



Order Entry Freight Tables



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This feature is only available in eNsite Pro.

Introduction

A new Graphical enhancement lets you easily add freight charges in order entry for all available freight vendors. You can set up freight charges that can be passed along to the customer, based on specific rates. For example, suppose you have several couriers that charge different delivery charges. In this case, you set up separate tables for each. When your order-takers final-verify orders and add freight, a new dialog box automatically opens. This dialog box displays the list of available freight vendors and lets them quickly select the one they want to use for the order.

To use this feature, you begin by setting up your freight item in the Item window. Next you flag the customer for use with freight tables. When you do, you can specify that the system bill the customer at cost only, or bill for freight and cost.

You set up freight tables in the Vendor window. At that time, you enter the rates and indicate whether you want the table to display in order entry. While you can specify a default table, you can always select which table you want to use in order entry. When the pick ticket prints, the freight amount appears in the subtotal portion of the ticket, not as a separate line item.

To track your freight table information, you can print the Reconciliation Report. You print this report using Report Writer.


Setting Up Freight Items

To set up a freight item:


- 1 Double-click



Item

- 2 When the Item window opens, click .
- 3 Click the Number box and enter the text FREIGHT. You must enter the text FREIGHT in the Number box in order for this feature to work. If you want to add any additional text to help identify the item, you can enter a dash after the text FREIGHT and then specify the identifying text. For example, if you have several freight items, you could specify FREIGHT-UPS or FREIGHT-FEDEX.
- 4 In the Description box, enter any text that helps you identify this freight item, FREIGHT UPS, for example.
- 5 In the Company box, you can enter a company name or leave this box blank.

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- 6 Click the remaining boxes to specify additional freight item information, such as the item's cost, price, and so on.
- 7 When you finish setting up this item, click  to save your changes.

Setting Up Customers

You can use the Fr box in the Customer Master tab to specify whether you want to add cost only freight to the customer's invoice, add cost and sale freight to the customer's invoice, or not add freight. However, this is an optional step. You do not have to set the Fr box in order to use vendor freight tables in order entry. If you leave the Fr box blank, the system will prompt you with the vendor freight tables you have available so you can select one for the order.


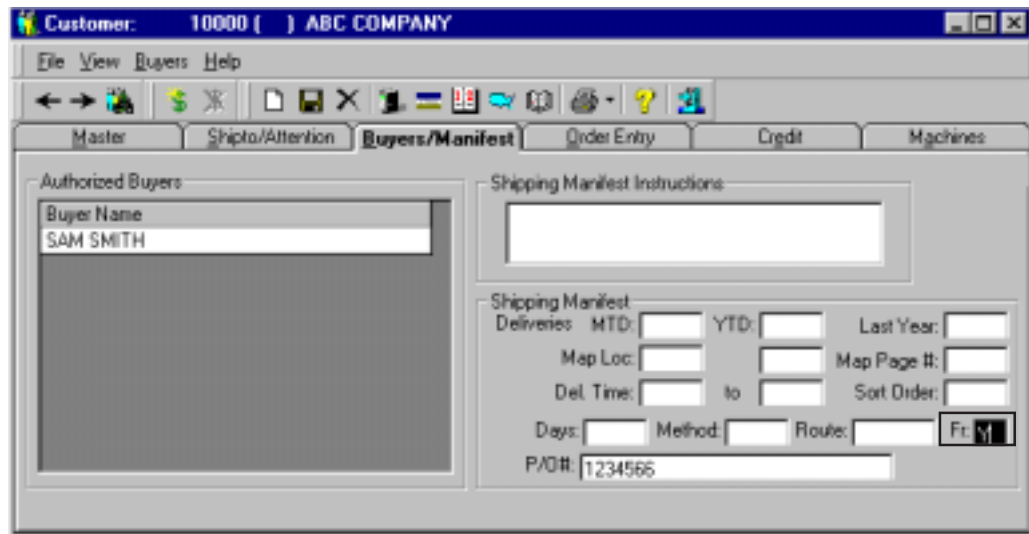
- 1 Double-click  to open the Customer window.
- 2 When the Customer window opens, select the customer for which you want to use freight tables.
- 3 After the customer is selected, click the Buyers/Manifest tab.
- 4 Click the Fr box, as shown in Figure 1, and enter your response according to the following:

Figure 1:
Specifying a
Customer for
Use with Freight
Tables



The screenshot shows a software window titled "Customer: 10000 () ABC COMPANY". The window has a menu bar with "File", "View", "Buyers", and "Help". Below the menu bar is a toolbar with various icons. The main area has several tabs: "Master", "Ship to/Attention", "Buyers/Manifest", "Order Entry", "Credit", and "Machines". The "Buyers/Manifest" tab is selected. On the left, there is a list box titled "Authorized Buyers" with "Buyer Name" and "SAM SMITH" listed. On the right, there is a "Shipping Manifest Instructions" text area. Below that, there are fields for "Shipping Manifest" including "Deliveries: MTD: [] YTD: [] Last Year: []", "Map Loc: [] Map Page #: []", "Del. Time: [] to [] Sort Order: []", "Days: [] Method: [] Route: []", and a "Fr: [X]" checkbox which is highlighted with a black box. At the bottom, there is a "P/O#: 1234566" field.




The vendor must already exist in your database to set up the vendor with a vendor freight table.

- Y** Add cost only freight to the customer's invoice. This option does not pass freight charges to the customer but does affect commissions.
- N** Add no freight to the customer's invoice. This option does not pass freight charges to the customer and does not affect commissions.
- B** Add cost and sale freight to the customer's invoice.

5 When you finish, click  to save your changes.

Setting Up Vendor Tables

After you set up items and customers, you can set up your vendor freight tables. To do so:

- 1 Double-click  to open the Vendor window.
- 2 Click the View menu and click Vendor Freight Tables or type **Ctrl + F**.
- 3 The Vendor Freight dialog box opens. Click Add New Table.
- 4 The Add New Vendor Freight Table dialog box opens, as shown in Figure 2. Select the vendor for which you are creating this freight table. You can select the vendor by account number or name. If you don't recall the vendor account number or name, you can click  to open the Vendor Query dialog box.
- 5 After you retrieve the vendor, select the freight item you created in the Item window. In the Item Information section of the dialog box, click the Number box and enter the item number, FREIGHT, for example. If you don't recall the item number, you can click  to open the Item Query dialog box.
- 6 Once the freight item is selected, you can use the Table Information section of this dialog box to specify information for this freight table. Enter your response according to the following:
 - **Ship Via:** In this box, enter the method by which items using this freight table will be shipped, UPS, for example.
 - **Cost Only Commission Code:** If the Fr box in the Customer Master tab is set to Y, the system uses the commission code you enter in this box when adding freight charges to the customer's order.
 - **Billable Commission Code:** If the Fr box in the Customer Master tab

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is set to B, the system uses the code you enter in this box when adding freight charges when adding freight charges to the customer's order.

- **Basis:** The information you enter in this box is for information purposes only. It lets you specify whether you want to bill the customer based on cartons, by weight, by cube, or by a dollar amount. Enter a two character code that identifies how you're billing the customer. For example, if you're billing the customer based on cartons, you might enter CN in this box.
- **Active in Order Entry:** Check this box if you want this vendor freight table to display in order entry. If you leave this box blank, this freight table does not appear in the list of freight tables.

Figure 2: Setting Up a Vendor Freight Table

Add New Vendor Freight Table

Vendor Information


Vendor : 

Name :

Address :

City :

Item Information

Number :  Company :

Description :

List \$: Cost \$: Dept :

Table Information

Ship Via :

Cost Only Commission Code : Active in Order Entry

Billable Commission Code : Set as Default in OE

Basis :

OK Cancel

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- **Set as Default in OE:** Check this box to specify that you want this freight table to be the default in order entry. Only one freight table should be designated as the default for all available vendors.
- 7 When you finish, click OK.
 - 8 The Vendor Freight Tables dialog box automatically opens. This dialog box lets you set different levels for this freight table. For example, you might be charged different freight based on how many cartons are delivered. Enter your responses according to the following:
 - **Level:** This is a user-defined box. You can use it to enter the level for this vendor freight table. For example, if this table is used when delivering six cartons, enter 6.
 - **Description:** In this box, enter a description for this level. Using the same example, you might enter 6 CARTONS SHIPPED VIA COURIER. The text you enter prints on the pick ticket.
 - **Cost:** In this box, enter the cost that the vendor charges you for this freight.
 - **Price:** In this box, enter the price that you want to charge the customer for this freight.

Vendor # : XXX Name : ABC

Item : FREIGHT-FEDEX Company : Dept : 1

Table Information

Ship Via : FEDEX Basis :

Cost Only Commission Code : Active in Order Entry

Billable Commission Code : Set as Default in OE

Level	Description	Cost	Price


Save Cancel

Figure 3:
Vendor Freight
Table Dialog
Box

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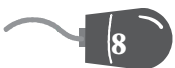
- 9 When you finish entering the price, press Enter to move the cursor to the next line. (You must move the cursor to the next line before the system will save your information.)
- 10 Click Save. You can continue to set up as many different freight tables as needed.

Using Freight Tables in Order Entry

- 1 Double-click the  icon. The Order Entry window opens, displaying the Global tab.
- 2 Click the down arrow in the Action Code list box and choose Final Verify.
- 3 When the Order Packer window opens, enter the name of the person packing the order for shipment, Bob Smith, for example.

Note: The order packer number does not automatically print on the pick ticket. It is saved, however, in the P-MASTER file. You can use the Report Writer module to print the order-packer on custom pick tickets.

- 4 Retrieve the order you want to final verify.
 - If you know the order number, enter it without the extension (number after the dash) in the Order # box. Press Enter.
 - If you don't know the order number, click Order Browse. The Order Browse dialog box opens, listing the orders. Click the order you want to verify and click OK. If the customer account or order you need is not displayed, you can use the Order # through Status list boxes to enter information for the order you want to initial verify. Click the appropriate box and enter the information. Click Find. The order that most closely matches the one you specified appears. When the order you want to verify appears, highlight the order and click OK.
- 5 The order appears in the Verify tab. Click Add Freight.
- 6 The Vendor Freight Browse dialog box opens, as shown in Figure 4. Click the Vendor whose freight tables you want to use for this order to highlight it, and click OK.
- 7 When the Vendor Freight Tables dialog box opens, you can change the commission code for this order. To change the commission code, click the Cost Only Commission Code box and enter the code you want to use.



Note: The Commission Code box displays the commission code for this order. To change the billing, click the Billing box and enter the billing you want to use.

- 8 When you finish changing and viewing information for this freight table, click OK.
- 9 The cursor returns to the Verify tab. Continue verifying the order in the normal manner. When you're ready, click Finished to complete the procedure. The cursor returns to the Global tab.

Figure 4: The Order Entry Vendor Freight Browse Dialog Box

