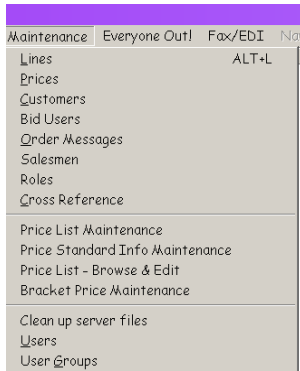


Section X

Maintenance

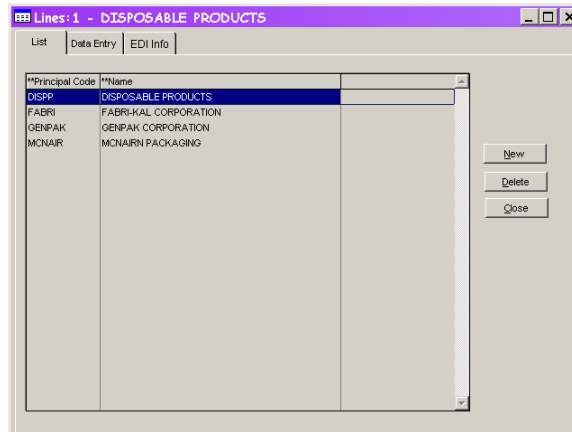
Maintenance Module

The Maintenance menu option allow you to add, edit and delete records for the items that are normally used to create the “lookup lists” such as mills and customers that make data entry easier and more accurate. There are also options to allow system administrators to perform regular maintenance tasks on the data.



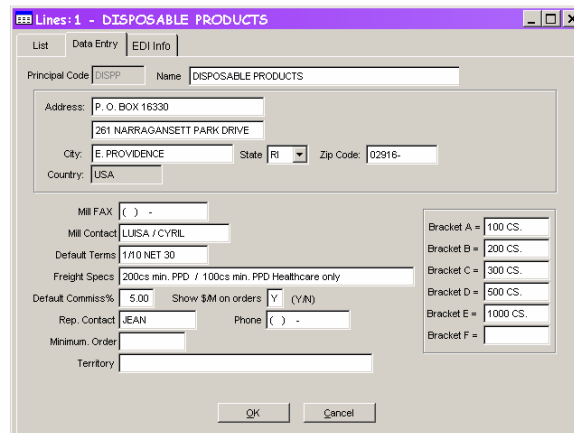
Lines

Choosing the Lines option from the Maintenance menu will display a list of the Lines currently on file in the system. To add a new line, click the New button to the right of the list. You will be switched to the next page to begin filling in all the data for your new line.



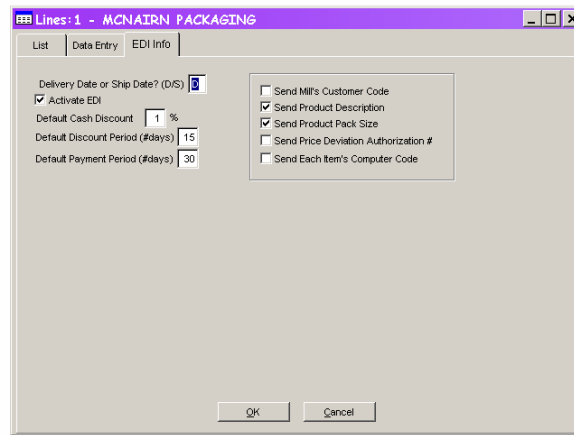
To find an existing line, scroll through the list or click in the code column and begin typing the code to quickly move to the record you want to change. Once you have found the record, double-click on the line or highlight it and press the Enter key.

You will be switched to the next page with the record displayed and ready to be changed



If you do not need to enter EDI Info, click OK when you have entered or changed the data. Click Cancel to discard the changes to this page and return to the Lines list.

If you need to enter EDI info, click the tab for that page and enter the data as needed. Click OK to save the data for *both* pages or Cancel to discard the changes to *both* pages and return to the Lines list.



The screenshot shows a dialog box titled "Lines: 1 - MCNAIRN PACKAGING" with three tabs: "List", "Data Entry", and "EDI Info". The "EDI Info" tab is active. The dialog contains the following settings:

- Delivery Date or Ship Date? (D/S): 3
- Activate EDI
- Default Cash Discount: 1 %
- Default Discount Period (#days): 15
- Default Payment Period (#days): 30
- Send MI's Customer Code
- Send Product Description
- Send Product Pack Size
- Send Price Deviation Authorization #
- Send Each Item's Computer Code

At the bottom of the dialog are "OK" and "Cancel" buttons.

When you have finished adding and editing lines, click the Close button on the first page or the X button in the upper right corner of the window or just press the Esc key.

Prices

*Note: It is not possible to add new items to the Price list in UCOES 2.0 at this time. That function will be added soon. For now, please add new items through UCOES DOS.

The Price file is very large and you never want to changes all the lines for all the customers and all the SKUs at one time. When you choose to edit the Price file, you will be given a Selection Criteria screen to narrow down the price(s) you want to work on.

To work on all of a mill’s generic prices, pick the mill from the Mill list and click the Find Records button. The List page will contain a list of all the generic prices for the selected mill and the Data Entry page will display the first item in the list.

To work on all of a mill’s customer-specific prices, pick the mill from the Mill list and the customer from the Customer list and click the Find Records button. The List page will contain a list of all the customer-specific prices for the selected mill and customer. The Data Entry page will display the first item in the list.

If you know the mill, customer and SKU, pick from all three lists and click Find Records. The List page will contain that single item. The Data Entry page will display the same item. If no such item exists, you will be asked if you want to add a new item.

Use the List page to select a record to edit.

Line	Custcode	#	Invcodes	Price	Desc
GENPAK		#4		34.40	3 OZ. CONE CLIP STRAIGHT EDGE
GENPAK		00102		0.00	Case PAJ Allow (meat tray only)
GENPAK		00105		0.00	Per Cert PAJ Allowance
GENPAK		00109		0.00	Cube PAJ Allow. (non-meat tray)
GENPAK		1		18.82	5-14X5-14X7/8 WHITE TRAY
GENPAK		1.5		20.01	8-38X3-78X7/8 WHITE TRAY
GENPAK		1.5G		10.00	8-38X3-78X7/8 GREEN TRAY
GENPAK		10066		16.01	6 X 6 WHITE TRAY
GENPAK		10066G		16.01	6 X 6 GREEN TRAY
GENPAK		10300		21.42	SMALL WHITE 3 COMPT.
GENPAK		10500		27.91	WHITE 5 COMPT. SCHOOL TRAY
GENPAK		10500S		24.73	SESAME 5 COMPT. SCHOOL TRAY
GENPAK		10600S		33.16	SESAME 6 COMPT. SCHOOL TRAY
GENPAK		10K		14.36	10-34X5-34X2 WHITE TRAY
GENPAK		10KG		14.36	10-34X5-34X2 GREEN TRAY
GENPAK		10KR		14.36	10-34X5-34X2 ROSE TRAY

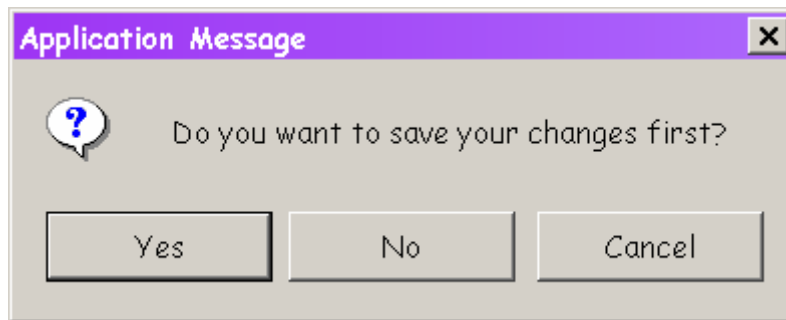
When you have found the record you want to edit, highlight the line and click the Data Entry tab. That record’s data will be displayed. Once you have made the necessary changes, click another tab or the Close box in the upper right.

The screenshot shows a window titled "1: Edit Price GENPAK/AAAAAA #105-10-3/4X5-3/4X1/2 WHITE TRAY". The window contains several sections of data entry fields:

- Price Data / Bracket Pricing:** Mill (GENPAK - GENPAK CORPORATION), Customer (AAAAAA - AL'S ALLIED ASSOCIATED ART AND), Stock # (105), UPC/Comp # (0), Description (10-3/4X5-3/4X1/2 WHITE TRAY).
- Pricing:** Price (11.25), Price Deviation Ref. (4-C6036), Effective Date (11/03/03).
- Physical Characteristics:** Weight (6.70), Price units (CASE), Group (FOAM TRAYS), Cube (3.60), Commission % (2.94), Pallet Size (0), Pack (500), Active (checked), Layer Size (0).

Buttons for "Save", "Void", and "Close" are located at the bottom right of the form.

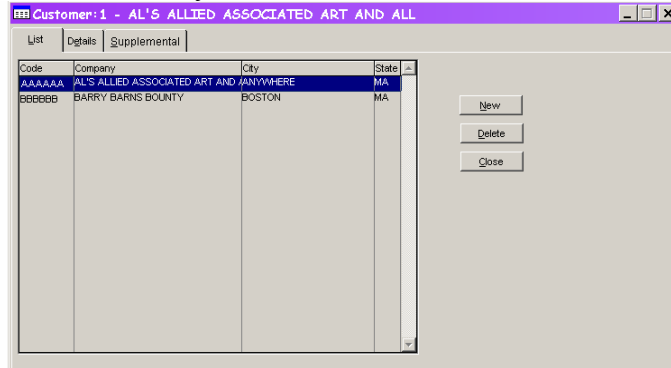
You will be asked if you want to save your changes. Yes will save the changes, No will discard the changes and move to the page you just chose. Cancel will do nothing if you selected the Selection Criteria page. If you selected the List page, you will move to that page without saving your changes.



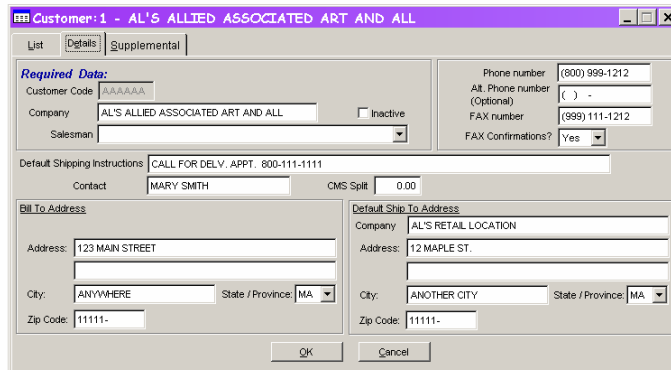
Customers

Choosing the Customers option from the Maintenance menu will display a list of the Customers currently on file in the system.

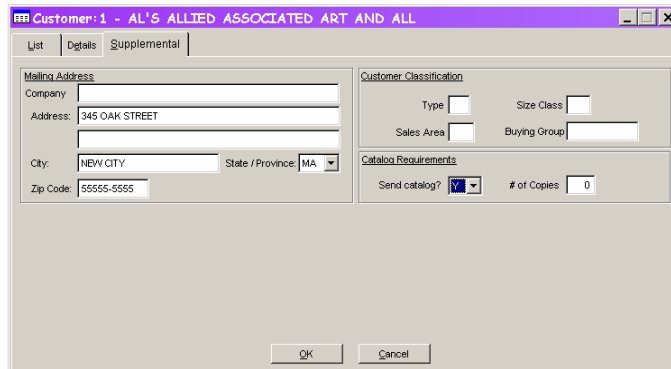
To add a new customer, click the New button to the right of the list. You will be switched to the Details page enter data for your new customer.



To find an existing customer, scroll through the list or click in the code column and begin typing the code to quickly move to the record you want to change. Once you have found the record, double-click on the line or highlight it and press the Enter key.

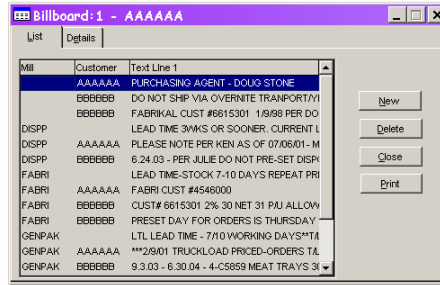


Add or change customer information on the Details page. Required fields are Customer Code, Customer Name and Salesman. All other information on this page is optional.

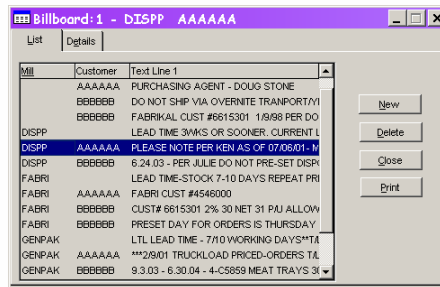


Additional information can be entered on the Supplemental page. Clicking Save or Cancel buttons on either page saves the data on both pages. If you have made changes to either page and click the List tab, you will be asked if you want to save the pending changes.

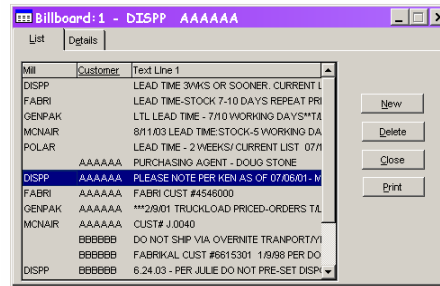
Billboard



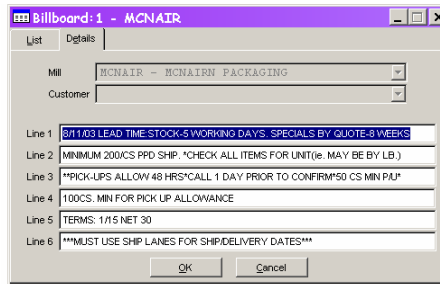
Choosing the Billboard option from the Maintenance menu will display a list of the Billboard messages currently on file in the system. To add a new record, click the New button.



To sort the list by Mill, click on the Mill title at the top of the column. Then you can type the mill code to find that mill. The same can be done for the Customer column.

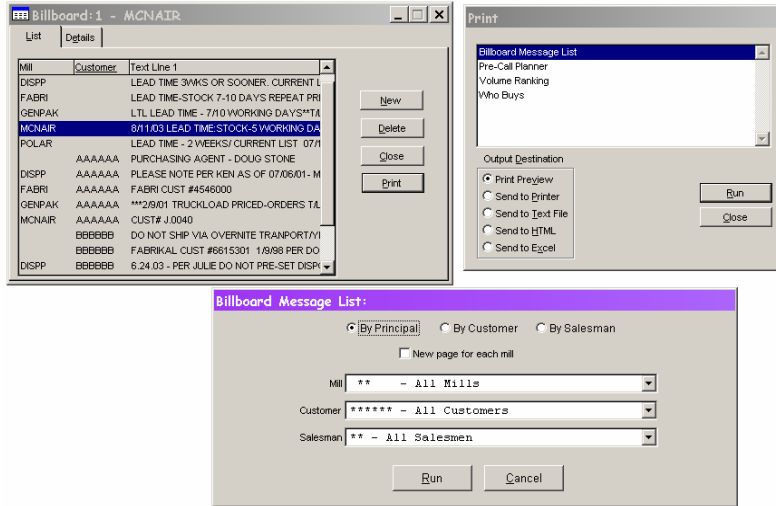


Once you find the record you want to edit, double-click on the line or highlight it and press Enter. You will be switched to the Details page with your chosen record displayed and ready for edit.



When you have finished editing, click OK to save or Cancel to discard changes. You will be returned to the List page where you can select another record to edit or click Close to exit the Billboard maintenance function.

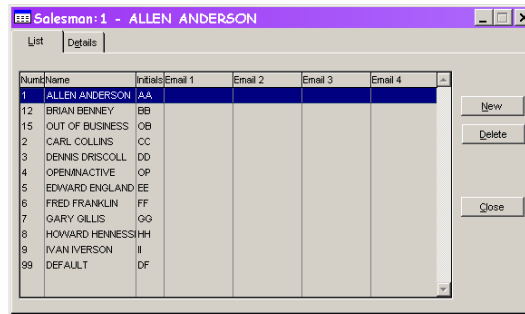
You can also print lists of billboard messages. The Print button will bring you to the Reports system. Selecting the Billboard Message List will display a form that allows you to select which messages to print and the order in which they will appear on the printout.



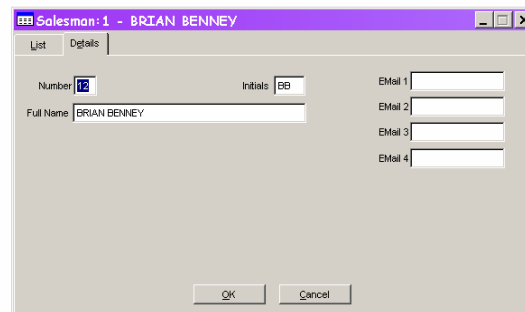
Salesmen

Choosing the Salesmen option from the Maintenance menu will display a list of the salesmen currently on file in the system. The Salesman maintenance form is used to add and delete salesmen or change a salesman's data.

To add a salesman, click the New button. The Delete button will remove the highlighted salesman.



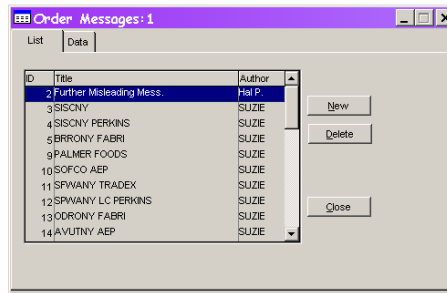
To modify information on an existing salesman, highlight the record on the List tab. Click the Details tab to modify the data associated with the salesman. Click the OK button to save your changes or the Cancel button to discard your changes.



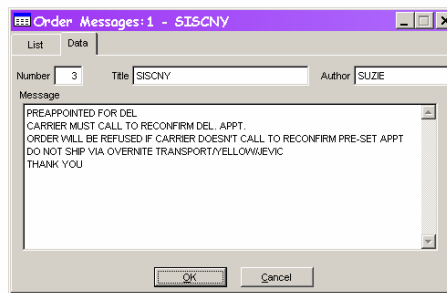
Order Messages

Choosing the Order Messages option from the Maintenance menu will display a list of the order messages currently on file in the system. Order Messages store text that you can insert into an order's notes at the press of a button. Any time you find yourself typing the same notes over and over, make an entry in the Order Messages table.

Use the form's list tab to select a record to edit or delete. The Delete button will remove the highlighted record.



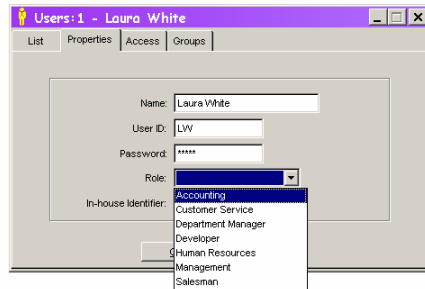
Add or edit your message by clicking the Details tab. Don't forget to give your message a unique title so you can identify it easily.



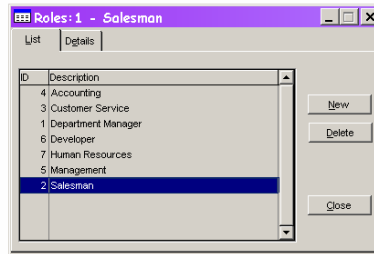
Roles

Choosing the Roles option from the Maintenance menu will display a list of the roles currently on file in the system. Roles are used to filter the menu options available to users. Users can be presented with only the choices that they need to do their jobs, rather than having to wade through every single menu entry to find the one you need.

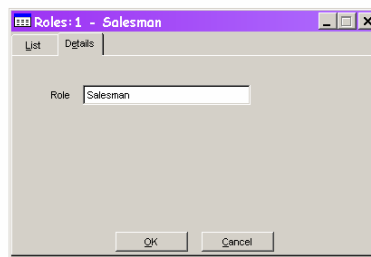
The Roles table controls the options available in the dropdown list on the Users form.



Find the role you want to edit or delete on the List tab of the Roles maintenance form. Click the Delete button to delete the record of the Details tab to edit the record. Click the Add button on the List page to add a new role.



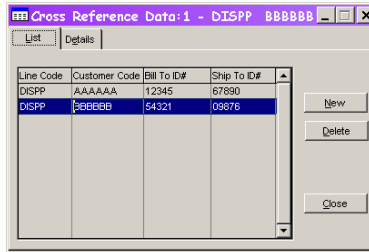
Roles are the simplest piece of data in the current system. The only thing you need is a title for the role. Click OK to save your changes or Cancel to discard any edits you've made.



Cross Reference

Choosing the Cross Reference option from the Maintenance menu will display a list of the Line/Customer pairs on file in the system. This table stores Bill To ID numbers and Ship To ID numbers for a given Line and Customer pair.

Use the List to find an individual record to edit or delete. Use the Delete button to delete the highlighted record or click the Details tab to change it. Click the New button to add a new Line/Customer pair.



When you've completed your changes press the OK button to save them. Press the Cancel button to discard the changes.

