



Infor Distribution A+ Advanced Mobile User Guide

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About this guide

This guide describes workflow, concepts and procedures for using the Infor Distribution A+ Advance Mobile Interface module.

Related documentation

You can find related documentation at Infor Documentation Central (docs.infor.com). We recommend that you check this website periodically for updated documentation.

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Chapter 1 Advanced Mobile Overview

Introduction

This overview introduces you to Advanced Mobile and provides a summary of the following topics:

- Advanced Mobile Interface
- Advanced Mobile Terms
- Processing
- Workflow
- Reporting
- Interfaces with Other Modules

Advanced Mobile Interface

Advanced Mobile by BlueDot Solutions (www.bluedotsolutions.com) is a comprehensive mobile solution that extends Infor Distribution A+ functionality to the mobile workforce. The applications can be deployed on a wide variety of Windows Mobile-powered handheld computing devices to facilitate Mobile Delivery, Mobile Inventory, and Order Management processes of your enterprise. Distribution A+ interfaces with the Advanced Mobile - Mobile Delivery component by delivering menu options in Distribution A+ to facilitate this functionality.

Advanced Mobile Terms

Blue Dot

Enterprise Software Company providing mobile software solutions. Blue Dot will be integrated with Distribution A+ in order to export call schedules for sales reps and to import orders placed by sales reps on their mobile devices. The software created by Blue Dot for mobile devices is called Advanced Mobile.

Consignment

Inventory is owned and managed by the supplier, but the inventory is located at the customer site.

ToolCrib (Vendor Managed Inventory)

Inventory is owned by the customer and located at the customer site, but the inventory is managed by the supplier.

Processing

Set Up Options

Advanced Mobile Options Maintenance

This option allows for the setup and configuration of the mobile interface. Use this option to define the path to the directory on the IFS/Root of the System i where the Advanced Mobile export (**.SET**) files will be generated and picked up by the Advanced Mobile Communication Server.

Communication with Advanced Mobile is completed by transferring data between Distribution A+ and Advanced Mobile by data transmission in the **.SET** files.

Both Export and Import processes to and from the Advanced Mobile Communication Server and System i will rely on an FTP protocol.

Vendor Managed Inventory (ToolCrib)

ToolCrib item setup can be defined for a specific company, customer and ship-to number. ToolCrib items will be added/updated in the Customer Consignment Item Balance File (**CABAL**) just as consignment items are, but the **Warehouse ID** field will be blank. Consignment items can be defined for a specific customer/ship-to/consignment warehouse from the Customer Consignment Item Balance option on MENU CNFILE.

Inquiries

Delivery Inquiry

The Delivery Inquiry option allows you to review those orders that have been imported into Distribution A+ through Import Delivered Orders. All orders that have been delivered for the indicated company and warehouse will display through this menu option. You will be able to review details of the imported delivered orders, and see which items or packages have or have not been delivered.

Processing

Shipment Delivery Maintenance

The Shipment Delivery Maintenance option allows you to add a delivery group containing orders to be delivered, and to select the Mobile Export option to export the delivery group to Advanced Mobile.

Once the export process completes, orders are then placed on the mobile device to be delivered.

Import Delivered Orders

Import Delivered Orders allows for the import of delivered orders into Distribution A+ that were previously exported to Advanced Mobile through Shipment Delivery Maintenance. When the Import Delivered Orders option is run, detail for orders that were delivered is imported into Distribution A+.

You can select to immediately submit the delivery import job to batch or schedule a particular date and time when the import process will occur. Delivery information will be imported, including the signatures captured during the delivery, and order activity for the delivered items will be updated if **Track Order Activity** is set to **Y** in Order Entry Options Maintenance (MENU XAFILE). If delivery discrepancies exist, orders imported during this process can also be placed on hold and the notes for that order activity record will indicate "Discrepancies Exist". Otherwise, the notes will indicate "No Discrepancies".

When the import process completes, the delivery group will be automatically closed if all orders in the delivery group have been delivered without any delivery discrepancies.

Call Schedules

Call Schedule Maintenance allows you to add a call schedule for a sales rep containing customers to visit and items that can be ordered by the customers. The sales rep can then set up each

customer/ship- to and define whether that customer/ship-to will be used for Order Entry, Consignment (if Distribution A+ Consignment is installed) and/or ToolCrib processing.

Once a call schedule has been added, this option allows you to export the call schedule to Advanced Mobile. Advanced Mobile will upload the customers and items from the call schedule to a sales rep's mobile device. While visiting customer sites, the sales rep will then be able to create orders for the customers and items in the call schedule and/or enter inventory counts and/or order quantities for customers that use Consignment and/or ToolCrib processing. Replenishment orders for Consignment/ ToolCrib items will then be created through the use of offline Order Entry when the import is run. Note that Consignment and ToolCrib items will not be set up in this menu option. Only items from the Customer Consignment Item Balance File (**CABAL**) will be exported for Consignment and ToolCrib customers.

A call schedule can be maintained or exported as many times as you need to. There is no limit to the number of times a call schedule can be maintained or exported to Advanced Mobile. A call schedule can also be deleted if it is no longer being used by a sales rep.

Through Call Schedule Maintenance, a single call schedule can be exported. To export multiple call schedules, use the Export Call Schedules option. The Export Call Schedules option allows you to export call schedules set up through Call Schedule Maintenance to Advanced Mobile.

Once call schedules have been exported, an Order Entry export file (**.SET** file) is created in the **Order and Inventory Management IFS Path** specified in Advanced Mobile Options Maintenance (MENU AMFILE). Each **.SET** file will have the following naming convention:

<Export File Name> + date/time stamp + .SET

Once the **.SET** file is picked up by Advanced Mobile, the file (containing customers and items in the call schedule) will display in a list in the Advanced Mobile Work Assigner so that it can be reviewed and assigned/unassigned to a specific mobile device for delivery. The Advanced Mobile Work Assigner is a module in the Advanced Mobile software which is used for **.SET** file management. A sales rep will then be able to use the call schedules for Advanced Mobile Order Entry while visiting a customer site. Each customer/ship-to on the mobile device will have a "List" name. If the "List" name is **OE**, then the sales rep would select that list to add items to a regular Order Entry sales order for the customer/ship-to. If the "List" name is **CSGN**, then the sales rep would select that list to enter inventory counts and/or enter order quantities for Consignment items. If the "List" name is **ToolCrib**, then the sales rep would select that list to enter inventory counts and/or enter order quantities for ToolCrib items.

Import Orders and Customer Inventory Balances

This process allows you to import sales order information and inventory balances (for Consignment and ToolCrib) into Distribution A+ that were entered through Advanced Mobile and create Order Entry orders through Offline Order Entry. In Advanced Mobile, an inventory count and/or an order quantity, along with minimum and maximum on-hand values for the items, can be entered for Consignment and ToolCrib items.

When this job is run, the system will scan the **Order and Inventory Management IFS Path** specified in Advanced Mobile Options Maintenance (MENU AMFILE) for files with an extension of **.CSE**. The **.CSE** files are the files sent back to Distribution A+ by Advanced Mobile containing the

orders that have been entered in Advanced Mobile. Each **.CSE** file will contain Order Header and Order Detail sections. The Order Header section will contain the header information for each Distribution A+ order that will be created. The Order Detail section will contain each detail line that will be added to the Distribution A+ order to be created. All **.CSE** files in the **Order and Inventory Management IFS Path** directory which match criteria you enter, will be processed.

If the type of order entered in Advanced Mobile was a regular Order Entry sales order, then a regular sales order will be created through Offline Order Entry for the customer/ship-to default warehouse. Order Entry orders will be created as **Order Type** of 'O', unless the order is marked as shipped in Advanced Mobile. If this is the case, the order will then be created as **Order Type** of 'I'.

If the type of order entered in Advanced Mobile was a Consignment order, then a consignment stock transfer order will be created with an **Order Type** of 'O' and **Consignment Order Type** will be 'AT' for Stock Transfer. The shipping warehouse for the order will be the customer/ship-to default warehouse. Stock will be transferred from the default warehouse to the consignment warehouse for the item being replenished.

If the type of order entered in Advanced Mobile was a ToolCrib order, then a regular Order Entry order will be created without a consignment order type. The **Order Type** will be 'O' and the shipping warehouse for the order will be the customer/ship-to default warehouse. Note that unlike Consignment, you will not be able to place orders for ToolCrib items through Distribution A+ Order Entry. Also, Inventory balance quantities will not be updated for ToolCrib items throughout Distribution A+ since a ToolCrib (VMI) module does not exist to track all of these quantities. The Last Count Quantity from Advanced Mobile will be the only quantity that is tracked for ToolCrib items in Advanced Mobile.

After the process completes and the **.CSE** file has been read, the system will rename the **.CSE** file with a **.UPD** file extension and move it to the Archive directory in the Order and Inventory Management IFS Path. The file is moved to another directory so that it cannot be processed twice by the Import option.

Workflow

The following steps summarize the sequence of the Delivery and Order and Inventory Management Advanced Mobile Workflow. Customers may or may not use both the Delivery and Order and Inventory Management components. Options 1 through 3 on the Advanced Mobile - Main Menu (MENU AMMAIN) are used to facilitate the export of orders to Advanced Mobile and import of deliveries into Distribution A+. Options 4 through 6 are used to facilitate the export of call schedules (containing customers and items) to Advanced Mobile, and import of orders into Distribution A+ that were entered through Advanced Mobile.

- 1 **MENU AMFILE - Option 1:** In Advanced Mobile Options Maintenance, if you are using the Delivery component, enter the **Delivery IFS Path** where Advanced Mobile will look to pick up exported files containing orders to be delivered. It is also the path where Advanced Mobile places files containing delivered orders to be imported by Distribution A+. If you are using the Order and Inventory Management component, enter the **Order and Inventory Management IFS**

Path which will be used to export to and import from Advanced Mobile for orders placed on a mobile device.

- 2 **MENU AMMAIN - Option 1:** Select the Shipment Delivery Maintenance option to add a delivery group containing orders to be delivered, and to select the Mobile Export option to export the delivery group to Advanced Mobile. Once the export process completes, orders are then placed on the mobile device to be delivered.
- 3 **MENU AMMAIN - Option 2:** Select the Import Delivered Orders option to import delivered orders into Distribution A+ that have been exported to Advanced Mobile through Shipment Delivery Maintenance. When you run this option, detail for orders that were delivered is imported into Distribution A+.
- 4 **MENU AMMAIN - Option 3:** Select the Delivery Inquiry option to review those orders that have been imported into Distribution A+ through Import Delivered Orders. All orders that have been delivered for the indicated company and warehouse will display through this menu option. You will be able to review details of the imported delivered orders, and see which items or packages have or have not been delivered.
- 5 **MENU AMFILE - Option 2:** Select the Managed Inventory (ToolCrib) Maintenance option to set up ToolCrib items for specific customers/ship-tos. Access the pre-existing Consignment File Maintenance Menu (MENU CNFILE) to set up Consignment items for specific customers/ship-tos. These items can then be used for Consignment and ToolCrib processing in the Advanced Mobile application.
- 6 **MENU AMMAIN - Option 4:** Select the Call Schedule Maintenance option to add a call schedule containing customers to visit and items that can be ordered by the customers. Select the Export Schedule option within Call Schedule Maintenance to export the call schedule to Advanced Mobile, which will then place the customers and items from the schedule on a mobile device.
- 7 **MENU AMMAIN - Option 5:** The Export Call Schedules option can also be used to export one or more call schedules to Advanced Mobile.
- 8 **MENU AMMAIN - Option 6:** Select the Import Orders and Customer Inventory Balances option to import orders placed on a mobile device into Distribution A+. Order Entry orders will be created through Offline Order Entry. Distribution A+ replenishment orders will also be created through Offline Order Entry for Consignment and ToolCrib items that were counted and/or ordered on the mobile device.

Reporting

Advanced Mobile has the Managed Inventory (ToolCrib) Listing that you can run from option 12 - Managed Inventory (ToolCrib) (MENU AMFILE). This listing will print all ToolCrib items and their descriptions in the Customer Consignment Item Balance File (**CABAL**).

Interfaces with Other Modules

Advanced Mobile interfaces with the following modules:

- Consignment
- Order Entry

Consignment

The Item Consignment Inquiry, Customer Consignment Inquiry, and Consignment Report options on MENU CNMAIN will show consignment items from the Consignment Item Balance File (**CABAL**). ToolCrib items [which have a blank warehouse ID in the Consignment Item Balance File (**CABAL**)] are not available for the inquiry and report options.

Additionally, the Consignment Replenishment program is called from within Advanced Mobile to pass back the replenishment order quantity for Consignment and ToolCrib items.

Order Entry

The Import Orders and Customer Inventory Balances option on MENU AMMAIN can be used to import sales order information and inventory balances (for Consignment and ToolCrib) into Distribution A+ that were entered through Advanced Mobile, and create Order Entry orders through Offline Order Entry. In Advanced Mobile, an inventory count and/or an order quantity, along with minimum and maximum on-hand values for the items, can be entered for Consignment and ToolCrib items.

Chapter 2 Maintaining Shipment Deliveries

Use Shipment Delivery Maintenance to add a delivery group containing orders to be delivered, and to select the Mobile Export option to export the delivery group to Advanced Mobile.

Once the export process is complete, the system places a file (.SET delivery export file) out in the IFS path specified in Advanced Mobile Options Maintenance (MENU AMFILE). Each .SET file will have a particular naming convention so that it has a unique name with the day and time combination. Once the .SET file is picked up by Advanced Mobile, the file will display in a list in the Advanced Mobile Work Assigner so that it can be reviewed and assigned/unassigned to a specific mobile device. If the characters in the **Export File Name** of the .SET file match characters for a specific driver, then that .SET file will automatically be assigned to the driver's mobile device instead of having to manually assign the file to a driver.

Shipment Delivery Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Shipment Delivery Group Prompt Screen	Use this screen to enter the company, warehouse, and type (outbound) for which a delivery group will be added or reviewed.
Shipment Delivery Group Inquiry Screen	Use this screen to review all delivery groups that have been entered for the Company , Warehouse , and Type you selected on the Shipment Delivery Group Prompt Screen , or to add a new delivery group (F5=NEW GROUP) containing orders to be delivered.
Shipment Delivery Header Screen	Use this screen to add a new delivery group containing orders to be delivered, maintain the selected group containing orders to be delivered, or view the delivery group information only. Which function you perform depends on how you accessed this screen.

Title	Purpose
Assign Orders Screen	Use this screen to assign orders to the delivery group you are adding or maintaining.
View Orders Screen	Use this screen to view the orders in the delivery group only; you will not be able to maintain them.
Override Shipment Information Screen	Use this screen to override the Total Weight , Total Cubes , and/or Total Boxes for the selected order in the delivery group.
Mobile Export Prompt Screen	Use this screen to export orders for delivery. You can enter criteria on this screen by which to limit the order information that will be exported for the mobile devices.

Shipment Delivery Group Prompt Screen

SHIPMENT DELIVERY GROUP PROMPT

Company?

01

Warehouse?

1

Type:

1

(1=Outbound, 2=Inbound)

F3=Exit

This screen displays after selecting option 1 - [Shipment Delivery Maintenance](#) on MENU AMMAIN. Use this screen to enter the **Company**, **Warehouse**, and **Type** for which a delivery group will be added or reviewed. The delivery group added through this option will contain the orders to be delivered, and once exported, this group will be placed on the mobile device for delivery.

Shipment Delivery Group Prompt Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. Key the company number associated with the shipment delivery group you want to add or review. Default Value: The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFIL). Valid Values: A valid company number defined through Company Name Maintenance (MENU XAFIL) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (N 2,0) Required

Field/Function Key	Description
Warehouse	Key the warehouse number associated with the shipment delivery group you want to add or review. Default Value: The default warehouse defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the Default Warehouse defined through Company Name Maintenance (MENU XAFIL). Valid Values: A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFIL) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (A 2) Required
Type	Currently, this field is protected and you cannot access it. Choice 1 for Outbound defaults in this field and it pertains to outbound Order Entry shipments. Since outbound orders involves creating groups of orders to export for delivery, you will only be able to create outbound groups if Advanced Mobile is installed. Groups set up through this option will therefore only pertain to Order Entry orders that will be shipped and delivered. Choice 2 for Inbound pertains to Purchasing receipts and is reserved for future use. Default Value: 1 for Outbound
F3=Exit	Press F3=EXIT to cancel this option and return to MENU AMMAIN.
Enter	Press ENTER to confirm your entries. The Shipment Delivery Group Inquiry Screen will appear.

Shipment Delivery Group Inquiry Screen

Company: 1 WH: 1 SHIPMENT DELIVERY GROUP INQUIRY ALL				
	Group	Description	Entry Date	Close Date
1	14	group 14	2/06/11	2/06/11
2	13	group 13	2/06/11	
3	11	Friday's group	2/04/11	
4	1	Hartford	1/20/11	

Last

Select: ... Limits

Group ID:	To:
Entry Date:	To:
Close Date:	To:

F2=Open F4=Close Group F5=New Group F6=Delivery Inquiry F10=Maintain Group F12=Return

This screen displays after pressing **ENTER** on the [Shipment Delivery Group Prompt Screen](#). Use this screen to review all delivery groups that have been entered for the **Company**, **Warehouse**, and **Type** you selected on the [Shipment Delivery Group Prompt Screen](#), or to add a new delivery group (**F5=NEW GROUP**) containing orders to be delivered. Delivery groups are displayed in descending order, so that the newest delivery groups entered are displayed first in the list.

Since the **Type** field (on the [Shipment Delivery Group Prompt Screen](#)) currently defaults to 1 for Outbound, which pertains to Order Entry shipments, all the groups displayed on this screen are delivery groups located in the Delivery Group Header File (**DGHED**).

If any of the groups have delivery discrepancies, then the group will be highlighted on this screen. A delivery discrepancy indicates that there was an issue with the delivery of the order; for example, certain items were not delivered due to damage or the order was not delivered because the customer refused to sign.

To narrow the groups displayed on this screen, you can limit the groups by **Group ID**, **Entry Date**, and **Close Date**. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Note: All dates on this screen will display in the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG); or, if that field is blank, the date using the system's **Default Date Format** specified through System Options Maintenance (MENU XAFIL).

Note: This is a roll screen. **More...** appears at the bottom of a roll screen to indicate that more data is available for viewing. **Last** appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- ***PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

Shipment Delivery Group Inquiry Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number. This field displays the company number you selected on the Shipment Delivery Group Prompt Screen. Display
WH	This field displays the warehouse number selected on the Shipment Delivery Group Prompt Screen. Display
All/Open/Close	This field indicates if the groups displayed on this screen are showing All groups, only those groups that are Open, or only those groups that are Closed, as toggled with the F2=OPEN / F2==CLOSED / F2=ALL function key. The default display of this screen is to show ALL groups. Display
(Reference Number)	This is the reference number assigned to each delivery group displayed on this screen. Key this number in the Select field to select a delivery group you want to close or maintain. Display
Group	This field displays the number of the group that was automatically assigned to this group on the Shipment Delivery Header Screen. Since the Type field on the Shipment Delivery Group Prompt Screen currently defaults to 1=Outbound (which pertains to Order Entry shipments), all the groups displayed on this screen are delivery groups. If any of the groups displayed on this screen have delivery discrepancies, then the group will be highlighted. A delivery discrepancy indicates that there was an issue with the delivery of the order; for example, certain items were not delivered due to damage or the order was not delivered because the customer refused to sign. Display
Description	This field displays the description of the group entered on the Shipment Delivery Header Screen. Display

Field/Function Key	Description
Entry Date	This field displays the date the group was created on the Shipment Delivery Header Screen. Display
Close Date	If Open groups only are displayed on this screen based on the F2=OPEN / F2=CLOSED / F2=ALL toggle function key, then this field will not appear on this screen. If the group has been closed, this field displays the date the group was closed via the F4=CLOSE GROUP function key on this screen. Once a group has been closed, you will not be able to maintain the group. Display
Select	Use this field to select one of the delivery groups displayed on this screen that you want to close or maintain. Key the number displayed in the (Reference Number) field that corresponds to the group you want to select, and press F4=CLOSE GROUP to close the group or F10=MAINTAIN GROUP to maintain the group. (N 2,0) Optional
Limits: Group ID	If Open groups only are displayed on this screen based on the F2=OPEN / F2=CLOSED / F2=ALL toggle function key, then this field will not appear on this screen. Use this field to limit the display of the groups shown on this screen to only those groups that fall within the from and to ranges entered. (2 @ N 10,0) Optional
Limits: Entry Date	If Open groups only are displayed on this screen based on the F2=OPEN / F2=CLOSED / F2=ALL toggle function key, then this field will not appear on this screen. Use this field to limit the display of the groups shown on this screen to only those groups whose entry dates fall within the from and to ranges entered. Valid Values: Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFIELD). (2 @ N 6,0) Optional

Field/Function Key	Description
Limits: Close Date	If Open groups only are displayed on this screen based on the F2=OPEN / F2=CLOSED / F2=ALL toggle function key, then this field will not appear on this screen. Use this field to limit the display of the groups shown on this screen to only those groups whose close dates fall within the from and to ranges entered. Valid Values: Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
F2=Open/F2=Closed/ F2=All	Press F2=OPEN / F2=CLOSED / F2=ALL to toggle the screen to display All groups (both open and closed), only those groups that are Open, or only those groups that are Closed. The mode of the screen is displayed in the upper right hand corner of the screen. If Open groups only are displayed on this screen, then the Close Date field and the Limits fields will not appear on this screen.
F4=Close Group	To close a delivery group, key the reference number of the group you want to select in the Select field and press F4=CLOSE GROUP. You will receive a warning message indicating that once the delivery group is closed, you will not be able to maintain it (you will still, however, be able to view it). Press F4=CLOSE GROUP again to close the selected group. Today's date will appear in the Close Date field. It is suggested that you close a delivery group once all orders have been delivered in that particular group.
F5=New Group	To add a new delivery group containing orders to be delivered, press F5=NEW GROUP. The Shipment Delivery Header Screen will appear.
F6=Delivery Inquiry	To review all orders that have been delivered for the selected company and warehouse, press F6=DELIVERY INQUIRY. The Delivery List Screen of the Delivery Inquiry option on MENU AMMAIN will appear. If you first key a reference number of a group in the Select field and then press F6=DELIVERY INQUIRY, the Delivery List Screen will only show the orders delivered for that specific delivery group.
F10=Maintain Group	To maintain the selected group, key the reference number of the group you want to select in the Select field, and press F10=MAINTAIN GROUPS. The Shipment Delivery Header Screen will appear. Note: Delivery groups cannot be maintained if they have been closed via the F4=CLOSE GROUP function key.

Field/Function Key	Description
F12=Return	Press F12=RETURN to return to the Shipment Delivery Group Prompt Screen .
Enter	To view group information only, key the reference number of the group you want to select in the Select field, and press ENTER . The Shipment Delivery Header Screen will appear. If you want to maintain the information, see F10=MAINTAIN GROUP .

Shipment Delivery Header Screen

SHIPMENT DELIVERY HEADER			
Company:	1	WH:	1
Group:	1		
Description:	Tuesday	Total Weight:	679.0000
Driver ID?		Total Cubes:	48.12500
Container ID:		Total Boxes:	1
Trailer ID:		Total Value:	5975.70 US\$
Waybill No:		Entry Date:	12/07/11
BOL No:		Pro No:	
FOB Code?	10	Delivered to Dock	
Ship Via:		Misc Notes:	
Broker Name:			
Addr1:			
Addr2:			
Addr3:			
Addr4:			
City:			
St/Prov?		Zip/Pstl:	Extn
Country?		Phone 1:	
Contact:		Phone 2:	
Email Address:			
		F9=View Orders	F12=Return

This screen displays after pressing **F5=NEW GROUP**, **F10=MAINTAIN GROUP**, or **ENTER** on the [Shipment Delivery Group Inquiry Screen](#).

If you are accessing this screen after pressing **F5=NEW GROUP** on the [Shipment Delivery Group Inquiry Screen](#), use this screen to add a new delivery group containing orders to be delivered. All information used for delivery purposes will be defined on this screen.

If you are accessing this screen after pressing **F10=MAINTAIN GROUP** on the [Shipment Delivery Group Inquiry Screen](#), use this screen to maintain the selected group containing orders to be delivered.

If you are accessing this screen after pressing **ENTER** on the [Shipment Delivery Group Inquiry Screen](#), use this screen to view the information in an inquiry only format.

Shipment Delivery Header Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Shipment Delivery Group Prompt Screen, if using multiple companies. The orders for the delivery group you are adding or maintaining are associated with this company. Display
WH	This field displays the warehouse number selected on the Shipment Delivery Group Prompt Screen. The orders for the delivery group you are adding or maintaining will be shipped from this warehouse. Display
Group	This field identifies the group number of the delivery group being added or maintained. If you are adding a new delivery group, this field is automatically assigned. If you are maintaining an existing delivery group, this field will display the existing delivery group number. Display
Description	This field identifies the description of the delivery group being added or maintained. Key a description for the delivery group being added. If you are maintaining an existing delivery group, this field displays the existing description of the group. (A 30) Required
Total Weight	This field identifies the total weight of the delivery group being added or maintained. This is the total shipped weight from the Order Header File (ORHED) for all the orders in the delivery group. Key the total weight of all the orders in the delivery group being added. You will also have the option to override this weight using the O=Ovr Ship Info option on the Assign Orders Screen. If you override weight for an order, then that weight will be used instead of the shipped weight from the Order Header File (ORHED). If you are maintaining an existing delivery group, this field displays the existing total weight from the Delivery Group Header File (DGHED). (N 15,5) Optional

Field/Function Key	Description
Driver ID	This field identifies the driver associated with the delivery of the group being added or maintained. This Driver ID field will become the Delivery Group Owner field. Key the Driver's ID. This Driver's ID will be used as the default in the Export File Name field on the Mobile Export Prompt Screen and will be used to create the .SET delivery export file. If you leave this field blank, the User ID will then be used as the default in the Export File Name field on the Mobile Export Prompt Screen. If you are maintaining an existing delivery group, this field displays the Delivery Group Owner. The description next to this field will be the Packer/Picker/Driver description from Packer/Picker/Driver ID Maintenance (MENU OEFIL3). Default Value: The Delivery Group Owner field in the Delivery Group Header File (DGHED). Valid Values: A valid Driver ID defined through Packer/Picker/Driver ID Maintenance (MENU OEFIL3). (A 3) Optional
Total Cubes	This field identifies the total cubes for all the orders in the delivery group being added or maintained. Key the total cubes of all the orders in the delivery group being added. You will also have the option to override the total cubes using the O=Ovr Ship Info option on the Assign Orders Screen. If you override cubes for an order, then that cube value will be used instead of the total cubes from the Order Header File (ORHED). (N 15,2) Optional
Container ID	This field identifies the ID of the container of the delivery group being added or maintained. Key the Container ID. (A 20) Optional
Total Boxes	This field identifies the total number of boxes of the delivery group being added or maintained. This is the total number of boxes located in the Box Header File (OEBHD) for all the orders in the delivery group. Key the total boxes for all the orders in the delivery group. You will also have the option to override the total boxes using the O=Ovr Ship Info option on the Assign Orders Screen. If you override boxes for an order, then that value will be used instead of the total boxes from the Box Header File (OEBHD). (N 9,0) Optional

Field/Function Key	Description
Trailer ID	This field identifies the ID of the trailer of the delivery group being added or maintained. Key the Trailer ID. (A 20) Optional
Total Value	This field identifies the total value of the delivery group being added or maintained. This is the total order value from the Order Header File (ORHED) for all the orders in the delivery group. If International Currency is installed, the currency symbol of the company's local currency will also display. Display
Waybill No	This field identifies Waybill Number of the delivery group being added or maintained. A Waybill Number confirms a delivery and is a document issued by a carrier giving details relating to the shipment of the order. If a package is en route, you can find out where the package is within seconds using the Waybill Number. Key the Waybill Number for the delivery group. (A 30) Optional
BOL No	This field identifies the Bill of Lading (BOL) Number of the delivery group being added or maintained. A BOL is a document acknowledging receipt of goods (can be used as evidence that a transport company or carrier received goods from a shipper). Key the BOL number for the delivery group. (A 20) Optional
Entry Date	This field identifies the date the delivery group is being added or maintained. If you are adding a new delivery group, today's date will automatically be assumed once you exit this screen. Display
Pro No	This field identifies the Pro No (package tracking number) of the delivery group being added or maintained. This number can be used by carriers as a reference for freight movement. Key the Pro Number. (A 25) Optional

Field/Function Key	Description
FOB Code	This field identifies the Freight On Board (FOB) Code of the delivery group being added or maintained. FOB codes are used to track cost liability and freight liability on orders that are processed and shipped as well as on orders that are purchased and received. Key the FOB Code for the delivery group. Note: This field is required if the Freight Charges Required to Ship Confirm Orders field in Order Entry Options Maintenance (MENU XAFIL) for the selected company is defined as Y. Otherwise, this field is optional. Valid Values: An FOB code defined through FOB Codes Maintenance (MENU OEFIL3 / MENU POFIL2). (A 5) Required/Optional
Ship Via	This field identifies the method of shipment of the delivery group being added or maintained. Key the shipment method that will be used for this delivery group. (A 20) Optional
Misc Notes	This field is used to enter any notes you want associated with the delivery group being added or maintained. Key notes for the delivery group. (A 30) Optional
Broker Name	This field identifies the name of the broker associated with the delivery group being added or maintained. Key the name of the broker for the delivery group. (A 30) Optional
Broker Addr 1 – 3	This field identifies address information for the broker associated with the delivery group being added or maintained. Key the broker address information for the delivery group. For example, the street address, post office box number, or other address information except for the city, state/province, country, and zip/postal code which are specified in their own fields on this screen. (3 @ A 30) Optional
City	This field identifies the city in which the broker resides that you assigned to the delivery group being added or maintained. Key the city where the broker resides for the delivery group. (A 20) Optional

Field/Function Key	Description
St/Prov	This field identifies the state or province in which the broker resides that you assigned to the delivery group being added or maintained. Key the state or province where the broker resides for the delivery group. Valid Values: A state or province code defined through State/Province Codes Maintenance (MENU OEFIL3) if Validate State/Province is Y in Systems Options Maintenance (MENU XAFIL2). (A 20) Optional
Zip/Pstl	This field identifies the zip or postal code in which the broker resides that you assigned to the delivery group being added or maintained. Key the zip or postal code where the broker resides for the delivery group. (A 10) Optional
Country	This field identifies the country in which the broker resides that you assigned to the delivery group being added or maintained. Key the country where the broker resides for the delivery group. Valid Values: A country code defined through Country Name Maintenance (MENU ARFIL2). (A 3) Optional
Phone 1 and Extn	This field identifies the telephone number and extension for the broker that you assigned to the delivery group being added or maintained. Key the broker's first telephone number and extension for the delivery group. The phone number includes a 3-character country access code followed by the area code and telephone number. For example: 011 (781) 555-1212. For more information, refer to Phone and Fax Number Delimiters in the Infor Distribution A+ Cross Applications User Guide. Note: Blank spaces are allowed between numerals only if Allow Blank Phone Delimiters is Y in Systems Options Maintenance (MENU XAFIL2). Valid Values: Numerals and the following symbols: - () . / (N 3,0 / N 20,0 / N 4,0) Optional
Contact	This field identifies the person who should be contacted, if needed, for the delivery group being added or maintained. Key the name of the contact person for the delivery group. (A 30) Optional

Field/Function Key	Description
Phone 2 and Extn	This field identifies the telephone number and extension for the broker that you assigned to the delivery group being added or maintained. Key the broker's second telephone number and extension for the delivery group. The phone number includes a 3-character country access code followed by the area code and telephone number. For example: 011 (781) 555-1212. For more information, refer to Phone and Fax Number Delimiters in the Infor Distribution A+ Cross Applications User Guide. Note: Blank spaces are allowed between numerals only if Allow Blank Phone Delimiters is Y in Systems Options Maintenance (MENU XAFILE). Valid Values: Numerals and the following symbols: - () . / (N 3,0 / N 20,0 / N 4,0) Optional
Email Address	This field identifies the broker's email address for the delivery group being added or maintained. Key the email address of the broker for the delivery group. (A 128) Optional
F9=Assign Orders / F9=View Orders	This function key displays as F9=ASSIGN ORDERS if you are adding or maintaining a delivery group. Press F9=ASSIGN ORDERS to assign orders to the delivery group you are adding or maintaining. The Assign Orders Screen will appear. If you are accessing this screen after pressing ENTER on the Shipment Delivery Group Inquiry Screen, and fields on this screen are for viewing purposes only, this function key displays as F9=VIEW ORDERS. Press F9=VIEW ORDERS to view the orders in the group but not be able to maintain them. The View Orders Screen will appear.
F11=Mobile Export	The F11=MOBILE EXPORT function key displays on this screen only if you are adding or maintaining a delivery group. Press F11=MOBILE EXPORT once orders have been assigned to the delivery group to export these orders for delivery. The Mobile Export Prompt Screen will appear. Note: You cannot export a delivery group if no orders have been assigned to the group on the Assign Orders Screen.
F12=Return	Press F12=RETURN to return to the Shipment Delivery Group Inquiry Screen without performing any functions. The Workstation ID in the Delivery Group Header File (DGHED) will be updated with blanks.

Field/Function Key	Description
F24=Delete	The F24=DELETE function key displays on this screen only if you are maintaining a delivery group. Press F24=DELETE to delete the delivery group being maintained. The group cannot be deleted if order deliveries exist for the group. When you press F24=DELETE, you will receive the message: Press F24 to Confirm Delete. Press F24=DELETE again to confirm deletion. The delivery group will be deleted and you will be returned to the Shipment Delivery Group Inquiry Screen.
Enter	If you are adding a delivery group, press ENTER to confirm the creation of the delivery group. The Shipment Delivery Group Inquiry Screen will appear. If you are maintaining an existing delivery group, press ENTER to confirm your changes and update the delivery group with the changed information. The Shipment Delivery Group Inquiry Screen will appear.

Assign Orders Screen

Company: 1		WH: 1		ASSIGN ORDERS			
Group: 1							
Del	Seg	Reg Date	CarCd	Rout/Stp	Order/Gn	Status	Customer Name
-	0001	12/11/09	UPS	/000	01829/01	PS-PRT	Shelton School Department
..	0002	12/11/09	UPS	/000	01837/01	PS-PRT	Financial Technologies
..	0004	1/20/10	UPS	/000	01992/00	RTN-HLD	Hartford Medical Association
..	0004	1/20/10	UPS	/000	01994/00	RTN-HLD	Hartford Medical Association
..	0004	2/20/10	UPS	/000	02127/01	Held-DL	Hartford Medical Association
..	0004	2/21/10	UPS	/000	02156/01	Held-DL	Hartford Medical Association
..	0004	3/08/10	UPS	/000	02514/00	PS-PRT	Hartford Medical Association
..	0004	3/15/10	UPS	/000	02545/00	PS-PRT	Hartford Medical Association
..	0004	3/22/10	UPS	/000	02574/00	PS-PRT	Hartford Medical Association
..	0004	3/29/10	UPS	/000	02611/00	Held-DL	Hartford Medical Association
..	0005	2/02/10	UPS	/000	01997/00	PS-PRT	Attleboro School Department
..	0005	1/10/11	TRUCK	/000	02789/00	History	Attleboro School Department
							More...

Opt: D=Delivery Inq	S=View Signature	Add: Order/Gn:
O=Ovr Ship Info	V=View Order	
R=Remove Order		

F2=Cust Addr	F5=Delivery Date	F9=Carrier Limits	F12=Return
			F24=Remove All

View Orders Screen

Company: 1		WH: 1		VIEW ORDERS			
Group: 1							
Del	Seg	Reg Date	CarCd	Rout/Stp	Order/Gn	Status	Customer Name
-	0001	12/11/09	UPS	/000	01829/01	PS-PRT	Shelton School Department
..	0002	12/11/09	UPS	/000	01837/01	PS-PRT	Financial Technologies
..	0004	1/20/10	UPS	/000	01992/00	RTN-HLD	Hartford Medical Association
..	0004	1/20/10	UPS	/000	01994/00	RTN-HLD	Hartford Medical Association
..	0004	2/20/10	UPS	/000	02127/01	Held-DL	Hartford Medical Association
..	0004	2/21/10	UPS	/000	02156/01	Held-DL	Hartford Medical Association
..	0004	3/08/10	UPS	/000	02514/00	PS-PRT	Hartford Medical Association
..	0004	3/15/10	UPS	/000	02545/00	PS-PRT	Hartford Medical Association
..	0004	3/22/10	UPS	/000	02574/00	PS-PRT	Hartford Medical Association
..	0004	3/29/10	UPS	/000	02611/00	Held-DL	Hartford Medical Association
..	0005	2/02/10	UPS	/000	01997/00	PS-PRT	Attleboro School Department
..	0005	1/10/11	TRUCK	/000	02789/00	History	Attleboro School Department
							More...

Opt: D=Delivery Inq	S=View Signature
V=View Order	

F2=Cust Addr	F5=Delivery Date	F12=Return
--------------	------------------	------------

Depending on the function you are performing, you will either receive the [Assign Orders Screen](#) or the [View Orders Screen](#). If you are adding or maintaining a delivery group, the [Assign Orders Screen](#) appears after pressing **F9=ASSIGN ORDERS** on the [Shipment Delivery Header Screen](#). Existing orders assigned to the delivery group in the Delivery Group Detail File (**DGDET**) are displayed. Use this screen to assign orders to the delivery group you are adding or maintaining. You can assign orders to the delivery group two ways:

- By entering an open order number in the **Order/Gn** field on this screen (when you press **ENTER**, the order will display on the top portion of the screen).
- By pressing **F9=CARRIER LIMITS** on this screen to access the Carrier Order Inquiry (MENU OEMAIN) to limit the open orders to add to the delivery group by carrier and route/stop. The orders that match the carrier criteria you enter will be called into this screen and display on the top portion of the screen.

If you are viewing a delivery group, the [View Orders Screen](#) appears after pressing **F9=VIEW ORDERS** on the [Shipment Delivery Header Screen](#). In this screen mode, you will only be able to view the orders in the group and not maintain them.

Note: The [Assign Orders Screen](#) and [View Orders Screen](#) are both roll screens. More... appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- ***PAGE DOWN** or **SHIFT-ROLL FWD** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** to display the previous screen.

Assign Orders Screen and View Orders Screen Fields and Function Keys

Field/Function Key	Description
Company	This field displays the company number you selected on the Shipment Delivery Header Screen , if using multiple companies. The orders for the delivery group you are adding, maintaining or viewing are associated with this company. Display
WH	This field displays the warehouse number you selected on the Shipment Delivery Header Screen . The orders for the delivery group you are adding, maintaining or viewing will be shipped from this warehouse. Display
Group	This field identifies the group number of the delivery group you are adding, maintaining or viewing. Display

Field/Function Key	Description
(Option)	This field is located before the Del Seq field. When adding or maintaining a delivery group, options are available to perform on the orders assigned to the group. Key D (D=Delivery Inq) in the option field corresponding to the order you want to select and press ENTER. The Delivery List Screen located in Delivery Inquiry (MENU AMMAIN) will appear. The inquiry will contain detailed order delivery information, including delivered lines and packages that you can view. Key O (O=Ovr Ship Info) in the option field corresponding to the order you want to select and press ENTER. The Override Shipment Information Screen will appear. You will be able to use this screen to override the Total Weight, Total Cubes and Total Boxes for the order. The overridden values on the Shipment Delivery Header Screen will not be changed. The override option only overwrites the values sent to Advanced Mobile. Key R (R=Remove Order) in the option field corresponding to the order you want to select and press ENTER. The order will be removed from the screen and from the delivery group. If any delivery records exist for the order, then you will not be allowed to remove the order from the group. Key S (S=View Signature) in the option field corresponding to the order you want to select and press ENTER. You cannot select this option until orders have been delivered. The signature in the Linked Document Inquiry for the order will be displayed. The linked document for the signature will have a title of: Delivery_Signature. When you select the signature record, the signature bitmap will display in a browser window. Each order that has been delivered will have an associated bitmap file for the delivery signature if a customer signed for that order. Key V (V=View Order) in the option field corresponding to the order you want to select and press ENTER. The Order Display Screen in the Open Order Inquiry (MENU OEMAIN) will appear. If the order is a history order (not open), the Invoice Display Screen in the Customer Order/ Shipment Inquiry (MENU OEMAIN) will appear instead. When viewing a delivery group, the O=Ovr Ship Info and R=Remove Order options will not be available and will not display on this screen. (A 1) Optional

Field/Function Key	Description
Del Seq	This field identifies the delivery sequence for the order in the delivery group. Orders in the delivery group will be grouped by delivery sequence and all orders for a specific customer will have the same delivery sequence to assist the driver making deliveries to customers along the route. Different customers will have different delivery sequence numbers. In order to determine if the customer from one order is the same customer for a different order, either the Ship-To or Bill-To addresses from the sales order will be compared. If the Ship-To Name for an open order is not blank, then the Ship-To Address fields will be matched. If the Ship-To Name for an open order is blank, then the Bill-To Address fields will be matched. Display
Req Date/Del Date	This field displays either the Req Date or the Del Date, as toggled with the F5=DELIVERY DATE / F5=REQ SHIP DATE function key. If the Req Date field is displayed, this field identifies the requested ship date from either the Open Order Header File (ORHED) or the Order History Header File (HSHEd). If the Del Date field is displayed, this field identifies the delivery date in the Delivery Group Detail File (DGDET), if that order has been delivered. Display
Car Cd	This field identifies the Carrier Code from the sales order. Display
Rout/Stp	This field identifies the Route/Stop from the sales order. Display
Order/Gn	This field displays the sales order and generation number assigned to this delivery group. If the order has any delivery discrepancies, then the Order/Gn field on this screen will be highlighted. A delivery discrepancy implies that there was an issue with the delivery of the order, such as certain items were not delivered due to damage, or the order was not delivered because the customer refused to sign. Display

Field/Function Key	Description
Status	This field identifies the status of the order. HELD: Displays for an open order with an order status of '9'. HELD + <hold code>: Displays for an open order with an order status of '9' and if there is an order hold code. PS-RDY: Displays for an open order with an order status of '1'. PS-PRT: Displays for an open order with an order status of '2'. INV-RDY: Displays for an open order with an order status of '3'. INV-PRT: Displays for an open order with an order status of '4'. RDY-CON: Displays for an open order if it is ready for consolidated invoice. RTN-RDY: Displays for an open order if it is a return order with a status of '3'. RTN-PRT: Displays for an open order if it is a return order with a status of '4'. RTN-RDY: Displays for an open order if it is a return order with a status of '9'. RF-PCK: Displays if using RF Directed Picking. HISTORY: Displays if the order is in history. Display
Customer Name / Customer Address / Customer City/St/Zip/ Pstl	This field identifies the: - customer name - customer address - customer city, state, zip and postal associated with the open order, as toggled with the F2=CUST ADDR / F2=CITY/ZIP/PST / F2=CUST NAME function key. The Customer Name field for an open order will either be the Ship-To Name or the Bill-To Name, if the Ship-To Name is blank. If the Ship-To Address 1 for an open order is not blank, then the Customer Address fields that show for the toggle information will be the Ship-To Address fields. Display

Field/Function Key	Description
Add: Order/Gn:	You can assign orders to the delivery group using the F9=CARRIER LIMITS function key on this screen, or by keying an open order number/ generation in this field. When you press ENTER, the order will display on the top portion of the screen (if all system edits are passed for the order being added), and the order will be added to the delivery group in process. The order will have either a new delivery sequence, or have the same delivery sequence as other orders in the group with the same customer. The order/generation number cannot be added if any of the following are true: - the order's warehouse is not the same as the warehouse for the delivery group - the order already exists in another open delivery group - the order already exists in the current delivery group Valid Values: Must be an open order and cannot already exist in the delivery group (A 5 / N 2,0) Optional
F2=Cust Addr / F2=City/Zip/Pst / F2=Cust Name	Press F2=CUST ADDR / F2=CITY/ZIP/PST / F2=CUST NAME to toggle between showing the Customer Name, Customer Address, and the Customer City/Zip/Postal Code on the top portion of this screen for orders in the delivery group.
F5=Delivery Date / F5=Req Ship Date	Press F5=DELIVERY DATE / F5=REQ SHIP DATE to toggle between showing the Requested Ship Date from the Open Order Header File (ORHED) or Order History Header File (HSBED), or the Delivery Date in the Delivery Group Detail File (DGDET), if that order has been delivered.
F9=Carrier Limits	The F9=CARRIER LIMITS appears only if you are adding or maintaining a delivery group. It does not appear if you are viewing a delivery group only. The F9=CARRIER LIMITS function key may be used as another way for you to add open orders to the delivery group. Using this function key, you will be able to limit orders to add to the delivery group by carrier and route/stop. Press F9=CARRIER LIMITS to access the Carrier Order Inquiry (MENU OEMAIN).
F12=Return	Press F12=RETURN to return to the Shipment Delivery Header Screen without performing any functions.

Field/Function Key	Description
F24=Remove All	The F24=REMOVE ALL function key appears only if you are adding or maintaining a delivery group. It does not appear if you are viewing a delivery group only. Press F24=REMOVE ALL to remove all orders from the delivery group. You will not be prompted to confirm your action. As soon as you press F24=REMOVE ALL, the orders will be removed from the delivery group. Note: If there are delivery records found for any of the orders, then those orders will not be removed from the delivery group.
Enter	Press ENTER after keying an option in the (Option) field to confirm your entry and perform the command. Key D (D=Delivery Inq) in the option field corresponding to the order you want to select and press ENTER. The Delivery List Screen located in Delivery Inquiry (MENU AMMAIN) will appear. Key O (O=Ovr Ship Info) in the option field corresponding to the order you want to select and press ENTER. The Override Shipment Information Screen will appear. Key V (V=View Order) in the option field corresponding to the order you want to select and press ENTER. The Order Display Screen in the Open Order Inquiry (MENU OEMAIN) will appear. If the order is a history order (not open), the Invoice Display Screen in the Customer Order/ Shipment Inquiry (MENU OEMAIN) will appear instead.

Override Shipment Information Screen

Company: 1 WH: 1 <u>Override Shipment Information</u>		
Group: 1		
Order/Gn: 02611/00		
	<u>Overridden Values</u>	<u>Current Order Values</u>
Total Weight:	205.0000	205.0000
Total Cubes:	17.916	17.916
Total Boxes:		
F5=Box Inquiry F12=Return		

This screen displays after keying **O** (O=Ovr Ship Info) in the **Option** column of an order on the [Assign Orders Screen](#), and pressing **ENTER**. For the order selected, the existing overridden values and current order values are displayed. Use this screen to override the **Total Weight**, **Total Cubes**, and/or **Total Boxes** for this order in the delivery group.

Note: The override function performed on this screen overwrites the values sent to Advanced Mobile only. The values in the Open Order Header File (**ORHED**) will not be updated with the new overridden values keyed on this screen.

Override Shipment Information Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Shipment Delivery Header Screen. The orders for the delivery group you are adding or maintaining are associated with this company. Display

Field/Function Key	Description
WH	This field displays the warehouse number selected on the Shipment Delivery Header Screen. The orders for the delivery group you are adding or maintaining will be shipped from this warehouse. Display
Group	This field identifies the group number of the delivery group you are adding or maintaining. Display
Order/Gn	This field displays the order number/generation number selected on the Assign Orders Screen by keying O (O=Ovr Ship Info) in the (Option) field corresponding to the order. For this order number, you have the ability to override the Total Weight, Total Cubes, and/or Total Boxes for this order in the delivery group. Display
Total Weight	This field displays the existing overridden value and current sales order value for the Total Weight of the selected order. The overridden value for Total Weight is from the Delivery Group Detail File (DGDET). The current order value for Total Weight is from the sales orders files that remain unchanged. Use this field to override the total weight of the order, for tracking through Advanced Mobile. (N 13,4) Optional
Total Cubes	This field displays the existing overridden value and current sales order value for the Total Cubes of the selected order. The overridden value for Total Cubes is from the Delivery Group Detail File (DGDET). The current order value for Total Cubes is from sales orders files that remain unchanged. Use this field to override the total cubes of the order for tracking through Advanced Mobile. (N 10,3) Optional

Field/Function Key	Description
Total Boxes	This field displays only if Track Boxes is set to Y for the delivery group warehouse in WM Warehouse Options (MENU WMFILE), or if Track Boxes is set to Y in Electronic Data Interchange (if Warehouse Management is not being used). This field displays the existing overridden value and current order value for the Total Boxes of the selected order. The overridden value for Total Boxes is from the Delivery Group Detail File (DGDET). The current order value for Total Boxes is from the sales orders files that remain unchanged. Use this field to override the total number of boxes of the order. (N 9,0) Optional
F5=Box Inquiry	The F5=BOX INQUIRY function key displays only if Track Boxes is set to Y for the delivery group warehouse in WM Warehouse Options (MENU WMFILE), or if Track Boxes is set to Y in Electronic Data Interchange (if Warehouse Management is not being used). Press F5=BOX INQUIRY to access the Box List Screen in Box Maintenance (MENU WMMAIN), where you can view or create boxes (using F6=CREATE BOX) for the current order. Refer to Box Maintenance (MENU WMMAIN) for further details. Once you exit the Box Inquiry function and return to this override screen, the overridden value for Total Boxes will be updated with the total number of boxes from the Box Header File (OEBHD) for the order. Therefore, if boxes were added for the order, the overridden value for Total Boxes will reflect the change. You also can manually change the Total Boxes value without creating boxes, but that value may not be the same as what resides in the Box Header File (OEBHD).
F12=Return	Press F12=RETURN to return to the Assign Orders Screen without performing any functions.
Enter	Press ENTER to confirm your changes. You will then be returned to the Assign Orders Screen .

Mobile Export Prompt Screen

```

Company: 1  WH: 1  OVERRIDE SHIPMENT INFORMATION
Group:      1
Order/Gn: 02611/00

                Overridden Values      Current Order Values

Total Weight:  - .... 205.0000          205.0000
Total Cubes:   .... 17.916             17.916
Total Boxes:   .....

                                F5=Box Inquiry   F12=Return
  
```

This screen displays after pressing **F11=MOBILE EXPORT** on the [Shipment Delivery Header Screen](#), once orders have been assigned to the delivery group. This screen also displays after pressing **ENTER** on the Create Delivery Group Screen in Ship Confirm Multiple Orders (MENU OEMAIN), if the option to export to Advance Mobile was selected. Refer to Ship Confirm Multiple Orders (MENU OEMAIN) for further details.

Use this screen to export these orders for delivery. You can enter criteria on this screen by which to limit the order information that will be exported for the mobile devices.

Note: You cannot export a delivery group if no orders have been assigned to the group on the [Assign Orders Screen](#).

Mobile Export Prompt Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Shipment Delivery Header Screen. The orders for the delivery group you are adding or maintaining are associated with this company. Display

Field/Function Key	Description
WH	This field displays the warehouse number selected on the Shipment Delivery Header Screen. The orders for the delivery group you are adding or maintaining will be shipped from this warehouse. Display
Group	This field identifies the group number of the delivery group you are adding or maintaining. Display
Export Line Items	Use this field to limit the order information that will be exported for the mobile devices. Key Y to export line items from orders in the delivery group. If line items are exported, these items will display on the mobile device for an order when deliveries are being made. Key N if you do not want line items from orders in the delivery group exported. Default Value: Y (A 1) Required
Include Backordered Items	Use this field to limit the order information that will be exported for the mobile devices. Key Y to export backordered line items from orders in the delivery group. Key N if you do not want backordered line items from orders in the delivery group exported. Valid Values: This field must be N if Export Line Items is set to N Default Value: N (A 1) Required

Field/Function Key	Description
Allow Line Item Changes	Use this field to limit the order information that will be exported for the mobile devices. Key Y to allow the driver to make line item changes for orders in the delivery group. When delivering the order, there will be a Quantity Shipped field on the mobile device. The driver will be allowed to change the quantity on the device if this field is Y. Reasons why a driver might need to change the quantity of the line items include: the items may be damaged and the full quantity cannot be delivered; the customer could refuse the items; the driver may not have enough of the item on the truck to deliver the full amount; the driver may have to deliver more of the item than what was originally shipped for the order. Key N if you do not want to allow line item changes on the mobile device for orders in the delivery group. Valid Values: This field must be N if Export Line Items is set to N Default Value: N (A 1) Required
Export Charges	Use this field to limit the order information that will be exported for the mobile devices. Key Y to export special charges from orders in the delivery group. Key N if you do not want to export special charges from orders in the delivery group. Default Value: N (A 1) Required
Export Comments	Use this field to limit the order information that will be exported for the mobile devices. Key Y to export line item comments from orders in the delivery group. Key N if you do not want to export line item comments from orders in the delivery group. Default Value: N (A 1) Required

Field/Function Key	Description
Export Box/Package Information	This field displays only if Track Boxes is set to Y for the delivery group warehouse in WM Warehouse Options (MENU WMFILE), or if Track Boxes is set to Y in Electronic Data Interchange (if Warehouse Management is not being used). Use this field to limit the order information that will be exported for the mobile devices. Key Y to export boxes or packages from orders in the delivery group. If boxes or packages are exported, these packages will display on the mobile device for an order when deliveries are being made. Key N if you do not want to export boxes or packages from orders in the delivery group. Default Value: Y (A 1) Required
Export File Name	Use this field to name the export file (.SET file) that is picked up by Advanced Mobile. Key the export file name. Once the file is exported to Advanced Mobile, Advanced Mobile will look at the characters entered in this field to determine if the file can be automatically assigned to one of the drivers with that same name. If none of the characters in this field match any of the drivers, then the export file will not be automatically assigned to a driver's mobile device and it will have to be manually assigned. The Export File Name entered in this field will be appended with the warehouse number and a date/time stamp when the export file is created. Valid Values: Cannot contain any special characters that are not allowed for Windows files Default Value: The Driver ID from the Shipment Delivery Header Screen for the Export File Name. If the Driver ID is left blank on the Shipment Delivery Header Screen, then this field will default to the current Distribution A+ user. (A 10) Required
F12=Return	Press F12=RETURN to return to the Shipment Delivery Header Screen without exporting the delivery group. If you have accessed this screen from the Create Delivery Group Screen in Ship Confirm Multiple Orders (MENU OEMAIN), when you press F12=RETURN, you will be returned to the Ship Confirm Multiple Orders Selection Screen and the delivery group will not be exported.

Field/Function Key	Description
Enter	Press ENTER to confirm your selections on this screen and export the delivery group. The Shipment Delivery Group Inquiry Screen will appear. If you have accessed this screen from the Create Delivery Group Screen in Ship Confirm Multiple Orders (MENU OEMAIN), when you press ENTER, the delivery group will be created and you will be returned to the Ship Confirm Multiple Orders Selection Screen.

Chapter 3 Importing Delivered Orders

Use Import Delivered Orders to import delivered orders into Distribution A+ that have been exported to Advanced Mobile through Shipment Delivery Maintenance (MENU AMMAIN). When you run this option, detail for orders that were delivered is imported into Distribution A+.

You can select to immediately submit the delivery import job to batch or schedule a particular date and time when the import process will occur. Delivery information will be imported, including the signatures captured during the delivery, and order activity for the delivered items will be updated if **Track Order Activity** is set to **Y** in Order Entry Options Maintenance (MENU XAFIL). If delivery discrepancies exist, orders imported during this process can also be placed on hold and the notes for that order activity record will indicate **“Discrepancies Exist”**. Otherwise, the notes will indicate **“No Discrepancies”**. Refer to the **Place Open Orders on Hold for Delivery Discrepancies** field on the [Import Delivered Orders Screen](#) for a list of delivery discrepancies that would place an open order on hold.

Also, when delivered orders are imported from Advanced Mobile, if the order has not been ship confirmed or invoiced, you can select to have undelivered items put on backorder (if you selected to place orders on hold for delivery discrepancies). Any orders with backordered items will go on a delivery discrepancy hold and be assigned the hold code entered in the **Hold Code** field on the [Import Delivered Orders Screen](#), unless the items are already on another type of hold. Undelivered items will only be able to be backordered if line items are exported to Advanced Mobile when a delivery group is exported.

When the import process completes, the delivery group will be automatically closed if all orders in the delivery group have been delivered without any delivery discrepancies.

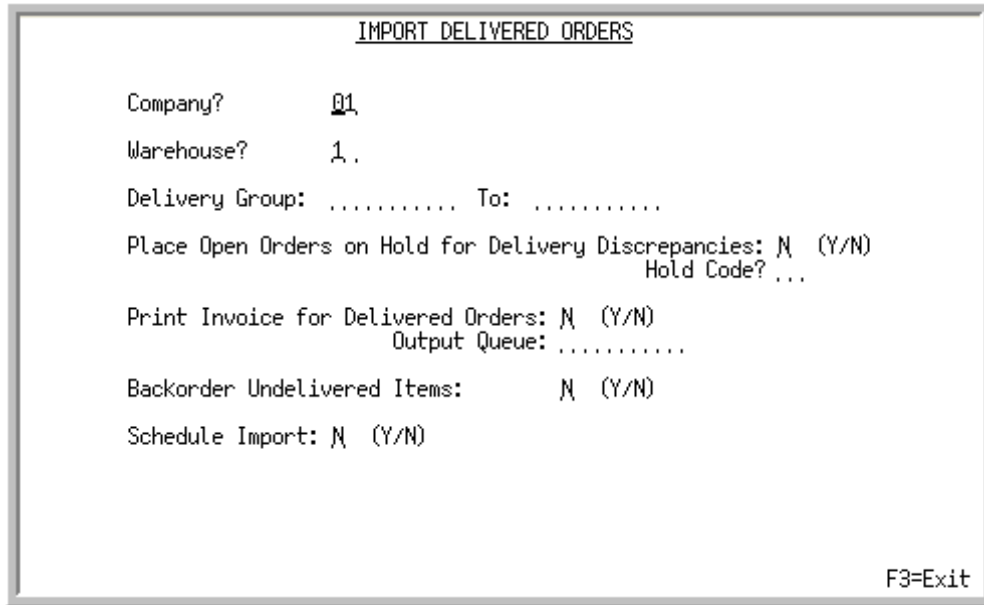
Import Delivered Orders

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Import Delivered Orders Screen	Use this screen to select the criteria to use when importing delivered orders into Distribution A+.

Title	Purpose
Schedule Options Screen	Use this screen to schedule a date and time to run the Import Delivered Orders job. Orders will be imported into Distribution A+ on this date and time. Refer to this screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide.

Import Delivered Orders Screen



```

IMPORT DELIVERED ORDERS

Company?      01
Warehouse?    1.
Delivery Group: ..... To: .....
Place Open Orders on Hold for Delivery Discrepancies: N (Y/N)
Hold Code? ...
Print Invoice for Delivered Orders: N (Y/N)
Output Queue: .....
Backorder Undelivered Items:      N (Y/N)
Schedule Import: N (Y/N)

F3=Exit
  
```

This screen displays after selecting option **2** - [Import Delivered Orders](#) on MENU AMMAIN. Use this screen to select the criteria to use when importing delivered orders into Distribution A+. You will be prompted to enter a company and warehouse for the import process. Only delivered orders with this company and warehouse will be imported. You can also select a range of delivery groups for which delivered orders will be imported. If the range is left blank, all delivery orders for the company and warehouse entered will be imported.

When an order is delivered, there could be delivery discrepancies such as damaged goods or customers refusing to sign for the orders. If you want to place orders on hold for delivery discrepancies, you can select to put these orders on hold during the import process and key a hold code indicating the reason. All orders having delivery discrepancies will then go on hold and will be assigned this hold code.

When delivered orders are imported from Advanced Mobile, if the order has not been ship confirmed or invoiced, undelivered items can also be put on backorder (if you selected to place orders on hold for delivery discrepancies). Any orders with backordered items will go on a delivery discrepancy hold and be assigned the hold code entered in the **Hold Code** field on this screen, unless the items are already on another type of hold. Undelivered items will only be able to be backordered if line items are exported to Advanced Mobile when a delivery group is exported.

The import job will either be automatically submitted to batch when you press **ENTER** on this screen or can be scheduled to occur at a later date and time, via the **Schedule Import** field on this screen.

Scheduled jobs run through the System i job scheduling functionality.

Import Delivered Orders Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number. Key the company number for which delivered orders will be imported into Distribution A+. Only delivered orders with this company will be imported. Default Value: The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFILE). Valid Values: A valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (N 2,0) Required
Warehouse	Key the warehouse number for which delivered orders will be imported into Distribution A+. Only delivered orders with this warehouse will be imported. Default Value: The default warehouse defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the Default Warehouse defined through Company Name Maintenance (MENU XAFILE). Valid Values: A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (A 2) Required
Delivery Group	When importing delivered orders into Distribution A+, a range of Delivery Groups can be entered by which to limit the delivered orders to be imported. Key the From and To delivery group number range associated with the delivered orders to be imported. If the From Delivery Group is entered only, or the From Delivery Group is equal to the To Delivery Group, then the From Delivery Group must be valid. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges. Valid Values: A group number defined through Shipment Delivery Maintenance (MENU AMMAIN). (N 10,0) Optional

Field/Function Key	Description
Place Open Orders on Hold for Delivery Discrepancies	When an order is delivered, there could be delivery discrepancies such as damaged goods or customers refusing to sign for the orders. If you want to place orders on hold for delivery discrepancies, you can select to put these orders on hold and key a hold code indicating the reason. All orders having delivery discrepancies will then go on hold and will be assigned this hold code. Key Y to place open orders with delivery discrepancies on hold during the import process. If you key Y, you must key a hold code in the Hold Code field on this screen. Key N if you do not want to place open orders with delivery discrepancies on hold during the import process. Default Value: N (A 1) Required
Hold Code	If the Place Open Orders on Hold for Delivery Discrepancies field is Y, use this field to key the hold code indicating the reason of the hold. This field must be blank if the Place Open Orders on Hold for Delivery Discrepancies field is N. Valid Values: A hold code defined through Order Hold Code Maintenance (MENU OEFILE). (A 2) Required/Blank
Print Invoice for Delivered Orders	Using this field, you have the option to automatically print an invoice for the ship confirmed delivered orders imported to Distribution A+. Key Y to print an invoice for the delivered orders being imported. An invoice will print only if the order is an open order with an order status of 3, and the order does not have any delivery discrepancies. If you key Y, you must enter an ID in the Output Queue field on this screen to which the invoice will be sent. Key N if you do not want an invoice automatically printed for the delivered orders being imported. Default Value: N (A 1) Required
Output Queue	If the Print Invoice for Delivered Orders field is Y, use this field to key the ID of the System i Output Queue to which this invoice print job will be sent. This field must be blank if the Print Invoice for Delivered Orders field is N. Default Value: The ID assigned to the user's profile on the System i, unless an override has been defined through Output Queue Overrides Maintenance (MENU XAFIELD). Valid Values: A valid Output Queue defined on the System i. (A 10) Required/Blank

Field/Function Key	Description
Backorder Undelivered Items	When delivered orders are imported from Advanced Mobile, if the order has not been ship confirmed or invoiced, you have the option to put undelivered items on backorder (if you selected to place orders on hold for delivery discrepancies). Any orders with backordered items will go on a delivery discrepancy hold and be assigned the hold code entered in the Hold Code field on this screen, unless the items are already on another type of hold. Undelivered items will only be able to be backordered if line items are exported to Advanced Mobile when a delivery group is exported. Key Y to backorder undelivered items when delivered orders are imported from Advanced Mobile. In order to key Y, the Place Open Orders on Hold for Delivery Discrepancies field must also be Y. Key N if you do not want undelivered items backordered. Note: There are other situations when the backorder will not occur. They are as follows: • Bill of material items, such as kit items, will not be backordered when delivered orders are imported. You will need to manually adjust quantities for undelivered BOM items since the quantity of the components delivered cannot be determined by Advanced Mobile. • Line items will not be backordered when the order's customer/ship-to is set up to not accept backorders in Customer/Ship-To Maintenance. Line items will also not be backordered if they are set up in Item Master Maintenance to not allow backorders. • Reservations and boxes can only be automatically adjusted for backordered items if the items are fully backordered. For partial deliveries, the reservations and boxes to update for the item cannot be automatically determined by Advanced Mobile. • If an entire order is marked as Not Delivered in Advanced Mobile, then all of the items that are exported to Advanced Mobile for order delivery will be backordered. If an order is marked as Delivered, then items will be backordered based on the quantity delivered that is entered in Advanced Mobile. • The next generation of an order with backordered items will not be automatically created by Advanced Mobile when delivered orders are imported. This will be done when the order containing the backordered items is invoiced. Default Value: N (A 1) Required

Field/Function Key	Description
Schedule Import	The import job will either be automatically submitted to batch when you press ENTER on this screen or can be scheduled to occur at a later date and time, via this field. Key Y to schedule the Import Delivered Orders job. The Schedule Options Screen will display after you press ENTER, and you will be able to select the scheduled time and date to run the import job. You will also be able to select the frequency of the job, specifying to have it run once, weekly, monthly, or daily, and can further select the days of the week or month you want it to run. When you press ENTER on the Schedule Options Screen, the import job will be scheduled according to the selection criteria entered and it will run at a later date and time without user intervention. Refer to the Schedule Options Screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide. Key N if you do not want to schedule the Import Delivered Orders job. The job will instead automatically be submitted to batch when you press ENTER, and you will be returned to MENU AMMAIN. Default Value: N (A 1) Required
F3=Exit	Press F3=EXIT to cancel this option and return to MENU AMMAIN. The import will not occur.
Enter	Press ENTER to confirm your entries and import delivered orders from Advanced Mobile into Distribution A+. If the Schedule Import field is N, the job will automatically be submitted to batch and MENU AMMAIN will appear. If the Schedule Import field is Y, the Schedule Options Screen will appear, where you can select the date and time for the import job to run. Note: When the import process completes, the delivery group will be automatically closed if all orders in the delivery group have been delivered without any delivery discrepancies.

Chapter 4 Inquiring on Deliveries

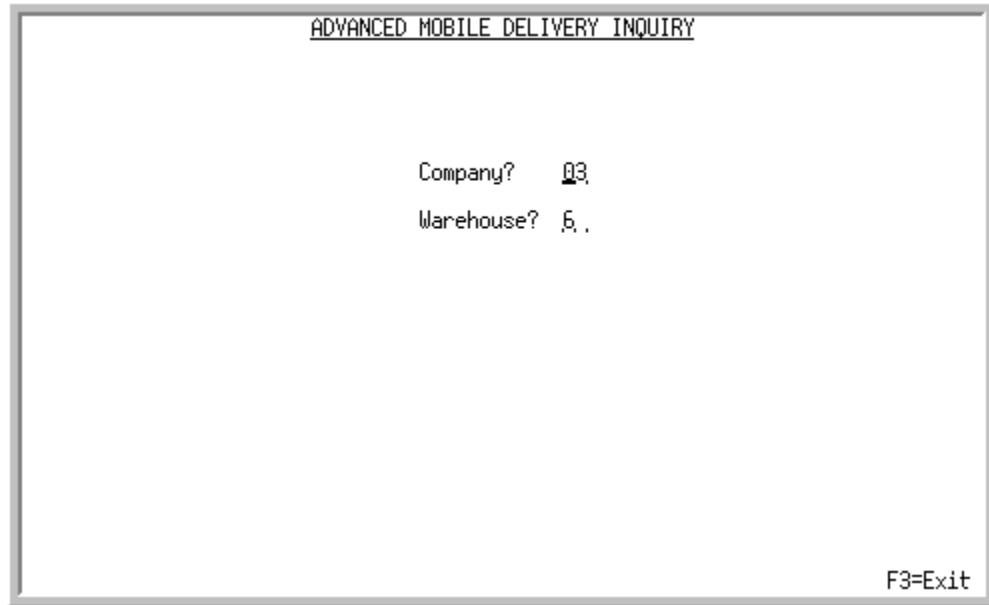
Use the Delivery Inquiry to review those orders that have been imported into Distribution A+ through Import Delivered Orders (MENU AMMAIN). All orders that have been delivered for the indicated company and warehouse will display through this menu option. You will be able to review details of the imported delivered orders, and see which items or packages have or have not been delivered.

Delivery Inquiry

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Advanced Mobile Delivery Inquiry Screen	Use this screen to select the company and warehouse for which you want to review details of imported delivered orders, and see which items or packages have or have not been delivered.
Delivery List Screen	Use this screen to review details of imported delivered orders, and see which items or packages have or have not been delivered.
Delivery Box Detail Screen	Use this screen to review the boxes delivered for an order.
Delivery Line Detail Screen	Use this screen to review each line item delivered for an order along with the delivery quantity and line disposition.
Box List Screen	Use this screen to review detailed box information for an order. Refer to this screen as shown in the Open Order Inquiry (MENU OEMAIN).

Advanced Mobile Delivery Inquiry Screen



ADVANCED MOBILE DELIVERY INQUIRY

Company? 03

Warehouse? 5,.

F3=Exit

This screen displays after selecting option **3** - [Delivery Inquiry](#) on MENU AMMAIN. Use this screen to select the company and warehouse for which you want to review details of imported delivered orders, and see which items or packages have or have not been delivered.

Note: The [Advanced Mobile Delivery Inquiry Screen](#) will only appear after selecting option **3** - [Delivery Inquiry](#) on MENU AMMAIN. This screen will not appear if you accessed the Delivery Inquiry via the **F6=DELIVERY INQUIRY** function key on the [Shipment Delivery Group Inquiry Screen](#) in Shipment Delivery Maintenance (MENU AMMAIN).

Advanced Mobile Delivery Inquiry Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. Key the company number for which you want to review details of imported delivered orders, and see which items or packages have or have not been delivered. Default Value: The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFIL). Valid Values: A valid company number defined through Company Name Maintenance (MENU XAFIL) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (N 2,0) Required
Warehouse	Key the warehouse number for which you want to review details of imported delivered orders, and see which items or packages have or have not been delivered. Default Value: The default warehouse defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the Default Warehouse defined through Company Name Maintenance (MENU XAFIL). Valid Values: A valid warehouse number defined through Warehouse Numbers Maintenance (MENU IAFIL) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (A 2) Required
F3=Exit	Press F3=EXIT to cancel this option and return to MENU AMMAIN.
Enter	Press ENTER to confirm your entries. The Delivery List Screen will appear.

Delivery List Screen

Company: 1		Warehouse: 1		DELIVERY LIST			
	Group	Order/Gn	Hld Cde	CarCd	Route	Date	Order Disposition
1	46	13077/00	WM	UPS		14/07/11	Order Delivered
2	44	13056/00	BX	UPS		13/07/11	Order Delivered
3	44	13058/00	WM	*NONE	Z	13/07/11	Not Del:Delivery Refused
4	43	08626/00		FEDEX		13/07/11	Order Delivered
5	43	08628/00		FEDEX		13/07/11	Order Delivered
6	43	08632/00		FEDEX		13/07/11	Order Delivered
7	43	13043/00		*NONE	Z	13/07/11	Order Delivered
8	42	13029/00		*NONE	Z	12/07/11	Order Delivered
9	30	02120/01		UPS	1	30/06/11	Customer Refused to Sign
10	9	02791/00	DD	FEDEX		31/05/11	Not Del:No Attempt Made
11	9	10348/00		FEDEX		31/05/11	Order Delivered

Select: 9 Limits: Group ID: To: Last
 Order Number: To:
 Carrier? To?
 Route: To:
 Delivery Date: To:

F5=Boxes F9=View Signature F11=Order/Ship Inquiry F12=Return

This screen displays after pressing **ENTER** on the [Advanced Mobile Delivery Inquiry Screen](#). Use this screen to review details of imported delivered orders, and see which items or packages have or have not been delivered. This screen will show all delivered orders with a **Delivery Type** of **O** in the Advanced Mobile Deliveries File (**DGDLV**) for the specified company and warehouse. Delivery groups are displayed in descending order, so that the newest delivery groups entered are displayed first in the list.

To narrow the groups displayed on this screen, you can limit the orders by a From and To range of **Group ID**, **Order Number**, **Carrier**, **Route**, and **Delivery Date**. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Note: This screen can also be accessed via the **F6=DELIVERY INQUIRY** function key on the [Shipment Delivery Group Inquiry Screen](#) in Shipment Delivery Maintenance (MENU AMMAIN). If you accessed this screen via that menu option and first selected a particular delivery group before pressing **F6=DELIVERY INQUIRY**, this screen will show only those orders delivered for that specific delivery group.

Note: This is a roll screen. **More...** appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- ***PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

Delivery List Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Advanced Mobile Delivery Inquiry Screen, if using multiple companies. Display
Warehouse	This field displays the warehouse number selected on the Advanced Mobile Delivery Inquiry Screen. Display
(Reference Number)	This is the reference number assigned to each delivery group displayed on this screen. Key this number in the Select field to select a delivery group you want to review in detail. Display
Group	This field displays the number of the Delivery Group from the Advanced Mobile Deliveries File (DGDLV). Display
Order/Gn	This field displays the Order Number and Order Generation Number from the Advanced Mobile Deliveries File (DGDLV), assigned to the delivery group. Display
Hld Cde	This field displays the Hold Code from the Order Header File (ORHED), if the order in the Advanced Mobile Deliveries File (DGDLV) is an open order and the order is on hold. Display
Car Cd	This field displays the Carrier Code assigned to the sales order. Display
Route	This field identifies the Route assigned to the sales order. Display
Delivery Date	This field displays the Delivery Date in the Advanced Mobile Deliveries File (DGDLV). Note: All dates will display in the Default Date Format for this user, specified through Register A+ User IDs (MENU XACF), or if that field is blank, the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFIL) Display

Field/Function Key	Description
Order Disposition	This field displays the Order Disposition from the Delivery Disposition field in the Advanced Mobile Deliveries File (DGDLV) for the order. The disposition will be one of the following: • Customer Refused to Sign • Left on Dock • Left in Office • Not Del: Delivery Refused • Not Del: No Attempt Made • Not Del: No One to Receive • Order Delivered Display
Select	Use this field to select one of the orders on this screen that you want to review in detail. You will be able to access box detail, line item detail, or the Order/Ship Inquiry for the order. Key the number displayed in the (Reference Number) field that corresponds to the order that you want to select, and press F5=BOXES to display box detail, F11=ORDER/SHIP INQUIRY to access the inquiry for the order, or ENTER to access line item detail. (N 2,0) Optional
Limits: Group ID	Use this field to limit the display of the orders shown on this screen to only those that fall within the Group ID from and to ranges entered. (N 10,0) Optional
Limits: Order Number	Use this field to limit the display of the orders shown on this screen to only those that fall within the Order Number from and to ranges entered. (N 5,0) Optional
Limits: Carrier	Use this field to limit the display of the orders shown on this screen to only those that fall within the Carrier from and to ranges entered. Valid Values: *NONE or a carrier code set up in Carrier Code Maintenance (MENU OEFIL2). (N 5,0) Optional
Limits: Route	Use this field to limit the display of the orders shown on this screen to only those that fall within the Route from and to ranges entered. (N 4,0) Optional

Field/Function Key	Description
Limits: Delivery Date	Use this field to limit the display of the orders shown on this screen to only those that fall within the Delivery Date from and to ranges entered. Valid Values: Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFIL). (N 6,0) Optional
F5=Boxes	The F5=BOXES function key displays only if Track Boxes is Yes for the delivery group warehouse in WM Warehouse Options (MENU WMFILE), or if Track Boxes is Yes in Electronic Data Interchange (if Warehouse Management is not being used). To review the boxes delivered for an order, key the reference number of the order in the Select field and press F5=BOXES (note that delivery box detail must exist for the order you are selecting). The Delivery Box Detail Screen will appear.
F9=View Signature	To view the signature bitmap for an order, key the reference number of the order in the Select field and press F9=VIEW SIGNATURE. The signature bitmap will display in a browser window. Each order that has been delivered will have an associated bitmap file for the delivery signature if a customer signed for that order. Following the signature bitmap, the Linked Document List Screen will appear, showing all documents that exist for that order, including the signature bitmap. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the Linked Document List Screen.
F11=Order/Ship Inquiry	To view open orders and history orders in the Open/Shipped Orders Inquiry (MENU OEMAIN), key the reference number of the order in the Select field and press F11=ORDER/SHIP INQUIRY. The Order Display Screen in the Open Order Inquiry (MENU OEMAIN) will appear, if the order is an open order. If the order is a history order, the Invoice Display Screen in the Customer Order/Shipment Inquiry (MENU OEMAIN) will appear instead.
F12=Return	Press F12=RETURN to return to the Advanced Mobile Delivery Inquiry Screen, if this screen was accessed after selecting option 3 from MENU AMMAIN. If this screen was accessed from Shipment Delivery Maintenance (MENU AMMAIN), you will be returned to the calling screen within that menu option.
Enter	To view line item detail, key the reference number of the order in the Select field and press ENTER. The Delivery Line Detail Screen will appear.

Delivery Box Detail Screen

Company: 1	Warehouse: 1	<u>DELIVERY BOX DETAIL</u>	Weight: 24.6000
Group: 30			Cubes: 2.45100
Order/Gn: 02120/01			Boxes: 1
	<u>Box</u>	<u>Box Disposition</u>	
	017GB	Shipped Complete	
			Last
<u>Limits:</u>			
Box: To:			
F5=Line Detail F6=Box Inquiry F9=View Signature F12=Return			

This screen displays after pressing **F5=BOXES** on the [Delivery List Screen](#) or **F5=BOX DETAIL** on the [Delivery Line Detail Screen](#). Use this screen to review the boxes delivered for an order. All of the boxes having a **Delivery Type** of 'P' (for packages) in the Advanced Mobile Deliveries File (**DGDLV**) with the same order/generation number and import number as the record selected will be listed on this screen.

To narrow the boxes displayed on this screen, you can limit the boxes by a From and To **Box ID** range. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Note: This is a roll screen. More... appears at the bottom of a roll screen to indicate that more data is available for viewing. The last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- ***PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

Delivery Box Detail Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Advanced Mobile Delivery Inquiry Screen. The boxes delivered for the order are associated with this company. Display
Warehouse	This field displays the warehouse number selected on the Advanced Mobile Delivery Inquiry Screen. The boxes delivered for the order are associated with this warehouse. Display
Group	This field displays the number of the delivery group for the order you selected on the Delivery List Screen. Display
Order/Gn	This field displays the Order Number and Order Generation Number from the Advanced Mobile Deliveries File (DGDLV), assigned to the delivery group. Display
Weight	This field displays the total weight for the order from the Delivery Group Detail File (DGDET). If the total weight in the DGDET file was overridden through Shipment Delivery Maintenance (MENU AMMAIN), then the value in this field will be highlighted. Display
Cubes	This field displays the total cubes for the order from the Delivery Group Detail File (DGDET). If the total cubes in the DGDET file was overridden through Shipment Delivery Maintenance (MENU AMMAIN), then the value in this field will be highlighted. Display
Boxes	This field displays the total number of boxes for the order from the Delivery Group Detail File (DGDET). If the total boxes in the DGDET file was overridden through Shipment Delivery Maintenance (MENU AMMAIN), then the value in this field will be highlighted. Display

Field/Function Key	Description
Box	This field displays the Box ID for the order from the Advanced Mobile Deliveries File (DGDLV). The ID is the first five characters of the Item Number field in the DGDLV file for records having a Delivery Type of 'P'. Display
Box Disposition	This field displays the disposition of the box from the Box Disposition field in the Advanced Mobile Deliveries File (DGDLV) for the order. If a box is changed on the mobile device, the disposition will be one of the following: • Damaged • Shipped Complete • Refused • Shipped Partial • Not Delivered If this field is blank, then it indicates that the box was completely delivered and no box changes occurred. Display
Limits: Box	Use this field to limit the display of the boxes shown on this screen to only those that fall within the Box ID from and to ranges entered. (A 5) Optional
F5=Line Detail	The F5=LINE DETAIL function key displays only if there is line item detail in the Advanced Mobile Deliveries File (DGDLV) for the order. Press F5=LINE DETAIL to view each line item delivered for the order along with the delivery quantity and line disposition. The Delivery Line Detail Screen will appear.
F6=Box Inquiry	Press F6=BOX INQUIRY to view detailed box information for the order. The Box List Screen will appear. Refer to this screen as shown and explained in the Open Order Inquiry (MENU OEMAIN).
F9=View Signature	Press F9=VIEW SIGNATURE to view the signature bitmap for the order. The signature bitmap will display in a browser window. Each order that has been delivered will have an associated bitmap file for the delivery signature if a customer signed for that order. Following the signature bitmap, the Linked Document List Screen will appear, showing all documents that exist for that order, including the signature bitmap. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the Linked Document List Screen.
F12=Return	Press F12=RETURN to return to the Delivery List Screen.
Enter	After keying ranges in the Limits: Box field, press ENTER to confirm your entry. The screen will be limited to only those boxes that fall within the Box ID from and to ranges entered.

Delivery Line Detail Screen

Company: 1	Warehouse: 1	<u>DELIVERY LINE DETAIL</u>		Weight:	24.6000
Group: 30				Cubes:	2.45100
Order/Gn: 02120/01				Boxes:	1

<u>Item Number/Description</u>	<u>Quantity</u>	<u>U/M</u>	<u>Line Disposition</u>
A150	1.000	EA	Shipped Complete
3-Ring Binder - 2" Red			
A260	5.000	BOX	Shipped Complete
#6 3/4 White Envelopes			
A350	1.000	EA	Shipped Complete
Bankers' Shears			
A360	2.000	EA	Shipped Complete
Waste Basket - Gray			
			24" tall, 2 gallon

Last

Limits:

Item Number: _ To:

F2=Shipped Quantity F5=Box Detail F9=View Signature F12=Return

This screen displays after pressing **F5=LINE DETAIL** on the [Delivery Box Detail Screen](#). Use this screen to review each line item delivered for the order along with the delivery quantity and line disposition. All of the line items having a Delivery Type of 'L' in the Advanced Mobile Deliveries File (**DGDLV**) and the same order/generation number and import number as the order record selected will be listed on this screen.

To narrow the line items displayed on this screen, you can limit the line items by a From and To **Item Number** range. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Note: This is a roll screen. More... appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- ***PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

Delivery Line Detail Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Advanced Mobile Delivery Inquiry Screen. Each line item delivered for the order is associated with this company. Display
Warehouse	This field displays the warehouse number selected on the Advanced Mobile Delivery Inquiry Screen. Each line item delivered for the order is associated with this warehouse. Display
Group	This field displays the number of the delivery group for the order you selected on the Delivery List Screen. Display
Order/Gn	This field displays the Order Number and Order Generation Number from the Advanced Mobile Deliveries File (DGDLV), assigned to the delivery group. Display
Weight	This field displays the total weight for the order from the Delivery Group Detail File (DGDET). If the total weight in the DGDET file was overridden through Shipment Delivery Maintenance (MENU AMMAIN), then the value in this field will be highlighted. Display
Cubes	This field displays the total cubes for the order from the Delivery Group Detail File (DGDET). If the total cubes in the DGDET file was overridden through Shipment Delivery Maintenance (MENU AMMAIN), then the value in this field will be highlighted. Display
Boxes	This field displays the total number of boxes for the order from the Delivery Group Detail File (DGDET). If the total boxes in the DGDET file was overridden through Shipment Delivery Maintenance (MENU AMMAIN), then the value in this field will be highlighted. Display

Field/Function Key	Description
Item Number/ Description	This field displays the item number and description of each line item delivered for the order. All of the line items having a Delivery Type of 'L' in the Advanced Mobile Deliveries File (DGDLV) are listed in this column. The Show 2nd Item Description Line field, in System Options Maintenance (MENU XAFILE), determines if the first Item Description will display below the Item Number field only or if the second Item Description line will be included as well. Display
Delivery Quantity / Shipped Quantity / Ordered Quantity	This field is toggled with the F2=SHIPPED QUANTITY / F2=ORDERED QUANTITY / F2=DELIVERY QUANTITY function key to display either the Delivery Quantity, Shipped Quantity, or Ordered Quantity for the line item. The Delivery Quantity is from the Advanced Mobile Deliveries File (DGDLV), and it is the quantity that is sent back in the file imported through Import Delivered Orders (MENU AMMAIN). The Shipped Quantity and Ordered Quantity are from the Open Order Detail File (ORDET) or Order History Detail File (HSDet). Display
U/M	This field displays the Unit of Measure (U/M) for the line item. Display
Line Disposition	This field displays the disposition of the line from the Delivery Disposition field in the Advanced Mobile Deliveries File (DGDLV) for the line item. The disposition will be one of the following: • Damaged • Refused • Shipped Complete • Shipped Over • Shipped Short If this field is blank, then it indicates that the line was completely delivered and no line changes occurred. Display
Limits: Item Number	Use this field to limit the display of the line items shown on this screen to only those that fall within the Item Number from and to ranges entered. (N 5,0) Optional
F2=Shipped Quantity/ F2=Ordered Quantity/ F2=Delivery Quantity	Press F2=SHIPPED QUANTITY / F2=ORDERED QUANTITY / F2=DELIVERY QUANTITY to toggle the screen to display either the Delivery Quantity, Shipped Quantity, or Ordered Quantity for the line item.

Field/Function Key	Description
F5=Box Detail	The F5=BOX DETAIL function key displays only if there is box detail in the Advanced Mobile Deliveries File (DGDLV) for the order. Press F5=BOX DETAIL to view the boxes delivered for the order. The Delivery Box Detail Screen will appear.
F9=View Signature	Press F9=VIEW SIGNATURE to view the signature bitmap for the order. The signature bitmap will display in a browser window. Each order that has been delivered will have an associated bitmap file for the delivery signature if a customer signed for that order. Following the signature bitmap, the Linked Document List Screen will appear, showing all documents that exist for that order, including the signature bitmap. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the Linked Document List Screen.
F12=Return	Press F12=RETURN to return to the Delivery List Screen.
Enter	After keying ranges in the Limits: Item Number field, press ENTER to confirm your entry. The screen will be limited to only those items that fall within the Item Number from and to ranges entered.

Chapter 5 Maintaining Call Schedules

Use Call Schedule Maintenance to add a call schedule for a sales rep containing customers to visit and items that can be ordered by the customers. The sales rep can then set up each customer/ship-to and define whether that customer/ship-to will be used for Order Entry, Consignment (if Distribution A+ Consignment is installed) and/or ToolCrib processing. Call schedules will be added/updated in the Call Schedule File (**CLSCH**), customers/ship-tos will be added/updated in the Call Schedule Customer File (**CLSCUS**), and items will be added/updated in the Call Schedule Item File (**CLSITM**).

Once a call schedule has been added, this option allows you to export the call schedule to Advanced Mobile. Advanced Mobile will upload the customers and items from the call schedule to a sales rep's mobile device. While visiting customer sites, the sales rep will then be able to create orders for the customers and items in the call schedule and/or enter inventory counts and/or order quantities for customers that use Consignment and/or ToolCrib processing. Replenishment orders for Consignment/ ToolCrib items will then be created through the use of offline Order Entry when the import is run. Note that Consignment and ToolCrib items will not be set up in this menu option. Only items from the Customer Consignment Item Balance File (**CABAL**) will be exported for Consignment and ToolCrib customers.

A call schedule can be maintained or exported as many times as you need to. There is no limit to the number of times a call schedule can be maintained or exported to Advanced Mobile. A call schedule can also be deleted if it is no longer being used by a sales rep.

Note: This option allows you to export a single call schedule. If you want to export multiple call schedules simultaneously, use Option 5 - Export Call Schedules (MENU AMMAIN).

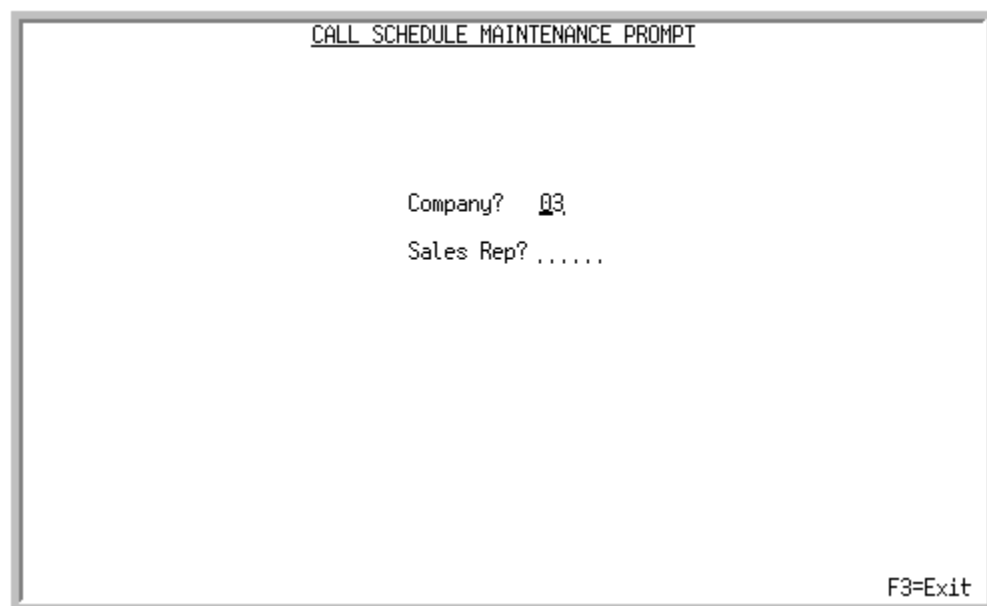
Call Schedule Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Call Schedule Maintenance Prompt Screen	Use this screen to select the company and sales rep for which you are creating a new call schedule or reviewing an existing call schedule.
Call Schedule List Screen	Use this screen to create a new call schedule or review an existing call schedule for the indicated sales rep.

Title	Purpose
Call Schedule Maintenance Screen	Use this screen to create a new call schedule for the selected sales rep, maintain an existing call schedule for the selected sales rep, or review (not maintain) call schedule information for the selected sales rep.
Item List Screen	Use this screen to manually assign items to the call schedule being added or maintained.
Customer/Ship-To List Maintenance Screen	Use this screen to assign customers/ship-tos to the call schedule being added or maintained.
Export Call Schedule Screen	Use this screen to enter a name for the call schedule file you will be exporting to Advanced Mobile to be placed on a mobile device.

Call Schedule Maintenance Prompt Screen



```
CALL SCHEDULE MAINTENANCE PROMPT

Company? 03,
Sales Rep? .....

F3=Exit
```

This screen displays after selecting option **4** - [Call Schedule Maintenance](#) on MENU AMMAIN. Use this screen to select the company and sales rep for which you are creating a new call schedule or reviewing an existing call schedule. To review call schedules for all sales reps, leave the **Sales Rep** field blank.

Call Schedule Maintenance Prompt Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number. Key the company number for which you are creating a new call schedule or reviewing an existing call schedule. Default Value: The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFILE). Valid Values: A valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (N 2,0) Required

Field/Function Key	Description
Sales Rep	Key the sales rep number for which you are creating a new call schedule or reviewing an existing call schedule. Leave this field blank to review existing call schedules for all sales reps. Valid Values: A valid sales rep number defined through Salesrep Maintenance (MENU SAFILE). (N 5,0) Optional
F3=Exit	Press F3=EXIT to cancel this option and return to MENU AMMAIN.
Enter	Press ENTER to confirm your entries. The Call Schedule List Screen will appear.

Call Schedule List Screen

CALL SCHEDULE LIST			
Company: 3 The Office Connection			
Rep No	Sales Rep Name	Call Schedule Description	Last Export
			Last
Select: _ .	Sales Rep?		
	Sales Rep Name:		
	Schedule Desc:		
F2=Last Import	F4=Schedule ID	F10=Maintain Schedule	
	F5=New Schedule	F11=Export Schedule	F12=Return

This screen displays after pressing **ENTER** on the [Call Schedule Maintenance Prompt Screen](#). If you entered a sales rep on the [Call Schedule Maintenance Prompt Screen](#), use this screen to create a new call schedule or review an existing call schedule for the indicated sales rep. If you did not enter a sales rep on the [Call Schedule Maintenance Prompt Screen](#), use this screen to create a new call schedule or review existing call schedules for all sales reps.

To narrow the sales reps displayed on this screen (if more than one is displayed), you can limit the reps by **Sales Rep ID**, **Sales Rep Name**, and/or **Schedule Desc/Schedule ID**.

Note: This is a roll screen. **More...** appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- ***PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

Call Schedule List Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number. This field displays the company number and name selected on the Call Schedule Maintenance Prompt Screen. The call schedule is associated with this company. Display
(Reference Number)	This is the reference number assigned to each call schedule displayed on this screen. Key this number in the Select field to select a call schedule to maintain (F10=MAINTAIN SCHEDULE), export (F11=EXPORT SCHEDULE) or review. Display
Rep No	This field displays the number of the sales rep defined through Salesrep Maintenance (MENU SAFILE) for which a call schedule has been created. Display
Sales Rep Name	This field displays the name of the sales representative associated with the sales rep number. Display
Call Schedule Description / Schedule ID	This field may be toggled with the F4=SCHEDULE ID / F4=SCHEDULE DESC function key to show either the sales rep's Call Schedule Desc or Schedule ID in this field and on the lower portion of this screen. Display
Last Export / Last Import	This field may be toggled with the F2=LAST IMPORT / F2=LAST EXPORT function key to show either the date of the call schedule's Last Export or date of the call schedule's Last Import. When the export process is run through this option, it sends the call schedule to Advanced Mobile establishing the Last Export as the last date when the call schedule was sent to Advanced Mobile. When the import process is run through Import Orders and Customer Inventory Balances (MENU AMMAIN), orders entered in Advanced Mobile for the call schedule are imported into Distribution A+. When Last Import is displayed as the field heading, this is the last date when orders entered in Advanced Mobile for the call schedule were imported into Distribution A+. Display

Field/Function Key	Description
Select	Use this field to select one of the call schedules displayed on this screen that you want to maintain or export. Key the number displayed in the (Reference Number) field that corresponds to the call schedule you want to select, and press F10=MAINTAIN SCHEDULE or F11=EXPORT SCHEDULE. The Call Schedule Maintenance Screen will appear, if you pressed F10=MAINTAIN SCHEDULE. The Export Call Schedule Screen will appear, if you pressed F11=EXPORT SCHEDULE. If you key a call schedule in this field and press ENTER, the Call Schedule Maintenance Screen will appear, but you will only be able to review the call schedule information displayed. (N 2,0) Optional
Sales Rep	This field may be used for two purposes. Use this field to limit the display of the call schedules shown on this screen to only those that match the sales rep entered in this field, or you can use this field to add a new call schedule for a particular sales rep. To limit the screen to certain call schedules for a particular sales rep, key the sales rep ID and press ENTER. The screen will refresh and show the call schedules for the sales rep that matches this ID. To add a new call schedule for a particular sales rep, key the sales rep ID and press F5=NEW SCHEDULE. The Call Schedule Maintenance Screen will appear. Default Value: The sales rep selected on the Call Schedule Maintenance Prompt Screen, if one was selected. Valid Values: A valid sales rep defined through Salesrep Maintenance (MENU SAFILE). (N 5,0) Optional
Sales Rep Name	Use this field to limit the display of the call schedules shown on this screen to only those that match all or part of the sales rep name you enter in this field. Key the sales rep name associated with the call schedules you want to review. (A 30) Optional

Field/Function Key	Description
Schedule Desc / Schedule ID	This field may be toggled with the F4=SCHEDULE DESC function key to show either the Schedule Desc or Schedule ID in this field and on the upper portion of this screen. Use this field to limit the display of the call schedules shown on this screen to only those that match all or part of a call schedule description or call schedule ID you enter in this field. Key the call schedule description or call schedule ID associated with the call schedules you want to review. (A 30 / A 10) Optional
F2=Last Import / F2=Last Export	Press F2=LAST IMPORT / F2=LAST EXPORT to toggle between showing the Last Import date or Last Export date field.
F4=Schedule ID / F4=Schedule Desc	Press F4=SCHEDULE ID / F4=SCHEDULE DESC to toggle between showing the Schedule Desc or Schedule ID field on the lower and upper portion of this screen.
F5=New Schedule	Use this function key to create a new call schedule for a sales rep. Press F5=NEW SCHEDULE to create a new call schedule for the sales rep entered in the Sales Rep field on this screen. The Call Schedule Maintenance Screen will appear.
F10=Maintain Schedule	Use this function key to maintain a call schedule for a sales rep. Key the (Reference Number) of a call schedule in the Select field and press F10=MAINTAIN SCHEDULE. The Call Schedule Maintenance Screen will appear.
F11=Export Schedule	Use this function key to export the call schedule file to Advanced Mobile to be placed on a mobile device. The Last Export field on this screen indicates the last date when the call schedule was sent to Advanced Mobile. Key a (Reference Number) of a call schedule in the Select field and press F11=EXPORT SCHEDULE to export the call schedule selected. The Export Call Schedule Screen will appear, where you key the export file name and then press ENTER to submit the export job. Note: You cannot select the F11=EXPORT SCHEDULE function key if the indicated call schedule is in use, or if the Order and Inventory Management IFS Path has not been set up in Advanced Mobile Options Maintenance (MENU AMFILE).
F12=Return	Press F12=RETURN to return to the Call Schedule Maintenance Prompt Screen , without performing a function on this screen.

Field/Function Key	Description
Enter	To limit the screen to certain call schedules, press ENTER after keying a value in the Sales Rep, Sales Rep Name, or Schedule Desc/Schedule ID fields. The screen will be refreshed and show call schedules that match the criteria entered. To review call schedule information for a sales rep, key the reference number of a call schedule in the Select field and press ENTER. The Call Schedule Maintenance Screen will appear, where you can review (not maintain) call schedule information. To maintain the information, you must key the reference number of a call schedule in the Select field and press F10=MAINTAIN SCHEDULE.

Call Schedule Maintenance Screen

CALL SCHEDULE MAINTENANCE	
Company:	1 A & C Office Supply
Sales Rep:	1 Mike Steele
Call Schedule ID:	1
Description:	Ellen, B's, Call, Schedule,
Include All Items:	N (Y/N)
Include All Items Customer/Item Contracts:	N (Y/N)
Include All Items Customer Assortments:	N (Y/N)
Months of Customer/Item Sales History:	
Item Number to Export:	0 (0=Ours, C=C/I, U=UPC, G=GTIN)
Export Price and Availability:	Y (Y/N)
Export Commission Cost:	Y (Y/N)
F7=Items F9=Customers F12=Return	

This screen displays after pressing **F5=NEW SCHEDULE**, **F10=MAINTAIN SCHEDULE**, or **ENTER** on the [Call Schedule List Screen](#). If you accessed this screen after pressing **F5=NEW SCHEDULE** on the [Call Schedule List Screen](#), use this screen to create a new call schedule for the selected sales rep. If you accessed this screen after pressing **F10=MAINTAIN SCHEDULE** on the [Call Schedule List Screen](#), use this screen to maintain an existing call schedule for the selected sales rep. If you accessed this screen after pressing **ENTER** on the [Call Schedule List Screen](#), use this screen to review call schedule information for the selected sales rep.

If the call schedule selected is in use by someone else, then the call schedule cannot be maintained. You will only be able to review the call schedule information.

Call Schedule Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Call Schedule Maintenance Prompt Screen. The call schedule you are adding or maintaining is associated with this company. Display
Sales Rep	This field displays the number and name of the sales rep for the call schedule that you are adding, maintaining or reviewing. Display

Field/Function Key	Description
Call Schedule ID	This field displays the sales rep's call schedule ID. If adding a call schedule for a sales rep, this field is automatically assigned based on the Next Call Schedule field in the Call Schedules Order Control (ORCTL) record. If maintaining an existing call schedule for a sales rep, this field displays the selected Call Schedule ID. Display
Description	Use this field to enter a description for the call schedule you are adding or maintaining for this sales rep. Key the call schedule description or change the existing description, if you are in maintenance mode. (A 30) Required
Include All Items	This field determines if all items from the Item Master File (ITMST) will be exported to Advanced Mobile when the export process occurs. These items can then be ordered on the mobile device. Items that are suspended items, will not be included. Replacement items, complement items, or upgrade items that exist for the item, will be included, as long as there are no other item errors. Key Y to include all items (except suspended items) during the export process. If this field is Y, the Include All Items Customer/Item Contracts field and Include All Items Customer Assortments field must also be Y. Key N if you do not want to include all items during the export process. If you select N, you will have to manually select the items you want to export using the Item List Screen. Note: This field does not apply to Consignment or ToolCrib. Only items residing in the Customer Consignment Item Balance File (CABAL) will be exported to Advanced Mobile for Consignment or ToolCrib processing. Default Value: N, if adding a new call schedule (A 1) Required

Field/Function Key	Description
Include All Items Customer/Item Contracts	This field displays only if the Customer/Item Contracts field is Y in Order Entry Options Maintenance (MENU XAFILE). Use this field to determine if all items on a valid customer/item contract will be exported to Advanced Mobile when the export process occurs. Key Y to include all items on a valid customer/item contract during the export process. This field must be Y if the Include All Items field is Y on this screen. If today's date is within the start and end dates of the contract, then the contract item will be included. Key N if you do not want to include all items on a valid customer/item contract during the export process. Note: This field does not apply to Consignment or ToolCrib. Only items residing in the Customer Consignment Item Balance File (CABAL) will be exported to Advanced Mobile for Consignment or ToolCrib processing. Default Value: N, if adding a new call schedule (A 1) Required
Include All Items Customer Assortments	This field determines if all items in valid customer assortments will be exported to Advanced Mobile when the export process occurs. Key Y to include all items in valid customer assortments during the export process. This field must be Y if the Include All Items field is Y on this screen. Key N if you do not want to include all items in valid customer assortments during the export process. Note: This field does not apply to Consignment or ToolCrib. Only items residing in the Customer Consignment Item Balance File (CABAL) will be exported to Advanced Mobile for Consignment or ToolCrib processing. Default Value: N, if adding a new call schedule (A 1) Required

Field/Function Key	Description
Months of Customer/ Item Sales History	This field determines the number of months of customer/item sales history to be included when items are exported to Advanced Mobile during the export process. All items from the Detail Sales File (DETSA) sold within the number of months keyed in this field will be exported to Advanced Mobile. Key the number of months. This value must be 0 or blank, if the Include All Items field is Y on this screen. Note: The Keep Detailed Sales Analysis field in Sales Analysis Options Maintenance must be Y in order for the Detail Sales File (DETSA) to be updated. The Detail Sales File (DETSA) must have customer/item sales records in order for items to be exported to Advanced Mobile based on the value keyed in this field. Note: This field does not apply to Consignment or ToolCrib. Only items residing in the Customer Consignment Item Balance File (CABAL) will be exported to Advanced Mobile for Consignment or ToolCrib processing. Default Value: 0 is assumed, if adding a new call schedule (N 2,0) Optional
Item Number to Export	This field determines the type of item number to export when the export process occurs. Key O to have the item number from the Item Master File (ITMST) exported to Advanced Mobile. Key C to have the customer item number from the Item/Customer Cross Reference File (IAXRF) exported to Advanced Mobile. The customer item number will display on the mobile device instead of the item number from the Item Master File (ITMST). If more than one customer item number exists for an item, then all of those customer item numbers will be exported to Advanced Mobile. Key U to have the bar coded item number from the Universal Product Code Cross Reference File (ITUPC) exported to Advanced Mobile. The bar coded item number will display on the mobile device. If more than one bar coded item number exists for an item, then all of those bar coded item numbers will be exported to Advanced Mobile. Key G to have the Global Trade Item Number (GTIN) from the Global Trade Item Number Cross Reference File (ITGTIN) exported to Advanced Mobile. The GTIN item number will display on the mobile device. If more than one GTIN item number exists for an item, then all of those GTIN item numbers will be exported to Advanced Mobile. Default Value: O (Ours), if adding a call schedule (A 1) Required

Field/Function Key	Description
Export Price and Availability	This field determines if the current sales price and availability for an item will be exported to Advanced Mobile when the export process occurs. Key Y to have the current sales price and availability for an item exported to Advanced Mobile. Key N if you do not want to have the current sales price and availability for an item exported to Advanced Mobile. Default Value: Y (A 1) Required
Export Commission Cost	This field determines if the commission cost for an item, not the current average cost, will be exported to Advanced Mobile when the export process occurs. The commission cost is exported because this is the cost that sales reps would like to see on a mobile device when they are placing orders at a customer site. Key Y to have the commission cost for the item, not the current average cost, exported to Advanced Mobile. Key N if you do not want to have the commission cost for the item exported to Advanced Mobile. Default Value: Y (A 1) Required
Days of Consignment Transaction History	This field displays only if the Consignment module is installed. This field determines if consignment orders with a consignment type of AI or AT that exist in the History Header File (HSBED) will be exported to Advanced Mobile when the export process occurs. Key the number of days of consignment order history you want to include during the export process. When consignment history orders are exported, you will be able to drill into consignment items in Advanced Mobile to view the Consignment Invoice or Stock Transfer orders that exist in history for those items. Key 0 or leave blank if you do not want to include consignment orders during the export. Default Value: If the field is left blank, 0 will be assumed (N 3,0) Optional

Field/Function Key	Description
F7=Items	Use this function key to manually assign items to the call schedule being added or maintained, if you did not want to automatically include all items during the export process. This function key cannot be used if Include All Items is Y. Press F7=ITEMS to manually assign items to the call schedule. The Item List Screen will appear. Note: If you accessed this screen after pressing ENTER on the Call Schedule List Screen, and you are using this screen to review (not maintain) call schedule information, you can still press F7=ITEMS but you will only be able to view items and not add or maintain them.
F9=Customers	Use this function key to assign customers/ship-tos to the call schedule being added or maintained. Press F9=CUSTOMERS to assign customers/ship-tos to the call schedule. The Customer/Ship-To List Maintenance Screen will appear.
F12=Return	Press F12=RETURN to return to the Call Schedule List Screen without performing any function on this screen.
F24=Delete	This function key only displays if the call schedule is being maintained. Press F24=DELETE to delete the call schedule. You will be prompted to confirm deletion and when you press F24=DELETE again, the call schedule will be removed.
Enter	Press Enter to confirm your entries. The call schedule will be added or updated, and you will be returned to the Call Schedule List Screen.

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Item List Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number This field displays the company number selected on the Call Schedule Maintenance Prompt Screen. The call schedule you are adding items to is for this company. Display
Sales Rep	This field displays the sales rep number selected on the Call Schedule List Screen. The call schedule you are adding items to is for this sales rep. Display
Call Schedule	This field displays the sales rep's call schedule ID and description of the call schedule for which you are adding or maintaining items. Display
(Option)	This field is located before the Item & Description field. When adding or maintaining items on the call schedule, use this column to individually remove an item from the call schedule. Key R in the option field corresponding to the item you want to remove and press ENTER. The item will be removed from the screen. To remove all items from the call schedule, press F17=REMOVE ALL. F17=REMOVE ALL only displays if one or more items exist on the call schedule. If you are in review mode only, you will not be allowed to remove item(s) from the call list. You will only be allowed to view items on this screen. (A 1) Optional
Item & Description	This field displays the item number, item number and description, or item description, based on the F2=DESC LEFT / F2=DESC RIGHT / F2=ITEM & DESC and F24=DOUBLE LINE / F24=SINGLE LINE function keys. You can toggle between showing the item number from the Item Master File (ITMST) and the manufacturer's item number from the Item Master File (ITMST), by pressing the F5=MFG ITEM / F5=OUR ITEM function key. Display

Field/Function Key	Description
Item Number	Use this field to add an item to the call schedule item list. You will only be allowed to add items in add or maintenance mode only. Key the item number to add to the call schedule and press ENTER. The item will display on the top portion of this screen. If you do not recall the item number, in add or maintenance mode, use search criteria in the Find, Item, and/or Class fields on this screen. An item cannot be added if: - the item already exists on the call schedule - the item is suspended in the Item Master File (ITMST) - the item's company number restriction does not match Valid Values: An item defined through Item Master Maintenance (MENU IAFILE) (A 27) Optional
Find	This field displays in add or maintenance mode only. To search for an item to add to the call schedule list, you can enter search criteria in the Find, Item and Class fields. Key one or more words that closely match the item for which you are searching. The words you key may be up to 15 characters long and may appear in any order. Key the most unique words to improve the speed of the search. To search for manufacturer item numbers, prefix the criteria you enter with M/. The system will search based on the Vendor/Item File (VNITM) valid manufacturer item number. To search for customer item numbers, prefix the criteria you enter with C/. The system will search based on the Item/Customer Cross Reference File (IAXRF) valid customer item numbers. To search for UPC cross references, prefix the criteria you enter with U/. The system will search based on the Universal Product Code File (ITUPC) for valid UPC cross references. To search for GTIN cross references, prefix the criteria you enter with G/. The system will search based on the Global Trade Item Number File (ITGTIN) for valid GTIN cross references. After entering criteria, press ENTER. The Item Description Search Screen will appear, and items matching the description entered will display. If an item is selected on the Item Description Search Screen, then the item will be displayed on this screen. Leave this field blank if you would like to search on an item class. For information on entering search criteria and the Item Description Search Screen, refer to the Infor Distribution A+ Inventory Accounting User Guide. (A 40) Optional

Field/Function Key	Description
Item	This field displays in add or maintenance mode only. This field may be used in addition to, or in place of, entering search criteria in the Find field to further limit the items to display. Key a partial item number. All items that match the characters of the item number keyed in this field will display on the Item Description Search Screen. This is helpful if you recall part of an item number, but not the entire number. For information on entering search criteria and the Item Description Search Screen, refer to the Infor Distribution A+ Inventory Accounting User Guide. (A 27) Optional
Class	This field displays in add or maintenance mode only. This field may be used in addition to (not in place of) the search criteria in the Find or Item fields to further limit the number of items that will display, based on their item class. Key the appropriate item class. Only items that have been assigned the item class that is keyed in this field will display on the Item Description Search Screen. For information on entering search criteria and the Item Description Search Screen, refer to the Infor Distribution A+ Inventory Accounting User Guide. (A 4) Optional
F2=Desc Left / F2=Desc Right / F2=Item & Desc	This function key displays in single line mode only, showing the item number and description on the same line in the list The F2=DESC LEFT / F2=DESC RIGHT / F2=ITEM & DESC toggle function key displays only if you selected not to display both descriptions lines, as determined in System Options Maintenance (MENU XAFIL) or as selected with the non-display F24=DOUBLE LINE / F24=SINGLE LINE function key. Press F2=DESC LEFT to show the “left window” of the item description starting with the left-most word in the description. Press F2=DESC RIGHT to show the “right window” of the item description starting with the right-most word in the description. Press F2=ITEM & DESC to show the item number and as much of the description as will fit (two blanks separate the fields.) The item number displays in high intensity to distinguish it from the description.
F5=Mfg Item / F5=Our Item	Press F5=MFG ITEM / F5=OUR ITEM to toggle between displaying the item number and the manufacturer’s item number (from the Item Master File (ITMST)), in the Item & Description field on this screen.
F12=Return	Press to return to the Call Schedule Maintenance Screen

Field/Function Key	Description
F17=Remove All	The F17=REMOVE ALL function key displays only if one or more items are shown on this screen in the call schedule list. Press F17=REMOVE ALL to remove all items from the call schedule.
F24=Double Line / F24=Single Line	F24=DOUBLE LINE / F24=SINGLE LINE is non-display. Press F24=DOUBLE LINE / F24=SINGLE LINE to toggle between double line mode and single line mode. The default mode of this screen is based on the selection to Show 2nd Desc Line as determined in System Options Maintenance (MENU XAFIL). In single line mode, the initial display shows the item number field based on the Longest Item Length field specified in System Options (MENU XAFIL) followed by the beginning of the item description. In double line mode, the two lines of item description are displayed below the full display of the item number field.
Enter	After selecting to remove an item from the call schedule list or selecting an item to add to the list, press ENTER to confirm your action. The item will be removed from or added to the call schedule.

Customer/Ship-To List Maintenance Screen

<u>CUSTOMER/SHIP-TO LIST</u>				
Company:		1	A & C Office Supply	
Sales Rep:		1	Mike Steele	
Call Schedule:		1	Ellen B's Call Schedule	
<u>Customer/Ship-To Name</u>	<u>City</u>	<u>State/Province</u>	<u>Zip/Postal</u>	
<u>Address Line 1</u>	<u>Address Line 2</u>			
.. Bon Secour School Department	Bon Secour	AL	36511-0060	
P.O. Box 60				
.. Bon Secour School Department	Wilmer,	AL	36587-0021	
21 Indian Run Trail				
				Last
Option: C=Change		Customer:	Ship-To:	
R=Remove		Order Entry: N	Consignment: N	ToolCrib: N
		Find:		
		City:	St/Prov:	
F2=Cust/Ship-To No		F4=Ship-To Search	F12=Return	F17=Remove All

Customer/Ship-To List Review Screen

File Edit View Communication Actions Window Help				
<u>CUSTOMER/SHIP-TO LIST</u>				
Company:		1	A & C Office Supply	
Sales Rep:		1	Mike Steele	
Call Schedule:		1	Ellen B's Call Schedule	
<u>Customer/Ship-To Name</u>	<u>City</u>	<u>State/Province</u>	<u>Zip/Postal</u>	
<u>Address Line 1</u>	<u>Address Line 2</u>			
Bon Secour School Department	Bon Secour	AL	36511-0060	
P.O. Box 60				
Bon Secour School Department	Wilmer,	AL	36587-0021	
21 Indian Run Trail				
				Last
F2=Cust/Ship-To No		F12=Return		

The [Customer/Ship-To List Maintenance Screen](#) displays after pressing **F9=CUSTOMERS** on the [Call Schedule Maintenance Screen](#). Use this screen to assign customers/ship-tos to the call schedule being added or maintained. Customers/ship-tos that have previously been assigned to the call schedule are displayed on this screen.

If you are in review mode only (that is, you pressed **F9=CUSTOMERS** on the [Call Schedule Maintenance Screen](#) when you were in review mode only on that screen), the Customer/Ship-To List Review Screen will display and you will only be able to view customers/ship-tos on this screen. You will not be able to add or maintain customers/ship-tos.

Note: This is a roll screen. More... appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:

- ***PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

Customer/Ship-To List Maintenance & Review Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. This field displays the company number selected on the Call Schedule Maintenance Prompt Screen. The call schedule you are adding customers/ship-tos to is for this company. Display
Sales Rep	This field displays the sales rep number selected on the Call Schedule List Screen. The call schedule you are adding customers/ship-tos to is for this sales rep. Display
Call Schedule	This field displays the sales rep's call schedule ID and description of the call schedule for which you are adding customers/ship-tos. Display

Field/Function Key	Description
(Option)	This column is located before the Customer/Ship-To Name field and displays only in add or maintenance mode. It does not display if you are in review mode. When adding or maintaining customers/ship-tos on the call schedule, use this field to individually remove a customer/ship-to from the call schedule, or change information for a customer/ship-to. Key R in the option field corresponding to the customer/ship-to you want to remove and press ENTER. The customer/ship-to will be removed. To remove all customer/ship-tos from the call schedule, press F17=REMOVE ALL. F17=REMOVE ALL only displays if one or more customer/ship-to exist on the call schedule. Key C in the option field corresponding to the customer/ship-to you want to change and press ENTER. You will now be allowed to change the Order Entry, Consignment, and ToolCrib fields on this screen. (A 1) Optional
Customer/Ship-To Name / Customer/Ship To No	This field displays the Customer Name, if the customer in the list does not have a ship-to. If the customer has a ship-to, this field displays the Ship-To Name. This field can also display the Customer/Ship-To Number by pressing the F2=CUST/SHIP-TO NAME / F2=CUST/SHIP-TO NO toggle key. The Customer/Ship- To Number is from the Call Schedule Customer/Ship-To File (CLSCUS). Display
OE	This field displays after pressing the F2=CUST/SHIP-TO NAME / F2=CUST/SHIP-TO NO toggle key. Y displays if the customer/ship-to will be used for Order Entry Processing in Advanced Mobile. N displays if the customer/ship-to will not be used for Order Entry Processing in Advanced Mobile. Display
CS	This field displays after pressing the F2=CUST/SHIP-TO NAME / F2=CUST/SHIP-TO NO toggle key, if Consignment is being used in Distribution A+. Y displays if the customer/ship-to will be used for Consignment Processing in Advanced Mobile. N displays if the customer/ship-to will not be used for Consignment Processing in Advanced Mobile. Display

Field/Function Key	Description
TC	This field displays after pressing the F2=CUST/SHIP-TO NAME / F2=CUST/SHIP-TO NO toggle key. Y displays if the customer/ship-to will be used for ToolCrib Processing in Advanced Mobile. N displays if the customer/ship-to will not be used for ToolCrib Processing in Advanced Mobile. Display
Address Line 1	This field displays the first address line of the customer or the ship-to. Display
Address Line 2	This field displays the second address line of the customer or the ship-to. Display
City	This field displays the city in which the customer or the ship-to resides. Display
State/Province	This field displays the state or province in which the customer or the ship-to resides. Display
Zip/Postal	This field displays the zip or postal code in which the customer or the ship-to resides. Display
Customer	This field displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). Use this field to add a customer to the call schedule item list. Key the customer number to add to the call schedule and press ENTER. The customer will display on the top portion of this screen. If you do not recall the customer number, in add or maintenance mode, use search criteria in the Find, City, and/or St/Prov fields on this screen. To add a customer/ship-to to the call schedule item list, key a customer number in this field and a ship-to number in the Ship-To field. A customer cannot be added if: - the customer already exists on the call schedule - the customer is suspended in the Customer Master File (CUSMS) Valid Values: A customer defined through Customer/Ship-To Master Maintenance (MENU ARFILE) (N 10,0) Optional

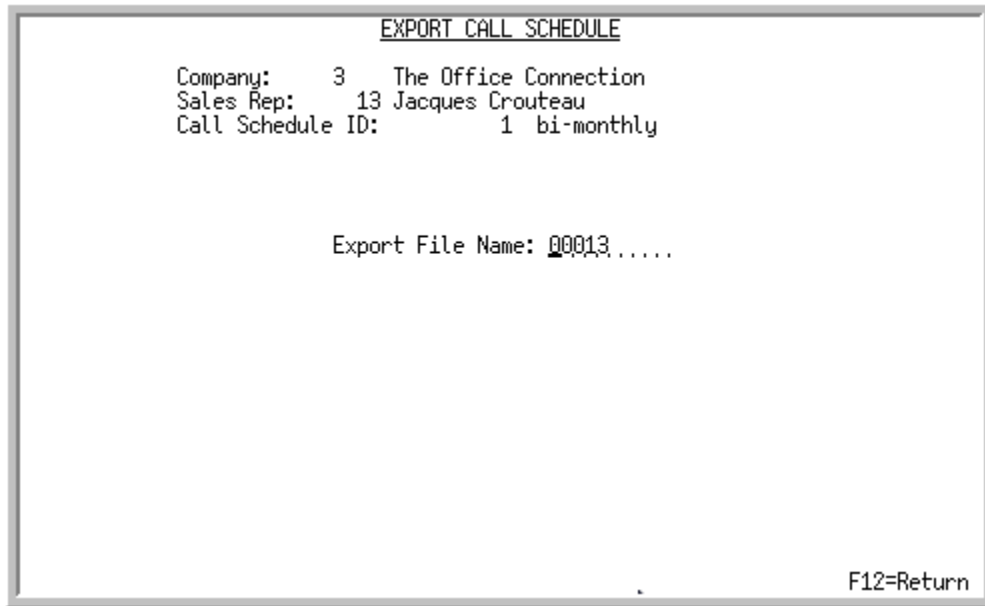
Field/Function Key	Description
Ship-To	This field displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). Use this field to add a customer/ship-to to the call schedule item list. After keying a customer number in the Customer field, key the ship-to number to add to call schedule and press Enter. The customer/ship-to will display on the top portion of this screen. If you do not recall the customer/ship-to number, in add or maintenance mode, use search criteria in the Find, City, and/or St/Prov fields on this screen. A customer/ship-to cannot be added if: - the customer/ship-to already exists on the call schedule - the customer/ship-to is suspended in the ADDR file Valid Values: A valid customer/ship-to defined through Customer/Ship-To Master Maintenance (MENU ARFILE). (A 7) Optional
Order Entry	This field displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). When adding or maintaining a customer/ship-to on a call schedule, use this field to select if the customer/ship-to will be used for Order Entry Processing in Advanced Mobile. Key Y if the customer/ship-to will be used for Order Entry Processing in Advanced Mobile. Key N if the customer/ship-to will not be used for Order Entry Processing in Advanced Mobile. Note: The Order Entry, Consignment, and ToolCrib fields cannot all be N. At least one field must contain a value of Y. Default Value: N (A 1) Required

Field/Function Key	Description
Consignment	This field displays only in add or maintenance mode, if Consignment is being used in Distribution A+. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). When adding or maintaining a customer/ship-to on a call schedule, use this field to select if the customer/ship-to will be used for Consignment Processing in Advanced Mobile. Key Y if the customer/ship-to will be used for Consignment Processing in Advanced Mobile. Key N if the customer/ship-to will not be used for Consignment Processing in Advanced Mobile. Note: The Order Entry, Consignment, and ToolCrib fields cannot all be N. At least one field must contain a value of Y. Default Value: N (A 1) Required
ToolCrib	This field displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). When adding or maintaining a customer/ship-to on a call schedule, use this field to select if the customer/ship-to will be used for ToolCrib Processing in Advanced Mobile. Key Y if the customer/ship-to will be used for ToolCrib Processing in Advanced Mobile. Key N if the customer/ship-to will not be used for ToolCrib Processing in Advanced Mobile. Note: The Order Entry, Consignment, and ToolCrib fields cannot all be N. At least one field must contain a value of Y. Default Value: N (A 1) Required

Field/Function Key	Description
Find	This field displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). Use this field either alone or with the City and St/Prov fields, to search for a customer and ship-to. Key one or more of the following, separated by one blank space: • up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order. • up to 10 characters (the first 10) of the PO contact's phone number, excluding the country code and delimiters • up to 5 characters (the first 5) of the customer's zip/postal code After entering criteria, press ENTER. The Customer Search Screen will appear, and customers/ship-tos matching the description entered will display. If a customer/ship-to is selected on the Customer Search Screen, then the customer/ship-to will be displayed on this screen. Refer to the Customer Search Screens as shown and explained in the Infor Distribution A+ Cross Applications User Guide. For information about entering search criteria, refer to the Searches topic in the Introduction section of the Infor Distribution A+ Cross Applications User Guide. (A 40) Optional
City	This field displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). Use this field either alone or with the Find and St/Prov fields, to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city. For information about entering search criteria, refer to the Searches topic in the Introduction section of the Infor Distribution A+ Cross Applications User Guide. (A 8) Optional

Field/Function Key	Description
St/Prov	This field displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). Use this field either alone or with the Find and City fields, to search for a customer in a particular state or province. Key up to 10 characters (the first 10) of the state or province code. For information about entering search criteria, refer to the Searches topic in the <i>Introduction</i> section of the Infor Distribution A+ Cross Applications User Guide. (A 10) Optional
F2=Cust/Ship-To No / F2=Cust/Ship-To Name	Press F2=CUST/SHIP-TO NO / F2=CUST/SHIP-TO NAME to toggle between showing the number or name of the customer/ship-to. The fields on the top portion of the screen will change accordingly.
F4=Ship-To Search	The F4=SHIP-TO SEARCH function key displays only in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). After keying a customer number in the Customer field on this screen, press F4=SHIP-TO SEARCH to search for ship-to numbers associated with the customer entered. The Ship-To Search Screen will appear. Refer to this screen as shown and explained in the Infor Distribution A+ Accounts Receivable User Guide.
F12=Return	Press F12=RETURN to return to the Call Schedule Maintenance Screen.
F17=Remove All	The F17=REMOVE ALL function key displays only if one or more customer/ship-tos are shown on this screen in the call schedule list, and only if in add or maintenance mode. It does not display if you are in review mode (that is, you pressed F9=CUSTOMERS on the Call Schedule Maintenance Screen when you were in review mode only on that screen). Press F17=REMOVE ALL to remove all customer/ship-tos from the call schedule.
Enter	Press ENTER to confirm your entry. If you keyed C or R in the (Option) field, you will be able to change the Order Entry, Consignment, and/or ToolCrib fields for the customer/ship-to, or remove the customer/ship-to from the call schedule. If you are adding a customer/ship-to to the call schedule, when you press ENTER, the customer/ship-to will be added to the call schedule and will display on the top portion of this screen.

Export Call Schedule Screen



```
EXPORT CALL SCHEDULE

Company:    3    The Office Connection
Sales Rep:  13  Jacques Crouteau
Call Schedule ID: 1 bi-monthly

Export File Name: 00013,.....

F12=Return
```

This screen displays after pressing **F11=EXPORT SCHEDULE** on the [Call Schedule List Screen](#).

Use this screen to enter a name for the call schedule file you will be exporting to Advanced Mobile to be placed on a mobile device. Once the export job completes, the export file (**.SET** file) for the call schedule will be placed in the **Order and Inventory Management IFS Path** specified in Advanced Mobile Options Maintenance (MENU AMFILE). Each **.SET** file will have the following naming convention:

<Export File Name> + date/time stamp + .SET

Once the **.SET** file is picked up by Advanced Mobile, the file (containing customers and items in the call schedule) will display in a list in the Advanced Mobile Work Assigner so that it can be reviewed and assigned/unassigned to a specific mobile device. (The Advanced Mobile Work Assigner is a module in the Advanced Mobile software which is used for **.SET** file management.) A sales rep will then be able to use the call schedules for Order and Inventory Management while visiting a customer site.

Note: This screen allows you to export a single call schedule. If you want to export multiple call schedules simultaneously, perform the export process through Option **5 - Export Call Schedules** (MENU AMMAIN).

Export Call Schedule Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number This field displays the company number selected on the Call Schedule Maintenance Prompt Screen. The call schedule you are exporting is for this company. Display
Sales Rep	This field displays the sales rep number selected on the Call Schedule List Screen. The call schedule you are exporting is for this sales rep. Display
Call Schedule ID	This field displays the sales rep's call schedule ID and description for the call schedule you selected to export from the Call Schedule List Screen. Display
Export File Name	Use this field to key the name the export file that will be exported to Advanced Mobile after pressing Enter on this screen. Once the file is exported, Advanced Mobile will look at the characters in the Export File Name to determine if the file can be automatically assigned to one of the sales reps with that number (the default value in this field is the sales rep number). If none of the characters in the Export File Name match any of the sales reps, then the export file will not be automatically assigned to a sales rep's mobile device and it will have to be manually assigned. The Export File Name entered on this screen will be appended with a date/time stamp when the export file is created. Default Value: the sales rep number. Valid Values: cannot contain any special characters that are not allowed for Windows files. (A 10) Required
F12=Return	Press F12=RETURN to return to the Call Schedule List Screen without exporting the call schedule.
Enter	Press ENTER to confirm the Export File Name and automatically submit the export job to batch for processing. You will be returned to the Call Schedule List Screen

Chapter 6 Exporting Call Schedules

Use Export Call Schedules to export the call schedules set up through Call Schedule Maintenance (MENU AMMAIN) to Advanced Mobile. An export file (.SET file) will be created for each call schedule that is processed during the export. Each export file created will be placed in the **Order and Inventory Management IFS Path** specified in Advanced Mobile Options Maintenance (MENU AMFILE). Each .SET file will have the following naming convention:

<Export File Name> + date/time stamp + .SET

Once the **.SET** file is picked up by Advanced Mobile, the file (containing customers and items in the call schedule) will display in a list in the Advanced Mobile Work Assigner so that it can be reviewed and assigned/unassigned to a specific mobile device. (The Advanced Mobile Work Assigner is a module in the Advanced Mobile software which is used for **.SET** file management.) A sales rep will then be able to use the call schedules for Advanced Mobile Order Entry while visiting a customer site. Each customer/ship-to on the mobile device will have a "List" name. If the "List" name is **OE**, then the sales rep would select that list to add items to a regular Order Entry sales order for the customer/ship-to. If the "List" name is **CSGN**, then the sales rep would select that list to enter inventory counts and/or enter order quantities for Consignment items. If the "List" name is **ToolCrib**, then the sales rep would select that list to enter inventory counts and/or enter order quantities for ToolCrib items.

Note: This option allows you to export multiple call schedules simultaneously. If you want to export a single call schedule, use Option 4 - [Call Schedule Maintenance](#) (MENU AMMAIN).

Export Call Schedules

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Export Call Schedules Screen	Use this screen to enter selection criteria for the export job.

Title	Purpose
Schedule Options Screen	Use this screen to schedule a date and time to run the export job. Refer to this screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide.

Export Call Schedules Screen

```

EXPORT CALL SCHEDULES

Company?      01
Sales Rep?    .....    To? .....
Call Schedule ID: .....    To: .....P...
Schedule Export: N (Y/N)

F3=Exit
  
```

This screen displays after selecting option **5** - [Export Call Schedules](#) on MENU AMMAIN. Use this screen to enter selection criteria for the export files. You can select to have the export immediately submitted to batch, or you can select to schedule the export file creation process.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Export Call Schedules Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIELD). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIELD), this field will not appear and 01 will be assumed as the company number. Key the company number for which you are exporting call schedules. Default Value: The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFIELD). Valid Values: A valid company number defined through Company Name Maintenance (MENU XAFIELD) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (N 2,0) Required

Field/Function Key	Description
Sales Rep	A range of sales reps can be entered by which to limit the call schedules to be exported. Key the From and To sales rep numbers associated with the call schedules you want to export. Leave this field blank to export all call schedules, regardless of who the sales rep is. Valid Values: A valid sales rep number defined through Salesrep Maintenance (MENU ARFILE). (N 5,0) Optional
Call Schedule ID	A range of call schedules can be entered by which to limit the call schedules to be exported. Key the From and To call schedule IDs of the call schedules you want to export. Leave this field blank to export all call schedules. Valid Values: A valid call schedule ID created through Call Schedule Maintenance (MENU AMMAIN). (A 10) Optional
Schedule Export	The export process will either be automatically submitted to batch when you press ENTER on this screen or can be scheduled to occur at a later date and time, via this field. Key Y to schedule the export of call schedules. The Schedule Options Screen will display after you press ENTER, and you will be able to select the scheduled time and date to run the export job. You will also be able to select the frequency of the job, specifying to have it run once, weekly, monthly, or daily, and can further select the days of the week or month you want it to run. When you press ENTER on the Schedule Options Screen, the export job will be scheduled according to the selection criteria entered and it will run at a later time without user intervention. Refer to the Schedule Options Screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide. Key N if you do not want to schedule the export process. The export of call schedules will be automatically submitted to batch when you press ENTER on this screen. Default Value: N (A 1) Required
F3=Exit	Press F3=EXIT to cancel this option and return to MENU AMMAIN.

Field/Function Key	Description
Enter	Press ENTER to confirm your entries. If the Schedule Export field is Y, the Schedule Options Screen will display and you will be able to select the scheduled time and date to run the export job. You will also be able to schedule the job to always run on certain days of the week or month. When you press ENTER on the Schedule Options Screen, the export job will be scheduled according to the selection criteria entered and it will run at a later time without user intervention. Refer to the Schedule Options Screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide. If the Schedule Export field is N, when you press ENTER the export job will immediately be submitted to batch. When the export occurs, call schedule information will be written out to an export file (.SET) based on what is entered on this screen and in export options for the call schedule created in Call Schedule Maintenance (MENU AMMAIN). This export file will be placed in the directory specified using the Order and Inventory Management IFS Path selected in Advanced Mobile Options Maintenance (MENU AMFILE). The export file will then be picked up by Advanced Mobile and will be placed on a mobile device for a sales rep. A sales rep will then be able to use the call schedules for Advanced Mobile Order Entry while visiting a customer site. Note that a .SET file will be created for each call schedule that is exported. Therefore, if multiple call schedules are exported at the same time, there will be several .SET files created. Note: You will only be able to run the export job if the Order and Inventory Management IFS Path is set up in Advanced Mobile Options Maintenance (MENU AMFILE).

Chapter 7 Import Orders and Customer Inventory Balances

Use Import Orders and Customer Inventory Balances to import sales order information and inventory balances (for Consignment and ToolCrib) into Distribution A+ that were entered through Advanced Mobile, and create Order Entry orders through Offline Order Entry. In Advanced Mobile, an inventory count and/or an order quantity, along with minimum and maximum on-hand values for the items, can be entered for Consignment and ToolCrib items.

When this job is run, the system will scan the **Order and Inventory Management IFS Path** specified in Advanced Mobile Options Maintenance (MENU AMFILE) for files with an extension of **.CSE**. The **.CSE** files are the files sent back to Distribution A+ by Advanced Mobile containing the orders that have been entered in Advanced Mobile. Each **.CSE** file will contain Order Header and Order Detail sections. The Order Header section will contain the header information for each Distribution A+ order that will be created. The Order Detail section will contain each detail line that will be added to the Distribution A+ order to be created. All **.CSE** files in the **Order and Inventory Management IFS Path** directory which match the criteria entered on the [Import Orders and Customer Inventory Balances Screen](#), will be processed.

If the type of order entered in Advanced Mobile was a **regular** Order Entry sales order, then a regular sales order will be created through Offline Order Entry for the customer/ship-to default warehouse.

Order Entry orders will have an Order Type of 'O', unless the order is marked as shipped in Advanced Mobile. If this is the case, the order will then be marked with an Order Type of 'I'.

If the type of order entered in Advanced Mobile was a **Consignment** order, then a consignment stock transfer order will be created with an Order Type of 'O'. The shipping warehouse for the order will be the customer/ship-to default warehouse. Stock will be transferred from the default warehouse to the consignment warehouse for the item being replenished. The Consignment Order Type will be 'AT' for Stock Transfer.

If the type of order entered in Advanced Mobile was a **ToolCrib** order, then a regular Order Entry order will be created without a consignment order type. The Order Type will be 'O' and the shipping warehouse for the order will be the customer/ship-to default warehouse. Note that unlike Consignment, you will not be able to place orders for ToolCrib items through Distribution A+ Order Entry. Also, Inventory balance quantities will not be updated for ToolCrib items throughout Distribution A+ since a ToolCrib (VMI) module does not exist to track all of these quantities. The Last Count Quantity from Advanced Mobile will be the only quantity that is tracked for ToolCrib items in Advanced Mobile.

When the item detail is imported into Distribution A+ for Consignment and/or ToolCrib items, the following occurs:

- The Quantity On-Hand in the **CABAL** file will be updated with the Quantity Counted in Advanced Mobile for the Replenishment U/M set up in the Customer Consignment Item Balance File (**CABAL**). For Consignment items, the Quantity On-Hand in the Item Balance File (**ITBAL**) will also be adjusted by the Quantity Counted for the item and consignment warehouse.
- The Last Count Date in the **CABAL** file will be updated with the date that the Import is run.
- The Maximum On-Hand Quantity and the Minimum On-Hand Quantity in the **CABAL** file will be updated with the Maximum and Minimum quantities from Advanced Mobile.

For Consignment and ToolCrib, if an order quantity was entered in Advanced Mobile for an item, then an order will be created in Distribution A+ for that quantity. Even if a count was entered, the order quantity entered will always be the quantity ordered in the Distribution A+ order. If an order quantity was not entered, but a count quantity was entered, Distribution A+ will determine if there is a replenishment quantity that needs to be ordered. The following occurs to determine the replenishment quantity:

- For a Consignment item, if the net available from the Customer Consignment Item Balance File (**CABAL**) is less than the minimum quantity in **CABAL**, then the replenishment order quantity for the item will be the **CABAL Maximum Quantity – Net Available**.

Net Available from the **CABAL** file = **On-Hand + On PO + Unposted + Pending Stock Transfer – Allocated**.

- For a ToolCrib item, if the **CABAL** On-Hand Quantity is less than the minimum quantity in **CABAL**, then the replenishment order quantity for the item will be the **CABAL Maximum Quantity – Quantity-On Hand**.

CABAL On-Hand Quantity = **Last Count Quantity from Advanced Mobile**.

Each item in a Consignment or ToolCrib Advanced Mobile order will be added to the same Distribution A+ order as long as the order quantity or the calculated replenishment quantity is greater than zero. Both Consignment and ToolCrib orders will be created through Offline Order Entry when the Import job is run.

Note: If using certain Consignment items with Advanced Mobile, Consignment balance records should be set up to use the customer/ship-to default warehouse as the originating warehouse when doing replenishment for the Consignment item. The originating warehouse for these balance records should not be changed once the Consignment items are exported to Advanced Mobile.

After the process completes and the **.CSE** file has been read, the system will rename the **.CSE** file with a **.UPD** file extension and move it to the Archive directory in the Order and Inventory Management IFS Path. The file is moved to another directory so that it cannot be processed twice by the Import option.

Import Orders and Customer Inventory Balances

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Import Orders and Customer Inventory Balances Screen	Use this screen to enter selection criteria for the import and customer inventory balances job.
Schedule Options Screen	Use this screen to schedule a date and time to run the import job. Refer to this screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide.

Import Orders and Customer Inventory Balances Screen

```

IMPORT ORDERS AND CUSTOMER INVENTORY BALANCES

Company?      01
Sales Rep?    .....      To?      .....
Call Schedule ID: .....      To:      .....
Offline OE Report Output Queue: CSMITH....
Offline OE Error Report Output Queue: CSMITH_...
Schedule Import: N (Y/N)

F3=Exit
  
```

This screen displays after selecting option **6** - [Import Orders and Customer Inventory Balances](#) on MENU AMMAIN. Use this screen to enter selection criteria for the import and customer inventory balances job. You can select to have the job immediately submitted to batch, or you can select to schedule the job to run at a later date and time.

Import Orders and Customer Inventory Balances Screen Fields and Function Keys

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFIL). If the Multi Company field is set to N through System Options Maintenance (MENU XAFIL), this field will not appear and 01 will be assumed as the company number. Key the company number for which you are importing call schedules. Default Value: The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFIL). Valid Values: A valid company number defined through Company Name Maintenance (MENU XAFIL) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (N 2,0) Required

Field/Function Key	Description
Sales Rep	A range of sales reps can be entered by which to limit the Advanced Mobile orders to be imported. Key the From and To sales rep numbers associated with the Advanced Mobile orders you want to import. Leave this field blank to import all Advanced Mobile orders, regardless of who the sales rep is. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges. Valid Values: A valid sales rep number defined through Salesrep Maintenance (MENU ARFILE). (A 5) Optional
Call Schedule ID	A range of call schedules can be entered by which to limit the Advanced Mobile orders to be imported. Key the From and To call schedule IDs of the Advanced Mobile orders you want to import. Leave this field blank to import all Advanced Mobile orders, regardless of the call schedule IDs. Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges. Valid Values: A valid call schedule ID created through Call Schedule Maintenance (MENU AMMAIN). (A 10) Optional
Offline OE Report Output Queue	Use this field to key the ID of the System i Output Queue to which the Offline OE Report will print when offline OE orders are created during the import process. Default Value: The ID assigned to the user's profile on the System i, unless an override has been defined through Output Queue Overrides Maintenance (MENU XAFIL). Valid Values: A valid Output Queue defined on the System i. (A 10) Required
Offline OE Error Report Output Queue	Use this field to key the ID of the System i Output Queue to which the Offline OE Error Report will print if any errors exist for the offline OE orders created during the import process. Default Value: The ID assigned to the user's profile on the System i, unless an override has been defined through Output Queue Overrides Maintenance (MENU XAFIL). Valid Values: A valid Output Queue defined on the System i (A 10) Required

Field/Function Key	Description
Schedule Import	The import and customer inventory balances job will either be automatically submitted to batch when you press ENTER on this screen or can be scheduled to occur at a later date and time, via this field. Key Y to schedule the import of orders and customer inventory balances into Distribution A+. The Schedule Options Screen will display after you press ENTER, and you will be able to select the scheduled time and date to run the job. You will also be able to select the frequency of the job, specifying to have it run once, weekly, monthly, or daily, and can further select the days of the week or month you want it to run. When you press ENTER on the Schedule Options Screen, the job will be scheduled according to the selection criteria entered and it will run at a later time without user intervention. Refer to the Schedule Options Screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide. Key N if you do not want to schedule the job. The job will instead automatically be submitted to batch when you press ENTER, and you will be returned to MENU AMMAIN. Default Value: N (A 1) Required
F3=Exit	Press F3=EXIT to cancel this option and return to MENU AMMAIN.

Field/Function Key	Description
Enter	Press ENTER to confirm your entries. You will only be able to run the job if the Order and Inventory Management IFS Path is set up in Advanced Mobile Options Maintenance (MENU AMFILE). If the Schedule Import field is Y, the Schedule Options Screen will display and you will be able to select the scheduled time and date to run the import and customer inventory balances job. You will also be able to schedule the job to always run on certain days of the week or month. When you press ENTER on the Schedule Options Screen, the job will be scheduled according to the selection criteria entered and it will run at a later time without user intervention. Refer to the Schedule Options Screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide. If the Schedule Import field is N, when you press ENTER the job will immediately be submitted to batch. When the import occurs, sales order information entered through Advanced Mobile will be imported into Distribution A+, and Order Entry orders will be created through Offline Order Entry. The system will scan the Order and Inventory Management IFS Path specified in Advanced Mobile Options Maintenance (MENU AMFILE) for files with an extension of .CSE. The .CSE files are the files sent back to Distribution A+ by Advanced Mobile containing the sales orders that have been entered in Advanced Mobile. For consignment and ToolCrib items, an Order Quantity and/or a Count Quantity can be entered in Advanced Mobile. If an Order Quantity is entered, then that will be the quantity of the item that is ordered in the Distribution A+ stock transfer order (consignment) or the sales order (ToolCrib) created. If an Order Quantity is not entered, but a Count Quantity is entered, then Distribution A+ will determine the replenishment quantity to order for the item based on the count entered. For a consignment item, if the Net Available is less than the Minimum Quantity set up in Consignment Item Balance Maintenance, then the replenishment order quantity for the item will be the Maximum Quantity – Net Available. For a ToolCrib item, if the On-Hand Quantity (Last Count Quantity) is less than the minimum quantity set up in Managed Inventory (ToolCrib) Maintenance, then the replenishment order quantity for the item will be the Maximum Quantity – Quantity-On Hand. All consignment items that need to be replenished will be added to the same consignment stock transfer order as long as they were placed on the same order in Advanced Mobile. All ToolCrib items that need to be replenished will be added to the same sales order as long as they were placed on the same order in Advanced Mobile.

Chapter 8 Maintaining Advanced Mobile Options

Advanced Mobile Options Maintenance (MENU AMFILE) allows for the setup and configuration of the mobile interface. Use this option to define the path to the directory on the IFS/Root of the System i where the Advanced Mobile export (.SET) files will be generated and picked up by the Infor Advanced Mobile Communication Server. Communication with Advanced Mobile is completed by transferring data between Distribution A+ and Advanced Mobile by data transmission in the .SET files.

Both Export and Import processes to and from the Advanced Mobile Communication Server and System i will rely on an FTP protocol.

Advanced Mobile Options Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Advanced Mobile System Options Screen	Use this screen to identify the paths on the IFS\Root directory where the .SET files will be loaded for Advanced Mobile.

Advanced Mobile System Options Screen

```

ADVANCED MOBILE SYSTEM OPTIONS

Delivery:
  IFS Path: /APLUS/ADVANCEDMOBILE/DELIVERY.....

Order and Inventory Management:
  IFS Path: /APLUS/ADVANCEDMOBILE/ORDINVMGMT.....

F3=Exit
  
```

This screen displays after selecting option **1** - [Advanced Mobile Options Maintenance](#) on MENU AMFILE. Use this screen to identify the IFS\Root directory paths for the location to where Distribution A+ will update the data that will be transmitted to Advanced Mobile. This option also builds an Archive folder as a sub-directory to store the completed import files.

Advanced Mobile System Options Screen Fields and Function Keys

Field/Function Key	Description
Delivery IFS Path	The Delivery IFS Path field is the directory where Advanced Mobile will look to pick up exported files containing orders to be delivered. It is also the directory where Advanced Mobile places files containing delivered orders to be imported by Distribution A+. Key the string for the delivery folders. If the path entered does not already exist, you will be prompted to press F5=CREATE PATH to build the folders for the IFS Path. Valid Values: must begin with a /; any valid character string; cannot be blank (A 50) Required

Field/Function Key	Description
Order and Inventory Management IFS Path	The Order and Inventory Management IFS Path field is the directory where Advanced Mobile will look to pick up exported files containing call schedule information, and where Advanced Mobile places files containing orders placed on the mobile device. Key the string for the order and inventory management folders. This path must be defined in order to export call schedules. Advanced Mobile will pick up the export file (.SET) residing in this path and load it to a mobile device so that orders can be entered. The .SET file will contain customer and item information for the call schedule. If the path entered does not already exist, you will be prompted to press F5=CREATE PATH to automatically build the folders for the IFS Path. An Archive directory will also be created at the same time. Once import files from Advanced Mobile are processed by Distribution A+, they will be moved to the Archive directory so that they will not be processed again. Valid Values: must begin with a /; any valid character string; cannot be blank (A 50) Required
F3=Exit	Press F3=EXIT to cancel the maintenance and return to MENU AMFILE.
F5=Create Path	The F5=CREATE PATH function key displays only after you press ENTER and one or both of the IFS Paths specified do not already exist. Press F5=CREATE PATH to build the folders for the IFS Paths. You will remain on the same screen.
Enter	Press ENTER to accept the Advanced Mobile System Options data and return to MENU AMFILE.

Chapter 9 Maintaining Managed Inventory (ToolCrib) Options

Managed Inventory (ToolCrib) Maintenance (MENU AMFILE) allows for the setup of ToolCrib items for a specific company, customer and ship-to number. ToolCrib items will be added/updated in the pre-existing Customer Consignment Item Balance File (**CABAL**) just as consignment items are, but the Warehouse ID field (**ABWHID**) will be blank. Consignment items can be defined for a specific customer/ship-to/consignment warehouse from the pre-existing Customer Consignment Item Balance option on MENU CNFILE. These items can then be used for Consignment and ToolCrib processing in the Advanced Mobile application.

Managed Inventory (ToolCrib) Maintenance

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Managed Inventory (ToolCrib) Selection Screen	Use this screen to add, change or delete ToolCrib items for a specific company, customer number and ship-to number.
Managed Inventory (ToolCrib) Maintenance Screen	Use this screen to add, change or delete replenishment information for the selected ToolCrib item.

Managed Inventory (ToolCrib) Selection Screen

```

MANAGED INVENTORY (TOOLCRIB) SELECTION

Function:      _ (A,C,D)
Company?      01 (01-99)
Customer No:   .....
Find:         .....
City:         ..... St/Prov: .....
Ship-To No:   .....

Item Number:   .....
Find:         .....
Item No:      ..... Class? .....

F3=Exit  F4=Ship-To Search  F5=Item Balance Mnt
  
```

This screen displays after selecting option **2** - [Managed Inventory \(ToolCrib\) Maintenance](#) on MENU AMFILE. Use this screen to add, change or delete ToolCrib items for a specific company, customer number and ship-to number. ToolCrib items will be added/updated in the pre-existing Customer Consignment Item Balance File (**CABAL**) just as consignment items are, but the Warehouse ID field (**ABWHID**) will be blank. Consignment items can be defined for a specific customer/ship-to/consignment warehouse from the pre-existing Customer Consignment Item Balance option on MENU CNFILE.

Managed Inventory (ToolCrib) Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	Use this field to add, change or delete a ToolCrib item for a specific company, customer number and ship-to number. Key A to add a ToolCrib item. Key C to change an existing ToolCrib item. Key D to delete an existing ToolCrib item. (A 1) Required

Field/Function Key	Description
Company	This field appears only if the Multi Company field is set to Y through System Options Maintenance (MENU XAFILE). If the Multi Company field is set to N through System Options Maintenance (MENU XAFILE), this field will not appear and 01 will be assumed as the company number. Key the company number for which you are adding, changing or deleting a ToolCrib item. Default Value: The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFILE). Valid Values: A valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). (N 2,0) Required
Customer No	Key the customer number for which you are adding, changing or deleting a ToolCrib item. Valid Values: A customer number defined through Customer/Ship to Master Maintenance (MENU ARFILE). (N 10,0) Required
Find	Use this field alone or with the City and St/Prov fields, to search for a customer by name, phone number, and zip/postal code. Key one or more of the following, separated by one blank space: - up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order. - up to 10 characters (the first 10) of the PO contact's phone number, excluding the country code and delimiters. - up to 5 characters (the first 5) of the customer's zip/postal code. For information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. (A 40) Optional
City	Use this field alone or with the Find and St/Prov fields to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city. For information about entering search criteria, refer to the refer to the Infor Distribution A+ Cross Applications User Guide. (A 8) Optional

Field/Function Key	Description
St/Prov	Use this field alone or with the Find and City fields to search for a customer in a particular state or province. Key up to 10 characters (the first 10) of the state or province code. For information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. (A 10) Optional
Ship-To No	Key the number of the ship-to address for which you are adding, changing or deleting a ToolCrib item. Valid Values: A ship-to number defined through Customer/Ship to Master Maintenance (MENU ARFILE). (A 7) Optional
Item Number	Key the number of the ToolCrib item you want to add, change or delete for the company and customer specified. Valid Values: An item number defined through Item Master Maintenance (MENU IAFILE). (A 27) Required
Find	If you do not recall the complete item number, use this field to key item description search criteria to activate the item search. For general information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. (A 40) Optional
Item No	Use this field in addition to, or in place of, the Find field to further limit the item for which you want to search. Key a partial item number. (A 27) Optional
Class	Use this field in addition to, but not in place of, the Find field or Item No field to further limit the item for which you want to search. Key an item class and/or sub-class. (A 2) Optional
F3=Exit	Press F3=EXIT to cancel this option and return to MENU AMFILE.
F4=Ship-To Search	After entering a value in the Function and Customer No fields, press F4=SHIP-TO SEARCH to search for ship-to numbers associated with the customer number you entered. The Ship-To Search Screen will appear. Refer to this screen as shown and explained in the Infor Distribution A+ Cross Applications User Guide.

Field/Function Key	Description
F5=Item Balance Mnt	Press F5=ITEM BALANCE MNT to access the Item/Inventory Balance Master File Maintenance Screen in Item Master or Item Balance Maintenance (MENU IAFILE). For master maintenance, use the Item/Inventory Balance Master File Maintenance Screen to add, change, delete, reactivate, or suspend an item. For balance maintenance, use the Item/Inventory Balance Master File Maintenance Screen to add, change, delete, reactivate, or suspend an item/ warehouse relationship. For further details about the Item/Inventory Balance Master File Maintenance Screen, refer to MENU IAFILE in the Infor Distribution A+ Inventory Accounting Users Guide.
Enter	Press ENTER to confirm your entries and continue. The Managed Inventory (ToolCrib) Maintenance Screen will appear.

Managed Inventory (ToolCrib) Maintenance Screen

```

MANAGED INVENTORY (TOOLCRIB) MAINTENANCE  Add
Co/Customer: 01/10      Bon Secour School Department
Item No:      A100      Sharp Fax Machine Model SX-765

  U/M  Last Count Qty  Last Count Date
1 => EA             .000
2              .000
3              .000

Replenishment
  U/M  Max On Hand  Min On Hand
....  .....000.  .....000.

F12=Return

```

This screen displays after pressing **ENTER** on the [Managed Inventory \(ToolCrib\) Selection Screen](#). Use this screen to add, change or delete replenishment information for the selected ToolCrib item.

Managed Inventory (ToolCrib) Maintenance Screen Fields and Function Keys

Field/Function Key	Description
(Add/Change/Delete Mode)	This field indicates if you are adding, changing or deleting replenishment information for the selected ToolCrib item. Add , Change , or Delete displays in the upper right corner of this screen, depending on the action you are performing. Display
Co/Customer	This field displays the company and customer number you selected on the Managed Inventory (ToolCrib) Selection Screen for which you are adding, changing, or deleting replenishment information for the selected ToolCrib item. Display
Item No	This field displays the item number you selected on the Managed Inventory (ToolCrib) Selection Screen for which you are adding, changing, or deleting replenishment information. Display

Field/Function Key	Description
U/M	This field displays the unit of measure defined for the selected item in the Item Master File (ITMST). Display
Last Count Qty	This field displays the quantity of the ToolCrib item last counted for the customer/ship-to in Advanced Mobile. This value is the Quantity On Hand from the Customer Consignment Item Balance File (CABAL). Display
Last Count Date	This field displays the date that the ToolCrib item was last counted for the customer/ship-to in Advanced Mobile. This value is the Date Last Counted from the Customer Consignment Item Balance File (CABAL), and it will display in the user's default date format. Note: All dates will display in the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFIELD). Display
Replenishment U/M	Key the unit of measure for the item that will be used to replenish the customer's stock. This field is required if a value is entered in the Max On Hand and/or Min On Hand field(s). Valid Values: Any stocking unit of measure defined for the item through Item Master Maintenance (MENU IAFIELD). (A 3) Required
Max on Hand	When ToolCrib replenishment orders are created, this value will be used to determine the quantity of the item to order for the customer/ship-to. This value will be updated in the Customer Consignment Item Balance File (CABAL). Key the maximum quantity of the item that is to remain on-hand for the item's replenishment unit of measure. If you key a value in this field, the Replenishment U/M field will be required. (N 11,3) Optional

Field/Function Key	Description
Min on Hand	When ToolCrib replenishment orders are created, this value will be used to determine the quantity of the item to order for the customer/ship-to. This value will be updated in the Customer Consignment Item Balance File (CABAL). Key the minimum quantity of the item that is to remain on-hand for the item's replenishment unit of measure. If you key a value in this field, the Replenishment U/M field will be required. Valid Values: a value greater than or equal to zero. (N 11,3) Optional
F12=Return	Press F12=RETURN to return to the Managed Inventory (ToolCrib) Selection Screen without saving your entries.
Enter	Press ENTER to confirm your entries and return to the Managed Inventory (ToolCrib) Selection Screen

Managed Inventory (ToolCrib) Listing

The reports in this option and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

Title	Purpose
Managed Inventory (ToolCrib) Listing Screen	Use this screen to select the item numbers and company/customer numbers you want to print the Managed Inventory (ToolCrib) Listing
Managed Inventory (ToolCrib) Listing	This listing prints all ToolCrib items and their descriptions in the Customer Consignment Item Balance File (CABAL).

Managed Inventory (ToolCrib) Listing Screen

MANAGED INVENTORY (TOOLCRIB) LISTING

Item No: - To:

Co/Customer? ... / To? ... /

F3=Exit

This screen displays after selecting option **12** - [Managed Inventory \(ToolCrib\) Listing](#) on MENU AMFILE. Use this screen to select the item numbers and company/customer numbers you want to print the Managed Inventory (ToolCrib) Listing.

Managed Inventory (ToolCrib) Listing Screen Fields and Function Keys

Field/Function Key	Description
Item No	Use this field to key the item number or range of items to include on the listing. For more information about using from and to ranges, refer to From and To Ranges in the Introduction of the Infor Distribution A+ Cross Applications User Guide. (A 27) Optional
Co/Customer	Use this field to key the company/customer or range or companies/ customers to include on the listing. For more information about using from and to ranges, refer to From and To Ranges in the Introduction of the Infor Distribution A+ Cross Applications User Guide. (A 2 / N 10,0) Optional
F3=Exit	Press F3=EXIT to return to MENU AMFILE without running the listing.

Field/Function Key	Description
Enter	Press ENTER to confirm your entries. The Report Options Screen appears. For a description of this screen refer to the Infor Distribution A+ Cross Applications User Guide.

Managed Inventory (ToolCrib) Listing

CNA812 27/06/11 16.53.50	MANAGED INVENTORY (TOOLCRIB) LISTING	BM/APDEMO	PAGE	1
Co/Customer: 01/10	Item Number: 1			
Bon Secour School Department	Replenishment U/M: EA	Max: 100.000	Min:	

This report prints after pressing **ENTER** on the Report Options Screen, which displays after pressing **ENTER** on the [Managed Inventory \(ToolCrib\) Listing Screen](#).

All ToolCrib items and their descriptions in the Customer Consignment Item Balance File (**CABAL**) which match the selection criteria entered on the [Managed Inventory \(ToolCrib\) Listing Screen](#) will print on this listing. Refer to [Managed Inventory \(ToolCrib\) Maintenance](#) (MENU AMFILE) for further details.

Note: ToolCrib items will have a blank warehouse in the Customer Consignment Item Balance File (**CABAL**). Only items with a blank warehouse in the **CABAL** file will print on this listing. Items set up for a consignment warehouse will not print.

Glossary

Blue Dot	Blue Dot is an Enterprise Software Company providing mobile software solutions. Blue Dot will be integrated with Distribution A+ in order to export call schedules for sales reps and to import orders placed by sales reps on their mobile devices. It is also used for exporting orders for delivery/importing delivered orders. The software created by Blue Dot for mobile devices is called Advanced Mobile.
BOL Number	A BOL is a document acknowledging receipt of goods (can be used as evidence that a transport company or carrier received goods from a shipper). The number is simply the unique identifier of the particular BOL.
Box Disposition	This is the disposition of the box from the Box Disposition field in the Advanced Mobile Deliveries File (DGDLV) for the order. If a box is changed on the mobile device, the disposition will be one of the following: Damaged, Shipped Complete, Refused, Shipped Partial, and Not Delivered.
Call Schedule	A call schedule is a schedule for a sales rep containing customers to visit and items that can be ordered by the customers. The sales rep can then set up each customer/ship-to and define whether that customer/ship-to will be used for Order Entry, Consignment (if Distribution A+ Consignment is installed) and/or ToolCrib processing.
Consignment	Consignment is when inventory is owned and managed by the supplier, but the inventory is located at the customer site.
Delivery Group	This is the group containing orders to be delivered (all information used for delivery purposes is defined for a delivery group).
Delivery IFS Path	The Delivery IFS Path is the directory where Advanced Mobile will look to pick up exported files containing orders to be delivered. It is also the directory where Advanced Mobile places files containing delivered orders to be imported by Distribution A+.
Delivery Quantity	The Delivery Quantity is from the Advanced Mobile Deliveries File (DGDLV), and it is the quantity that is sent back in the file imported through Import Delivered Orders (MENU AMMAIN).
Driver ID	This identifies the driver associated with the delivery group.

Export	The Export is the process that sends Orders to be Delivered or Call Schedule information from Distribution A+ to Advanced Mobile.
Export File Name	The name of the Export file (.SET file) that is picked up by Advanced Mobile.
FOB Code	This is the Freight On Board Code of the delivery group. FOB codes are used to track cost liability and freight liability on orders that are processed and shipped as well as on orders that are purchased and received.
GS1	GS1 is an international not-for-profit association with member organizations in over 100 countries. GS1 is dedicated to the design and implementation of global standards and solutions to improve the efficiency and visibility of supply and demand chains globally and across sectors. The GS1 system of standards is the most widely used supply chain standards system in the world.
GTIN (Global Trade Item Number)	Global Trade Item Number (GTIN), as defined in the document called “An Introduction to the Global Trade Item Number”, is a unique identifier for trade items developed by the GS1, which include both products and services that are sold, delivered, and invoiced at any point in the supply chain. Such identifiers are used to look up product information in a database (often by inputting the number through a bar code scanner pointed at an actual product) which may belong to a retailer, manufacturer, collector, researcher, or other entity. The uniqueness and universality of the identifier is useful in establishing which product in one database corresponds to which product in another database, especially across organizational boundaries.
Import	The Import is the process that brings in Delivered Orders or Orders Entered from Advanced Mobile to Distribution A+.
Line Discrepancies	There can be either Order, Line or Package delivery discrepancies. There are three different levels of discrepancies in case a driver just simply marks the entire order with one delivery discrepancy and does not go into the line item/ package level when delivering the order. Line discrepancies include: Damaged, Refused, Shipped Over, and Shipped Short.
Line Disposition	The disposition of the line from the Delivery Disposition field in the Advanced Mobile Deliveries File (DGDLV) for the line item. The disposition will be one of the following: Damaged, Refused, Shipped Complete, Shipped Over, and Shipped Short.
Order and Inventory Management IFS Path	The Order and Inventory Management IFS Path is the directory where Advanced Mobile will look to pick up exported files containing call schedule information, and where Advanced Mobile places files containing orders placed on the mobile device.

Order Discrepancies	There can be either Order, Line or Package delivery discrepancies. There are three different levels of discrepancies in case a driver just simply marks the entire order with one delivery discrepancy and does not go into the line item/ package level when delivering the order. Order discrepancies include: Customer Refused to Sign, Not Del: Delivery Refused, Not Del: No Attempt Made, and Not Del: No One to Receive.
Order Disposition	The Order Disposition from the Delivery Disposition field in the Advanced Mobile Deliveries File (DGDLV) for the order. The disposition will be one of the following: Customer Refused to Sign, Left on Dock, Left in Office, Not Del: Delivery Refused, Not Del: No Attempt Made, Not Del: No One to Receive, and Order Delivered.
Package Discrepancies	There can be either Order, Line or Package delivery discrepancies. There are three different levels of discrepancies in case a driver just simply marks the entire order with one delivery discrepancy and does not go into the line item/ package level when delivering the order. Package discrepancies include: Damaged, Refused, Shipped Partial, or Not Delivered.
Pro Number	This is the Package Tracking Number of the delivery group.
Status	This is the status of the order: HELD / HELD + <hold code>, PS-RDY, PS-PRT, INV-RDY, INV-PRT, RDY-CON, RTN-RDY / RTN-PRT / RTN-HLD, RF-PCK, In U- + <Workstation ID> / PS-PRT / INV-PRT, and HISTORY.
ToolCrib (Vendor Managed Inventory)	Inventory is owned by the customer and located at the customer site, but the inventory is managed by the supplier.
Total Weight	This is the total shipped weight from the Order Header File (ORHED) for all the orders in the delivery group. Total BoxesThis is the total number of boxes located in the Box Header File (OEBHD) for all the orders in the delivery group. Total ValueThis is the total order value from the Order Header File (ORHED) for all the orders in the delivery group.
Waybill Number	A Waybill Number confirms a delivery and is a document issued by a carrier giving details relating to the shipment of the order. If a package is en route, you can find out where the package is within seconds using the Waybill Number.