Distribution Xtensions

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ddms distribution software

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Contents

About Ensite Xtensions

Ensite Xtensions are features to enhance your Ensite Pro system. These features are not included in all software packages. They may require authorization, either individually or as a group.

There are Xtensions available for Customers, General Ledger, Distribution, Workflow, E-commerce, Line of Business, Contract Office Furniture, and Office Machines and Equipment.

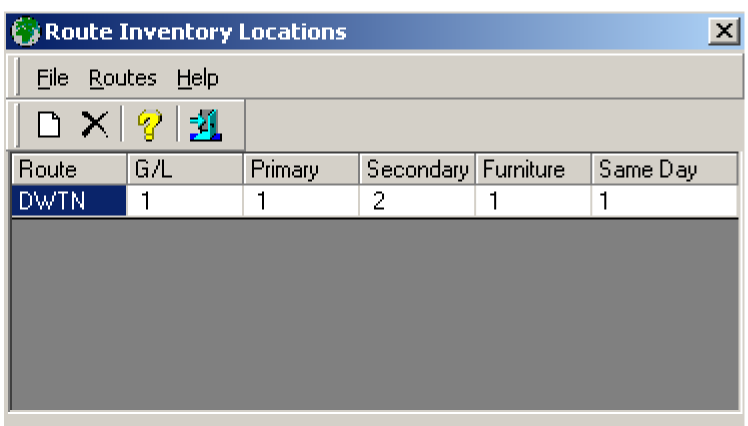
This document details Distribution Xtensions. These include:

- Advanced Manifests
- Auto Receive
- Auto Flush
- Multiple Credits
- Xtended Warehouse Management.

Advanced Manifests

- **Graphical Route Table:** You can assign multiple inventory locations to a single route. You do this in the Route Inventory Locations window in Warehouse Parameters, shown in Figure 1. This window is useful if you have several general ledger locations (profit center locations) that also pull stock from multiple inventory locations. For example, you may maintain separate G/L locations for supplies, furniture, and machines for accounting purposes, and also sell this merchandise from different inventory locations.

Figure 1: The Route Inventory Locations Window



- **Enhanced Supply/Furniture Item Logic:** You can classify inventory items by business category (supplies or furniture, for example). You can use the classification in both order entry and picking manifest applications.
- **Same Day Order Options (Text-Based):** You can include or exclude manifests according to the SameDay Route field in the (TM) [A] screen. To include Same Day Routes in the build, set this field to **Y**. To Exclude them, set it to **N**. To build the manifest based on Same Day Routes exclusively, set it to **O**.
- **Time Stamps (Text-Based):** This field lets you specify a cutoff time for the picking manifest you are building. Previously, you could only view the time the ticket was printed. Now, when creating an order in Order Entry, the Initial Print Time prompt appears and the order's creation time is saved in the P-GLOBAL file. The order creation time also displays when inquiring on an order.
- **Create Shipping Manifests from Picking Manifests (Text-Based):** In the (TM) Picking Manifest screen you can build a shipping manifest. Select the [S] Build Shipping Manifest action code. If there's a non-departed manifest in the system, the shipping manifest automatically appends that manifest. If there are none, a new shipping manifest is created.
- **Bulk Item Identification:** Items that are set up in the text-based (EK) Bulk Item Update Screen are flagged as bulk items when a picking manifest is created. Setting up an item in the (EK) screen lets you indicate bulk items on a picking manifest. Bulk items are updated in the P-LINE2 file.
- **Lower-case Printer Ids:** You can enter lower case letters for the Printer ID in the Picking Manifest and Shipping Manifest screens.
- **Multiple Manifest Types:** There are three types of picking manifests: furniture, same day, and standard picking manifests. When creating picking manifests, all three types are created unless the following is true: if the manifest is based on route, a same day picking manifest is created; or if the Single Pulling Location Dept field in the (LE2) Inventory Parameters screen is set up, a furniture picking manifest is created.
- **Batch Print Tickets During Picking Manifest Creation:** You can automatically batch print when creating manifests. In the (TM)[A] screen, type **Y** at the Print Tickets Included on Manifest prompt.

- **Split Tickets to Multiple Printers:** You can print ticket items to different printers. For example, you can set up one printer to print supply items listed on the ticket and another to print furniture items. You do this in the Inventory Location Printers window in the Warehouse Parameters.
- **Expanded Ticket Information Options:** When creating a picking manifest, you can print tickets so items are grouped in inventory location order. When a pick ticket prints, each location's items are separated by a line of asterisks. When initially printing the pick ticket, all items whether shipped or backordered will appear on the ticket. When subsequently printing the pick ticket, only shipped items will print. The last section of the pick ticket is reserved for wholesaler items. A P/O number and P/O due date trigger items to print in this group.
- **View All Non-departed Shipping Manifests (Text-Based):** You can limit your view by non-departed manifests when departing manifests.
- **Mark Non-departed Manifests for Printing (Text-Based)**: You can view on screen and print all non-departed manifests.

Auto Receive

Auto receive lets you skip the pre-receiving process and automatically final receive purchase orders using wholesaler acknowledgments. Auto receiving:

- Saves time during the purchasing process.
- Helps eliminate flushing errors.

This feature works with automated short-buy (ASB) as well as manual purchasing. If you have this feature set up, manual and automated short-buy transmissions only final receive items with a shipped quantity. This lets you transfer any outstanding items so that they can be filled by another wholesaler either manually or using ASB.

You can use this feature with S.P. Richards and United Stationers. To do this, enter an F in the Pre-Receive fields in the (L6C) and (L6F) screens, respectively.

Auto Flush

Completed purchase orders flush automatically as part of your automated short-buy (ASB) flow. For example, you can auto flush a P/O after transmitting it to a certain vendor. Previously, you could pre-receive a P/O or final-receive a P/O. In addition to these two options, now you can use Final Receive & Available for Auto Flush to make a P/O eligible for auto flushing.

- You can turn the auto flush on or off by individual call or by vendor. Only calls with final-received P/Os can be auto flushed.
    - You specify the calls to flush in the (LFA4) Auto Flush Call List screen.
    - Auto flush calls begin with an ampersand (&). For example, one auto flush call number might be &1.
    - The (LFA4) screen lets you set ticket limits; specify to include/exclude/only Furniture orders; specify sort order; specify inventory location; set ticket status; specify ticket printer and format; specify label printer and format; and specify terminal ticket print options.
- All eligible P/Os created since the last flush are available for auto flushing.
- You can have multiple flushes in a single time slot.
- The ASB status displays as Flushing while the pick is updated. The ASB status is cleared after all orders are updated with the ship quantitites. It is not held while printing.
- Auto flush is available on Packages B, C, and D.
- You can use auto flush with these trading partners:
    - Sparco
    - United
    - Emco
    - Azerty
    - Horizon

Multiple Credits

With the new (text-based) multiple credits feature, you can create multiple credits for a specific invoice during the same day's business. Each credit has its own unique number, all linked to the original accounts receivable invoice number.

Previously, when performing (GX) credits, there were some restrictions if you had to issue multiple credits to the same original invoice number.

If your previous naming structure utilized the original invoice number with a C in front of the number to indicate a credit, you were unable to perform multiple credits in the same day unless the previous credit transaction was at a billed status. When the credit transaction was billed, it would automatically post a credit memo to the original invoice number in A/R. When you created multiple credits in the same day using this method, all credits would appear on the same ticket every time you printed it. This could be confusing to the drivers because there might be items on the ticket that they had picked up previously under the same credit invoice.

To avoid this confusion, instead of using the original invoice number, you could assign the next sequential ticket number from the (LGØ) screen with the leading C to indicate that it was a credit. However, in accounts receivable, you would have to manually apply the credit to the original invoice. The system did not automatically apply a credit memo to the original invoice.

With Multiple Credits, you can create multiple credits for a specific invoice during the same day's business, even if the previous credit was not at invoice status. Each credit will have its own unique number, all linked to the original invoice number. Since each credit has its own number, each return prints on a separate ticket. When you complete the credit transaction in order entry, the system will automatically write the original invoice number to the new A/R Orig Invoice# field in the order entry files. By using this new field, the system is able to automatically post the credit memo to the original invoice in A/R. The original invoice number will also appear on the credit invoice in Order Entry.

When the original charge invoice is at billed status, the system posts the invoice to the A/R screens as a charge. When you create a credit invoice for this original charge invoice, it will post the new credit invoice as a reference. Since it is a different invoice number than the original charge invoice, it will appear on a separate line in A/R with an adjusting entry to make the balance zero, applying the credit amount to the original charge invoice. An informational A/R special will be written as a cross reference. (The special line for multiple credits will always begin with 900.)

To use this feature, you must set two parameters.

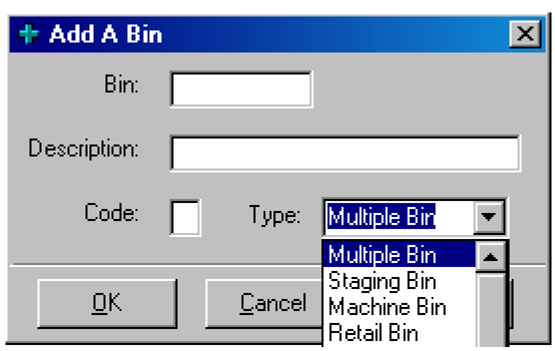
- Set the Apply Charge Credits to Original Invoice field in the (LGB) Credit Order Entry Parameters screen. By setting the Apply Charge Credits to Original Invoice field, you can determine whether to reference the original invoice when creating a credit. To display a line on the credit referencing the original invoice number, set this field to Y.
- You must also set the Use Next Invoice # for Credits field in the (LG5) Additional Order Entry Parameters screen to Y.

Xtended Warehouse Management

We've made many enhancements to Item Bins. These new features let you set up more bins and use larger bin numbers.

- Eight-digit Bin Numbers: In the Item Bins database, you can have eight-digit bin numbers. Previously you could only have four digits.
- Min/Max Bin Quantities: You can now set minimum and maximum quantities in bins.
- Optional Quantity Field: Bins can now contain quantities.
- Last Refill Date: You can keep track of the last date the bin was refilled.
- Receive by Bin Quantity: You have the ability to set the bin prior to release to onhand quantity.
- Item History Enhanced Bins Tab: This new tab is in the Item History window. The boxes in the Item History Enhanced Bins tab show the details of pulling bins and overflow bins. In this tab, you can add overflow bins and edit bin totals. If you are viewing a serialized item, the Item History Enhanced Bins tab can only be used for viewing information on serial bins. You can view bin number, current quantity, reset date, filled date, and pulled date.
- There are several new types of bins available. When creating a new bin, you can select the type, as shown in Figure 2.

Figure 2: Selecting the Bin Type



- Multiple Quick Pull Locations: You can set up multiple quick pull bins. This bin is the first pulling location for sell unit of measure.
- Multiple Bulk Pull Bins: You can set up one to four bulk bins that are based on quantity. This is the second pulling location based on quantity limitations. This bin has a unit of measure with a multiple quantity. Only multiples can be pulled or added to this bin.
- Multiple Overflow Bins: A floating bin is one that is only assigned to an item as long as there is on-hand quantity for that item. Examples of floating bins are multiple bins, staging bins, and serial bins.
- Machine Bins: You can now utilize bins in Serialized. Serial bins can contain multiple items.
- Intermediate Bins: You can pull from this bin if there is an intermediate quantity.
- Staging Bins: Staging bins are used with Furniture items. Staging bins are used to stage sold product. This feature works the same as item transfer for staging bins and lets you assign and change staging bins assigned to line items on a ticket.
- Refill from Back Up Quick Pull, Bulk, or Floating Bins: You now have the ability to refill pulling bins from back up bins.