checkmark in the checkbox indicates you want that address type, a blank box indicates you do not want that address type.

5. Use the GoTo/Selection button next to “Label Name” to select the type of label you want to print.

6. Change formatting options as desired. Click the Advanced Formatting button located on the toolbar to adjust label formatting if necessary.

7. Click the Print button located on the toolbar to generate the labels for previewing and printing.

8. If you clicked the checkbox next to “Allow me to Indicate Specific Labels on which Nothing should be Printed”, you will see a graphic representation of a sheet of labels. Click the label(s) you want to skip. They will have “Don’t Use” on them. Click again to allow them to be used. Click “Next Page” to mark additional sheets as necessary. Click “Ok” when you are ready to start printing.

Warehouse

What is a Warehouse?

A warehouse is either a physical or logical place where inventory is stored.

Warehouse Screens

“Warehouse” consists of three tabbed screens that are used to enter and maintain warehouse data.

Warehouse

The warehouse screen allows you to define a warehouse with basic information about the warehouse such as the type of warehouse, status, address, etc.

Information

This screen allows you to enter text you wish to maintain concerning a warehouse. For example, you could enter text information for a warehouse that describes how to get there. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL’s for web sites.

Summary

The warehouse summary screen allows you to list warehouses based on selection criteria entered.

Warehouse Screen

This screen is for entering and maintaining warehouse definitions.

Current Warehouse

Field	Explanation
Warehouse	A unique identifier assigned to each warehouse. It is the main key for all other warehouse data.
Type	The classification of the warehouse. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Finished", "Scrap" or "WIP".
Description	Brief description of the warehouse.
Status	Specifies whether the warehouse is "Active" or "Inactive".

Address

Field	Explanation
Line 1	First line of the address for this warehouse.
Line 2	Second line of the address for this warehouse.
City	City for this address.
State	State associated with this address.
Zip	Postal Zip Code for this address.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Warehouse Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Warehouse". The Warehouse screen is displayed.

3. If there is a warehouse in the "Warehouse" field, the information for that warehouse is displayed on the main screen.

Using the Warehouse Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next warehouse.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Warehouse

To display a warehouse, perform the following steps:

1. Enter a warehouse in the "Warehouse" field.

2. Click the Open (Display) button located on the toolbar or hit the Enter key.

3. The warehouse data is displayed on the main screen.

   -or-

1. Use the Search button next to various fields on the screen to select a warehouse.

2. Double-click on the "Warehouse" you would like to display in the "Search" screen table.

3. The warehouse data is displayed on the main screen.

Adding a New Warehouse

To add a warehouse, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.

2. Enter a warehouse in the “Warehouse” field. It can be any combination of numbers and letters.

3. Enter data in any of the other fields you desire, these fields are optional.

4. When done, click the Save button located on the toolbar.

   -or-

1. Display a warehouse. See “Displaying a Warehouse” above.

2. Enter a new warehouse in the “Warehouse” field and change any of the fields you desire.

3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy warehouse data to a new warehouse; however, information text and external reference entries are not copied with this procedure.

Updating a Warehouse

To update a warehouse, perform the following steps:

1. Display the warehouse data you wish to change. See “Displaying a Warehouse” above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting a Warehouse

To delete a warehouse, perform the following steps:

1. Display the warehouse data you wish to delete. See “Displaying a Warehouse” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the warehouse click “No” on the “Confirm Action” pop up message.

Note: Once a warehouse is deleted, it can no longer be displayed or updated.

Displaying the Previous Warehouse

To display the warehouse that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous warehouse data is displayed on the main screen.

Displaying the Next Warehouse

To display the warehouse that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next warehouse data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Warehouse" field, then click the Next button .

Information Screen

This screen allows you to enter text you wish to maintain concerning a warehouse. For example, you could enter text information about how to get to a warehouse. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Warehouse

Field	Explanation
Warehouse	A unique identifier assigned to each warehouse. It is the main key for all other warehouse data.
Description	A brief description of the warehouse.
Type	The classification of the warehouse. Some examples of types are: "Finished", "Scrap" or "WIP".

Information Table

Column	Explanation
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	Explanation
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Warehouse". The Warehouse screen is displayed.

3. If there is a warehouse in the "Warehouse" field, the information for that warehouse is displayed on the main screen.

4. Click the "Information" tab at the top of the main screen.

5. If there is a warehouse in the "Warehouse" field, the information text types and reference information for that warehouse are displayed on the main screen.

Using the Information Screen

Use these procedures to display, add, update, delete, display the previous, and display the next warehouse information or references.

Displaying Information and References

To display information or references, perform the following steps:

1. Enter a warehouse in the "Warehouse" field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the "Warehouse" field, or the "Description" field to select a warehouse and double-click on the "Warehouse" you would like to display in the "Search" screen table.

2. The information text types and references for the warehouse are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the "Text Information" column of the Text table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

6. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

Adding Information

To enter information, perform the following steps:

1. Display the warehouse you want. See "Displaying Information and References" above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the "Info Type" column of the Information table.

4. Click the Goto/Selection button in the "Text Information" column of the Text table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click “Ok” when done.

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

Note: You can add warehouse information and references at the same time.

Adding References

To enter references, perform the following steps:

1. Display the warehouse you want. See “Displaying Information and References” above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the “Reference Type” column of the Reference table.

4. Enter the reference in the “Reference” column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can add warehouse information and references at the same time.

Updating Information

To update information, perform the following steps:

1. Display the warehouse data you want to change. See “Displaying Information and References” above.

2. Click the Goto/Selection button in the “Text Information” column of the Text table for the row you want to update and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click “Ok” when done.

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

Note: You can update warehouse information and references at the same time.

Updating References

To update references, perform the following steps:

1. Display the warehouse data you want to change. See “Displaying Information and References” above.

2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can update warehouse information and references at the same time.

Deleting Information and References

To delete information and references, perform the following steps:

1. Display the warehouse data that has the information text and/or reference you want to delete. See “Displaying Information and References” above.

2. To delete text information, click the checkbox in the “Delete” column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the “Delete” column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once warehouse information and references are deleted, they can no longer be displayed or updated. Deleting a reference to an external file does not delete the actual file; it deletes only the reference to the file.

Displaying the Previous Information and References

To display the information and references for the warehouse that precedes the warehouse currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The information and references for the previous warehouse are displayed on the main screen.

Displaying the Next Information and References

To display the information and references for the warehouse that follows the warehouse currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The information and references for the next warehouse are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Warehouse" field, then click the Next button .

Warehouse Summary Screen

The warehouse summary screen allows you to display a list of warehouse definitions based on selection criteria entered.

Selection Criteria Group

Field	Explanation
Warehouse	Field for entering all or part of a warehouse name to select the warehouses to be displayed in the Summary table. Leave this field blank to select all warehouses.
Type	This field is for selecting what types of warehouses are to be displayed in the Summary table. Leave this field blank to select all types of warehouses.
Description	Field for entering all or part of a warehouse description to select the warehouses to be displayed in the Summary table. Leave this field blank to select all warehouses regardless of description.
Status	Field for selecting warehouses based on status. Leave this field blank to select warehouses with any status.
City	Field for selecting warehouses based on the city where they are located. Leave this field blank to select warehouses in any city.
State	Field for selecting warehouses based on the state where they are located. Leave this field blank to select warehouses in any state.
Zip	Field for selecting warehouses based on the zip code where they are located. Leave this field blank to select warehouses in any zip code.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.

Summary Table (Primary and Secondary tabs)

Column	Explanation
Row	The line number of the row in the table.
Warehouse	Identification of the warehouse.
Description	Brief description of the warehouse.
Type	Information indicating the type of “Warehouse”. Some examples of Warehouse Types include: Finished, Scrap, and WIP.

Status	Information indicating the status of the Warehouse: "Active" or "Inactive".
City	City where the warehouse is located.
State	State where the warehouse is located.
Zip	Zip code where the warehouse is located.

Message Line

Message	Displays information about the current status of the screen.

Accessing the Warehouse Summary Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Warehouse". The Warehouse screen is displayed.

3. If there is a warehouse in the "Warehouse" field, the data for that warehouse is displayed on the main screen.

4. Click "Summary". The Warehouse Summary screen is displayed.

5. If there is a warehouse in the "Warehouse" field, the data for that warehouse is displayed on the main screen.

Using the Warehouse Summary Screen

Use the following procedures to display a warehouse summary list.

Displaying a Warehouse Summary List

Perform the following steps to display a warehouse summary list:

1. Enter all or part of a warehouse name in the “Warehouse” selection criteria field, and/or select a type in the “Type” selection criteria field from the dropdown, and/or a city in the “City” selection criteria field, and/or select a status in the “Status” selection criteria field from the dropdown.

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

Work Center

What is a Work Center?

A work center is an area defined as a particular place where work is performed.

Work Center Screens

"Work Center" consists of three tabbed screens that are used to enter and maintain work center data.

Work Center

The work center screen allows you to define a work center with basic information about the work center such as the type of work center, status, shifts, etc.

Information

This screen allows you to enter text you wish to maintain concerning a work center. For example, you could enter text information for a work center that describes the kind of work performed there. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Summary

The work center summary screen allows you to list work centers based on selection criteria entered.

Work Center Screen

This screen is for entering and maintaining work center definitions.

Current Work Center

Field	Explanation
Work Center	A unique identifier assigned to each work center. It is the main key for all other work center data.
Type	The classification of the work center. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Administration", "Production" or "Inspection".
Description	Brief description of the work center.
Status	Specifies whether the work center is "Active" or "Inactive".
Cost Center	Accounting cost center for this work center.

Shift Schedules

Field	Explanation
Monday Shifts	The number of shifts this work center is available on Mondays.
Hours Per Shift	The number of hours per shift this work center is available on Mondays.
Tuesday Shifts	The number of shifts this work center is available on Tuesdays.
Hours Per Shift	The number of hours per shift this work center is available on Tuesdays.
Wednesday Shifts	The number of shifts this work center is available on Wednesdays.
Hours Per Shift	The number of hours per shift this work center is available on Wednesdays.
Thursday Shifts	The number of shifts this work center is available on Thursdays.
Hours Per Shift	The number of hours per shift this work center is available on Thursdays.
Friday Shifts	The number of shifts this work center is available on Fridays.

Hours Per Shift	The number of hours per shift this work center is available on Fridays.
Saturday Shifts	The number of shifts this work center is available on Saturdays.
Hours Per Shift	The number of hours per shift this work center is available on Saturdays.
Sunday Shifts	The number of shifts this work center is available on Sundays.
Hours Per Shift	The number of hours per shift this work center is available on Sundays.
Total Shifts	The total number of shifts this work center is available in a week.
Total Hours	The total number of hours this work center is available in a week.
City	City where this work center is located.
State	State where this work center is located.
Zip	Postal Zip Code where this work center is located.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Work Center Screen

1. Click the plus ("+") next to "Shared Applications" or double-click  "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Work Center". The Work Center screen is displayed.

3. If there is a work center in the "Work Center" field, the information for that work center is displayed on the main screen.

Using the Work Center Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next work center.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Work Center

To display a work center, perform the following steps:

1. Enter a work center in the "Work Center" field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The work center data is displayed on the main screen.

-or-

1. Use the Search button next to various fields on the screen to select a work center.
2. Double-click on the "Work Center" you would like to display in the "Search" screen table.
3. The work center data is displayed on the main screen.

Adding a New Work Center

To add a work center, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter a work center in the "Work Center" field. It can be any combination of numbers and letters.
3. Enter data in any of the other fields you desire, these fields are optional.
4. When done, click the Save button located on the toolbar.

-or-

1. Display a work center. See "Displaying a Work Center" above.
2. Enter a new work center in the "Work Center" field and change any of the fields you desire.
3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy work center data to a new work center; however, information text and external reference entries are not copied with this procedure.

Updating a Work Center

To update a work center, perform the following steps:

1. Display the work center data you wish to change. See “Displaying a Work Center” above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting a Work Center

To delete a work center, perform the following steps:

1. Display the work center data you wish to delete. See “Displaying a Work Center” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the work center click “No” on the “Confirm Action” pop up message.

Note: Once a work center is deleted, it can no longer be displayed or updated.

Displaying the Previous Work Center

To display the work center that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous work center data is displayed on the main screen.

Displaying the Next Work Center

To display the work center that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next work center data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Work Center” field, then click the Next button.

Information Screen

This screen allows you to enter text you wish to maintain concerning a work center. For example, you could enter text information about the kind of work performed at the work center. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Work Center

Field	Explanation
Work Center	A unique identifier assigned to each work center. It is the main key for all other work center data.
Description	A brief description of the work center.
Type	The classification of the work center. Some examples of types are: "Administration", "Production" or "Inspection".

Information Table

Column	Explanation
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	Explanation
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

<u>**Field**</u>	<u>**Explanation**</u>
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click  “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Work Center”. The Work Center screen is displayed.

3. If there is a work center in the “Work Center” field, the information for that work center is displayed on the main screen.

4. Click the “Information” tab at the top of the main screen.

5. If there is a work center in the “Work Center” field, the information text types and reference information for that work center are displayed on the main screen.

Using the Information Screen

Use these procedures to display, add, update, delete, display the previous, and display the next work center information or references.

Displaying Information and References

To display information or references, perform the following steps:

1. Enter a work center in the "Work Center" field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the "Work Center" field, or the "Description" field to select a work center and double-click on the "Work Center" you would like to display in the "Search" screen table.

2. The information text types and references for the work center are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the "Text Information" column of the Text table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

7. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

Adding Information

To enter information, perform the following steps:

1. Display the work center you want. See "Displaying Information and References" above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the "Info Type" column of the Information table.

4. Click the Goto/Selection button in the "Text Information" column of the Text table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click “Ok” when done.

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

Note: You can add work center information and references at the same time.

Adding References

To enter references, perform the following steps:

1. Display the work center you want. See “Displaying Information and References” above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the “Reference Type” column of the Reference table.

4. Enter the reference in the “Reference” column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can add work center information and references at the same time.

Updating Information

To update information, perform the following steps:

1. Display the work center data you want to change. See “Displaying Information and References” above.

2. Click the Goto/Selection button in the “Text Information” column of the Text table for the row you want to update and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click “Ok” when done.

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

Note: You can update work center information and references at the same time.

Updating References

To update references, perform the following steps:

1. Display the work center data you want to change. See “Displaying Information and References” above.

2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can update work center information and references at the same time.

Deleting Information and References

To delete information and references, perform the following steps:

1. Display the work center data that has the information text and/or reference you want to delete. See “Displaying Information and References” above.

2. To delete text information, click the checkbox in the “Delete” column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the “Delete” column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once work center information and references are deleted, they can no longer be displayed or updated. Deleting a reference to an external file does not delete the actual file; it deletes only the reference to the file.

Displaying the Previous Information and References

To display the information and references for the work center that precedes the work center currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The information and references for the previous work center are displayed on the main screen.

Displaying the Next Information and References

To display the information and references for the work center that follows the work center currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The information and references for the next work center are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Work Center" field, then click the Next button .

Work Center Summary Screen

The work center summary screen allows you to display a list of work center definitions based on selection criteria entered.

Selection Criteria Group

Field	Explanation
Work Center	Field for entering all or part of a work center name to select the work centers to be displayed in the Work Center table. Leave this field blank to select all work centers.
Type	This field is for selecting what types of work centers are to be displayed in the Work Center table. Leave this field blank to select all types of work centers.
Status	Field for selecting work centers based on status. Leave this field blank to select work centers with any status.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.

Work Center Table (Primary and Secondary tabs)

Column	Explanation
Row	The line number of the row in the table.
Work Center	Identification of the work center.
Description	Brief description of the work center.
Type	Information indicating the type of “Work Center”. Some examples of Work Center Types include: Administration, Production, and Inspection.
Status	Information indicating the status of the Work Center: “Active” or “Inactive”.
City	City where the work center is located.
State	State where the work center is located.
Zip	Zip code where the work center is located.

Message Line

Message Displays information about the current status of the screen.

Accessing the Work Center Summary Screen

1. Click the plus ("+") next to "Shared Applications" or double-click "Shared Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Shared Applications".

2. Click "Work Center". The Work Center screen is displayed.

3. If there is a work center in the "Work Center" field, the data for that work center is displayed on the main screen.

4. Click "Summary". The Work Center Summary screen is displayed.

5. If there is a work center in the "Work Center" field, the data for that work center is displayed on the main screen.

Using the Work Center Summary Screen

Use the following procedures to display a work center summary list.

Displaying a Work Center Summary List

Perform the following steps to display a work center summary list:

1. Enter all or part of a work center name in the "Work Center" selection criteria field, and/or select a type in the "Type" selection criteria field from the dropdown, and/or select a status in the "Status" selection criteria field from the dropdown.

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

Zone

What is a Zone?

A zone is either a physical or logical place within a warehouse where inventory is stored.

Zone Screens

"Zone" consists of three tabbed screens that are used to enter and maintain zone data.

Zone

The zone screen allows you to define a zone with basic information about the zone such as the warehouse it is in, the type of zone, status, address, etc.

Information

This screen allows you to enter text you wish to maintain concerning a zone. For example, you could enter text information for a zone that describes the boundaries of the zone. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Summary

The zone summary screen allows you to list zones based on selection criteria entered.

Zone Screen

This screen is for entering and maintaining zone definitions.

Current Zone

Field	**Explanation**
Warehouse	A unique identifier assigned to each warehouse. It is the warehouse that contains this zone.
Zone	A unique identifier assigned to each zone. Together with the warehouse it is the main key for all other zone data.
Description	Brief description of the zone.

The following fields are used as default values when generating locations within a zone and you have the option to use the default values from the zone when you are inserting a new location manually. Some of the fields apply to locations only and are indicated as such.

Field	**Explanation**
Type	The classification of the zone/location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Finished", "Inventory" or "Tool Crib".
Status	Specifies whether the zone/location is "Active" or "Inactive".
City	City for the zone/location.
State	State for the zone/location.
Zip	Postal Zip Code for the zone/location.
Usage	Defines how the **location** is to be used. A dropdown is provided with these values: "Pallet", "Bulk", "Replenish", "Packing", "Receiving", "Staging", "Shipping".
Environment	Indicates any special environmental considerations for the **location**. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Environments include: "Refrigerated", "Heated", and "Clean Room".
Constraint	Indicates any special constraints for the **location**. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control"

	screen. Some examples of Constraints include: “Lift Truck” and “High Lift”.
Max Pallets	The maximum number of standard size pallets that can be stored in the **location**.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Zone Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Zone”. The Zone screen is displayed.

3. If there is a zone in the “Zone” field, the information for that zone is displayed on the main screen.

Using the Zone Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next zone.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying a Zone

To display a zone, perform the following steps:

1. Enter a warehouse in the "Warehouse" field.
2. Enter a zone in the "Zone" field.
3. Click the Open (Display) button located on the toolbar or hit the Enter key.
4. The zone data is displayed on the main screen.

   -or-

1. Use the Search button next to various fields on the screen to select a zone.
2. Double-click on the "Zone" you would like to display in the "Search" screen table.
3. The zone data is displayed on the main screen.

Adding a New Zone

To add a zone, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter or select a warehouse in the "Warehouse" field. It can be any combination of numbers and letters.
3. Enter a zone in the "Zone" field. It can be any combination of numbers and letters.
4. Enter data in any of the other fields you desire, these fields are optional.
5. When done, click the Save button located on the toolbar.

   -or-

1. Display a zone. See "Displaying a Zone" above.
2. Enter a new zone in the "Zone" field and change any of the fields you desire.

3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy zone data to a new zone; however, information text and external reference entries are not copied with this procedure.

Updating a Zone

To update a zone, perform the following steps:

1. Display the zone data you wish to change. See “Displaying a Zone” above.
2. Change the desired information on the screen.
3. When done, click the Save button located on the toolbar.

Deleting a Zone

To delete a zone, perform the following steps:

1. Display the zone data you wish to delete. See “Displaying a Zone” above.
2. Click the Delete button located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the zone click “No” on the “Confirm Action” pop up message.

Note: Once a zone is deleted, it can no longer be displayed or updated.

Displaying the Previous Zone

To display the zone that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.
2. The previous zone data is displayed on the main screen.

Displaying the Next Zone

To display the zone that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next zone data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Zone” field, then click the Next button .

Information Screen

This screen allows you to enter text you wish to maintain concerning a zone. For example, you could enter text information describing the boundaries of the zone. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Zone

Field	Explanation
Warehouse	A unique identifier assigned to each warehouse. It is the warehouse that contains this zone.
Zone	A unique identifier assigned to each zone. Together with the warehouse it is the main key for all other zone data.
Description	A brief description of the zone.
Type	The classification of the zone. Some examples of types are: "Finished", "Scrap" or "WIP".
Status	Current status of the zone (Active or Inactive).

Information Table

Column	Explanation
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	Explanation
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click  “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Zone”. The Zone screen is displayed.

3. If there is a zone in the “Zone” field, the information for that zone is displayed on the main screen.

4. Click the “Information” tab at the top of the main screen.

5. If there is a zone in the “Zone” field, the information text types and reference information for that zone are displayed on the main screen.

Using the Information Screen

Use these procedures to display, add, update, delete, display the previous, and display the next zone information or references.

Displaying Information and References

To display information or references, perform the following steps:

1. Enter a zone in the “Zone” field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the “Zone” field, “Description”, “Type”, or “Status” field to select a zone and double-click on the “Zone” you would like to display in the “Search” screen table.

2. The information text types and references for the zone are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the “Text Information” column of the Text table for the row you want to display and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

6. To view electronic references, right click on the reference you would like to display. Choose “Goto External Application” from the menu.

Adding Information

To enter information, perform the following steps:

1. Display the zone you want. See “Displaying Information and References” above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the “Info Type” column of the Information table.

4. Click the Goto/Selection button in the “Text Information” column of the Text table for the row you want and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click “Ok” when done.

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

Note: You can add zone information and references at the same time.

Adding References

To enter references, perform the following steps:

1. Display the zone you want. See “Displaying Information and References” above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the “Reference Type” column of the Reference table.

4. Enter the reference in the “Reference” column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can add zone information and references at the same time.

Updating Information

To update information, perform the following steps:

1. Display the zone data you want to change. See “Displaying Information and References” above.

2. Click the Goto/Selection button in the “Text Information” column of the Text table for the row you want to update and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click “Ok” when done.

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

Note: You can update zone information and references at the same time.

Updating References

To update references, perform the following steps:

1. Display the zone data you want to change. See “Displaying Information and References” above.

2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

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

Note: You can update zone information and references at the same time.

Deleting Information and References

To delete information and references, perform the following steps:

1. Display the zone data that has the information text and/or reference you want to delete. See “Displaying Information and References” above.

2. To delete text information, click the checkbox in the “Delete” column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the “Delete” column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

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

Note: Once zone information and references are deleted, they can no longer be displayed or updated. Deleting a reference to an external file does not delete the actual file; it deletes only the reference to the file.

Displaying the Previous Information and References

To display the information and references for the zone that precedes the zone currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The information and references for the previous zone are displayed on the main screen.

Displaying the Next Information and References

To display the information and references for the zone that follows the zone currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The information and references for the next zone are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Zone” field, then click the Next button .

Zone Summary Screen

The zone summary screen allows you to display a list of zone definitions based on selection criteria entered.

Selection Criteria Group

Field	**Explanation**
Warehouse	Field for entering all or part of a warehouse name to select the zones to be displayed in the Summary table. Leave this field blank to select all zones.
Zone	Field for entering all or part of a zone name to select the zones to be displayed in the Summary table. Leave this field blank to select all zones.
Type	This field is for selecting what types of zones are to be displayed in the Summary table. Leave this field blank to select all types of zones.
Description	Field for entering all or part of a zone description to select the zones to be displayed in the Summary table. Leave this field blank to select all zones regardless of description.
Status	Field for selecting zones based on status. Leave this field blank to select zones with any status.
City	Field for selecting zones based on the city where they are located. Leave this field blank to select zones in any city.
State	Field for selecting zones based on the state where they are located. Leave this field blank to select zones in any state.
Zip	Field for selecting zones based on the zip code where they are located. Leave this field blank to select zones in any zip code.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.

Summary Table (Zone, Address, and Defaults tabs)

Column	**Explanation**
Row	The line number of the row in the table.
Warehouse	Identification of the warehouse where the zone is located.
Zone	Identification of the zone.
Description	Brief description of the zone.

Type	Information indicating the type of “Zone”. Some examples of Zone Types include: Finished, Inventory, and Tool Crib.
Status	Information indicating the status of the Zone: “Active” or “Inactive”.
City	City where the zone is located.
State	State where the zone is located.
Zip	Zip code where the zone is located.
Usage	Defines how the location is to be used.
Environment	Indicates any special environmental considerations for the location.
Constraint	Indicates any special constraints for the location.
Max Pallets	The maximum number of standard size pallets that can be stored in the location.

Message Line

Message	Displays information about the current status of the screen.

Accessing the Zone Summary Screen

1. Click the plus (“+”) next to “Shared Applications” or double-click “Shared Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Shared Applications”.

2. Click “Zone”. The Zone screen is displayed.

3. If there is a zone in the “Zone” field, the data for that zone is displayed on the main screen.

4. Click “Summary”. The Zone Summary screen is displayed.

5. If there is a zone in the “Zone” field, the data for that zone is displayed on the main screen.

Using the Zone Summary Screen

Use the following procedures to display a zone summary list.

Displaying a Zone Summary List

Perform the following steps to display a zone summary list:

1. Enter all or part of a zone name in the “Zone” selection criteria field, and/or select a type in the “Type” selection criteria field from the dropdown, and/or a city in the “City” selection criteria field, and/or select a status in the “Status” selection criteria field from the dropdown.

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

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, 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 free of charge.

Registration

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

Suggestions

We are eager to improve TFG4000 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. We want to hear from you!

Services

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

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

Phone Call **770-844-8516** between 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 for more details.

Other Support Options

Other support options are available.

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

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

For more information go to www.tfg4000.com.