

Discussion

This option will allow for scheduled/future orders to be created. You have the ability to enter customer/item combinations that will generate orders based on criteria supplied. For example, you will have the flexibility to enter an order that should be created every Wednesday, or every third Wednesday of the month. You could also set it up to only create the order on the 10th of every month, or any combination of the above. You simply select a customer and specify if the order is to be created based on a day of the week, or on a date (or range of dates). Then you enter the items to be included with optional quantities. Then the "selection" program (Option 3) prompts you for the criteria and creates a "work" file of orders that meet the criteria.

COMMAND	MENU: SCHED
The Equinox Welding Supply Management System	
Scheduled Orders Menu	
1. Scheduled Orders Maintenance	
2	
3. Scheduled Orders Selection	
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5. Selected Scheduled Orders Maint	

DIRECTORY

Seq:

To work with an order, you may key the sequence number of the order as displayed on the directory. Use <ENTER> to update or <F4> to delete.

Position to/Customer to ADD:

If a new scheduled order is to be added, place the cursor in this field, key in the order and press <F6>. You may also work with an existing order by entering the customer number in this field. Use <ENTER> to update or <F4> to delete.

OPTIONS

Enter=Continue: update/change an existing record.

F3=Exit: end maintenance program.

F4=Delete: flag a record for deletion.

F6=Add: enter a new scheduled order.

F8=PO#: Add purchase order number to order.

F10=Detail: enter/update items and quantities to order.

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SCREEN 2

*Customer: (5)

Enter customer number. If customer number is not known, Use a "?" followed by search criteria and press <Enter>.

*Customer: <u>00157</u> Stephen D. Bowyer
*Code of sched: <u>AN</u> and/or between dates of month: <u>12</u> - <u>15</u>
Is this a "one shot" order? <u>N</u> Del Chg enabled? <u>N</u> Surcharge enabled? <u>N</u>
*Location: <u>01</u> Customer PO# to use: <u>12345</u>
Ordered By: <u>John Paul</u> Fire ext acct?: <u>Y</u>
Date of last Transaction: 071895 (zeros=appear on every run until 1st invoice)
Update Last Trans date with S)hip or I)nvoyce date?: <u>I</u>

*Code of sched:

Enter the proper code in which the order should be generated.

This is a searchable by placing a "?" and <F1=Verify>.

Codes are: AN...Annually, BA...Biannually, BM...Bimonthly, BW...Biweekly, FR...Friday, MO...Monday, MN...Monthly, QR...Quarterly, SA...Saturday, SE...Semiannually, SU...Sunday, TH...Thursday, TU...Tuesday, WE...Wednesday, WK...Weekly.

and/or between dates of month:

Enter the range of dates on which the order should be generated.

Is this a "one shot" order? (Y/N)

Enter a "Y" if this is a one shot order and it will be removed from the scheduled system after it is posted.

Enter a "Y" if this is a fire extenguisher account

Del Chg enabled? N

If you wish to charge a delivery charge put a "Y" in this field.

Surcharge enabled? N

If you wish to charge the surcharge put a "Y" in this field.

*Location: 01

Customer PO# to use: 12345

Customer blanket PO number here.

Ordered By: John Paul

Persons name placing the order

Fire ext acct?: Y

If this is a Fire Extenguisher customer put a "Y" here.

Date of last Transaction: 071895 (zeros=appear on every run until 1st invoice)

This date will automatically fill in once you invoice the customer. You may however, change the date manually at this screen.

Update Last Trans date with S)hip or I)nvoice date?: I

OPTIONS

Enter=Continue: update/change an existing record.

F1=Verify: verify data before accepting screen.

F3=Exit: end maintenance program.

F10=Detail: enter/update items and quantities.

F12=PrevScrn: return to prior screen without accepting data.

Seq	Item Number		Qty/Cyl	Ship
01	KIT	KIT	1	
02	OX251	251 CF OXYGEN	5	
03	316L062S30	316L 1/16 X 30# SPL WIRE	5.00	
04				
05				

No more records to display
Seq: ____
Position to/Item Number to ADD: _____
ENTER=Continue F3=Exit F4=Delete F6=Add F12=PrevScrn
F18=Include All Hdgd F19=Include All Gas

SCREEN 3

Seq: select the sequence number from the directory and press <Enter>

Position to/Item Number to Add:

Enter the item number to add to the order or to be positioned at item numbers starting with the selected criteria.

OPTIONS

Enter=Continue: update/change an existing record.

F3=Exit: end maintenance program.

F4=Delete: delete item.

F6=Add: add item to the scheduled order.

F12=PrevScrn: return to prior screen without accepting data.

F18=Include All Hrdg: includes all inventory items this customer currently has hardgood special pricing deals on. Items that are included in group deals will not be included.

F19=Include All Gas: includes all the gases that this customer has gas price records on.

SCREEN 4

*Item Number (10):

Enter the item number to add to the scheduled order. Use a "?" followed by search criteria to scan for and unknown item number and press <F1=Verify>.

[See Fig 1-5]

Quantity/Cyl Ship (optional):

You have the option to enter quantities (for hardgoods), or cylinders shipped (for gases) in this field. [See Fig 1-5]

OPTIONS

Enter=Continue: update/change an existing record.

F1=Verify: verify data before accepting screen.

F3=Exit: end maintenance program.

F12=PrevScrn: return to prior screen without accepting data.

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Discussion

This option is used to create a subset of the scheduled orders that meet the criteria specified below. A message will be sent to this workstation when the selection is complete. Then you may "fine tune" the selections by using the maintenance program in Option 5, Selected Scheduled Orders Maintenance.

*Enter Location: (2)

Enter the location to print. *Use a "?" in this field followed by search criteria to scan for a location number, if unknown.

Enter Route (blank=no limit):

You may want to consider using a route code for your fire extinguisher customers. I suggest FE in the customer master file under route. This way when you wish to pull out the fire extinguisher deliveries you can do so using the FE code.

*Enter Days to include:

Enter the days to include for the selection. *Use a "?" in this field followed by search criteria to scan for the days.

Scheduled Orders Selection	
*Enter Location: ____	
Enter Route (blank=no limit): ____	
*Enter Days to include: ____ _	
And/Or	
Enter Date(s) From: ____ To: ____	
This program will create a subset of the Scheduled Orders that meet the criteria specified above. A message will be sent to this workstation when the selection is complete.	

And/Or

Enter Date(s) From: To:

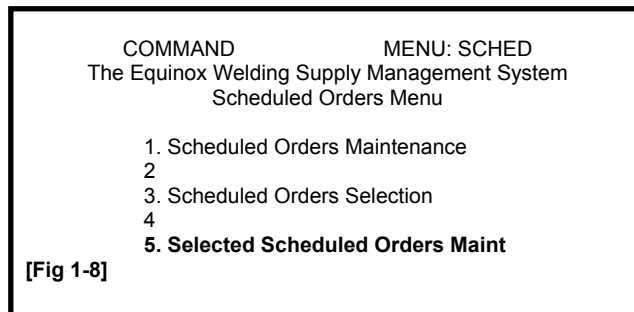
Enter the "From" and "To" dates for a range of dates. This field can be used alone or in conjunction with the above "Days" field.

Options:

Enter=Jobq: place the report on the jobq.

F1=Verify: verify the selected criteria before placing on the jobq.

F3=Exit: end program.



Options

Enter = Continue

F3 = Exit

F4 = DeSelect: Do not process order today.

F8 = PO#: Verify the PO Number

F10 = Detail: Unselect or change qty of item ordered.

F11 = Post: Print packing slips.