Enter Orders On A Manifest

PROGRAM NAME: SASHPMAN
MENU OPTION TITLE: Enter Orders On A Manifest
MAIN MODULE: MANIFEST PROCESSING
HELP KEY ACTIVE: YES

PROGRAM OVERVIEW

This program is used to create, track, and print any and all shipping activity through UPS. This process is divided into two steps, with the first being to retrieve and recreate an invoice the way it will be shipped. This means getting the correct shipping quantities showing and serial numbers and tag numbers entered as needed. The second process is to load this information into a valid manifest number just as if you were entering the information into the UPS manifest book manually. The big difference is you won't have to enter all information for the order manually or write or hand type COD tags. This system also stores and calculates total shipping charges based on destination, weight, COD charges, AODs, and insurance.

If only shipping part of an order or need to modify any dollar amounts on an order, this program will recalculate sales tax based on the tax rate stored in the order header {CUSTINFO} when the order was first processed. A UPS approved manifest printout of inventory shipped from stock to any destination nationally and internationally, where UPS delivers, is generated. This printout shows all costs from UPS charges and receivables from customers with valid orders on your system. By simply typing in a valid order number, the order header and detail is recreated into the manifest processing program automatically. Shipping charges are automatically calculated and you can edit them. If an order is shippable and due, the C.O.D. charge is calculated and C.O.D. tag can be printed automatically.

This module offers the ability to assign a C.O.D. tag to each box on the same order, sent to the same customer. You can assign the C.O.D. amount to each box either by value of the contents or as an equal value of the total due on the order. Remember, UPS will charge you a fee for every COD tag you send out.

Further, you can have multiple manifest numbers open simultaneously, if running multi-company, and need to track shipping per company. Or you may choose to run one consolidated manifest number for all companies. NOTE: Remember, you **MUST** move **ALL** open manifests to history **BEFORE** updating **ANY** orders that are on **ANY** open manifests.

PROGRAM OPERATION

Please enter which shipping computer # (1 or 2)? : This prompt asks which computer you are going to use. Each computer is referred to as either number <1> or <2>. Enter <1> if you are the first person to use the system for shipping. If your system uses two computers and someone is using the first computer, you must always answers <2> and press <ENTER>. The reason for this is that the system is designed to automatically load the next valid C.O.D. tag number based on the spool of tags

attached to either PC1 or PC2's printer. This keeps the numbering system separate for each printer and PC.

NOTE: Certain function keys are active at this point. <F1> brings up the on line help screen that shows you which hot keys are active. <F7> pops up an options menu that allows the user to enter into other programs without having to exit this program first, by pressing <F8> you will be prompted at the bottom of the screen, **ENTER PASSWORD TO CHANGE SHIP DATE _____**. (You need to see your system manager in order to get the password). This option gives you the ability to change the date displayed at the upper right portion of this screen. This may be necessary in the event your computer is displaying the wrong date. (You also need to have a computer technician reset the date in your computer before going any further). The <F9> key clears the screen without saving any information.

INVOICE#: < > To enter orders for shipment, you should have the packing slips in front of you that need to be shipped for that day's business. Enter a valid packing slip number in this field. If the computer beeps or displays this message

Do you want to make changes to this order <Y/N>? N:

THIS ORDER HAS ALREADY BEEN MARKED FOR SHIPMENT << STATUS 300 >> #117. This message indicates that the order has been processed for shipment. You have the ability to escape or to continue. Press <ENTER> to escape or tap the <Y> key and press <ENTER> to bring the invoice on screen.

If the packing slips are in numeric sequence, you can use the <PAGEUP>/<PAGEDOWN> keys to scroll for the next valid number to ship against without having to type it in manually. After you have typed in a valid packing slip number, the customer's name will appear in the **SHIP TO:** field and the order detail will be displayed. At the bottom of the screen you will see displayed:

(S)hip as shown, (A)lter ship, See (M)ore, or (Q)uit?

LAST INVOICE: This field displays the last packing slip number processed.

SHIP TO: When you have a valid packing slip number entered, this field will display the customer name.

ORIG. INV. #: Through the program "Release Back Orders"/<OEBCKRLS>, back orders released from back order status create a new invoice number. By typing in the new invoice number this field shows the original invoice number.

PART NUMBER: The part number of items ordered will be displayed in this field.

ORDERED: The quantity on order is displayed here.

SHIPPED: The quantity to ship is displayed here. If you have chosen the (A)lter ship option from the bottom of the screen, you can change the quantity to be shipped. This would be necessary in the event you could not ship the entire order.

DESCRIPTION: The part description is shown in this field.

P SERIAL# S: The serial number, (including the prefix and suffix), of the item to be shipped is displayed or entered here.

TAG#: Use this field, for tracking, if you need to associate an item to a specific part. Examples are a certificate of authenticity, a serial number/warranty tag.

(S)hip as shown, (A)lter ship, See (M)ore, or (Q)uit? Enter <S> to accept all information as shown. You will be required to enter any serial numbers for items that are flagged as serialed. The program will not allow you to enter serial numbers that are not valid, meaning they either do not exist or they have already been logged out to someone else. Type in a valid serial number to use and temporary information will be stored in the serial number database preventing another user from allocating this particular serial number.

NOTE: When the manifest is updated, the temporary information will be changed to the actual information.

Enter <A> to alter ship. If you select this option you will be able to change the quantity to ship, the serial numbers, and tag numbers per line item. NOTE: IF YOU USE THE ALTER SHIP OPTION YOU MUST TYPE <Q> TO QUIT AFTER YOU ADJUST ANY FIELD. Then you will see SHIP EVERYTHING AS SHOWN (Y/N) Y. Press <ENTER>, if all information is correct, and this action saves the altered information and takes you to the manifest entry screen. NOTE: IF YOU ADJUST ANY FIELD AND TYPE <S> TO "SHIP AS SHOWN" THIS DOES NOT MEAN IT WILL SHIP THE WAY YOU SEE THE INFORMATION NOW, BUT AS IT IS ON THE ORIGINAL ORDER. THIS IS VERY IMPORTANT TO REMEMBER.

Enter <M> to scroll to the next set of line items on the order, if the length of the order is longer than the number of lines you can see on the screen.

If you enter <Q> to quit, you will be asked to ship as shown and will be prompted with a <Y>. Press <ENTER> and the screen will change to the second step of the program where you enter in the necessary information for the manifest. If you answered <N>, the order will be cleared from the screen and you can enter in another valid packing slip number to process.

After you have selected the appropriate option you will be taken to the SHIP ORDERS screen. The program name at the bottom of the screen will display {SAENTRY}.

Three different function keys are activated now. The first is <F4>, which lets you skip the order header entry area. The second key <F7> is used to input a new COD tag number in the event you need to reprint a tag for whatever reason. The third key, <F8> is used to run the call tag/manual entry program.

ORDER #: The order number will automatically be loaded into this field from the previous screen.

CUSTID:, NAME, ADDRESS, CITY, STATE AND ZIP: All of these fields will be automatically filled in from the order number.

MANIFEST #: The first time you use the manifest system, the number is automatically loaded from the menu option {SACOMPAN}, entered in from the UPS manifest book in affect. When you have accumulated enough orders to ship and close that days manifest, the next time you fire up the manifest system it loads the last manifest number used, in this field. If you try to use that same number, you will see a message at the bottom of the screen **Manifest found in history, use new number**. You MUST change the manifest number, at this point, to the next consecutive number. Press <ENTER> and the cursor will move to the manifest # field. Type in the next manifest number to be used and press <ENTER>. You will be prompted at the bottom of the screen **Do you really want to change manifest #? (Y/N) N**. You can escape from the manifest program and when you restart the program, that current number automatically comes into the field until it has been sent to history.

AOD: This field is left blank unless you need Acknowledgement Of Delivery.

COMPANY#: This field is automatically loaded with the company number under which the order was processed.

ZONE: < >: The zone field will automatically pull up the proper zone for regular ground shipping, based on the zip code of the order. If you need to reassign the zone you can use the IFF system to quickly locate the desired zone indicator. If the package is going to be shipped NEXT DAY or SECOND DAY, then you must enter the proper zone number for that package. You must also enter zones for Canada and any foreign shipments.

BOXES: Enter in the number of boxes to be shipped on this order. The system will require a line entry for the number of boxes entered in to this field. NOTE: This number does not necessarily mean the number of items shipped, but how many boxes you used to pack all the shippable items in.

Press RETURN to continue: Press <ENTER> and a line number will be created (Starting at 10) and the cursor will jump up to the field under the WEIGHT column. The reason we use 10 as the first line number is to give you the ability to insert a line before or after any existing line number.

WEIGHT: In this field you will enter the weight of the boxes you are shipping. Enter the weight of one box per line. Each box will need it's own line and you must enter as many lines as you have boxes indicated in the **BOXES:** field. As you enter in the weight of each box, the postage will keep a running total of the weight charges.

CHARGE: The charge will be calculated automatically based on the weight and the zone that it will be shipped to. If upon setup of the software, we assigned a mark-up percentage to the freight charges that will also be included.

DCLARED $: This field is where you enter the declared value of this particular box. It is optional, you are not required to enter any values into this field. In some cases you should declare the value if the item is more than $100.00.

OSZE: Indicate whether or not the package is oversized or not. If the package is not oversized leave this field blank. If it is oversized, type the letter <X> in this field. After pressing <ENTER>, the cursor moves to the **TRACKING ID #** field. Enter in a tracking number, if needed, or enter past (if left blank) for the next line number. Once you have completed the number of lines as indicated by the box count, enter past the next line number. If you try to enter more line numbers than boxes indicated, you will see **Box count does not match - Press RETURN**. By pressing <ENTER>, you will see **Do you want to edit the number of boxes N**. Tap the <Y> key and <ENTER>, the cursor will move to the **BOXES:** field so you can change the box count to match the number of lines indicated. If you do not want to edit the box count, press <ENTER> (with "N" showing) and you can delete the line number that does not apply to this shipped order. Either way, if the box count doesn't match the number of lines, you can not proceed until both match.

COD TAG # / **COD AMOUNT:** These fields will be filled in automatically.

GT: If a ground track zone was indicated by the zone field in the top half of the screen, an "X" will appear in this field.

TRACKING ID #: We can type in the tracking number in this field, which helps us as well as UPS in tracking a package.

NOTE: At this point other function keys can be used. <F3> will print a new or replacement label. <F6> can be used to delete an order from the manifest you are working on. When you press <F6>, while at the {SAENTRY} screen you will see **Delete this order from the manifest N**. Tap <Y> to change the <N> to a <Y> and press <ENTER>. You will see **ARE YOU SURE N**. Tap the <Y> and press <ENTER> and the order will be deleted from the manifest and the cursor will move up to the **<ORDER # :>** field to begin again. <F7> is used to align labels and tags, or input a new tag number.

(A)dd, (E)dit, (S)ee more, (D)elete, (F)reight, or (Q)uit: Enter <A> to add a line of information. This is a continuation of normal line information entry.

Enter <E> to edit a line of information. Incase of error in data entry you can go back and edit line information. After selecting, you will see **Enter a line # that you wish to edit**. Type the line number on screen that you need to edit. Make necessary changes in each field, and when satisfied press <ENTER> at the **Q** prompt.

Enter <S> to see more lines of information. If there are more lines on the order than are visible on screen, this function will scroll down through to list and stop on the last line of the previous screen.

Enter <D> to delete a line of information. You will be prompted **Enter the line # you wish to delete**. Type the line number on screen that you want to delete. You will see **Do you really want or delete this line (Y/N) N** and the line number you selected showing.

Tap <Y> and press <ENTER>, **One moment please** will display and that line will be deleted from the screen.

Enter <F> to edit the freight charges. Since freight is automatically calculated, this gives you a chance to change the freight charges for whatever reason. You will be prompted with a question at the bottom of the screen **<A>ssign a postage value or use the <C>alculated amount C**. The cursor will be flashing under the<C> assuming you are using the calculated amount. Type an <A> and press <ENTER> to change the postage field amount. Now the cursor will be flashing in the postage field and you have the opportunity to change the amount. Once you have changed the amount press <ENTER> and you will see at the bottom of the screen **Is this correct Y**.

Simply press <ENTER> and the new amount will be accepted. If you are finished enter <Q> to quit editing. Remember; if you assign a new amount to the postage, this will cause the system to ignore the C.O.D. charge, so you will need to add that charge on top of the new amount you have assigned to the postage charge.

Enter (Q)uit to end manifest processing. By pressing <ENTER>, you will see **Not a COD order - no tags required - press RETURN**. If you press return, you will see **Do you want to print labels Y**. Press <ENTER> to print the labels and you will be returned to the first screen to continue or escape the program. NOTE: Be sure you have the proper label paper in the wide carriage printer before answering yes to the print job.

Do you want to print COD tags: Before you proceed any further, lets address one very critical issue, at this point. The UPS manifest system is going to showoff its intelligence right here. In order to pay any orders that are assumed prepaid by a credit card, we need to know the amount of the shipping charges. Even though an order is to be prepaid and has not as of yet, the system will want to print a C.O.D. tag because we have not applied any money against the order. If the order is being paid by a credit card, we need to get an approval for the order total including shipping charges and process the payment. If the order is being paid by a check we need to process the payment before shipping the order. To make a payment in either instance to make a payments, please refer to the Accounts Receivable menu and program "Make Payments"/<ARECEIVE> and apply the payment to the order. Now, when asked if you want to print a C.O.D. tag for this order, press <N> for no. If the order is C.O.D., you will be asked if you want to print the C.O.D. tags now. Obviously you should print them but if you press <N> for no, you will see **Quit without printing COD tags N**.

If you press **<ENTER>** you will be taken back to the options at the bottom of the screen. If you type <Y>, the order will go out without any C.O.D. tags printed for it. You should always print the C.O.D. tags if it is a C.O.D. order.

HOW MANY COD TAGS DO YOU WANT TO PRINT? The number of boxes you have indicated will automatically be loaded into this field or you can type in any quantity you need. Be aware that UPS will charge you a C.O.D. fee for every C.O.D. tag you send out. By creating a C.O.D. tag for each box being shipped, this insures the sender that all boxes shipped and received will be paid for by the receiving party. Select the desired number of tags to be printed and press <ENTER>. Two new windows pop up. The window on the left shows the box count, the amount of C.O.D.

per box, calculated automatically, and the tag number being assign by the system, per box. The window on the right is displaying the total dollars involved to visually and mathematically assist you in the use of assigning correct and complete values to the C.O.D. tags.

Notice that the system has already calculated the amount for each tag, but you can change the amount as needed. The box on the left-hand side of the screen shows the **BOX#, COD AMOUNT,** and **COD TAG#**. The box on the right hand side of the screen shows **COD $ TO CHARGE:, COD $ CHARGED SO FAR:** and **COD $ REMAINING TO CHARGE:**.

COD $ TO CHARGE: This is the total amount you need to charge for shipping on this order. You can divide the C.O.D. amount between the boxes any way you wish. If the value of one box is higher than the value of another you may want the higher C.O.D. amount on it.

COD $ CHARGED SO FAR: The total amount of C.O.D. charges that have been applied so far will be displayed in this field.

COD $ REMAINING TO CHARGE: This is the amount of C.O.D. charges yet to be applied to this order. When this balance is "0" (zero), all the money has been applied to every C.O.D. tag on the order. Good Job!

(E)dit or (Q)uit? Enter <E> to edit any line item as displayed on the far left hand side of the screen, below the word **BOX #** (1.-15.). You will see in the right hand window **Enter the LINE # you want to change**. Type in the line number to edit and press <ENTER>. The cursor moves to the column labeled **COD AMOUNT**. You can edit the C.O.D. amount to reflect the value of the contents or an equal amount per C.O.D. tag. Type in the dollar amount you need and press <ENTER>. The cursor moves to the **COD TAG#** to allow you to type in a number that matches the number on the C.O.D. tag being printed with this information. Keep in mind the system bases the tag number on information setup in the program menu option {SYSGUT}. If you have multiple tags you will need to check that all tag numbers are correct before printing. After all editing has been successfully completed, tap the <Q> key and <ENTER> to print the C.O.D. tags.

Did the tags print correctly (Y/N)? If the tags printed correctly enter <Y>.

If the tags did not print correctly, enter <N>. You will then see **Do you need to align the COD tags N**. By pressing <Y> the printer will print an alignment test for you and display **Print another for alignment N**. Keep answering yes until you have the tags line up properly and then <ENTER> because an <N> will be at the prompt automatically. Now you will see **Please input new COD tag number** and the next tag number that should be used. You then see **Is this correct Y**. If so press <ENTER>. Then you will see **Do you need to align the COD tag N**. Press <ENTER> and the C.O.D. tag will be reprinted.

After each invoice has been processed for shipment, a window will pop up. Inside the window you will see...

INVOICE # TO BE PRINTED with an invoice number displayed to the right of the statement. This should be the invoice you just processed to the manifest. Below that you will see...

PRINT THIS INVOICE NOW (Y/N)? N

NOTE: Here is something to think about with this last step. We have added this option so that you can quickly enter an invoice to be shipped and immediately pull an updated (for amounts only) invoice to use possibly as the packing slip or to get the bill on the way to customer ASAP. If this is the daily routine and you do not want that invoice to print by answering "NO", after all manifests have been closed and invoices updated, all the invoices will be printed then anyway. After the last order for the day has been processed onto the manifest, you need to escape out of the manifest processing and go to the program {Print A Manifest}.