

Line Item Drop Ship

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Understanding Line Item Drop Ship

For several years now, you've had the ability to create drop ship orders. The drop ship order entry application lets you create an order for a particular vendor or a group of vendors so that they can ship merchandise directly to the customer. The drop ship feature has now been enhanced to allow you to drop ship only specific line items on the order. You do this before ending the order by selecting the new drop ship function. When you do, a new screen appears that lets you specify which items are to be drop shipped and which purchase orders and vendors they will be assigned to.

You can also flag drop ship items as "special bid" items. With this feature, the purchase orders will still be automatically created, but the orders can be received and flushed as regular commercial orders.

In addition, you can also specify that the system track drop ship item quantities separately from regular item quantities. You do this by setting the new Track Drop Ship Sold Quantities field in the (LE1) Inventory Parameters (Con't) screen to Y. If this field is set to Y, the system will update the new I-AUX-SUP and I-HIST-SUP files with drop ship quantities.

Note: The I-AUX-SUP file allows you to track the month-to-date quantities of drop ship items sold when the I-AUX month-to-date quantities are updated. The I-HIST-SUP file updates the monthly quantity of drop ship items sold when the I-HISTORY sold quantity is updated.

When you print cycle Low Stock Reports, you also have the opportunity to subtract drop ship quantities from the low stock calculation. This document shows you how to set up and use the new line item drop ship features.

Field Definitions

Fields that affect the line item drop ship feature are described below. We don't necessarily include every field you may encounter when using this feature, but we do include every field that affects how it will run. Reviewing these fields before you begin setting up line item drop ship may highlight options you'll need to discuss with management.

Fields in the (LGF) Screen

Parameters in the (LGF) General Continued screen let you specify whether you want to use the line item drop ship feature as well as a password to use in conjunction with this feature. You also use the fields in this screen to specify the cost you want to use and whether you want to update costs when using this feature. See Figure 1.

Line Item Drop Ship

Enable

The Enable field in the (LGF) screen must be set to **Y** in order to use the line item drop ship feature. If you set this field is set to **N** or leave it blank, the order-taker will not be prompted in order entry when an order is ended to access the line item drop ship feature.

Password

This field lets you set a password for use with the line item drop ship feature. You can specify up to four alphanumeric characters in this field. If you set a password in this field, the order-taker must enter the correct password when an order is ended to access the line item drop ship feature.

Use Pick Cost

You can use this field to indicate whether you want to update the pick cost of an item in line item drop ship. The response you specify in this field acts as the default response for the Use Pick Cost prompt in order entry. However, you can also manually override the default cost when using the line item drop ship feature. Enter your response according to the following:

- Y** The default response for the Use Pick Cost field in the Line Item Drop Ship screen will be set to **Y**. This indicates that the line item cost will be set to the pricing cost on the pick ticket.

Figure 1:
Parameters in
the (LGF)
Screen that
Affect Line Item
Drop Ship

```
09:50:37                (LGF) GENERAL CONTINUED                01/09/01
=====
ACTION [I] (C=Change, I=Inquiry)                G/L Location [ 1]
=====
Blanket Discount : Default 10%  Maximum 15%  Apply % to L/S ?L (List / Sell)
                  Only Apply Blanket Discount if Results in Lower Price Y/N ?Y

Force "Attention" Special for Customer Status TM1 : [1] to [2] + [3,4,5,6,7]

Prompt Serial Number For Uncataloged Items Y/N/Z=Serial O/E Only ?Y  Class :X

Line Item Drop Ship :  Enable Y/N ?Y  Password [   ]  Use Pick Cost Y/N ?N
                      Update P.Cost Y/N ?          Use Item Up Cost % Y/N ?

Auto Display Customer / Item History in Graphical O/E Y/N ?

=====
```

- N** The default response for the Use Pick Cost field in the Line Item Drop Ship screen will be set to N. This indicates that the line item cost will be set to the purchasing vendor cost determined by the vendor contract's range you specify, or the default vendor contract's range set in Cont fields in the (C) Vendor Master screen. You can also manually specify the line item's cost in the Line Item Drop Ship screen.

Update P Cost

When you change the cost on the purchase order, you can use this field to specify whether you want this change to update the pricing cost on the drop ship ticket.

- Y** Updates the drop ship ticket with the pricing cost from the purchase order.
- N (default)** Does not update the pricing cost on the drop ship ticket.

Use Item Up Cost

This field is used in conjunction with the Update P Cost field and lets you specify whether the pricing cost from the drop ship ticket is set before the percentage in the Up Cost % field in the (E) Inventory Master screen is calculated.

Note: You should only use this option if you enter a percentage in the Up Cost % field in the Pricing Record of the (E) screen.

- Y** The system will set the pricing cost before calculating the percentage in the Up Cost % field.
- N (default)** The system will set the percentage in the Up Cost % field before calculating the actual cost.

Fields in the (LE1) Screen

There is one parameter to set in the (LE1) Inventory Parameters (Con't) screen that affects the line item drop ship feature. See Figure 2.

Track Drop Ship Sold Quantities

This field lets you specify that the system track drop ship item quantities separately from regular item quantities. To do this, set this field to **Y**.

If this field is set to **Y**, the system will update the I-AUX-SUP and I-HIS-SUP files with drop ship quantities.

Note: The I-AUX-SUP file allows you to track the month-to-date quantity of drop ship items sold when the I-AUX month-to-date quantities are updated. The I-HIS-SUP file updates the monthly quantity of drop ship items sold when the I-HISTORY sold quantity is updated.

Fields in the (C) Screen

There is one fields to set in the (C) Vendor Master screen that affects the line item drop ship feature.

Comm

This field lets you specify that the system allow you to fax P/Os that have not been previously faxed, but which are ended in the (F) Purchase Order Entry screen. To use this option, set this field to **F**.

When you specify to fax P/Os in the (F) screen, the system will check the Comm field and limit the fax to only those vendors which have the Comm field set to **F**.

Note: The system will use the fax number set in the Fax # field as the default fax number.

Line Item Drop Ship Files

I-AUX-SUP: This file is used to store line item drop ship quantity information. This file allows you to track the month-to-date quantities of drop ship items sold when the I-AUX month-to-date quantities are updated.

I-HIS-SUP: This file (which is created on your Inventory History unit) stores line item drop ship information. The I-HIST-SUP file updates the monthly quantity of drop ship items sold when the I-HISTORY sold quantity is updated.

Figure 2:
Parameter in the (LE1) Screen that Affects Line Item Drop Ship

```
09:47:06                (LE1) Inventory Parameters (Con't.)                01/09/01
=====
Action [I] (C=Change, I=Inquiry)  G/L Location [ 1 ]
=====
Update Manual "E" Screen Item # Changes to Other Files during "MA" Y/N/X ?N
Which Aliases to Check in Order Entry ? [123] (1=Customer, 2=Common, 3=Print)
Class Range to Build History From [1] To [Z] + Additional Classes [      ]
Class Range to Force Ship (O/E) From [*] To [Z] + Additional Classes [      ]
Amount to Increment Bom Sequence Number by [ 2] (1 - 99, Blank = 10)
Cost for Col. Price Disp. ?M (A=Avg,M=Mfg,L=Mfg Lst,W=Whl,X=Whl Lst,P=Purch Ven)
Display GP% on $ Type Col. Y/N ?                Track Drop Ship Sold Quantities Y/N ?Y
Inventory Pulling Location ?                    Companion Locations From ? To ?
Default to Loc 1 For "I-COLUMNS" Y/N ?        Default to Loc 1 For "I-PRICE" Y/N ?N
Update "I-AUX" Sales For Inventory Location (Not G/L Location) Y/N ?
Multiple Bin Pulling Codes: First [ ] to [ ], Last [ ] to [ ], Never [ ] to [ ]
----- CONTRACTS -----
Apply Weight Rate to Cost When Using WHL, MFG or FUTURE Y/N ?
Apply Up Cost % to Cost Y/N ?                  Apply Con % to List Y/N ?
Prompt to Save Price Changes Y/N/X ?          Cost To Use W/M/F/L/A/P/2-9 ?A
Display Cost Window Y/N ?                    Lower Price when Refiguring Y/N/P ?
Allow Contract Dates by Line Y/N ?           Other Lists to Discount Price Y/N ?
Default List W/M/L/2-9 ?                      "ET" Passwords: Update ?DDMS Set Cost/List ?
=====
```

What You Need to Set Up

To set up line item drop ship, follow these steps:

1. Go to the (LGF) screen and specify line item drop ship parameters. See the heading **Setting Up Line Item Drop Ship Parameters in the (LGF) Screen**.
2. Go to the (LE1) screen and set the one parameter that affects line item drop ship. See the heading **Setting Up Line Item Drop Ship Parameters in the (LGF) Screen**.
3. Go to the (C) screen and set the field that affects line item drop ship. See the heading **Setting Up Line Item Drop Ship Fields in the (C) Screen**.

Setting Up Line Item Drop Ship Parameters in the (LGF) Screen

Use the following instructions to set up parameters in the (LGF) screen:

- 1 Go to the (LGF) screen and select the [C] Change action code.
- 2 In the G/L Location field, press Tab to accept the default location, or enter the location for which you are setting parameters.
- 3 When the cursor moves to the Default % field, press Tab until the cursor moves to the Enable field.
- 4 In the Enable field, type Y. You must set this field to Y in order to use the line item drop ship feature.
- 5 When the cursor moves to the Password field, you can specify a password for the line item drop ship feature. Enter the appropriate information in the Password through Use Item Pick Cost fields. For more information on these fields, refer to the heading **Fields in the (LGF) Screen**.
- 6 After you enter your responses in these fields, press Enter. The cursor returns to the action code field.

Setting Up Line Item Drop Ship Parameters in the (LE1) Screen

Use the following instructions to set up the one line item drop ship parameter in the (LE1) screen.

- 1 Go to the (LE1) screen and select the [C] Change action code.
- 2 In the G/L Location field, press Tab to accept the default location, or enter the location for which you are setting parameters.
- 3 When the cursor moves to the Update Manual "E" Screen Item # Changes to Other Files during "MA" field, press Tab until the cursor moves to the Track Drop Ship Sold Quantities field.

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- 4 To specify that the system track drop ship item quantities separately from regular item quantities, type **Y**.
- 5 Press Enter. The cursor returns to the action code field.

Setting Up Line Item Drop Ship Fields in the (C) Screen

Use the following instructions to set up the Comm field in the (C) screen:

- 1 Go to the (C) screen and select the [C] Chg action code.
- 2 When the cursor moves to the Vendor # field, retrieve the vendor for which you are changing information. You can retrieve vendors by vendor account number or vendor name. For details on retrieving items, see *Book I: Customers, Vendors, and Salespersons*.
- 3 After you retrieve the vendor, press Tab until the cursor moves to the Comm field. If you want to be able to fax ended P/Os through the (F) screen to this vendor, set this field to **F**.

Note: The system will use the fax number set in the Fax # field as the default fax number.

- 4 Press Enter until all the fields are cleared, and the cursor returns to the Vendor # field.

Figure 3: The Line Item Drop Ship Screen

```

14:50:47                Line Item Drop Ship rev.(05/30/00)                01/05/01
-----
Vendor #..... Name :..... Transaction # 17709-0
Purchase Order #.....
Ship To : Name :DALLAS DESK      P/O Due Date :.../.../...
Suite :14560 MIDWAY RD          End the P/O   Y/N ?Y
Addr. :                          DropShip P/O  Y/N ?Y
City :ADDISON                    Use Pick Cost Y/N ?N
State :TX Zip #75244 [ ]         Vend. Contract :.. to :..
-----
#_  Item_____ Mfg _____ Description_____ UM C D Order _____ Price__
100 000          SEL MAILER,JIFFY PADDED,4X8      EA O 1 1 13.330
105 00001        FEL BOX,STOR,8.125X4X23.25      EA Z Z 1 10.431
110 00001        UPR ENVELOPE,PAY,KRFT,3.5X5.5  BX O 1 1 29.326
115 00002        FEL BOX,STOR,9X4X23.25         EA O 1 1 10.107
120 00003        FEL BOX,STOR,6X4.25X23.25      EA O 1 1 10.422
125 00004        PMC PAPER,FAX,8.5X49,ULTRA HI  RL O 1 1 4.635
130 00006        FEL BOX,STOR,8.625X5.75X23.25  EA O 1 1 7.025
135 00005        FEL BOX,STOR,10.5X4.5X23.25    EA O 1 1 10.710
140 00007        FEL BOX,STOR,9.25X4.25X23.25   EA O 1 1 7.132
145 00009        FEL BOX,STOR,9X4X14.25         EA O 1 1 10.170
150 00010        CLI PROTECTOR,SHT,LTR,CR      BX O 1 1 9.450
155 00011        FEL BOX,STOR,12 X 10.25 X 24   CT O 1 1 84.606
Select Purchase Order Vendor or <ESC> to Exit

```

Creating Line Item Drop Ship Orders

The following instructions detail how to create a line item drop ship order in the (G) Order Entry screen. Use the following steps:

- 1 Begin placing an order in the normal manner until the Process Ticket prompt appears. For instructions, see *Book III: Order Entry*.
- 2 When the Process Ticket prompt appears, type L.
- 3 At the Line Item Drop Ship Password prompt, enter the password set in the Password field in the (LGF) screen and press Enter. If no password is set in the (LGF) screen, press Enter.
- 4 The Line Item Drop Ship screen appears, and the cursor moves to the Vendor # field. See Figure 3. You can use this field and the corresponding Name field to retrieve the vendor for this drop ship order.
 - To retrieve the vendor by account number, enter the number in the Vendor # field, and press Enter. At the Correct Record prompt, specify whether this is the vendor you want to use for this order.
 - To retrieve the vendor by vendor name, press Tab to move the cursor to the Name field. Enter the name of the vendor for this order and press Enter. At the Correct Record prompt, specify whether this is the vendor you want to use for this order.
- 5 The cursor moves to the Purchase Order # field. You can enter a purchase order number for this order, or let the system assign the next sequential purchase order number set in the Next P/O # field in the (LF) Parameters screen.
 - To specify a purchase order number, enter the number and press Enter.
 - To let the system assign the next sequential purchase order number, press Enter. The next sequential number from the Next P/O # field in the (LF) screen will be assigned to this line item drop ship order.
- 6 The cursor moves to the P/O Due Date field. Enter the date when this purchase order is due, or press Tab and leave these fields blank.
- 7 In the End the P/O field, specify whether you want to mark this purchase order as ended. Enter your response according to the following:
 - Y Mark the P/O as ended.
 - N Do not mark the P/O as ended.

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- 8** In the Drop Ship P/O field, you can specify whether you want to mark the P/O as a drop ship purchase order and use the default shipping address or you can specify that you want to mark the P/O as a special bid purchase order and not use the shipping address. Enter your response according to the following:
- Y** Mark the P/O as a drop ship purchase order. Use the default shipping address.
 - N** Mark the P/O as a special bid purchase order. Do not use the shipping address.
- 9** The cursor moves to the Use Pick Cost field. The default response for this field comes from the setting you specified in the Use Pick Cost field in the (LGF) screen. This field lets you specify which cost you want to use for this line item drop ship order.
- Y** The cost for the line item on this order will be set to the item's pricing cost on the pick ticket. Go to **Step 11**.
 - N** The cost for this line item will be set to the purchasing vendor cost determined by your response in the Ven Contract To/From fields, described below. You can also manually specify the cost for the line items later in this procedure. Go to **Step 10**.

Figure 4: The A=All, X=Select Prompt

```

15:43:46                Line Item Drop Ship rev.(05/30/00)                01/05/01
-----
Vendor #PBJ             Name :TEST VENDOR                               Transaction # 17710-0
                                                                Purchase Order # 2999
Ship To : Name :ABS SYSTEMS                                         P/O Due Date :02/02/01
        Suite :                                                       End the P/O   Y/N ?Y
        Addr. :                                                       DropShip P/O  Y/N ?Y
        City  :ROANOKE                                               Use Pick Cost Y/N ?N
        State :TX Zip #76262 [   ]                                   Vend. Contract : to :
-----
#_  Item_  Mfg_  Description_  UM C D Order  Price_
100 000    SEL MAILER,JIFY PADDED,4X8    EA O 1 1 13.330
105 00001  FEL BOX,STOR,8.125X4X23.25    EA Z Z 1 10.431
110 00001  UPR ENVELOPE,PAY,KRFT,3.5X5.5 BX O 1 1 29.326
115 00002  FEL BOX,STOR,9X4X23.25        EA O 1 1 10.107
120 00003  FEL BOX,STOR,6X4.25X23.25     EA O 1 1 10.422
125 00004  PMC PAPER,FAX,8.5X49,ULTRA HI RL O 1 1 4.635
130 00006  FEL BOX,STOR,8.625X5.75X23.25 EA O 1 1 7.025
135 00005  FEL BOX,STOR,10.5X4.5X23.25   EA O 1 1 10.710
140 00007  FEL BOX,STOR,9.25X4.25X23.25  EA O 1 1 7.132
145 00009  FEL BOX,STOR,9X4X14.25        EA O 1 1 10.170
150 00010  CLI PROTECTOR,SHT,LTR,CR      BX O 1 1 9.450
155 00011  FEL BOX,STOR,12 X 10.25 X 24  CT O 1 1 84.606
-----
Press A=All, X=Select, E=End, S=Specials, U=Up, D=Down, N=Next Page

```

- 10 If you type N in the Use Pick Cost field, the cursor moves to the Vend Contract To field and the Enter Vendor Contract Range message appears at the bottom of the screen. These fields default to the vendor's contract range set in the Cont fields in the (C) Vendor Master screen, if any. In the Vend Contract To field, press Tab to accept the default contract range, or enter the beginning vendor contract number for this line item drop ship order. In the corresponding From field, press Tab to accept the default, or enter the ending vendor contract number for this order. If you want to manually specify the cost for the line items, you can do so later in this procedure. In this case, you can leave the Vend Contract To fields blank.
- 11 The cursor moves to the Ship To Name field. At this point, you can use the Ship To Name through Zip fields to enter the shipping address for this drop ship order. Press Tab to move the cursor from field to field and enter the address.
- 12 After you specify the shipping address, the cursor moves to the first line item on the order, and the A=All, X=Select, E=End, C=Cost, S=Specials, U=Up, D=Down, N=Next Page prompt appears. See Figure 4. This prompt lets you perform a variety of procedures including select all the items on the order for drop ship; select specific line items for drop ship; end the order; change the cost for the line item; add or view specials for the order; and move the cursor up, down, or view the next page of items.

Marking all the Items for Drop Ship

- Step 1:** When the A=All, X=Select, E=End, C=Cost, S=Specials, U=Up, D=Down, N=Next Page prompt appears, you can select all the items on the order for drop ship. To do so, type A.
- Step 2:** All the items on the order will be marked to be drop shipped, including any additional pages of items. To view additional pages of items, type N.

Selecting Items to be Drop Shipped

- Step 1:** When the A=All, X=Select, E=End, C=Cost, S=Specials, U=Up, D=Down, N=Next Page prompt appears, you can select specific items on the order for drop ship. Use the following instructions for cursor movement in this screen:
- U Moves the cursor up one line item.
 - D Moves the cursor down one line item.
 - N Displays the next page of line items on this order.

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Step 2: When the cursor is beside the appropriate item, type **X**. The item is marked for drop ship. You can continue to mark as many items as necessary.

Changing the Cost for Line Items

Step 1: When the A=All, X=Select, E=End, C=Cost, S=Specials, U=Up, D=Down, N=Next Page prompt appears, you can change the cost of line items on the order. Use the following instructions for cursor movement in this screen:

U Moves the cursor up one line item.

D Moves the cursor down one line item.

N Displays the next page of line items on this order.

Step 2: When the cursor is beside the appropriate item, type **C**.

Step 3: The cursor moves to the Cost field so you can change the item's cost for this order. You can continue to change the cost for as many items as necessary.

Adding or Viewing Specials

Step 1: When the A=All, X=Select, E=End, C=Cost, S=Specials, U=Up, D=Down, N=Next Page prompt appears, you can add or view specials for this order. You can add or view AAAA, ZZZZ, or line item specials.

Figure 5: the Enter AAAA, Item, or ZZZZ Specials Prompt

```

15:43:46                Line Item Drop Ship rev.(05/30/00)                01/05/01
-----
Vendor #PBJ            Name :TEST VENDOR                                Transaction # 17710-0
Purchase Order #      2999
Ship To : Name :ABS SYSTEMS                                           P/O Due Date  :02/02/01
Suite :                                                       End the P/O   Y/N ?Y
Addr. :                                                       DropShip P/O  Y/N ?Y
City :ROANOKE                                                Use Pick Cost Y/N ?N
State :TX Zip #76262 [ ]                                       Vend. Contract : to :
-----
#_  Item_  Mfg_  Description_  UM C D Order  Price_
100 000    SEL MAILER,JIFFY PADDED,4X8    EA O 1 1      13.330
105 00001  FEL BOX,STOR,8.125X4X23.25    EA Z Z 1      10.431
x110 00001  UPR ENVELOPE,PAY,KRFT,3.5X5.5 BX O 1 1      29.326
115 00002  FEL BOX,STOR,9X4X23.25        EA O 1 1      10.107
120 00003  FEL BOX,STOR,6X4.25X23.25     EA O 1 1      10.422
125 00004  PMC PAPER,FAX,8.5X49,ULTRA HI  RL O 1 1       4.635
x130 00006  FEL BOX,STOR,8.625X5.75X23.25 EA O 1 1       7.025
135 00005  FEL BOX,STOR,10.5X4.5X23.25   EA O 1 1      10.710
x140 00007  FEL BOX,STOR,9.25X4.25X23.25  EA O 1 1       7.132
145 00009  FEL BOX,STOR,9X4X14.25        EA O 1 1      10.170
150 00010  CLI PROTECTOR,SHT,LTR,CR      BX O 1 1       9.450
155 00011  FEL BOX,STOR,12 X 10.25 X 24  CT O 1 1      84.606
-----
Enter AAAA, Item, or ZZZZ Specials A/I/Z ?I

```

- To add or view an AAAA or ZZZZ special, type **S**.
- To add or view a line item special, move the cursor to the appropriate item using the **U** for up one item, **D** for down one item cursor movement. When the cursor is beside the item for which you want to enter a line item special, and type **S**.

Step 2: At the Enter AAAA, Item, or ZZZZ Specials prompt, as shown in Figure 5, enter your response according to the following:

- A** Enter an AAAA special. The text you enter will appear above the first item on the drop ship order.
- I** Enter a line item special. The text you enter will print below the line item on the drop ship order.
- Z** Enter a ZZZZ special. The text you enter will print at the end of the drop ship order.

Step 3: The word “Special” appears in the Item # field and 100 displays in the Mfg field. The cursor moves to the Description field so you can add a line of text. You can enter up to 50 characters. When you finish entering text, press Enter to move the cursor to a blank line and press Esc.

Ending the Drop Ship Order

Step 1: When you finish marking items for drop ship, changing the cost of line items, and adding specials, you can end the drop ship order. To do so, type **E**.

Step 2: At the Are You Sure prompt, type **Y**.

Step 3: The cursor returns to the Vendor # field. Press Esc.

Step 4: The Building Purchase Orders, Please Wait message appears. When the P/O is built, the Print and/or Fax P/O's prompt appears so you can print the order, fax the order, or perform both functions. Enter your response according to the following:

- P** Print the drop ship order. At the Print P/O # prompt, type **Y**. The cursor will move to the Printer field so you can specify the logical name of the printer where you want the order to print as well as the number of copies you want to print. If you need to change the selector for this order, press Esc and enter the selector. When you finish entering printer information, type **Y** at the Are You Sure prompt to print the drop ship order.

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- F** Fax the drop ship order. At the Fax P/O # prompt, type Y. The Enter Comments field appears so you can enter any comments for this order. When the Change Defaults prompt appears, you can enter the fax number, the format for this fax, the modem you want to use to fax this order, and so forth in the usual manner. When you finish specifying fax information, type Y at the Are You Sure prompt to fax the order.
- B** Print and fax the drop ship order. The system will display the printer and fax information in turn so you can print and fax the order. For details, see the **P** and **F** responses shown above, respectively.

Step 5: When you finish printing and faxing the order, the cursor returns to the (G) Order Entry screen. The Process Ticket prompt reappears. Type **Y** to complete the order.

Editing Line Item Drop Ship Orders

You can easily change the vendor's acknowledgment number and due dates for an entire line item drop ship order or specific line items on the order. The following instructions show you how to edit line item drop ship orders. Use the following instructions:

- 1 Go to the (G) screen and enter your order-writer number.
- 2 When the cursor moves to the Action field, select the [S] Drop Ship Order action code.

Figure 6: The Correct Ticket Prompt

```
13:59:29                (G) Order Entry (05/05/00)                01/17/01
-----
Order Writer :ROBI      G/L Loc # 1  Inv Loc # 1      Transaction #  10162-0
      Edit                Charge                File :P-MASTER  Vol :W2??
Name :DUNCAN'S SUPPLIES      Account #      10003      Status :1
                                Slsm :          Status :W   P/O #10041
                                Lines #          %
      KELLER                TX 76248      817      Sub-Total $
-----
#  Item      Mfg      Description      UM C Order Ship  Price
-----
Correct Ticket Y/N/G ?Y  (G=Global Ack. Nbr / Due Dates)
```

- 3 The text Drop Ship appears in the Action field, and the cursor returns to the Order Writer field. Enter your order-writer number.
- 4 In the Type of Drop Ship field, type E to edit the order.
- 5 When the cursor moves to the Transaction field, enter the number of the order you want to edit.
- 6 After you enter the order number, the Correct Ticket prompt appears, as shown in Figure 6. At this prompt, type G to change the global acknowledgment number and due dates for this line item drop ship order.
- 7 The ten vendor account numbers, purchase order numbers, acknowledgment numbers, and due dates appear. The cursor moves to the first acknowledgment number field. Enter the acknowledgment number for this order. If you do not completely fill the field with characters, press Tab.
- 8 When the cursor moves to the Due Date field, enter the due date for this drop ship order.
- 9 At the Are You Sure prompt, specify whether the global information you specified for this order is correct. You can continue to enter acknowledgment numbers and due dates for all line items on the order.
- 10 After you specify the last acknowledgment number and due date, the first line item on the order appears. The cursor moves to the Line Item Correct prompt. When this prompt appears, you can change the vendor packing slip number and due date for this specific line item. To do so, type P.

Figure 7: The Vendor Packing Slip Field

```

13:59:29                (G) Order Entry (05/05/00)                01/17/01
-----
Order Writer :ROBI      G/L Loc # 1  Inv Loc # 1      Transaction # 10162-0
      Edit                Charge                File :P-MASTER  Vol :W2??
Name :DUNCAN'S SUPPLIES      Account #      10003      Status :1
                                Slsm :      Status :W  P/O #10041
                                Lines #
                                Sub-Total $
      KELLER                TX 76248      817
-----
#  Item      Mfg      Description      UM C Order  Ship  Price
  0      SEL MAILER,JIFFY PADDED, 6X10      EA W  2      117.96
-----
Date 01/17/01 Due  / /  Invoice  / /  P/O # 10041 Due 01/22/01
List $ 58.980 Contract : Discount :N 00.0% Sell $ 58.980 G.P. 30.0%
P.Cost $ 41.280 A.Cost $ 41.280 Vendor Packing Slip [ ]
    
```

Line Item Drop Ship

- 11 The cursor moves to the Vendor Packing Slip field, as shown in Figure 7. Enter the vendor packing slip number for this specific line item, or press Tab to accept the default, if any.
- 12 When the P/O Due Date field appears, enter the due date for this specific line item, or press Tab to accept the default date, if any.
- 13 The Line Item Correct prompt reappears, type Y to accept the information you specified.
- 14 The next line item on the order appears, along with the Line Item Correct prompt. You can continue to specify vendor packing slip numbers and due dates for each line item on the order.
- 15 When you finish specifying vendor packing slip numbers and due dates, complete editing the drop ship order in the usual manner.

Receiving and Verifying Line Item Drop Ship Orders

You receive and verify line item drop ship orders in the Drop Ship Order Entry screen. When you do, you have the option of receiving and verifying every purchase order, or you can receive and verify specific purchase orders on the line item drop ship order. This allows you to receive and verify specific line items on a P/O.

Figure 8: The Limit Receive/Verify to P/O # Prompt

```
15:47:05                (G) Order Entry (05/05/00)                01/18/01
-----
Order Writer :ROBI      G/L Loc # 1  Inv Loc # 1      Transaction # 10161-1
Receive/Verify      Charge      File :P-MASTER  Vol :W2??
Name :DUNCAN'S SUPPLIES      Account # 10003      Status :7
                               Slsm :      Status :W  P/O #10040
                               Lines # %
KELLER      TX 76248      817      Sub-Total $
-----
#  Item      Mfg      Description      UM C Order Ship Price
-----
Limit Receive/Verify to P/O #      (<RTN> to Receive/Verify All P/O's)
```

If you choose to receive and verify specific line items on a P/O, all the line items will be moved to the status specified when the order is ended. Therefore, any lines that have backordered quantities will be moved to the next dash ticket number, -1, -2, and so on when the ticket is moved to a status 8 or greater.

Note: You should set the Prompt for Updating Mfg Cost When Cost is Changed field in the (LG4) Drop Ship Order Entry Parameters screen to **P**. Setting this field to **P** prevents the purchase order number from being cleared on the pick ticket when backordered items move to a dash ticket, -1, -2, for example.

Use the following instructions:

- 1 Go to the (G) screen and enter your order-writer number.
- 2 When the cursor moves to the Action field, select the [S] Drop Ship Order action code.
- 3 The text Drop Ship appears in the Action field, and the cursor returns to the Order Writer field. Enter your order-writer number.
- 4 In the Type of Drop Ship field, type **R** to receive the order.
- 5 When the cursor moves to the Transaction field, enter the number of the order you want to receive.
- 6 After you enter the order number, the Correct Ticket prompt appears. Specifying whether this is the correct order number.
- 7 The Limit Receive/Verify to P/O # prompt appears, as shown in Figure 8. At this prompt, you can limit all the purchase orders on the order, or you can specify the purchase order number you want to receive and verify.
 - To receive and verify all the purchase orders, press Enter.
 - To receive and verify a specific purchase order, enter the number of the purchase order you want to receive. If you do not completely fill the field with characters, press Enter.
- 8 The first line item on the purchase order you specified appears, along with the Line Item Correct prompt. When this prompt appears, you can change the vendor packing slip number and due date for this specific line item just as you do when editing line item drop ship orders. To do so, type **P**.
- 9 The cursor moves to the Vendor Packing Slip field. Enter the vendor packing slip number for this specific line item, or press Tab to accept the default, if any.
- 10 When the P/O Due Date field appears, enter the due date for this specific line item, or press Tab to accept the default date, if any.

Line Item Drop Ship

- 11 The Line Item Correct prompt reappears, type **Y** to accept the information you specified.
- 12 The next line item on the order appears, along with the Line Item Correct prompt. You can continue to specify vendor packing slip numbers and due dates for each line item on the order.
- 13 When you finish specifying vendor packing slip numbers and due dates, complete receiving the drop ship order in the usual manner.

Deleting Line Items from an Order

You can delete an item from a line item drop ship order. Use the following instructions:

- 1 Go to the (G) screen and enter your order-writer number.
- 2 When the cursor moves to the Action field, select the [S] Drop Ship Order action code.
- 3 The text Drop Ship appears in the Action field, and the cursor returns to the Order Writer field. Enter your order-writer number.
- 4 In the Type of Drop Ship field, type **E** to edit the order.
- 5 When the cursor moves to the Transaction field, enter the number of the order from which you want to delete items.
- 6 After you enter the order number, the Correct Ticket prompt appears. At this prompt, type **Y**.

Figure 9: The Delete This Line Item Prompt

```
14:44:15                (G) Order Entry (05/05/00)                01/17/01
-----
Order Writer :ROBI      G/L Loc # 1  Inv Loc # 1      Transaction # 10162-0
      Edit                Charge                File :P-MASTER  Vol :W2??
Name :DUNCAN'S SUPPLIES      Account #      10003      Status :1
                                Slsn :          Status :W   P/O #10041
                                Lines #          %
      KELLER                TX 76248      817          Sub-Total $
-----
#  Item          Mfg      Description          UM C Order  Ship  Price
  0          SEL MAILER,JIFFY PADDED, 6X10      EA W      2          117.96
-----
Date 01/17/01 Due  / /  Invoice  / /  P/O #      10041 Due 01/22/01
List $      58.980 Contract :      Discount :N 00.0% Sell $      58.980 G.P. 30.0%
P.Cost $      41.280 A.Cost $      41.280 Delete This Line Item Y/N/P ?N
```

Line Item Drop Ship

- 7 The first item on the order appears, and the cursor moves to the Line Item Correct prompt. To delete this line item, type **D**.
- 8 The Delete This Line Item prompt appears, as shown in Figure 9. Enter your response according to the following:
 - Y** Delete this line item from the order. The item is no longer marked for drop ship.
 - N (default)** Do not delete this line item from the order.
 - P** Delete this line item from the order and send the item back through the short-buy process. The Line Removed From P/O message appears. The item 's purchase order number and due dates are cleared, allowing the item to be processed through the short-buy. In addition, an exception of "c" will be written to the EXCEPTIONS file. Press Enter.
- 9 The next line item on the order appears, along with the Line Item Correct prompt. You can continue to delete as many items as necessary.
- 10 When you finish deleting items, complete editing the drop ship order in the usual manner.

**Figure 10:
Inquiring on
Item Drop Ship
Quantities in
the (G) Screen**

```

09:19:36                (G) Order Entry (06/21/00)                01/17/01
-----
Order Writer : 265      G/L Loc # 1  Inv Loc # 1      Transaction # 10157-0
Inquiry              Charge          File :P-MASTER  Vol :W2??
Name :DUNCAN'S SUPPLIES      Account # 10003      Status :1
                               Slsm :      Status :W  P/O #
                               Lines # 1 30.0%
KELLER              TX 76248      817          Sub-Total $ 35.90
-----
#  Item              Mfg          Description          UM C Order  Ship  Price
-----
                                ** Drop Ship - Complete Order **
00001              PAJ SHEARS,ROLLING          EA W      2          35.90

Date 01/17/01 Due / / Invoice / / P/O # 92843 Due / / D/S
List $ 17.950 Contract : Discount :N 00.0% Sell $ 17.950 30.0
P.Cost $ 12.560 A.Cost $ 12.560 D.C.=1 C.C.=1 More/V=Vendor/C=Comments
    
```

Inquiring on Line Item Drop Ship Orders in the (G) Screen

You can view line item drop ship orders in the (G) screen. Use the following steps:

- 1 Go to the (G) screen and select the [I] Inquire action code.
- 2 When the cursor moves to the Transaction field, enter the number of the order you want to view, and press Return.
- 3 A complete drop ship order appears with the text “**Drop Ship --Complete Order**”, as shown in Figure 10. If only specific line items are to be dropped shipped on the order, the text “**Drop Ship--Partial Order**” appears. To view additional items on the order, press Enter.
- 4 When you finish viewing the information, press Esc.

Viewing and Changing Line Item Drop Ship Quantities in the (EH) Screen

You can view and change line item drop ship quantities in the (EH) Inventory History screen. Use the following instructions:

- 1 Go to the (EH) screen and select the [I] Inq or [C] Chg action code.
- 2 When the cursor moves to the Location field, press Tab to accept the default location or enter the location for which you are viewing items.

Figure 11:
Viewing Line Item Drop Ship Quantities in the (EH) Screen

```

10:54:14          (EH) INVENTORY HISTORY REV. (06/23/00)          01/17/00
=====
ACTION [C] (C=Chg, D=Del, I=Inq, B=Back to E)          Location [ 1] (Space=All)
(O=Other Screens)          ===== DROP SHIP HISTORY =====
===== MASTER RECORD =====
Item #43000          Co:OID          M-T-D 1 : 20 = : 4 + : 16
Desc. :CHAIR,BIG/TALL,BY          : 10 2 : 3 = : 3 + :
[ ] Alter.          Co:          3 : 3 = : 3 + :
Extended 43000          Sic :0005          Calendar 4 : 10 = : 3 + : 7
Unit :EA Kit :          Lead :          Hr. :          Months 5 : 10 = : 3 + : 7
Dept :1 Class :O Ser. :          Weight :          6 : 10 = : 3 + : 7
===== DIRECT BUY =====
Vendor #ABEL          Cost $ 327.550          7 : 10 = : 3 + : 7
Page # Prefix :          L.Cost $          8 : 10 = : + : 10
Buy Unit : Of :          F.Cost $          9 : 14 = : 3 + : 11
Eff. On : / /          F.List $          10 : 4 = : 3 + : 1
Weight Rate          L.Update :02/08/99          11 : 10 = : 3 + : 7
===== PRIMARY WHOLESALER [ 1] =====
Vendor #UNITED          Cost $ 328.950          Qty : 62 :          YTD
Page # 65 Prefix :OID L.Cost $ .000          Cost $ 20394 $          Hits
Buy Unit :EA Of : 1 Catalog $ 645.000          Sales $ 37837 $          : 84
Weight Rate          L.Update :04/07/98          46.1%          %
=====
** ENTER DATA OR <?> FOR HELP !!
    
```

- 3 When the cursor moves to the Item # field, retrieve the item for which you want to view line item drop ship quantities. For details on retrieving items, see *Book II: Inventory*.
- 4 When the Correct Record prompt appears, type **S**. The system displays the line item drop ship quantities, as shown in Figure 11.

This includes the current month-to-date drop ship quantities from the I-AUX-SUP file, the twelve month's total history, the twelve month's history quantities from the I-HIS-SUP file and the difference between these two files.

- 5 At this point, you can change the quantities in these fields. When you finish changing the information, press Enter. When you finish viewing the information, press Esc.

Faxing P/Os in the (F) Screen

In addition to faxing P/Os in the Line Item Drop Ship screen, you can easily fax purchase orders that have not been faxed, but which are ended in the (F) Purchase Order Entry screen.

Note: In order to use this feature, the Comm field in the (C) Vendor Master screen must be set to F for the appropriate vendor. For more details, see the heading **Setting Line Item Drop Ship Fields in the (C) Screen** earlier in this handout.

- 1 Go to the (F) screen and select the [F] Fax action code.

Figure 12: The Fax All Ended P/O's Not Previously Faxed Prompt

```

14:22:45                (F) Purchase Order Entry  rev. (06/21/00)                01/18/01
-----
Action [F]   Inv Loc [ 1]   File [PO-MASTER ] Vol [W3??]
Vendor # _____ Contact : _____ Phone # ___-___-___
Name  : _____ Fax # ___-___-___ R.Phone # ___-___-___
Street : _____ Account # _____ Last P/O # _____
City  : _____ State :__ Zip # _____-___ Current P/O # _____
----- Total Weight # _____ $ _____ Due Date :__/__/__
STOCK NUMBER__ CO. _____ DESCRIPTION _____ UNIT C ORDER RECEIV ACK. NBR.
-----
FAX ALL ENDED P/O'S NOT PREVIOUSLY FAXED Y/N ?N
    
```

Line Item Drop Ship

- 2 When the cursor moves to the Current P/O # field, press Enter.
- 3 The Fax All Ended P/O's Not Previously Faxed prompt appears, as shown in Figure 12. Type **Y**.
- 4 At the Are You Sure prompt, type **Y** to fax the purchase orders.

Low-Stock Report

The Low-Stock Report now prompts you to include drop ship quantities, as shown in Figure 13. This prompt appears in the (RR) Inventory Reports and (R) Inventory Selectors screens.

In order for this prompt to appear, the Track Drop Ship Sold Quantities field in the (LE1) Inventory Parameters (Con't) screen must be set to **Y**.

Note: You must also perform the month-end procedure in the (MK) Period End Functions screen prior to printing the Low-Stock Report. Performing the month-end procedure moves the drop ship quantities to the new I-HIS-SUP file. This file is stored on the Inventory History volume serial. The Inventory History volume serial corresponds to the Inv Hist Volume Serial field in the (LØ) Global Master Parameters screen.

Figure 13: The Include Drop Ship Quantities in Calculation Prompt

```
14:55:21 (RR) Inventory Reports rev. (05/05/00) 01/01/09
-----
Type [L] A-Alias, B-Bom, C-Cat, Z-Serial, $-Dol., U-Usage, L-Low Stock, S-Labels
Right Hand Columns ? . ? . ? . A/D/R/P ? . Sales ? . L/O ?L S/P/B ? .
A-Avg Cost P-Price %-Gross% S-Asort W-Weight M-Min/Max Weeks ?10 Sets ? .
R-Rep Cost 1-5-Qty D-Max% B-Bin H-Hits O-O/O J-O/H K-Back L-Alloc Alignment ? .
-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
Location | 1(.) | 1(.) Y/N/S/D | #-Nbr. C-Cost Q-Ytd Qty A-Asort H-Hits O-Page
(Tab-All)| 2(.) | 2(.) | N-Name P-List $-Ytd Sales S-Class V-Vendor
?.. | 3(.) | | D-Dept L-Bin M-Ytd Margin X-Prefix G-Gross %
-----
Y-Report With, N-Report Without Avg. Cost Gt Rep ? . Serial ? . Assm ? . Net ? .
O-Omit Alt. ? . Qty Breaks ? . Min/Max ? . Max % . On Order ? . On Hand ? . Back ? .
Desc.:..... To :..... Hits ? .
Nbr. :..... To :..... Prefix :.... To :....
Vendor1 :..... To :..... C/M ? . Unit B/S ? . :.. To :..
Vendor2 :..... To :..... Dept :. To :.
List $..... To $..... Class I/V ? . :. To :.
Ytd Hit #.... To #.... Asort :.... To :....
Qty #..... To #..... Bin P.... S.... To P.... S....
Sales $..... To $..... Contract :.. To :..
Margin $..... %..... To $..... %..... Date O/S/U ? . :././.. To :././..
Printer [Pl] Copies [ 1] Records To Print [.....] Totals Only [N]
INCLUDE DROP SHIP QUANTITIES IN CALCULATION Y/N ?N
```