

Setting Up the System Guide

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Command Alkon

Solutions To Build On™

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Welcome to the COMMANDseries Setting Up the System Guide. Using this manual will help you prepare the COMMANDseries system for use in your construction materials business.

As you look through this manual, the amount of information needed to properly set up the COMMANDseries system may seem overwhelming. However, once you start to enter the information, you will realize that the process moves quickly. Once you enter the required information, you will notice the efficiency and ease of use that is part of the COMMANDseries design. A properly configured system provides easily accessible information and an efficient usage.

Topics in this section:

Gathering Information **Entering Codes**

Gathering Information

Before you start entering data, you should take the time to complete several preliminary tasks to ultimately make entering information and setting up your system much easier.

Review the checklist on the following pages for the information required to set up your system. The checklist is organized with the following codes for each of the Command Alkon applications.

- **CC** COMMANDconcrete
- **CA** COMMANDaggregate
- **IY** COMMANDinventory
- **IG** COMMANDinvoicing
- **AR** COMMANDreceivables
- **EX** COMMANDexecutive
- **CT** COMMANDcartage
- **QU** COMMANDquote
- **LN** COMMANDlien

System Information	C C	C A	I Y	I G	A R	E X	C T	QU	L N	Purpose
Licenses	1	1	1	1	1	1	1		√	Gives the privileged user access to COMMANDseries product licensing information. {Files > System Information > Licenses}
Users							√			To set lifetime on installation username; to set up other users for getting started process. {Files > System Information > Users}
Print Models	1	1	1	1	1	1	1		\	To set up print models for the printers and other types of output required. {Files > System Information > Print Model}
Currency	~	\	~	\	~	~	√	<		To set up currency code and its display characteristics. {Files > System Information > Currency}
Companies	√	1	√	√	√		√			To set up companies to be represented on the system. {Files > General Information > Companies}
Employees (Weigh- masters and Drivers)										To establish the employees who function as weighmasters at plants, or as truck drivers. {Files > General Information > Employees}
Employees (Salesmen and Credit Persons)				 Image: A start of the start of	~		 Image: A start of the start of			To establish the employees that function as salesmen and credit persons, to be assigned to customers. {Files > General Information > Employees}
Reason Codes (Non- tax)	1	1		1	1		1			To establish reasons that non- taxable sales are generated. {Files > General Information > Reason Codes}
Reason Codes (Canceled Items)	1	1		√			√			To establish the reason codes to be assigned to canceled orders and tickets. {Files > General Information > Reason Codes}
Reason Codes (Suspended Items)		1		1			1			To establish the reason codes to be assigned to suspended orders and tickets. {Files > General Information > Reason Codes}

System Information	C C	C A	I Y	I G	A R	E X	C T	Q U	L N	Purpose
Reason Codes (Lost Quotes)										To establish the reason codes to be assigned to lost quotes in the Quote system. {Files > General Information > Reason Codes}
Modem Codes	√	~								To set up modem codes and characteristics to be used by the system for any dial-up plants. {Files > General Information > Modem Codes}
Signaling Units	1	1								To set up signaling units and characteristics for interfaces. {Files > General Information > Signaling Units}
Scale Types		1								To set up scale types and characteristics for interfaces. {Files > General Information > Scale Types}
Next Numbers	1	1		1			 			To establish numbering sequence groups for orders, tickets, and invoices. {Files > General Information > Next Numbers}
Document Formats										To establish information about the preferred style of tickets, orders, invoices, statements, and quotes. Also, to determine if you will be importing or exporting any information to other systems for processing. {Files > General Information > Documents > Document Formats}
Document Format Groups				~	 					To set up the group codes for combining document formats to make up an invoice, statement, or quote. {Files > General Information > Documents > Document Format Groups}
Message Text				1	\					To establish messages that can be printed on invoices and statements for all customers, or aging sensitive messages that can be printed on applicable statements. {Files > General Information > Message Text}

System Information	C C	C A	I Y	I G	A R	E X	C T	QU	L N	Purpose
A/R Accounting Periods				1	√					To set up the beginning and ending dates for each accounting period in the current accounting year, to control the invoicing and receivables transactions. {Files > General Information > A/R Accounting Periods}
G/L Accounting Periods										To set up the beginning and ending dates for each company, for each accounting period in the current accounting year, to control the general ledger transactions. {Files > General Information > G/L Accounting Periods}
Bank Codes					1					To set up banks to be used when entering payment transactions. {Files > General Information > Bank Codes}
Adjustment Codes										To set up adjustment codes to be used when making A/R adjustments, identifying the type of adjustment, and controlling the G/L codes that are used to record the adjustment. {Files > General Information > Adjustment Codes}
Tax Authorities	1	1		1	1		1			To establish the major groups of taxing entities. {Files > Sales Tax Information > Tax Authorities}
Tax Authority Locations	 Image: A start of the start of	 		 Image: A start of the start of	 Image: A start of the start of		 Image: A start of the start of			To set up the specific taxing entities within each tax authority. {Files > Sales Tax Information > Tax Authority/ Locations}
Tax Codes										To set up the combinations of tax authority/locations that represent any given point of taxation. {Files > Sales Tax Information > Tax Codes}

System Information Inventory Accounting Periods	CC	CA	I Y	IG	A R	EX	C T	QU	LN	Purpose To set up the beginning and ending dates for each accounting period in the current accounting year, to control the inventory transactions. {Files > General Information > Inventory Accounting Periods}
Item Locations	√	√		√	√	√	√	√		To establish the locations inventory is stored and to which plants it can be assigned. {Files > Item Information > Locations}
Plants	1	1		1	1		1			To set up the plants to be used to price products, and to schedule and ship deliveries. {Files > Plant & Delivery Information > Plants}
Haulers	1	1	\	1			1			To establish external people/ companies that perform deliveries. {Files > Plant & Delivery Information > Haulers}
Truck Types	1	1		1			1			To establish the types of trucks represented in the fleet. {Files > Plant & Delivery Information > Truck Types}
Trucks	1	1		1			1			To set up the actual trucks in the fleet. {Files > Plant & Delivery Information > Trucks}
Trailers		1					1			To set up trailers that may be loaded and weighed separate from trucks. {Files > Plant & Delivery Information > Trailers}
Delivery Methods	1	√								To set up delivery methods to be assigned to orders. {Files > Plant & Delivery Information > Delivery Methods}
Auto- Ticketing Units		1								To set up auto-ticketing units and characteristics for interfaces. {Files > General Information > Auto-Ticketing Units}

System Information	C C	C A	I Y	I G	A R	E X	C T	Q U	L N	Purpose
Map Page Time Periods	1	1					1			To establish the intervals of time to be used to record estimated and actual travel times between plants and map page locations. {Files > General Information > Map Page Time Periods}
Map Pages										To set up areas related to map page books to which deliveries can be made. {Files > Plant & Delivery Information > Map Pages}
Price Categories	~	~		~						To establish the groups to which customers can be assigned that allow for assigning prices for products purchased. {Files > Item Information > Price Categories}
Usage Codes	1			1			1	1		To establish the ways that customers ultimately use ready- mixed concrete. {Files > Item Information > Usage Codes}
Item Categories	1	1	1	1			1	1	\	To set up the categories that represent the groups of products sold or used in the process of making products for sale, or items that are maintained in inventory. {Files > Item Information > Item Categories}
Items										To set up all products, those for resale as well those that are constituents for salable products, also services and intangibles charges (minimum load, seasonal, unloading, etc.), also, those items that, while not related to products sold, are simply maintained in inventory. {Files > Item Information > Items}

System Information	C C	C A	I Y	I G	A R	E X	C T	Q U	L N	Purpose
Minimum Load Charge Tables	1			1						To establish the table that controls when minimum load charges are to be assessed for concrete tickets and the price for various tiers of load sizes. {Files > Item Information > Minimum Load Charges}
Seasonal Charges	~									To establish seasonal charges and the date ranges for which they are applied to orders and tickets. {Files > Item Information > Seasonal Charges}
Unloading Charges	\	√		√						To establish methods of calculating unloading charges. {Files > Item Information > Unloading Charges}
Sundry Charges										To set additional charges, such as fuel surcharges or environmental charges. {Files > Item Information > Sundry Charges}
Vendor Types			\							To set up types of vendors related to inventory receipts and purchase orders. {Files > Item Information > Vendor Types}
Vendors										To set up vendors related to inventory receipts and purchase orders. {Files > Item Information > Vendors}
Freight Methods										To set up freight methods related to inventory receipts and purchase orders. {Files > Item Information > Freight Methods}
Zones	\			√			\			To set up the large geographical areas to which deliveries can be made. {Files > Plant & Delivery Information > Zones}
Cartage Rate Codes										To define cartage rates that are later applied to orders, along with the detailed information specified during the code setup. {Files > Cartage Information > Cartage Rate Codes}

System Information	C C	C A	I Y	I G	A R	E X	C T	Q U	L N	Purpose
Cartage Surcharge Codes		1			1		1			To establish additional payments applied to a cartage transaction. {Files > Cartage Information > Cartage Surcharge Codes}
Credit Codes										To establish the credit codes that are assigned to customers and projects and dictate what action takes place for orders and tickets regarding the credit status of the customer or project. {Files > Customer & Project Information > Credit Codes}
Terms Codes										To set up the terms codes to be assigned to customers and projects that identify the payment terms for an invoice, i.e. due dates and discount amounts. {Files > Customer & Project Information > Terms Codes}
Accounting Categories			√							To establish the groups to which customers and projects can be assigned and allow unique invoice formats and numbering, unique G/L booking codes, and special sort options on some reports. {Files > Customer & Project Information > Accounting Categories}
Sales Analysis Codes	1	1	1	√						To set up sales analysis codes that are assigned to customers and allow sorting and totaling options on sales analysis reports. {Files > Customer & Project Information > Sales Analysis Codes}
Source Codes				 Image: A start of the start of	 Image: A start of the start of					To set up source codes that are assigned to G/L transactions to identify the application in which they were created. {Files > G/L Information > Source Codes}

System Information	C C	C A	I Y	I G	A R	E X	C T	Q U	L N	Purpose
Configuration	•		√		√		√			To enter the first screen in the Configuration file. To set up customer defaults to serve as a template for entering customers. To set up parameters in all appropriate windows, based on applications being used. {Files > General Information > Configuration}
Customers	~									To set up customers and customer-specific products for special pricing if applicable. Appropriate fields will be defaulted from the configuration customer defaults record. {Files > Customer & Project Information > Customers}
Projects										To set up projects for customers and project-specific products for special pricing if applicable. Appropriate fields will be defaulted from the customer record. {Files > Customer & Project Information > Projects}
Cartage Accounting Periods										To establish the beginning and ending dates for accounting periods within an accounting year. {Files > Cartage Information > Cartage Accounting Periods}
Quoted Cartage Rates										To assign cartage rates, along with associated information such as "waiting" charge and a "premium" charge to customers, projects, quotes, haulers, trucks, and drivers. {Files > Cartage Information > Quoted Cartage Rates}
Account Types			 Image: A start of the start of		 Image: A start of the start of					To set up account types that are assigned to account codes to broadly define and group the account codes. {Files > G/L Information > Account Types}

System Information	C C	C A	I Y	I G	A R	E X	C T	Q U	L N	Purpose
Cost Centers			√							To identify cost centers that represent where – or at which fiscal location (i.e. plants, main office, shop, etc.) – a general ledger transaction occurred. {Files > G/L Information > Cost Centers}
Account Codes			~							To identify the chart of accounts that represent the type of activity (i.e. receipt, usage, sales, sales tax payable, cash received, etc.) is recorded by a general ledger transaction. {Files > G/L Information > Account Codes}
G/L Booking Codes										To set up tables that tie cost centers and account codes to various types of inventory, invoicing, and receivables activity in order to assign an individual cost center and account code to each general ledger transaction that is made. {Files > G/L Information > G/L Booking Codes}
Hauler/truck Information		1					1			To specify cartage employees on the hauler, truck, or driver level. {Files > Cartage Information > Hauler/Truck Information}
Deduction Codes							1			To identify and implement organized deductions from the cartage rate of a hauler/truck/ driver, allowing systematic deductions for loans, penalties, etc. {Files > Cartage Information > Deduction Codes}
Quoted Deductions							 Image: A start of the start of			To apply deductions to the cartage transactions of a hauler, truck, or driver. {Files > Cartage Information > Quoted Deductions}
Sales Data Periods						1				To set up accounting years used by COMMANDexecutive to sort sales information. {Reporting > Sales Data Periods}

System Information	C C	C A	I Y	I G	A R	E X	C T	Q U	L N	Purpose
Sales Data Configuration						 Image: A start of the start of				To define the layout of the database table used for COMMANDexecutive reports. {Reporting > Sales Data Configuration}
Contact Type Codes								1		To set up tables that support the multiple contacts assigned to Quote records. {Files > Contacts > Contact Information}
Contact Information								1		To specify address and phone number information about contacts in the Quote records. {Files > Contacts > Contacts}
Job Source Codes								1		To specify the source of job information in Quote records. {Files > General Information > Job Sources}
Job Types								1		To specify the type of job in Quote records. {Files > General Information > Job Types}

Some Starting Tips

Gather all of the information necessary before you begin entering data. Having all of the information at hand allows you to quickly move through the setup process without skipping over steps and potentially failing to enter important information.

 \square

Caution: Follow the order presented in this manual. In many cases, information entered in later sections builds on information entered earlier.

Familiarize yourself with the online help. Read through the section titled **Using Online Help** in The COMMANDseries Workplace manual and take some time to move through the Online Help. Also, get used to pressing <Shift+F1> when you are in a field that you do not understand. This opens the help specific to the screen you are on and this will provide you with field descriptions.

The COMMANDseries Workplace manual includes shortcuts and functionality secrets. Once you become familiar with the system, your only limitation is your typing speed.

Entering Codes

General

During your system setup, you will be repeatedly asked to assign codes to various entries. Codes are composed of letters, numbers, or alphanumeric (a combination of letters and numbers). They are assigned to values or entries as a means of uniquely identifying the value or entry. Codes are also used to sort and organize files and reports in groups such as customers, projects, products, etc.

The system you use to apply codes to all of the files that will need them must be uniform and organized for you to efficiently use the system. So for each different file that requires a group of codes, adhere to the following rules:

- 1. Make **ALL** related codes (company, item, location, etc.) either all number, all letters, or all numbers and letters; don't make some codes all numbers and other codes all letters, etc.
- 2. If your codes contain any letters, make **ALL** codes the same length; that is, put the same number of characters in each code.

Following these simple guidelines will ensure that your files are properly organized and can be readily accessed.

Caution: It is highly advisable to work out coding conventions prior to data entry. Doing so helps ensure the usability of your codes.

Comm Managers

COMMANDseries uses a program called COMMANDcomm to monitor various tyes of comminications--ticket printing at a plant, automated data out routines, etc. Different instances of COMMANDcomm are needed to manage different processes. A single instance of COMMANDcomm is referred to as a **Comm Manager**.

Each comm manager is assigned an identifying number--that number allows COMMANDseries to know what comm manager is used for a given routine. The number is specified at the process (autoticketing setup, for example) and the comm manager command line.

It is possible to have a lot of comm managers running on a single system. As a result, it is **critical** to maintain a master list of all comm managers running on your system. Each Comm manager should be documented as follows:

- Computer Name--what computer is running the comm manager.
- Manager Number
- Manager Function--Ticket printer for plant 2, for example.

This list will greatly aid troubleshooting and maintenance.

 \square

Locating What You Need

This section provides guidance for you to more easily locate information within our manuals.

Contents

Use the *Contents* as an outline for the document. It enables you to quickly locate the page that contains the information you need.

Headings

Scan the headings to find the topic you need.

Procedures

Procedures tell you how to perform a task and are indicated by numbered sequences in the body of the document.

Appendices

Appendices provide information that is not necessary for the task at hand, but is related to the topic. Use appendices to find out more about a particular topic, for further documentation, or where to go for technical help if necessary.

Topics in this section:

Style Before You Begin Setting Up the System Starting COMMANDseries Accessing Help Customer Lookup The Calendar Five Important Functions

Style

This document uses a style designed to help you identify specific functionality.

• **Button** names are capitalized and bold. For example:

Select the **Pricing** button.

• Field names are capitalized and bold. For example:

Enter the **Order Code** in this field.

Note: To enhance the readability of the text, the enhanced formatting is only used for the first instance of the name within a section.

• Forms (also called screens or windows), Menu names, and Options are capitalized. For example:

On the Edit menu, if you select Volume Calculator, the Item Code screen may appear first.

• Required **user input** examples use Courier New plain. For example:

Enter 123 Main Street in this field.

 Braces and arrows { > } indicate how to navigate to a specific screen. For example:

To navigate to the **Tickets** screen, go to the **Dispatch** menu and select **Tickets** from the pull-down menu {Dispatch > Tickets}.

Before You Begin

COMMANDseries runs under Windows 2000 or Windows XP Professional Edition). If you are not comfortable using Windows, you will not feel comfortable using COMMANDseries. It would be helpful to spend some time acquainting yourself with the environment.

There are several functions that are unique to COMMANDseries. To help you with these functions, we have provided a *COMMANDseries Getting Started in the Workplace* manual. This manual will show you how to work effectively in COMMANDseries applications. We encourage you to look through the manual before you begin working in the system, and we also hope that you will refer to the manual when questions about the functionality of COMMANDseries arise.

Setting Up the System

COMMANDseries manipulates a large database of information, and most of this data is unique to your construction materials business. For COMMANDseries to efficiently and properly operate, a basic set of information must be entered before trying to perform your daily tasks with the system. Files such as products, plants, trucks, and customers must be entered, along with files pertaining to taxes, minimum load charges, and accounting periods. There is a large amount of information that must exist before you can begin using COMMANDseries. With this in mind, Command Alkon has provided a *Setting Up the System* document to assist you as you enter the information that will make your system unique to your business. As the size of the *Setting Up the System* document shows, there is a great deal of information to enter. However, once this initial information exists in the system, the only products, projects, customers, etc. that you will have to enter are new ones.

Properly built files make COMMANDseries extremely easy to use. The information you need is either already in place or just a mouse click or keystroke away.

Caution: Before attempting to use COMMANDseries, make sure you have entered the information described in the *Setting Up the System* document.

Starting COMMANDseries

There are several ways to start your COMMANDseries applications:

- Select the COMMANDseries Program from the Windows **Start** button.
- Select the application module icon from the COMMANDseries Program group in Windows Explorer.
- Select the COMMANDseries shortcut on your Desktop.
- Implement the COMMANDstart feature, which starts COMMANDseries automatically upon start-up of your computer.

After entering a COMMANDseries program, you can switch to another COMMANDseries application by selecting the program from the **Alternate Menu** list in the **Misc** drop-down menu of all COMMANDseries applications.

Topics in this section:

Logging into COMMANDseries Exiting COMMANDseries Entering File Information

Logging into COMMANDseries

Effective with version 5.57.7, COMMANDseries provides two different options for user verification.

Windows Security

This options integrates COMMANDseries security with Windows security. When a user launches COMMANDseries, the program retrieves the current Windows username and validates it against the COMMANDseries User list. If the Windows username matches a COMMANDseries user, that user is automatically logged onto COMMANDseries. No username/password entry is required.

COMMANDseries (Standard) Security

After launching COMMANDseries, you are prompted to enter a username and password.



To log into COMMANDseries:

- 1. Enter the assigned username in the **User** field (the name is initially set by your CA service team) and press <Tab>.
- Enter the assigned **Password** (the password is initially set by your CA service team) and press <Tab>.
 The COMMANDseries application module opens.

Exiting COMMANDseries

To exit a COMMANDseries application:

- Click the Exit button in the upper right portion of the screen.

 -or
- Press <Alt+F4>.

A screen appears which asks you to confirm that you want to close COMMANDseries; click **Yes**.



Entering File Information

Once inside the application, you will find that most of the screens used to enter information are located in the **Files** menu.

	The Flies Menu									
<u>D</u> ispatch	Invoicing	<u>F</u> iles	<u>M</u> anage	Mis <u>c</u>	<u>H</u> elp					
🗙 🖃	Ø	Customer & Project Information								
		lter	n Informatio	n						
		Plant & Delivery Information								
		Sales Tax Information								
		G <u>e</u> r	neral Inform	ation		F				
		Sys	System Information							
		Master File Data <u>I</u> n								
		Master File Data <u>O</u> ut								
		Aut	omated Dal	ta In/Ou	t					

Note: The menu options under the **Files** menu vary from module to module. If, for example, you want to create or modify A/R accounting periods, you need to be in either COMMANDinvoicing or COMMANDreceivables— A/R Accounting Periods will not be an option if you are in COMMANDconcrete.

Accessing Help

There are several ways to access the online Help while working in COMMANDseries:

- For help specific to the screen in which you are currently working, press <Ctrl+F1> or click the **Screen Help** icon on the toolbar.
- For help with the functions of the keyboard, press <Shift+F1> or click the **Keyboard Help** icon on the toolbar.
- From any COMMANDseries application, click on the Help menu located on the far right of the COMMANDseries menu bar. Select a specific help function, such as Screen Help, Keyboard Help, Contents, How to Use Help, or the About window.
- From the COMMANDseries Program Group in the Windows menu, select the COMMANDseries **Help** icon.

Customer Lookup

Many COMMANDseries procedures involve entering a customer code. It is important that you feel comfortable finding customer-related information in the system. These directions are based on an order entry screen; however, this procedure will work anywhere you have to enter a customer code.

To look up a customer code:

1. Select the detail button next to the **Customer Code** or press <Enter> to access the Select screen.



This screen allows you to search for customers using one or more search parameters. Each search parameter has its own line. The first field allows you to select the field you wish to key on. The **Customer Sort Name** is the default value, but you can select other options by selecting the field and choosing another field from the drop-down list.

2. The next field determines how you wish to search through that field. The options are:

Begins as - Looks at the beginning of each field entry for the specified search string. This is most useful for searching for names, as opposed to numbers.

Range of - Similar to **Begins as**, but by providing a second field for a search string, this option allows for broader searches.

Contains - The system looks through the entire field for the search string, as opposed to just the beginning.

- 3. In the field to the right, enter the search string. If **Range of** is the search option, there will be two fields in which to specify the range.
- 4. If you wish to specify more search criteria, place your cursor in the next field (to the right of the number 2). If not, accept the screen and proceed to step 6.
- 5. You can specify up to 10 criteria. When you are finished, accept the data you have selected.
- 6. The **Choices** screen will display the customers that match your criteria.
- When you have located the customer, either double-click or highlight the desired customer and press <Enter> to accept. The Choices screen will close and the selected customer code will be entered into the form.

The Calendar

Use the Calendar feature in COMMANDseries to simplify date entries. You can use it whenever you see the **Calendar** button. The Calendar button will usually be found next to the **Date** field. You can also invoke the calendar by pressing <Enter> when the cursor is in a Date field.

Function
Advances one day
Backs up one day
Previous Week/Next Week
Previous Month/Next Month
Invokes the Calendar

Keystroke	Function
<f11></f11>	Searching toggle
<f2></f2>	Closes the Calendar
{File > Search}	Searches for a month

Five Important Functions

COMMANDseries has a wide variety of tools and commands, and new users can easily find themselves overwhelmed by the different options. Despite the large number of options, four commands will serve you in most situations.

The <Tab> Key Accepting (Saving) Screens Detailing Add Occurrence Smart Lookup

The <Tab> Key

COMMANDseries is a form-based program. This means that most screens are essentially entry forms, with a number of fields in which information is entered. To move from field to field, press <Tab>. Doing so will move the flashing cursor (which may also be referred to as the focus) through the entire form. There are a couple of additional things to remember about <Tab>:

- <Shift+Tab> takes you back one field, which can be useful if you overshoot your target.
- The cursor not only moves from field to field, but also moves across the buttons on the screen. If the cursor is resting on a button, a faint box appears inside it.

The cursor is on this button.



If you can't find the cursor in a field, look at the buttons. If the cursor is on a button, you can access the button by pressing <Enter>.

- For a standard keyboard, COMMANDseries remaps the numeric keypad <Enter> key to function as a <Tab> key. This mapping allows for more efficient data entry. This remapping is only for COMMANDseries; in most other programs, the key functions as a standard <Enter> key.
- If you are directed to press <Enter>, make sure that you press the main <Enter> key (the one that is equivalent to <Return> on a typewriter). This enter key is frequently referred to as the "Center Enter" key.

Accepting (Saving) Screens

Throughout COMMANDseries you will often need to save your work (also known as committing the data to the database). There are a host of different

screens in COMMANDseries, but they all have one thing in common: the Accept command. The Accept command is the same as **Save**, **OK**, **Execute**, etc. There are a number of different ways to accept a screen:

- Pressing <F2> is the most common method.
- Clicking on the screen's accept button.
- Selecting the File > Accept menu option.
- Clicking on the screen's **Exit** button. When you close a screen that contains new or changed information, a dialog box displays, asking whether or not you want to save this new information.

Note: A list of commonly-used keyboard commands is included on the back cover of all COMMANDseries manuals.

Because the command "Accept" does not refer to a single button or key, in the documentation, the word accept will not have any special formatting. For example, "you must accept the screen to continue."

Detailing

Many COMMANDseries fields link to other data sources. For example, the **Customer Code** field on the **Order** screen is linked to the list of all customers in the system, and the **Date** fields are linked to a calendar function.

Sometimes you can simply enter data in a field, press <Tab>, and move on. However, there will be other times that you will need to call up a list of available choices. If you are on a field and want to view your options, press <Enter>. A form will appear with a list of selections appropriate to that field.

Some fields also have small buttons next to them that have the same effect:

Example of fields with detail buttons

Owner		Baptist Church
Architect		Fasenden Architechs
Engineer		Lindhurst Engineering
General Contractor	-	Kraus Anderson

The small buttons are called detail buttons. The act of bringing up a list of available choices, whether by using the detail button or the <Enter> key, is referred to as "detailing on a field".

Clicking on the detail button will do the same thing as pressing the <Enter> key. In this example, to retrieve a list of all the architects in the system, you could either:

 Press <Tab> until the cursor is in the Architect field, then press <Enter>

-or-

• Click on the detail button to the left of the **Architect** field, regardless of the location of the cursor.

Some types of fields have specialized detail buttons, such as date fields:

Example o	of a Date button	1
Order Date		•

Even though the button is different, its place to the immediate left of the **Order Date** field lets you know that it is a detail button.

Add Occurrence

Many forms in COMMANDseries call for varying amounts of data. For example, one order might have only one item, but the next might have four.

For any situation in which you finish entering something and say, "I need to enter another one of these," use the **Add Occurrence** button. The hooked arrow on the button is taken from the symbol on a typewriter's <Return> key—the key you pressed whenever you needed a new line. Anytime you see it, you can select it to create another line for data entry.

For example, if you are entering **Task Codes** and need to enter a new one, press the **Add Occurrence** button:



The **Add Occurrence** button appears throughout COMMANDseries:



Example of many types of Add Occurrence buttons

You can also press <F6> to execute the **Add Occurrence** command.

Smart Lookup

Many functions in COMMANDseries involve selecting information from a list. In some cases--customer or items, for example--those lists can be quite long. To simplify the lookup process, we have established **Smart Lookup** for selected fields. This feature allows you to find a specific record quickly, even if the list you are searching is long.

Most lookups in COMMANDseries are based on some sort of code--Customer Code, Project Codes, etc. However, most of the codes used in COMMANDseries are arbitrary numbers, and it is difficult to keep track of them. Smart Lookup allows you to perform lookups based on the description of the record--the Customer Name instead of the Customer Code, for example. Because you are more likely to remember a customer's actual name that a code, smart lookup allows you to find a specific record faster than if you were to search based solely on codes.

To use smart lookup:

Note: This example demonstrates looking up a specific customer. The basic process is the same for all fields that support smart lookup.

1. Once the cursor is in the **Customer Code** field, enter the first few letters of the **Customer Description** (not the customer code).

Searching for customers beginning with BA.

📱 Orders		
Order Date	21-0 ct-2002 - Monday	Order Code
Customer Code Project Code Lot/Block		Order Type Payment Form

2. Detail on the field. A lookup screen will appear.

🖹 Ch	oices		×
Q	Customer File, "BA"	Records Selected By : Sort nam	e
Custóm	Name	Sort nat Contact name	Invoicing name
10021	Bamboozle Builders	BAMBC	A
110012	Barton Steel Erection	BARTC Billy Borden	
510410	Bali-Hi Pools	BALI-H	

The lookup screen displays all customer records that begin with the search string. Across the top of the lookup screen are displayed the search string and the selection key (in this case, the selection key is the customer Sort Name).

Note: If only one record matches the entered string, the system will simply retrieve the record into the form.

- 3. Double-click on the desired customer to enter that record in the form.
- 4. You will be returned to the Orders screen, with the selected record retrieved. You can now continue order entry.

The following fields currently support smart lookup. Each field is listed by the screen on which it appears, as well as the field used as a search key.

Search Key
Customer Sort Name
Tax Code Description
Item Description

The following section addresses entry of basic system information. By entering this information, you are, in effect, laying the foundation for your company's business operations.

There are a number of elements in the section that call for information that has not yet been entered. For example, when you enter Employee records, you can assign drivers to trucks, but you have not entered trucks yet. Once you have entered trucks, you can return to the Employee screen and assign trucks to drivers.

Topics in this section:

COMMANDseries Licensing User Configuration Non-COD Price Change Printer Setup Generic Printer Setup Print Models Currency Code Lengths Companies Employees **Reason Codes** Modem Codes Signaling Units Auto-Ticketing Interface Auto-Ticketing Units Pre-Ticketing Setup Scale Types Next Numbers **Document Tags Document Formats Document Format Groups Document Formatting** Message Text

COMMANDseries Licensing

COMMANDseries Licensing is accomplished through two methods:

- A COMMANDseries license controls what specific modules are active.
- A COMMANDnetwork license controls how many users may be connected to COMMANDnetwork at any given time.

When your software is initially installed, your license will already be entered in the system. If additional modules are purchased later, you will be issued a new license. Installing a new license is a three step process:

- 1. Make a backup of your existing license.
- 2. Delete the existing license.
- 3. Enter the new license.

Topics in this section:

Making a Backup of the Existing License Entering a New License Temporary Licenses Restoring an Old License

Making a Backup of the Existing License

Backing up the existing license provides you with some additional security. In the event that there is something wrong with your new license, you can always restore the old license and keep your business up and running.

To back up an existing license:

- 1. Open the Export Data screen. {Manage > Data Manage > Export Data}
- Scroll down the list of database tables until you see the license table (LICN). Double-click the LICN table.
- 3. Enter a file name for the export file in the **File** field. If no name is specified, the file name will be LICN.TXT.
- 4. The **Output File Location** will default from settings in the USYS72.INI file. Enter a different path if necessary.

		· · ·	
🗂 Export Data			_ 🗆 ×
JSCH JJSTA JICN LICN LICN LNCC LNCO LNHD LNLE LNLG LNOW LNQH LNQT LNS2	License File License File Export File Output File Location Show Selected 0	IDLDLICN.TXT ICscv5_52qa\import\ nly	

Export Data (DBAEXPR)

5. Accept the screen. The export will only take a few seconds.

Entering a New License

If you purchase additional COMMANDseries modules, you will receive a new license to activate the new features. You must enter the license manually.

Caution: License information must be entered exactly as it appears on your COMMANDseries license. A single mispelled word will invalidate the license.

To enter a new license:

1. Ensure that all other users have logged off the system and open the **Licenses** screen. {Files > System Information > Licenses}
| Licenses | (EDTLICN) |
|----------|-----------|
| | (|

🗂 Licenses	_ 🗆 🗙
Client Name Command Data All Products	_
Start Date Image: Display black End Date Image: Display black Applications 1 2 Image: AP 3 Image: AR	1
Batch Consoles Signaling Units Flat Scales Overhead Loadout Concrete Aggregate Asphalt Tracking Scheduling Pricing / Prep Ticketing Truck Count 0	Options Invoicing
Checksum	Temporary

2. Use the **Clear** command to delete the existing license. The License screen will clear.

WARNING: This step erases your existing license from the database. Do not perform this step without first making a backup copy of your license!!

- 3. Enter the **Client Name** exactly as it appears on your printed license.
- 4. Enter the **Start Date** and **End Date** of your license.
- 5. Enter the **Applications** as they appear on your license. Use the <Tab> key to move from field to field as you enter information.
- 6. Go to each **tab** and enter the licensing information.

The Batch Console, Signaling Unit, and Overhead Loadout areas of the license will contain number sequences like this:

11/2

The first number represents the unit type, while the second number represents the number of such units allowed under the license. These pairs are entered on the appropriate tab:

Concrete | Aggregate | Asphalt | Tracking | Scheduling | Pricing / Prep | Invoicing Batch Consoles Signaling Units Flat Scales Overhead Loadout Options **Batch Console** Eagle (2 way) Count 11 -1 Count Generic (2 way) 21 1

Batch Console Licensing

Enter the first number in the first field, then press <Tab>. The Batch Console represented by that number will display. Then go to the **Count** field and enter the second number. Repeat as necessary.

- 7. Enter the **Checksum**.
- 8. Accept the screen. If the license information has been entered correctly, the Licenses screen will disappear. If the license has been entered incorrectly, a message box will display **Invalid License!**, and the license screen will clear.

Temporary Licenses

COMMANDseries allows users to test modules for which they do not have a primary license. A temporary license is good for thirty days and can be used only once for any module.

To activate a temporary License:

1. Open the Licenses screen. {Files > System Information > Licenses}

🗂 Licenses		_ 🗆 🗙
Client Name	Command Data All Products	
Start Date End Date Applications	Image: Second system 03-Dec-1999 Image: Second system 31-Dec-2099 1 Image: Second system 2 Image: AP 3 Image: AP 3 Image: AP 4 AR	11
Batch Consoles Concrete Aggregate Ticketing Truck Count	Signaling Units Flat Scales Overhead Loadout s Asphalt Tracking Scheduling Pricing / Prep 0	Options Invoicing
Checksum		Temporary

Licenses (EDTLICN)

2. Select the **Temporary** button. The Temporary License Options screen displays.

Temporary Licensing screen (EDTLICN1)

Temporary License Optic	ons	×
The following are lists of temporary options th You may add options to these lists, but wher You cannot change, delete or duplicate optio an option permanent, contact Command Data	at are in addition to your permanent lic added, will only be available for 30 d ons that were previously added. To ma a for a new license.	ense. ays. ake
Applications COMMANDmap	Expiration Date 12-Jul-2001 🗖 Disable	
Batch Console Count Libra Asphalt	Expiration Date 12-Jul-2001 🗖 Disable 🧕	
Signaling Unit Count Speedcall Ric-D	Expiration Date 12-Jul-2001 🗖 Disable	

- 3. Select the **Applications** you wish to activate. The **Expiration Date** of the temporary license will display automatically.
- 4. Use the **Add Occurrence** button to add additional applications.
- 5. If a temporary feature appears to be affecting how your system runs, use the **Disable** button to turn the feature on and off for testing purposes.

Note: Disabling a feature has not impact on the 30-day trial period.

- 6. Select additional **Batch Console** functions and enter **Counts** as neccessary.
- 7. Select additional **Signaling Unit** functions and enter **Counts** as neccessary.
- 8. Accept the Temporary License Options screen, and accept the Licenses screen to activate the temporary license(s).

Restoring an Old License

Sometimes it is necessary to restore an old license, either because of database problems or because of problems with a new license. An old license can restored in one of two ways:

- Enter the license manually (see directions above).
- Import the license (if you have made a backup copy).

To make it easier to import licenses (as well as other data), a shortcut to the Data Import function is placed in the Windows Start menu. {Start > Programs > COMMANDseries > Import COMMANDseries Data}

To import an old license:

Ensure everyone is logged off and open the Import Data screen. {Manage
 > Data Management > Import Data}

🛅 Import Data		_ 🗆 🗙
JPRD JSCH JSCH JSTA UCN LMCC LMCC LNCO LNCO LNLE LNLE LNLG LNQH LNQT	License File Licen	All

Import Data scren (DBAIMPR)

- 2. Scroll down the list of database tables on the left side of the screen until you see the license table (**LICN**). Double-click the LICN table.
- Select the Delete Existing Records Before Import button. This option deletes the existing license information, preventing the two licenses from becoming merged (and invalid).
- 4. Enter the **File** name of the import file. If no name is specified, the system will look for a file names LICN.TXT.
- 5. The **Optional File** field is not needed for this operation.
- 6. The **Input File Location** will default from the system's USYS72.INI file. Change the location if necessary.
- 7. The remaining fields are not needed for this procedure.
- 8. Accept the screen.

License Codes

The different licensed functions are accessed with a two-letter code. Here are some of the application codes used by COMMANDseries :

GL

SH

SR

TT

General Ledger

Scheduling

Sales Reports

Time Analysis

Truck Tracking

- **CC** Concrete Dispatch **IG** Invoicing
- **AR** Accounts Receivable **AP** Accounts Payable
- PO Purchasing
- **OE** Order Entry & Ticketing
- CR Credit Checking
- PR Contribution Reports TA
- OM Order Monitoring
- **DS** Dynamic Scheduling **MS** Mobile Signaling

AU	Auditing	IV	Inventory
RP	Replication Services	QU	Quotations
CA	Aggregate Dispatch	FS	Flat Scale Interfaces
CW	COMMANDwriter	СВ	Block & Building Material Dispatch
СТ	Cartage	CE	Eagle Batching
CR	Credit Checking	LN	Liens
CD	Asphalt	IN	Inform Interface
MO	Map Order Entry	RO	Rostering
PP	Pricing & Prep	МТ	Map Truck Tracking
AT	Auto-ticketing	AL	Auto-loadout
EX	COMMANDexecutive	GP	Graphic Performance Monitor
PS	Product Sales Option	OL	Overhead Loadout
MP	Mix Proportioner	DI	Document Imaging
СР	COMMANDperformance	GM	Windows Tracking & Scheduling
AS	Auto-Statusing	MM	Material Manager

User Configuration

The Users screen defines the user records that allow individuals access to all COMMANDseries applications. The user record controls certain aspects of an individual's use of the COMMANDseries applications.

When the application is installed, a temporary user is set up. At the minimum, you need to extend the life of the temporary user by changing its Lifetime field. Eventually, you will need to set up permanent user records for each individual or group, before allowing them access to the applications.

Topics in this section:

Password Security Assigning a User and Password Preferences User-level Licenses Privileges Field-level Security Order Printers Order Printers Communications Port Setup Options Plants

Password Security

Effective in 5.57.7, COMMANDseries is implementing a new method of password security. This new option, which integrates COMMANDseries security with Windows security, has been developed to address the requirements of the U.S. Public Company Accounting Reform and Investor Protection Act of 2002, known as the Sarbanes-Oxley Act (SOx).

Process Flow

This option allows COMMANDseries to use Windows security to provide seamless access to COMMANDseries:

- 1. A User logs into Windows with a Username and Password.
- 2. The user subsequently launches COMMANDseries. No Username or Password entry is required; COMMANDseries automatically tests the Windows Username against the COMMANDseries User file.
- 3. If the Windows Username and COMMANDseries Username are identical, COMMANDseries starts and the user is logged in.

If the Windows username does not exist as a COMMANDseries user, an error is displayed: "Windows Username is not a valid COMMANDseries Username". COMMANDseries will then close.

Note: The user **will not** have the option to enter a COMMANDseries username & password manually.

4. Once in COMMANDseries, the user has the privileges that are set up in the COMMANDseries Username for all COMMANDseries features.

Implementation

The new password system is activated by a new form, User Security Management {Files - System Information - Users - User Security Management}. Please note that the menu option for the Users editor has been moved into the new Users sub-menu.

📱 User Security Management		_ 🗆 🗙
System Password Securi	ty Parameters	
Security Control	COMMAND series Security COMMAND series Security Window Security	×



The two options are

- COMMANDseries Security (default)
- Windows Security

Once this screen is accepted, all people who subsequently launch COMMANDseries will be subject to the selected security system.

COMMANDseries User Accounts

If a system is being installed with Windows security, the first person to launch COMMANDseries will be prompted for a username. If the entered username matches the Windows username, the person will be allowed to log on to COMMANDseries with sufficient privileges to add additional users.

Citrix Environments

In order to use Windows security in a Citrix environment, users must be configured so that their Windows, Citrix, and COMMANDseries usernames are identical.

Other Considerations

The new form, User Security Management, is subject to standard COMMANDseries security. Access to this form should be strictly controlled.

Users should be reminded of standard Windows security functions, including locking the workstation.

Enabling Windows Security disables the Password field in both the User editor and the User Preferences editor.

If Windows security is enabled, all password management, from password length to aging, is handled through Windows, not COMMANDseries.

This new feature is not supported in Windows 98SE.

Assigning a User and Password

Before entering this data, you need to gather information about the individuals who will be using the system. Also, you need to determine if you are going to use groups. Using groups makes maintaining user information easier by allowing you to set up the same information for a large number of people.

To create a user and password:

1. Open the Users screen. {Files > System Information > Users > Users}

Users (EDTUSNM)

🛅 Users					
User		SYSTEM			
Group?		Concerned Allian	 		
Group Name Password	•		Last Changed Last Accessed	13-Jul-2001 16-Jul-2001	16:26 (16) 12:06 (204)

- 2. Assign the **User** a name using uppercase or lowercase characters.
- 3. Unmark the **Group** checkbox.
- 4. Enter an **Owner Name**. This required field is a description of the user name.
- 5. Select a **Group Name** for the user. This will specify the user record, if any, to which this user will belong. A list of group names can be accessed by clicking on the field's detail button.
- 6. Enter a **Password** for the user. Re-enter the password when prompted for confirmation.
- 7. In the **Lifetime** field, specify the number of days that the password for this user is valid, starting from the day the current password is assigned to the user. If the field is blank, no limit is set on the lifetime of the password.

Note: If Windows Security is enabled, the Password and Lifetime fields will be suppressed.

To assign a group:

- 1. Go to the Users screen. {Files > System Information > Users}
- 2. Assign the group a **User** name using uppercase or lowercase characters.
- 3. Mark the **Group** checkbox to assign the information you enter to a group of users.
- 4. Enter an **Owner** Name. This required field specifies the full name of the group.

Preferences

To assign user preferences:

 Select the **Preferences** tab from the Users screen. {Files > System Information > Users > Preferences}

Preferences Licenses	Privileges Order Printers Options Plants Cost Centers
Language Date Format Date Order	English Imm-dd-yyyy or dd-mm-yyy v Month before day
Print Model 📃	SCREEN Report to Screen t Model
Employee Code Plant Code Scale Code	2 Albert Tschannen Default Location for Mix Conversion 5 Trussville Quarry 1 South Scale

Users - Preferences Tab (EDTUSNM1)

- 2. From the **Language** field's drop-down list, select the language that will be used by this user or user group.
- 3. From the **Date Format** field's drop-down list, select the format that you want to use when viewing dates.

- 4. From the **Date Order** field, choose whether you want the month to display before the day or the day to display before the month.
- Select a printer from the **Print Model** field's drop-down list.
 Mark the **Only Allow This Print Model** checkbox if you want the user or group to be able to use that printer only.
- 6. Select the **Employee Code** from the drop-down list. Populating this field allows the system to automatically append to an order the employee code of the person who took the order.
- 7. Select the **Plant Code** from the drop-down list. The value can do two different things, based on the system's license:
 - If the system is licensed for the Product Sales Option, this field specifies the Point of Sale plant.
 - If the system is licensed for aggregate, the field specifies the user's default plant for aggregate ticketing and overhead loadout.

The field can be left blank.

- 8. If a plant is specified, the **Scale Code** field will appear. Entering a valid scale code establishes a default scale code for aggregate dispatch and ticketing screens.
- 9. If the Materials Manager is in the license, the **Default Location for Mix Conversion** field appears. If you are deploying the Materials Manager in a multi-region environment, this field allows you to override the systemlevel lab location (specified on the Configuration-Distribution-Materials Manager screen).

User-level Licenses

The Licenses function allows you to specify what COMMANDseries modules the user can access.

By default, all users have access to all modules in the system license. To restrict a user's access to a module or modules, specify the module(s) on this tab. By entering CC, as in the screenshot below, you can quickly restrict a dispatcher to the COMMANDconcrete module.

License-level restrictions are the broadest level of security control; you can also restrict access by scree-level and field-level security.

To configure user-level licenses:

1. Select the **Licenses** tab from the Users screen. {Files > System Information > Users > Licenses}

Preferences	Licenses	Privileges	Order Printers	Options	Plants	Cost Centers
A 6 6						
CC Con	crete Dispat	ch			•	
IG Invo	icing				•	

- 2. In the short **Application** field, enter the two-letter abbreviation for the application(s) that should be available to the user, or select an application from the drop-down list in the longer field. Only applications that are licensed will be available.
- 3. To enter multiple applications, click on the **Add Occurrence** button.

Note: If nothing is entered on this tab, the system will grant full access to all modules in the system license.

Privileges

The Licenses tab provides broad, module-level control over user access in COMMANDseries. The **Privileges** tab provides screen and field-level control, allowing you to define which forms the user will have access to and the type of access (add, inquire, etc.) they will have.

To configure privileges:

1. Select the **Privileges** tab from the Users screen. {Files > System Information > Users > Privileges}

Users - Privileges Tab (EDTUSNM3)

Preferences Licenses Privileges Order Printers	S Options Plants Cost Centers
Form # All EDTORDR Orders	Privilege Add Price Suppress Cost Suppress Add Price Suppress Cost Suppress Fields
Press right-mouse button over "Form" field to displa	ay a menu of choices!

2. In the **Form** fields, enter the screen names for which the user must have privileges from the pull-down menus. -or-

Right-click over the field to display the menu for each licensed COMMANDseries application. You can select the specific screen from this series of menus.

- **Note:** If using multiple applications within COMMANDseries, you can grant a user privileges for an entire application and switch to another application from the User Privileges screen by selecting the application name from the Alternate Menu's options. A prompt will ask you which activity you wish to perform.
- **Caution:** The form RPTWRIT must be included in the forms selected for privileges when individual editors are selected if the user is to have privileges to listings for that editor. When **All** or **#** is selected, the form does not have to be individually specified since it is included in the **All** selection.

A

3. Enter a Privilege from the drop-down list. The options are as follows:

Add – the user is allowed to add, delete, change, and inquire. This option provides full control over a field.

Chg (change) – the user is allowed to change and list existing records, but cannot delete existing records or create new ones.
 Inq (inquire) – the user is allowed to inquire (but NOT add, delete, or change). This option is the equivalent of Read Only.
 None – the user is NOT allowed to access the form/field at all

- 4. Mark the **Price Suppress** checkbox if the user is NOT allowed to add, delete, change or inquire about price information on any price fields.
- 5. Mark the **Cost Suppress** checkbox if the user is NOT allowed to add, delete, change or inquire about cost information on any cost fields.
- 6. Accept this screen to save the group or user privileges, or select another tab from the Users screen to set up more information.

Field-level Security

To configure field-level security:

1. Select the **Privileges** tab from the Users screen. {Files > System Information > Users > Privileges}

		Field-level Sec	curity		
 Form # EDTORDR	All Orders	Privilege Add v None v	Price Suppress Price Suppress	Cost Suppress Cost Suppress	Fields

The Field button will not display unless a specific form with field-level security options is entered.

2. In the **Form** fields, enter a specific screen name for which the user is to have privileges from the pull-down menus.

-or-

Right-click over the field to reveal the menu for each licensed COMMANDseries application. Select the specific screen from this series of menus.

If the right-click method is used to enter a form name, a **#** will be displayed at the end of the form name. The **#** is a COMMANDseries wildcard, and its presence at the end of the form indicates that all fields on the form will assume the access level assigned on the main Privileges tab. So, **EDTORDR#** will control access for not just the main order screen (EDTORDR) but all secondary screens associated with that screen (Order Pricing Information, Other Order Information, etc.)

To enable field-level access for the form, delete the #.

3. Select the **Fields** button. The Fields screen for the specified screen will display.

Fields (EDTUSNMA)

🚦 Fields			×
Access Full Full Full Full Full Full Full Ful	Field Name ASSOC_BUTTON COD_BUTTON CUST_CODE_DISP CUST_JOB_NUM CUST_NAME DELV_ADDR DELV_METH_CODE	Description Associated Products Button COD Button Customer Code Customer Job Customer Name Delivery Address Delivery Method	<u> </u>
Full	EXPIR_DATE_DISP	Expiration Date	-

4. Select an Access level for the listed fields. The options are:



- **Note:** Not all fields are available for field-level security. In addition, Field names that correspond to screen buttons (such as COD_BUTTON in the above image) have only two access options, Full and None.
- 5. Accept the Fields screen. You can then proceed to setting field-level access to another screen, or accept the User screen to save the changes for the selected user or group.

If you assign a user an access level of None to a tab (for example, the Configuration-Defaults tab–EDTCNFXB), then that tab will not display for the user. That is the only situation in which security for a tab extends to the fields on that tab. Assigning a user Read Only access to EDTCNFXB, for example, will have no impact on the user's access to the fields on that tab.

Order Printers

The User Order Printers tab provides the user access to information regarding order printers that are used by the COMMANDconcrete application. When an order is entered in the Orders screen {Dispatch > Orders}, the user will be prompted for printing the order to one of the printers defined on this screen.

To assign order printers:

1. Select the **Order Printers** tab from the Users screen. {Files > System Information > Users > Order Printers}

Users – Order Printers Tab (EDTUSNM5)

Preferences Licenses Privileges Order Printers Options Plants Cost C	enters
Description	Short
HP 1701 PhaserJet Printer	HP1701 Setup 🛃 📩

- Enter a Description, then press <Tab>. The Short description field and the Setup button will appear.
- 3. Enter a **Short** Description for the printer in the field that displays.
- 4. Click the **Setup** button to go to the User Order Printer Setup screen.

User Order Printer Setup (EDTUSNMB)

🛅 User Order Printer Sel	up	×
Manager Number Port Name Selective Address Document Format	1 ■ COM1 Port 2 ✓ ORDPRINT Order Print Format	
 Auto Dial Flag Modem Phone Number Modem Code 		

- 5. Enter a **Manager Number**. This specifies the COMMANDcomm manager that will control the printer.
- 6. Enter an LPT or COM **Port Name** or select the proper printer from the field's drop-down list.

If a COM port is entered in the first field, the second field becomes the **Port** button. Click on the button to set up the printer or modem that COMMANDcomm will use to print orders. See instructions below.

Note: The Communication Port Setup screen requires that the settings match the configuration of the printer or modem.

If you wish to print orders to a device that has already been setup within Windows, select that device from the drop-down list. The **Prompt** option can also be selected if you wish to allow the user to select the device at each print command.

- 7. Enter a **Selective Address**. This field specifies the selective address code to use when printing an order through a multi-drop phone line where more than one output device exists.
- 8. Enter a **Document Format**. This field specifies the format in which the document will print.
- 9. Mark the **Auto Dial Flag** if COMMANDcomm will use the information in the Modem Phone Number and Modem Code fields to send data to a remote printer.

8/9/05

10. Accept the User Order Printer Setup and Communication Port Setup screens.

Communications Port Setup

The Communications Port Setup screen allows you to define information about the port.

To set up communications information for the port:

1. Click on the **Port** button, located on the User Order Printer Setup screen. {Files > System Information > Users > Order Printers > Setup}

Communication Port Setup (EDTUSNMD)				
🖬 Communication Port Setup (COM1) 🛛 🔀				
Baud Rate Data Bits Parity Stop Bits Flow Control	115200 8 None 1 Xon/Xoff			

- In the **Baud Rate** field, select the number that represents the bits of 2. data that the port can transfer per second.
- 3. In the **Data Bits** field, enter the number of bits that comprise a unit (byte) of data.
- In the **Parity** field, select the type of parity that will be used to check for 4. errors during transmission. Options are **Even**, **Odd**, **None**, **Mark** or Space.
- 5. In the **Stop Bits** field, select the number of bits that indicate a byte has been transmitted.
- 6. In the **Flow Control** field, select the process used to control the flow of information. Options are:

None – no flow control method is used.

XON/XOFF – the receiving port sends an XOFF signal when the buffer (a temporary storage area) is full. The port will stop sending data. It sends an XON signal when it is ready to receive more data. **Hardware** – flow control is determined by the hardware.

7. Accept the data to return to the User Order Printer Setup screen.

Options

The Options screen allows the privileged user to set up the various preferences regarding invoicing, user access and ticketing.

To assign users options:

1. Select the **Options** tab from the Users screen. {Files > System Information > Users > Options}

Users – Options Tab (EDTUSNM6)

Preferences Licenses Privileges Order Printers Options Plants Cost Centers					
 Allow Suspending of Orders/Tickets/Products for Invoicing Allow Release of Orders/Tickets/Products for Invoicing 	 Allow Release of Credit and Debit Memos Allowed to Create Original Invoices and Re-print In Invoice Print Option 				
Allow Access to Order Level Mix Design	Allow Override of Unapproved Mix Designs in Tickets				
 Allow Project Updates from Orders/Tickets Allow Access to Quotes for Orders 	Allow Overhead Loading Restrict customer lookup to company				
 Suppress Minimum Load Charge Messages in Tickets Suppress Display of Pricing Information Messages 	Suppress Seasonal Charge Messages in Tickets				
 Auto Display Shipping Address in Orders/Tickets Auto Display Possible Projects in Orders/Tickets 	 Auto Display Instructions in Orders/Tickets Auto Display Possible Products in Orders/Tickets 				

Mark the checkbox of the necessary options. The options are listed below (left to right, top to bottom):

- Allow Suspending of Orders/Tickets/Products for Invoicing gives the user the privilege to suspend orders, tickets, or products so that the particular transaction will not be invoiced.
- 3. Allow Release of Credit and Debit Memos gives the user privilege to edit an AR creditor debit memo in a released status for posting.
- 4. Allow Release of Orders/Tickets/Products for Invoices gives the user the privilege to release (un-suspend) an order, ticket, or product so that the transaction may be invoiced.
- 5. **Invoice Print Options** allows you to control what invoice print functions a user may perform. The options are:
 - Allowed to Create Original Invoices and Reprint Invoices (default)
 - Allowed to Create Original Invoices Only
 - Allowed to Reprint Invoices Only

The next two fields relate to Order Level Mix Design, an option that allows mixes to be modified, subject to QA approval, during order entry. For these user-level options to have any effect, Order LEvel Mix Design must be enabled at the system level (Configuration-Distribution).

- 6. Allow Access to Order Level Mix Design gives the privileged user access to the order level mix design functionality in Order Entry.
- 7. Allow Override of Un-approved Mix Designs in Ticketing allows the user to ticket orders containing mixes that are not in the Mix Design file.
- 8. Allow Project Updates from Order Entry/Ticketing gives user the privilege to update project information based upon data entered in Order Entry or Full Scale Ticketing. Such update information could include purchase order number, job number, delivery address, delivery instructions, map page, and zone fields.
- 9. **Allow Overhead Loading** gives the user the ability to perform overhead loadout ticketing. This option is valid only with a COMMANDaggregate license.

- 10. Allow Access to Quotes for Orders allows order takers to activate accepted quotes as projects during order entry.
- 11. **Restrict customer lookup to company** is useful in a multi-region system. The field is enabled by selection the Maintain Credit by Comapny option (Configuration-Receivables). Each customer can be assigned a default pricing plant, which is itself assigned to a company. When a valid company is entered, customer lookups will only return customers associated with the specified company.
 - **Note:** At this point in the file build process, neither system configurations nor companies have been entered. To activate this option, you must return to the Users screen later in the process.
- 12. **Suppress Minimum Load Charge Messages in Tickets** will not give the user the option to dismiss a minimum load charge on a load. The charge will be applied automatically. If this box is left unchecked, then when a qualifying load is ticketed box, a dialog box will ask the user to confirm the charge.
- 13. **Suppress Season Charge Message in Tickets** will not give the user the option to dismiss a seasonal charge on a load. The charge will be applied automatically. If this box is left unchecked, then when a qualifying load is ticketed box, a dialog box will ask the user to confirm the charge.
- 14. **Suppress Display of Pricing Information Messages** If an item's price is being drawn from the item file rather than the customer file, the system will display the message in the message line instead of in a dialog box.
- 15. **Auto Display Instructions in Orders/Tickets** If this is selected, the Delivery Instruction zoom box will automatically open when the cursor enters the Delivery Instructions field.
- 16. **Auto Display Instructions in Orders/Tickets** If this is selected, the list of customer projects will automatically open when the cursor enters the Projects field.
- 17. **Auto Display Possible Projects in Orders/Tickets** If this is selected, the list of possible products will automatically open when the cursor enters the Item Code field.
- 18. Accept the screen to save user options information.

Plants

The Plants tab allows users to set up security to limit the number of plants in most areas of COMMANDseries that a user can access to view, add, or change data. This function effectively allows the user to divide a system into several divisions from an operational view but keep a single unified database for file storage of customers, projects, products and other files. This will not control every area of the system. Areas covered are in the operational end of the system, from projects, orders, tickets, Daily and Scheduling Reports to Invoice Preparation. It assumes that users enabled to enter customers, products, and other master files will have ability to see all plants.

To configure plants:

1. Select Files > System Information > Users > Plants.

Users - Plants Tab (EDTUSNM7)

Preferences	Licenses Privileges Order Printers Options	Plants	Cost Centers	
Plant	Description			
 ✓ 1 ✓ 2 ✓ 3 ✓ 4 ✓ 17 	Birmingham Plant Hoover Plant Bessemer Plant Alabaster Plant Libra Test Plant Setup			

 Select the plant(s) to which the user is assigned by selecting the box next to the plant name. This field can be used to tie a plant record to the user, and possibly to restrict the user's access to records at that plant.

Accept this screen to save the information.

Cost Centers

Cost centers are business units that incur costs or expenses but do not directly generate revenue. It is here that specific cost centers for budgeting purposes are made available to the user.

Caution: At this point in the configuration process, you have not yet created yor cost centers. If you wish to link users to a cost center, you will need to return to the user records after G/L account information has been entered.

To assign cost centers:

 Select the **Cost Centers** tab on the Users screen. {Files > System Information > Users > Cost Centers}

Preferences Licenses	Frivileges Order Printers Options Plants	Cost Centers	
Cost Center	Description Ready Mix Corp. Office Ready Mix Plant 1 Ready Mix Plant 2		

Users - Cost Centers Tab (EDTUSNM4)

- Select the Cost Centers that will be available to the user from the Choices (Cost Centers File) screen. To access the screen, press the down arrow button or press <Enter> while in the Cost Centers field.
- 3. The full name of the cost center will display in the **Description** field.

4. Accept the screen to save the cost center's information.

Groups

Groups allow you to define a standard set of user-level privileges. Once a group is created, you can make assign a user to the group using the Group Name field on the Users editor.

Once a user has been assigned to a group, specific privileges can still be assigned to the user.

Note: In the event that a user-level privilege conflicts with a group-level privilege, the user-level pivilege will take precedent.

Non-COD Price Change

COMMANDseries by default allows price changes on COD orders. When an order is flagged as COD, the Item Price field displays on the order form, where the price can be entered. For non-COD orders, the Item Price does not display. Displaying the price for COD orders is a business necessity— otherwise, the order taker would not be able to give the customer a total for the order.

It is possible that a user may need access pricing information for non-COD orders as well. COMMANDseries allows you to grant privileged users the ability to view or edit prices for non-COD orders. This feature is dependent on three configuration settings:

User Field-level privileges — A user must have certain privileges for the Order field PRICE_DISP.

Print Price on Ticket — This flag is found on both the customer and project pricing tabs.

Allow Price Change in Order Entry — This flag is found on both the customer and project pricing tabs.

Note: Selecting the **Price Suppress** flag in User Privileges has the same effect as a field-level PRICE_DISP privilege of **None.** In the event that the Price Suppress flag is set while user field-level privileges are set to read only or full, the Price Suppress flag setting will take precedence.

During order entry, as soon as customer and (if necessary) project information has been entered, the system determines what level of access the user will have to item pricing, based on the following matrix:

Field-level Privilege	Print Price on Ticket	Allow Price Change	User's Access Level
None	Ν	Ν	no edit, no display
	Y	N	no edit, no display
	Ν	Y	no edit, no display
	Y	Y	no edit, no display

Read Only	N	N	no edit, no display
	Y	N	display only
	N	Y	display only
	Y	Y	display only
Full	N	N	no edit, no display
	Y	N	display only
	N	Y	edit
	Y	Y	edit

If a user has no access, then no pricing information is displayed. If the user has **display only** access, then the item price is displayed in an inactive field. The PSC is displayed immediately below the price field for reference purposes. If the user has full access, the **Item Price** field activates.

Note: You can track prices changed in Order Entry. If a price is changed in Order entry, that price is labeled with a Price Source Code (PSC) of 90 (User Entered in Orders). The PSC is printed on all invoicing reports.

Printer Setup

COMMANDseries supports most Windows-compatible dot-matrix and laser printers. Some older line printers are also supported. Before your printers can be configured within COMMANDseries, they must first be properly configured within Windows.

Note: COMMANDseries does not support ink-jet printers.

To create a local shared printer on an NT workstation/server:

- 1. Click the Windows **Start** button, then click Settings > Printers > Add Printer.
- 2. When prompted on how the printer is attached to your computers, **Select Local Printer** and click **Next**.
- 3. Select the manufacturer and printer. The recommended choices are **Generic** and **Generic/Text Only**. If a screen appears informing you that these drivers have previously been installed on your computer, select the option that allows you to keep those drivers.
- 4. Select the printer port and click **Next**.
- 5. Enter the name of the printer. This name must be eight characters or less, must not contain any spaces, and must be unique among all printers being set up. If the name would be a valid DOS filename (without extension), then it will work.
- 6. If so desired, set the printer as your default printer.
- 7. Click **Next**, and then click **Finish**. An icon representing the new printer will appear.
- 8. Right-click on the icon you just set up and select **Properties**.
- 9. From the **General** tab, click the **Print Processor...** button.

- 10. Select **RAW** from the **Default Datatype** field.
- 11. Mark the Always spool RAW Datatype checkbox and click OK.
- 12. Select the **Scheduling** tab and slide the **Priority** slider to the center.
- 13. Select Start printing after last page is spooled and click OK.

To connect to the above printer with an NT client:

- 1. Double-click the **Add Printer** icon.
- 2. Select **Network Printer** and click **Next**.
- 3. Select the proper printer.

To connect to the above printer with a Windows 95/98 client:

- 1. Double-click the **Add Printer** icon.
- 2. Select Network Printer and click Next.
- 3. Select the proper printer and click **Next**.
- 4. Enter the name of the printer and click **Finish**.
- 5. Right-mouse click on the printer's icon and select **Properties**.
- 6. Select the **Details** tab.
- 7. Click the **Spool Settings** button.
- 8. Mark the **Start printing after last page is spooled** checkbox.
- 9. From the Spool Data Format pull-down menu, select **RAW** and click all **OK** buttons to complete the procedure.

To set up a networked printer on Windows NT:

- 1. Double-click the **Add Printer** icon.
- 2. Mark the **Network Printer Server** checkbox and click the **Next** button.
- 3. Enter the printer and click **Next**.
- 4. Click Finish.
- 5. Right-click on the new printer icon and select **Properties**.
- 6. Click the **Print Processors** button and select **RAW** from the **Default Datatype** field's pull-down menu.
- 7. Mark the Always Spool "RAW" Datatype and click OK.
- 8. Select the **Scheduling** tab and move the **Priority** slider to the center position.
- 9. Mark the **Start Printing after Last Page is Spooled** checkbox and click **OK**.

To configure a printer connected to a HP JetDirect network port.

- 1. Install the printer normally.
- 2. Right-click on the new printer icon and select **Properties**.
- 3. Select the **Ports** tab. Select the port being used and select **Configure**.
- 4. Select the **Optional** tab. The following settings should be selected:

Parallel Mode -- Centronics Parallel Handshaking -- Busy only Error Behavior -- Dump then Reboot Status Page Language -- Text

5. Select **OK** until the Printer Properties dialog has closed.

Generic Printer Setup

If there is a printer on your system that is not found in the Possible Print Models, that printer and the computer can be configured to communicate through a generic print format that emulates Epson printers.

To configure Windows to accept a generic print model:

- 1. From the Start menu, open the **Settings** sub-menu and select Printers.
- 2. Select **Add a printer** from the subsequent menu.
- 3. Follow the instructions of the Add Printer Wizard routine and choose Local printer to configure the new printer.
- 4. Select **Epson** from the Manufacturers list and Epson FX-286 as the type.

Add Printer Wizard				
Ï	Click the manufacturer and model of your printer. If your printer came with an installation disk, click Have Disk. If your printer is not listed, consult your printer documentation for a compatible printer.			
<u>M</u> anufac Diconix Digital Epson Fujitsu GCC Generic Gestetr	eturers: Printers: Epson FX-185 Epson FX-286e Epson FX-800 Epson FX-800 Epson FX-870 Fnson FX-880 Fnson FX-880 Epson FX-880			
	< <u>B</u> ack Next > Cancel			

5. Complete the Add Printer Wizard screens.

To configure a printer to emulate a generic print model:

- 1. Press **Mode** and **Print** at the same time to print out the details of that printer's current configuration.
- 2. Under the General Control group, set the Emulation Mode item to Epson FXE.

3. To save the new setting, turn the printer off and back on.

Print Models

The Print Models screen allows access to print model records that define the printing characteristics used by COMMANDseries applications for reports or listings. The print model does NOT define the printer, just the characteristics. The specific printer is chosen after the Print Models Selection window is displayed, using the Windows Print function.

Print models can simply specifiy basic layout information allowing the user to select a printer through Windows, or they can specify layout information as well as direct print jobs to a specific printer.

Before entering print model information, determine where you want output (listings, reports, orders, tickets, invoices, statements, etc.) directed. Also, you need to know what brand and model printers will be connected to the system and what size paper will be used in each.

After the print models have been entered, print a short report to each print model to verify that each is functioning correctly.

To define a print model:

- Go to the **Print Models** screen. {Files > System Information > Print Models}
- 2. Enter a **Print Model** code number.

Print Models - 🗆 × Print Model Description Okidata Microline 320 Short Output Type Printer -Printer Options Print Device Prompt ٠ Device Type ٠ Device Mode Portrait at 12 cpi • Columns 96 🗄 Lines 60 🗄 Printer Initialization String Printer Close String \mathbf{T} Queue Options Route Reports to Queue

Print Models (EDTUPRT)

- 3. Enter a **description** of the Print Model.
- 4. If you want, enter a short description in the **Short** field.

5. From the Output Type field's list, choose a method of printing:

Screen – sends the information to the screen for display

Printer – prints the information to a printing device

File – sends the information to a file

Plant – sends information through COMMANDcomm and to a plant

WordPad – sends information to Windows WordPad Note: If you encounter difficulties with Wordpad print models, you may need to specify the path to Wordpad in the assignment file. Additional information can be found in the SETUP.RME file.

COMMANDprint – This option is a conversion utility to enable proper printing of foreign language characters. Contact your Command Alkon Service Representative for more information

- 6. Print the details of the printer's current settings. You can print this from the printer itself. Compare these details to the Printer Options information from the print model file, making changes as necessary.
- 7. Mark the **Route Reports To Queue** checkbox if you want to send the information through COMMANDcomm. When this checkbox is marked, you will be asked for a Manager Number.
- 8. Accept the Print Models screen.
- 9. Repeat steps 1-8 for all the printers on your system.
 - **Note**: If a printer on a Windows NT or Windows 2000 system is printing an additional blank page at the end of everything, go to the print models that access that printer, and enter <FF> in the Close Printer String field. That setting will intercept the form feed character before it is sent to the printer.

Testing Ticket Printers in COMMANDseries

To test ticket printers:

1. Simultaneously press the **Shift** and **Power** buttons on your Okidata 320 printer.

Note: The Okidata printer mentioned here is only an example. If you are using another printer, please refer to its documentation for instructions on how to define printer specifications.

- 2. Press the **Print** button and make necessary changes. At any time, you may press the **Shift** and **Select** buttons to put the printer back online.
- 3. Select the emulation mode. The recommended mode of emulation for COMMANDseries printing is **ML** (micro-line) because it guards against wrapping and character pitch shifting.
- 4. Select your page specifications including page length, rear feed, bottom feed and top feed.
- 5. For Symbol Sets Code Page, select **BRASCII**. This setting allows the proper interpretation and printing of international characters.

- **Note:** If the printer is in Epson FX emulation mode, you must also select **Set II** in Symbol Sets Character Set to properly print international characters; if in ML emulation mode, select **Standard**. HP printers require no special setup procedures for the printing of these characters.
- 6. Press the Print button on the printer to print the specifications you have defined. Adjust these specifications as necessary.
- 7. In COMMANDseries, go to the Plant Communication Setup screen. {Files > Plant & Delivery Information > Plants > Communication > Setup}
- 8. In the second **Port Name** field, enter the name of the new printer.

Note: Leave the first field blank.

- 9. Accept the Plant Communication Setup screen.
- 10. Go to the Data Maintenance screen. {Manage > Data Management > Data Maintenance}
- 11. In the File field, enter **PLNT** and press the <Tab> button on your keyboard.
- 12. Scroll down until you see the **TKTING_PORT_SETUP** (Ticketing Port Setup) field. The contents of this field should be the name of the new printer with @ preceding it. For example, if the name of your new printer was **print1**, then the contents of this field would be @**print1**.
- 13. Enter and then ticket a test order. Send the ticket to the printer.
- 14. Review the printed ticket and confirm that pitch is set to its proper setting. If not, adjust using the buttons on your printer.
- 15. Go to the Print Models screen. {Files > System Information > Print Models}
- 16. Enter the **Print Model** you will use to run reports.
- 17. From the **Output Type** field's pull-down menu, select **Printer**.
- 18. From the **Print Device** field's pull-down menu, select the name of the new printer.
- Select the Device Type from the field's pull-down menu. The device type is directly related to the emulation mode you selected on your printer. For example, if you selected ML emulation mode, you would select Okidata 320 in this field. If your printer is in Epson FX emulation mode, you would select Epson in this field.
- 20. Print a report and confirm that your settings are correct.

Currency

The Currency screen specifies the display characteristics for various currencies used.

Before entering currency information, gather information about the currencies to be used in your system.

To add or edit a currency code:

- 1. Go to the Currency screen. {Files > System Information > Currency}
- 2. Using a standardized naming convention, enter a new **Currency Code**.

Cl	urrency (EDICORR)
📷 Currency	
Currency Code	USA
Description Short Descr	United States Dollars US\$
Currency Symbol Symbol Placement	\$ Leading number
Thousand Separator Decimal Separator I Decimal Places Used	, ,
Negative Sign Negative Sign Placement	Parentheses "()" Symbol inside parentheses
Alternate Currency Conversion Factor	

- Enter a long **Description** and **Short** description for the currency type. 3.
- 4. Enter a **Currency Symbol** specific to the currency, and select **Leading** number or Following number to specify the Symbol Placement.
- Enter a Thousand Separator and Decimal Separator. If a decimal 5. separator is used, mark the **Decimal Places Used** checkbox.
- Select a **Negative Sign** character to indicate a negative value, and select 6. Symbol Inside Parentheses or Symbol Outside Parentheses for the **Negative Sign Placement.**
- 7. If desired, enter an Alternate Currency Conversion Factor. This factor will be multiplied by the total invoice amount to allow for printing in a currency other than that configured in the systems.
- 8. Accept the screen to save the new or changed currency.

Code Lengths

Four codes form the heart of your COMMANDseries accounting structure:

- Company Codes
- Cost Center Codes •
- Account Codes
- Sub-account Codes

Before going any further in the file build process, you must establish the lengths for each of these codes. Once these lengths are entered, the appropriate editor will enforce the lengths.

To establish code lengths:

1. Open the Financials Configuration screen. {Files > General Information > Configuration > Financials}

Configuration				_ 🗆 ×
System Defaults Aging Stat	Distribution Dispatch ements Financials	Aggregate Invoicing Projects/Quotes	Inventory Lien I	Receivables User Fields
Company Code Length Cost Center Length Account Code Length Sub Account Code Lengt Number of Budgets Budgets Round To	h 23			
Multiple Companies				

Setting Code Lengths (EDTCNFXL)

- 2. Enter a Company Code Length between 1-4.
- 3. Enter a **Cost Center Length** between 4-12. Cost Center codes must begin with their associated Company Code. Therefore, the Cost Center Length must be greater than the Company Code Length.
- 4. Enter an **Account Code Length** between 1-6.
- 5. Enter a **Sub-Account Code Length** between 1-6.
- 6. If you will be using **Multiple Companies** in your account structure, mark the checkbox.
- 7. Accept the screen.

Note: The **Number of Budgets** and **Budgets Round To** Fields are artifacts of an older COMMANDseries module and are not required.

Caution: These settings can be entered on this screen only once. After initial entry, code lengths can only be changed by using the Realign Accounts and Cost Centers function.

Companies

Companies represent business entities and are used to group plants for various reports in all applications. Large clients may want to use the Companies function to group and organize their plants and operations, but smaller clients may want to enter just one company. If hauling companies deliver your items for you, enter those companies here for use in COMMANDcartage.

Topics in this section:

Company Setup Company Cost Centers Setup Company Finance Charges Setup

Company Setup

Before entering company information, gather information about the setup for your business entities and group plants for reporting purposes.

Review the settings on the Realign Accounts and Cost Centers screen {Manage > Application Management > Realign Accounts & Cost Centers} to verify the length of Company Codes, Cost Center codes, and Account codes. If any changes are needed, make them at this time—it is a lot easier to change these values **before** account information gets entered.

To set up your company or companies:

1. Go to the Companies screen. {Files > General Information > Companies}

🛅 Companies	
Company Code	01
Name	Command Concrete
Short	Concrete
Address Line 1	1800 International Park Drive
Remit-to Line 1	1800 International Park Drive
Phone Number	205-879-3282
Current Accounting Year	2000
Save Balances (Years)	5
Save Detail (Years)	1
Tax ID	1
Cost Centers Finance Charges	
Cost C Net Profit I 0100 Retained Earnings I 0100	Account 2124 2124 2124

Companies (EDTCOMP1)

- 2. Enter a numeric **Company Code** to identify the company and press <Tab>.
- 3. Specify a **Name** and a **Short** name to describe the company.
- 4. Enter the company's mailing address in the **Address Line 1** field.
- 5. Enter the location of the company's remittance office in the **Remit-to Line 1** field.
- 6. Enter the **Phone Number** for the company.
- 7. Enter the **Current Accounting Year** (fiscal).
- 8. Enter a **Tax ID** for the company.
- 9. Accept the screen to save the company information.

Company Cost Centers Setup

Cost Centers are areas or divisions within a company to which revenues and costs are assigned. {Files > G/L Information > Cost Centers}

To assign company cost centers:

- Select a Cost Center, Account code, and Sub-Account code for which to assign Net Profit. If cost centers have not yet been defined, leave this field blank and return to it after cost centers are defined. {Files > G/L Information > Cost Centers}
- Select a Cost Center, Account code, and Sub-Account code to associate with Retained Earnings for this company. If cost centers have not yet been defined, leave this field blank and return to it after cost centers are defined. {Files > G/L Information > Cost Centers}
- 3. Accept the screen to save the cost centers information.

Company Finance Charges Setup

The Company Finance Charges function allows the user (with appropriate system security) to access company based finance charges that can be assessed against customer balances in COMMANDreceivables. The Create Finance Charges option passes through the customer balance file and creates finance charge transactions that can then be posted to the customer's record. {Manage > Application Management > Create Finance Charges} The information on this screen controls how the balances belonging to this company will be treated with respect to finance charges.

To set up company finance charges:

1. Click on the **Finance Charges** tab to enter company-based finance charge information that can be assessed against customer balances in COMMANDreceivables.

		Companies (ED	DTCOMP2)	
Cost Centers	Finance Charge	es		
Annual Perc Calculation M Calculation L	entage 18 flethod By D level Cust e on Finance Cha	1.000 Due Date 💽 tomer/Plant 💽 arges	Minimum Amount Waiver Amount	1.00 0.25

- 2. Select the **Calculate on Finance Charges** checkbox if the company applies finance charges.
- 3. Enter the **Annual Percentage** rate to be charged the company.
- 4. Select the **Calculation Method** and **Calculation Level** for tabulating the finance charges.
- 5. Enter the **Minimum Amount** of a finance charge. This field identifies the minimum amount to be used as a finance charge. Any finance charge calculation that falls below this amount is automatically raised to this amount.

- Enter the Waiver Amount of a finance charge. This field identifies the amount that will cause the finance charge to be waived (not charged). Any finance charge calculation that falls below this amount will be waived.
- 7. Accept the Companies screen.

Employees

Your employees perform one or more of the following functions.

Drivers – assigned to truck records and confirmed as the driver when trucks are assigned to tickets

Salesmen – first assigned to customers and projects; then, they are assigned to orders where they receive credit for a sale

Weighmasters – assigned to plants

Credit Persons – assigned to customers and projects

Batchers – assigned to plants

At this point in the system setup, it is only necessary to enter employees who are drivers, weighmasters, and batchers. But if you have the information on your other employees, go ahead and enter them as well.

Employee Files

Before entering employee information, gather information about the employees within your company and the duties they perform.

To enter a new employee:

1. Go to the Employees screen. {Files > General Information > Employees}

Employees (EDTEMPL)

🛅 Employees	
Employee Code	17
Name Address	Dale Earnhardt
City State Country Postal Code Phone Number	Birmingham Birmin
Assigned Driver Salesman	🗖 Weighmaster 🧮 Credit Person 🗖 Batcher
Payroll Plant Code Default Truck Seniority Driver Overtime Code	

- 2. Enter an **Employee Code** to identify the employee.
- 3. Enter the employee **Name** for the assigned employee code.
- 4. If desired, enter employee information, such as **Address**, **Phone Number**, etc.
- 5. Specify the employee's job function by marking the checkbox next to the appropriate job.

Note: These flags determine how an employee can be used within COMMANDseries. For example, only employees flagged as drivers can be assigned to a truck.

- 6. If needed, you may enter **Payroll**, **Plant Code**, **Default Truck**, and **Seniority**.
- 7. If this employee is a driver, assign a **Driver Overtime Code**.

Note: If Driver Overtime Tables have not yet been entered, return to the Employee files after the tables have been entered.

8. Accept this screen to add the employee and related information to the employees file.

Reason Codes

Reason codes explain why a field is set to a particular value. For instance, a non-taxable reason code is used on the Customers screen to tell why a particular customer is set to a non-taxable status.

Reason codes can be established to explain the following occurrences.

 $\ensuremath{\textbf{Removed Items}}$ — orders or tickets that have been removed or canceled

Suspended Items — orders or tickets that have been suspended from invoicing

Non-taxable Items — a customer/project/order is set to a non-taxable status

A/R Balance Remaining — a balance remains for an invoice that has had some A/R transaction applied

Job/Quote Status — status changes in a job or quote

Job/Quote Product — status change in a job or quote at the product level

Removed/Cancelled Purchase Order — the customer cancelled the order due to a removed or cancelled purchase order

Unapproved Purchase Order — your company has rejected the customer's purchase order

Inventory Adjustment — used in COMMANDinventory when adjusting quantities; allows the user to assign a reason for the adjustment

Debit/Credit Memo Order — allows the user to assign a reason for a debit or credit memo order

Truck Unavailability — provides a means of classifying periods during which a truck in unavailable (scheduled maintenance, repairs, etc.)

Plant Unavailability — provides a means of classifying periods when a plant is unavailable

Non-taxable reason codes are used in the Customers, Projects, Order Entry, Items, Edit Orders and Tickets (Prep), and Configuration Defaults screens to explain a customer is set to a non-taxable status.

Before entering reason codes information, gather information about each type of reason code you want to enter. Each reason code type should have at least two reason codes entered if you want to track the reason code type.

To enter a reason code:

 Go to the Reason Codes screen. {Files > General Information > Reason Codes}

Reason Usage Code Description Short CT IG IV EX Removed Item 11 Customer cancelled order! Cust Can Cust Can Cust Can Detail I Removed Item 13 Ticket generated for wrong truck! No truck Detail I Detail I Removed Item 14 Ticket generated for wrong order! No order Detail I Detail I Suspended Item 21 Price not available! No price Dispute I	Reason Codes								I	_ 🗆 🗙
Removed Item 11 Customer cancelled order! Cust Can Detail - Removed Item 13 Ticket generated for wrong truck! No truck Detail - Removed Item 14 Ticket generated for wrong order! No order Detail - Suspended Item 21 Price not available! No price -	Reason Usage	Code	Description	Short	СТ	IG	IV	EΧ		
Removed Item 13 Ticket generated for wrong truck! No truck Detail I Removed Item 14 Ticket generated for wrong order! No order Detail I Suspended Item 21 Price not available! No price I I Detail I Suspended Item 22 Customer disputes price! Dispute I I I I I Non-taxable Item 31 Location not taxable! Loc N/T I I I I Non-taxable Item 32 Deliveur Evernot Deleter I I I I I	Removed Item 💽	11	Customer cancelled order!	Cust Can					Detail	
Removed Item 14 Ticket generated for wrong order! No order Detail Suspended Item 21 Price not available! No price Image: state	Removed Item 💽	13	Ticket generated for wrong truck!	No truck					Detail	린
Suspended Item 21 Price not available! No price Image: specific constraints of the specific constrain	Removed Item 💽	14	Ticket generated for wrong order!	No order					Detail	
Suspended Item 22 Customer disputes price! Dispute Non-taxable Item 31 Location not taxable! Loc N/T Non-taxable Item 32 Deliverur Evernot Deliverur Evernot	Suspended Item 📃	21	Price not available!	No price						₽
Non-taxable Item	Suspended Item 💽	22	Customer disputes price!	Dispute						4
Non-taxable Item V 32 Deliveru Evenot Delv Even	Non-taxable Item 📃	31	Location not taxable!	Loc N/T						+
	Non-taxable Item 💽	32	Delivery Exempt	Delv Exm						₽
Non-taxable Item 🔽 33 Reseller Reseller	Non-taxable Item 📃	33	Reseller	Reseller						┛╺

Reason Codes (EDTRSNC)

2. Select the most accurate reason from the **Reason Usage** field's list.

- 3. Enter a **Reason Code** to identify why an item was removed, suspended, lost, etc.
- 4. Enter a long **Description** and **Short** description for the reason code. The long description should briefly justify the removal, suspension, etc.
- 5. If the Reason Usage is Removed Item, four boxes and a Detail button appear next to the short description. The detail button calls the **Reason Code Detail** screen.

Reason Code Detail	×
Don't update removed ticket to cartage	-
Update removed ticket to invoicing	•
Update removed ticket to inventory	
Don't update removed ticket to executive	-

Reason Code Detail (EDTRSNC1)

This screen allows you to specify how items removed with a given code will be treated with respect to four areas: Cartage, Invoicing, Inventory, and Executive. For each module, there are two options:

- Don't update removed ticket to [module]
- Update removed ticket to [module]

Make your selections and accept the screen. When you return to the main Reason Codes screen, modules specified for update will be flagged.

Note: You cannot set a flag by selecting the indicator box.

Press the Add Occurrence button to enter another reason code, or accept this screen to save the new Reason Codes.

Modem Codes

The Modem Codes screen defines modem code records used throughout the COMMANDseries applications. Modem codes are assigned to plants that are marked as **auto-dial** plants. These records are used by COMMANDcomm to control and access modems when sending a ticket or a report to be printed at an auto-dial plant.

Before entering Modem Codes information, gather information about the type of modems used to communicate with remote plants.

Modem Setup

Before you attempt to enter modem information needed by COMMANDseries, refer to the documentation included with your modem and investigate the possibility of importing the information provided for Hayes compatible modems and MultiTech modems. These two popular brands include settings that are guaranteed to work for most modems.

If you do not have a modem that is compatible with the two brands listed, refer to the Modems file, located in the Control Panel of your Windows system. This file provides much of the information needed to set up the modem.

To enter modem settings:

 Go to the Modem Codes screen. {Files > General Information > Modem Codes}

🛅 Modem Codes		
Modem Code	HAYES	
Description Short	Hayes-compatible modem Hayes	
Prefixes Timeout Code ATZ <cr> ATDT!x<cr></cr></cr>	30 Response OK <cr> CONNECT 9600<cr></cr></cr>	-
Suffixes Timeout Code	30 Response ■ OK <cr></cr>	

Modem Codes (EDTMODM)

- 2. Enter a **Modem Code** to identify the modem.
- 3. Enter a **Description** and a **Short** description to identify the type and brand of modem.
- 4. Use the **Prefixes** area to enter modem control code sequences that perform startup or connection activities, such as clearing the line, auto-dialing a number, or setting the baud rate.
- 5. In the **Timeout** field, enter the maximum allowed amount of time, in seconds, between the modem's transmission of any prefix control code sequence and the modem's reception of the correct answering control sequence from the device to which the modem is attempting to connect. The default is 0, indicating that no timeout is set, so the modem waits indefinitely for a response.
- 6. In the **Code** field, enter a specific modem control code sequence of alphanumeric characters that performs a particular startup action, such as clearing the line, autodialing a number, or setting the baud rate. Up to nine prefix-control codes may be specified for a modem.

- **Note**: The prefix information controls modem connection activity, while the suffix information controls modem disconnection activity.
- 7. In the **Response** field, enter the sequence of alphanumeric characters that COMMANDcomm expects to receive to indicate that the corresponding prefix code was successfully received and acknowledged by the device to which the modem is attempting to connect. Up to nine prefix responses may be specified.
 - **Note:** Some internal modem commands (such as the Hays modem ATH command) return messages directly from the modem itself and not from the remote device; these commands must also be included in this list if used as prefix codes. (ATH always returns **OK**, unless there is a hardware problem with the modem, so you would need to specify **OK** as the prefix response to the ATH prefix code.)
- 8. Use the **Suffixes** area to enter modem control code sequences that perform a shutdown action, such as hanging up the phone line. These sequences vary from modem to modem. Consult your modem user's guide for more information.
- 9. In the **Timeout** field, enter the maximum allowed amount of time between the modem's transmission of any suffix control code sequence and the modem's reception of the correct answering control sequence from the device from which the modem is attempting to disconnect from. The default is 0, indicating that no timeout is set, so the modem waits indefinitely for a response.
 - **Note**: The prefix information controls modem connection activity, while the suffix information controls modem disconnection activity.
- 10. In the **Code** field, enter a specific modem control code sequence of alphanumeric characters that perform a particular shutdown action, such as hanging up the phone line. Up to nine suffix-control codes may be specified for a particular modem.
- 11. In the **Response** field, enter a sequence of alphanumeric characters that COMMANDcomm expects to receive to indicate that the corresponding suffix code was successfully received and acknowledged by the device that the modem is attempting to disconnect from. Up to nine suffix responses may be specified.
- 12. Accept the Modem Codes screen to save the modem and its settings.

Signaling Units

Signaling units identify the signaling system connected to the COMMANDseries system and the unique means of communicating with and understanding each unit.

You do not enter individual signaling units in this screen. Instead, you need an entry for each **type** of signaling unit.

Before entering information, gather technical information about the signaling systems that you connect to COMMANDseries. Also, determine if automatic signaling is used to move trucks through the system.

Topics in this section:

Signaling Units Setup Signaling Unit Options Signaling Unit Incoming Messages Signaling Unit Outgoing Messages Signaling Unit Statuses

Signaling Units Setup

To set up signaling units:

 Go the Signaling Units screen. {Files > General Information > Signaling Units}

Si	gnaling Units (EDTSIGU)
🛓 Signaling Units	
Signaling Unit	10
Description Short Unit Type Manager Number Port Name Attack Delays	COMMANDsignaling CMDsig COMMANDsignal Default 1 Port 12

- 2. Enter a **Description** of the signaling unit. This can include the brand name and any other pertinent information.
- 3. Enter a **Short** description for use on COMMANDseries screens.
- 4. Select a **Unit Type** from the possible choices list:

Auto-signaling	PTT MM300 Traxis	Bosch (Befu)
Radio Holland mf1104	Coded Communication	Rohill
COMMANDsignal	Rohill 2 Digit Truck	Dinet
Sigtec	Generic	Speedcall Ric-C
Motorola (Europe)	Speedcall Ric-D	Motorola BSC-H
Ultralog	Motorola GCC-80	Vehicom
Motorola Smart-Status (1.4)	Rohill 2 Digit Status	

If the selected unit type supports messaging, the fields and tabs pertaining to messages will display. In addition, if the unit type is COMMANDsignal, a **Default** button will appear next to the Unit Type field. This button creates default messages (see below).

Note: If you are attempting to communicate with a signaling unit not represented in the list shown, please contact your Command Alkon Customer Service Representative for further instructions.

- 5. Identify the COMMANDcomm **Manager Number** to control communication for this signaling unit. The manager number can be found in the properties file of COMMANDcomm (highlight the COMMANDcomm icon and press <Alt+Enter>).
- 6. Enter an appropriate **COMMANDcomm Port Name**. If a COM port is entered, click the **Port** button to further configure the communications port. See the **Communications Port Setup** section of this manual.
- 7. If this is a COMMANDsignal unit, the **Attack Delays** fields display below the **Port Name** field. These fields represent the time, in milliseconds, from the time you send the message until the unit sends a data pulse. For example, entering **12** causes it to wait 1.2 seconds.
 - **Note:** There are three **Attack Delay** fields, one representing each card of the RIC. If you have a single-card RIC, enter a value in the first field. Enter values in he first two fields for a second-card RIC and all three fields for a third-card RIC.
- 8. Accept the screen to save the signaling unit information.

Signaling Unit Options

The **Options** tab on the Signaling Units screen allows you to specify messages and statuses that the signaling unit can accept and display.

To set up signaling unit options:

1. Select the Options tab on the Signaling Units screen. {Files > General Information > Signaling Units > Options}

Signaling Units (EDTSIGU1)
Options Incoming Outgoing Statuses
 Allow Truck Punch-In Allow Truck Punch-Out Acknowledge Valid Statuses Acknowledge Invalid Statuses Allow Text Messages

 Mark the Allow Truck Punch-In/Punch-Out checkboxes if you want this signaling unit to send a truck punch-in or punch-out flag to the system.
- 3. Mark the **Acknowledge Valid/Invalid Statuses** checkboxes if you want COMMANDcomm to send a flag to the signaling unit acknowledging that a valid/invalid status was received.
- 4. Mark the **Allow Text Messages** checkbox if you want this signaling unit to accept and display text messages.
- 5. Accept the screen to save the signaling unit options.

Signaling Unit Messages (General)

All of the message fields are initially blank. If the unit type is COMMANDsignal, then pressing the Default button will import a set if standard messages, both incoming and outgoing.

All that is imported are the message code and message text. All other message fields must be configured manually.

Signaling Unit Incoming Messages

The **Incoming** tab on the Signaling Units screen allows you to define messages for certain events. The signaling unit will send these messages.

To set up incoming messages for the signaling unit:

1. Click on the Incoming tab on the Signaling Units screen. {Files > General Information > Signaling Units > Incoming}

			5 - 5 - (-	/		
Optio	ons	Incoming Outgoing Statuses				
C - 4	_	Jub and Manager Taut	Friend	Color	Time Flag	
LOG	e	Indound Message Text	Event	Color	rime riag	
1	٩	Send Police	•		15	Sound +
2	의	Send Ambulance	•		15	Sound +
3	9	Request Lunch	•			Sound +
4	9	Request Quick Stop	•			Sound +
5	9	Request Wash Out	•		16	Sound +
6	9	Lost/Need Directions	•		15	Sound +

Signaling Units (EDTSIGU2)

- 2. Enter a **Code** and the **Inbound Message Text** to accompany it.
- 3. Select an Event from the list.

Blank – no event is associated with the message Clock in – the truck is clocking in Clock out – the truck is clocking out Leftover qty – the truck is carrying leftover material

- 4. Select a **Color** for this message when it is displayed on the Tracking and Scheduling screen.
- 5. Enter a **Time** to indicate the length of time allowed for this truck status.
- 6. Enter a symbol in the **Flag** field to be displayed on the Tracking and Scheduling screen when this inbound message is received.

7. Click on the **Sound** button if you want a sound to be played upon reception of this inbound message. If you select this button, the Sound window displays.

	Sound		
Sound			? ×
File <u>n</u> ame: *.wav	Eolders: c:\windows C:\ WINDOWS All Users Application Data CATROOT COMMAND	•	OK Cancel
List files of <u>type</u> :	Dri <u>v</u> es:		
All Files (*.*)	🖃 c: HARD DRIVE	-	Net <u>w</u> ork

- 8. Locate and select the file (with a .WAV extension), then click the **Open** button to accept and return to the **Incoming** tab.
- 9. Accept the screen to save incoming messages information.

Signaling Unit Outgoing Messages

The **Outgoing** tab on the Signaling Units screen allows you to define messages for certain events. The signaling unit will receive these messages.

To set up outgoing messages for the signaling unit:

- 1. Select the Outgoing tab from the Signaling Units screen. {Files > General Information > Signaling Units > Outgoing}
- 2. Enter a **Code** and the **Outbound Message Text** to accompany it.

	Signaling Units (EDTSIGU3)						
Options	Options Incoming Outgoing Statuses						
Cada							
Lode			Event	Formativame			
00 9	Press Button		•	ਤ ⊻			
01 9	Return Same Plant	_ 	•	. .			
02 9	Call Dispatch	」 <u> </u>	•	. <u> </u>			
03 9	Call when Loaded		▼				
04 9	Wash Truck		▼	▼			
05 9	Use Leftover		•	▼			

- 3. Select the **Return Plant** to indicate to which plant the truck is returning.
- 4. Select an **Event** from the list to define an action for the outgoing message. The valid options are:

Blank – no event is associated with the message **Type Ticket** – the ticket is being typed **Cancel Ticket** – the ticket has been cancelled Change Plant – the shipping plant has been changed New Assignment – the driver now has a new assignment Cancel Assignment – the current assignment has been cancelled

- 5. Assign a document format in the **Format Name** field.
- 6. Accept the screen to save the outgoing messages information.

Signaling Unit Statuses

The Statuses tab on the Signaling Unit screen allows you to define codes for various events.

To set up status information for the signaling unit:

- Select the **Statuses** tab from the Signaling Units screen. {Files > General Information > Signaling Units > Statuses}
- 2. Enter a **CA Code** for each CA Status event. These codes allow for configuration of the signaling unit without the need for hard coding. Refer to the unit manufacturer's information for the correct status codes.

Signaling Units (EDTSIGU4)					
Options Inc.	oming Outgoing	Statuses			
CDI Status Load On Job Wash At Plant	CDI Code 0 2 4 6	CDI Status To Job Unload To Plant	CDI Code 1 3 5	CDI Status Out of service In Service Driver punch in	CDI Code 7 7 7

3. Accept the screen to save the signaling unit statuses.

Auto-Ticketing Interface

COMMANDaggregate's Auto-Ticketing Interface is designed to work with several different badge reader systems so that trucks can be automatically dispatched, weighed and ticketed without any action from the weighmaster.

The system provides full integration of COMMANDseries, badge readers, scales, and stop lights. Error messages are displayed on the COMMANDcomm message line, to prevent dialog boxes from interrupting the process flow. If necessary, errors may be addressed through manual dispatch, without disrupting the auto-ticketing interface.

The business flow described here represents basic functionality. Contact your Command Alkon sales representative to determine how your business practices can be best accommodated by the current interface.

An ID reader is assigned to a scale lane, and is identified by a **Lane Type**. The lane type determines the auto-ticketing functionality:

Tare Lane

1. Truck drives on scale.

- Card/badge reader identifies truck. If the car/badge code is not associated with a truck, the stop light will flash red and an error message will display in the comm manager.
- 3. If the ID code is associated with a truck, the new tare weight is written to truck record. The stop light flashes green to indicate that the truck may proceed.

Note: The tare weight is updated regardless of the **Days Tare is Valid** setting in the truck file.

Dispatch Lane

- 1. Trucks are assigned or rostered ahead of time.
- 2. Truck arrives at gate, card is read.
- 3. If truck is rostered/assigned, the truck is dispatched to the order. The stop light will flash green.
- 4. If the truck is not assigned/rostered, or the truck is not identified, the stop light will flash red. An error message is displayed on the comm manager.

Gross (Ticketing) Lane

- 1. Truck drives onto scale. Card is read.
- 2. If the truck is dispatched to a valid order, the gross weight is retrieved and a ticket generated based on the gross weight. A ticket is printed and the stop light turns green.

If the truck is not dispatched to a valid order, a message is displayed on the comm manager and the stop light flashes (or remains) red.

3. Driver leaves scale, retrieves ticket, and leaves plant.

Combo Lane (Gross & Tare)

- 1. Truck drives onto scale.
- 2. The system compares the gross weight to the tare weight in the truck record. If the gross weight is equal to or less than the tare weight plus the **Truck Minimum Weight over Tare for Gross** value (set on the Configuration > Aggregate tab), the scale weight is read as a tare and the, the system reads the weight as a tare weight and update the truck record accordingly.
- 3. If the truck has been assigned to an order and the gross weight exceeds the allowed weight, the system uses the scale weight as a gross weight and generates a ticket.

Supported Readers

Command Alkon has a partnership with TransID to support their SmartPass and Ego RF badge readers. The partnership was developed to help provide a comprehensive, reliable badge reading solution. We have also created an interface for XCI readers. XCI is a third-party vendor who supplies badge reader hardware and badges.

Finally, the system provides support for standard bar code readers, including the ability to print barcodes.

Scale Configuration

In addition to configuring COMMANDseries, you will also need to properly configure your scales to optimize autoticketing performance.

Command Alkon recommends that scales be configured to send weights ondemand, including a motion character. Once COMMANDseries is configured to recognize the motion character, the auto-ticketing interface will automatically retry the scale reading until a stable weight is received.

Auto-Ticketing Units

An Auto-Ticketing Unit corresponds to a specific lane in the aggregate plant. Once an auto-ticketing lane has been defined (based on the type of badge reader being used), the lane is configured.

Topics in this section:

Auto-Ticketing Units Setup Auto-Ticketing Units Communication Auto-Ticketing Units Lane Configuration Auto-Ticketing Units Libra Asphalt Interface Setup Stop Light Setup

Auto-Ticketing Units Setup

To set up auto-ticketing units:

1. In COMMANDaggregate, open the Auto-Ticketing Units screen. {Files > General Information > Auto-Ticketing Units}

Note: Scale configuration is handled by your scale vendor/service representative.

Auto-Ticketing Units (EDTAUTK1)

Auto-Ticketing Units				
Auto-Ticketing Unit	1			
Description Short Unit Type Communication Libra	XCI XCI Libra Asphalt			
Manager Number Port Name	4 ≝ COM2 Port			

- 2. Enter the **Auto-Ticketing Unit** code.
- 3. Enter the long **Description** of the auto-ticketing unit.
- 4. Enter a **Short** description to be used in a number of fields to conserve screen space.
- 5. Enter a **Unit** Type. Current auto-ticketing options are:
 - XCI LC20K
 - Bar Code
 - SmartPass
 - SmartPass (Buffer Control)
 - Toledo 9360

The other two options in the drop-down menu, Libra Asphalt and Astec WM2000, are asphalt interfaces and will be discussed elsewhere.

Auto-Ticketing Units Communication

The available fields on the Communication tab are determined by the Unit Type. All fields will be discussed below.

To set up communication:

Select the **Communication** tab from the Auto-Ticketing Units screen.
 {Files > General Information > Auto-Ticketing Units > Communications}

Communication	
Manager Number Port Name	COM1 Port
TCP/IP Address	

This image shows all communications fields

- 2. Enter a **Manager Number**. This specifies the COMMANDcomm manager number to be used when auto-ticketing.
- 3. If you have selected a Unit Type other than SmartPass, the **Port Name** field displays. Enter an LPT or COM Port Name. When a COM port is entered, a **Port** button appears. Click on the button to set up the printer or modem that COMMANDcomm will use to print orders. See the **Communications Port Setup** section of this manual.

Note: The Communication Port Setup screen requires that the settings match the configuration of the unit.

4. Accept the information.

Auto-Ticketing Units Communication (SmartPass)

To set up communication:

- Select the **Communication** tab from the Auto-Ticketing Units screen. {Files > General Information > Auto-Ticketing Units > Communications}
- 2. Enter a **Manager Number**. This specifies the COMMANDcomm manager number to be used when auto-ticketing.
- 3. Enter the TCP/IP Address of the Moxa Server controlling your badge readers.
- 4. Accept the information.

Auto-Ticketing Units Lane Configuration

Regardless of your auto-ticketing interface, the individual lane configuration will be similar. The screen shot below shows an XCI LC20K.

Caution: Plants using SmartPass must have a separate comm manager for each lane.

To configure a lane:

1. Select the interface tab from the Auto-Ticketing Units screen. {Files > General Information > Auto-Ticketing Units > [interface type]}

Communication XCI LC20K				
Serial Number				
LaneTarget ManagerPlant Code21✓232✓2	Scale Code Action I Tare Truck Stop Light I Stop Light Stop Light	년 Setup 년		

Auto-Ticketing Units (EDTAUTK2)

- 2. (XCI LC20K only) Enter the unit's Serial Number.
- 3. Enter a Lane number, Target Manager, Plant Code, and Scale Code.
- 4. In the **Action** field, define the type of lane.

- 5. Check the **Stop Light** checkbox if you want a stop light.
- 6. If you marked the Stop Light checkbox, click the **Setup** button. See instructions below.
- 7. Select the **Add Occurrence** button to add other lanes.
- 8. Accept the screen.

Auto-Ticketing Units Libra Asphalt Interface Setup

Follow the instructions below if you selected **Libra Asphalt Interface** in the **Unit Type** field.

To set up the Libra:

1. Select the **Libra** tab from the Auto-Ticketing Units screen. {Files > General Information > Auto-Ticketing Units > Libra}

Auto-Ticketing Units – Libra Tab (EDTAUTK3)

Communication Libra			
Target Plant Manager Code 1 2 ¥ 2 ¥ 2 ¥ 2 ¥	Scale Code 1 1	Action Image: Stop Light Batch Operation Image: Stop Light	년 Setup 년

- 2. Enter a Manager Number, Plant Code, and Scale Code.
- 3. In the Action field, select Batch Operation, Silo Operation or Batch or Silo Operation.
- 4. Mark the **Stop Light** checkbox if you want a stop light.
- 5. If you marked the Stop Light checkbox, click the **Setup** button. See instructions below.
- 6. Select the **Add Occurrence** to add other target managers.
- 7. Accept the screen.

Stop Light Setup

To set up the stop light:

- 1. Click the **Setup** button.
- 2. Select an **Interface Type**.
- If the Interface Type is ICS I/O Controller or Kontron I/O, enter a Base Address and Base Address Bit.
 If the Interface Type is Serial, enter the Manager Number and Port Name. Select the Port button to configure the specified port
 If the Interface Type is SmartPass, no port configuration is needed.
- 4. Enter a **Duration** in seconds. This value is the length the stop light will flash a given signal.
- 5. Accept the screen.

Pre-Ticketing Setup

You must follow a specific set of steps to set up pre-ticketing, regardless of whether you initiate pre-ticketing through COMMANDseries or via a truck's VSC.

To set up pre-ticketing:

- 1. Load the Task Codes. {Files > Plant and Delivery Information > Task Codes}
- 2. Accept the form. Failure to accept the form will result in the data not being saved.
- Load the Condition Codes. {Files > Plant and Delivery Information > Task Codes}
- 4. Confirm that the deadhead condition color and flag match the customer preference. If necessary, set the color and flag fields appropriately.
- 5. Accept the form. Failure to accept the form will result in the data not being saved.
- 6. Set up a Driver Overtime Code. {Files > General Information > Driver Overtime}

Note: For more information, refer to "Driver Overtime Tables" on page 196.

 Add the Driver Overtime Code to the employee code record for each driver, as appropriate. {Files > General Information > Employees}

Scale Types

COMMANDseries can handle any scale interface by allowing the user to configure it using the Scale Types screen. In many cases, you will need to consult with the installer/manufactuerer of the scale to get some of the appropriate settings, or to configure the scale itself.

Individual scales are specified in the Plant editor.

To set up scale types:

1. In COMMANDaggregate, open the Scale Types screen. {Files > General Information > Scale Types}

🛅 Scale Types		_ 🗆 ×
Scale Type	2	
Interface Type Description Short	Truck Scale Cardinal Scale Cardinal	
Request String Format		
Sign Characters Motion Characters U.O.M. Characters Special Characters	Positive Negative Motion Still Received	- - -

Scale Types (EDTSCTY)

- 2. Enter a number to represent the type of scale in the Scale Type field.
- 3. Enter a long **Description** for the scale type.
- 4. Enter a **Short** description, which will be substituted in numerous fields to conserve screen space.
- 5. In the **Request String Format** field, enter the arming sequence code to be used for **on demand** output scales. On demand scales require a host system to **ask** for the weight data. A character or sequence of characters must be sent to the scale indicator before it will send back any weights. If the scale is configured for continual output (not recommended), no Request String Format is required.
- 6. In the **Input String** Format field, enter the mask used to define a packet of weight data being sent by the scale indicator to the host. Special codes must be used to define the weight string. Following is a list.

b – space	s – sign
c – CRC or checksum (ignored)	u – unit of measure
m – motion detection	w – weight

Note: Lowercase must be used for the six special characters listed above. Hard coded characters can also be used within the format definition. For example, a scale may send over **G** in position 11.

- 7. In the Sign Characters section, enter the characters that represent **Positive** and **Negative** weights.
- 8. In the Motion Characters section, enter the characters to be used in the scale reading when the scale is in Motion and when it is Still.

Note: The scale's configuration determines what is considered an "in motion" weight. Consult the manufactuere/installer for details.

 In the U.O.M. Characters section, enter the character(s) that should be placed in COMMANDaggregate' s scale reading to represent the unit of measure in the Received field.

- 10. In the second field, use the pull-down menu to select a unit of measure to decipher the first Received field.
- 11. On the **Special Characters** field, the **Bit** field, will display the bit that is used by some scales in lieu of the sign, motion, and UOM characters. It is a single character byte that represents settings for one or more of the fields.
- 12. Accept the Scale Types screen.

Next Numbers

The Next Numbers screen allows you to control the sequential numbering of specific records genereated by cOMMANDseries. Use the next numbers entries to generate numbering sequences for order codes, ticket codes, invoice codes, receipts codes, quote codes, etc.

Order and ticket next numbers are determined by the sequence code assigned to a plant record. For orders, the pricing plant assigned to the order is used to determine the next number sequence code. For tickets, the shipping plant assigned to the ticket is used. More than one plant can be assigned the same next number sequence code so that they would share in a single sequential assignment of numbers.

Quote next numbers are determined by the next sequence code assigned in the Next Quote Code Sequence Code field on the **Quotes** tab of the Configuration screen. {Files > General Information > Configuration>Quotes}

Invoice next numbers are determined by the sequence code assigned to an accounting category (if such is in use) or a plant record. If using accounting categories, credit memos, and debit memos generated through the invoicing process, an independent sequence code can be used to determine the next number. The accounting category used would be the one assigned to the project (if any) or the customer for which the invoice is generated. The plant used would be the first pricing plant encountered for the invoice being generated. If you want the orders, tickets, and invoice numbers to indicate the plant for which each was generated, you could assign a unique sequence code to each plant. The sequence could start with the plant number, and be large enough to support an appropriate range of numbers for each document. To employ this concept, the starting codes to set up for plant 12 would be as follows.

Orders – 1200 (Starts over each day, and allow for 100 orders for that plant)

Tickets – 12000000 (Continues to increment and would support 1 million ticket numbers for that plant)

Invoices – 120000 (Continues to increment and would support 9,999 invoice numbers for that plant)

Note: Quote sequences are not set up by plant.

To add or create a next number setting:

 Go to the Next Numbers screen. {Files > General Information > Next Numbers}

🛅 Next Numbers			_ 🗆 X	
Order Sequence 1 Orders	Short ORDERS	Begin At 1	¥ ▼	
Ticket Sequence 2 Plant 2 3 Plant 3	Short 2 3	Begin At Next End At 200000 200000 299999 ✓ Perpetual 300000 300000 399999 ✓ Perpetual	+ + • •	
Invoice, DM & CM, Receipts Sequence 1 Invoices 3 Credit or Debit Memo	Short INVOICE CM	Begin At 1000000 [88000000	+ + • •	
Quote Sequence	Short QUOTES	Begin At Next Next 1 8	ب ۲	
Project Sequence	Short 1	Begin At Next	∓ ×	
		A/R Batch No Begin At 1		

Next Numbers (EDTNEXT)

- 2. Enter a **Code** to identify this numeric sequence for orders, tickets, invoices, or quotes. This is the first field on the row, if the sequence if plant-specific, use the plant code.
- 3. Enter a **Description** for the sequence in the field next to the Code.
- 4. Enter a short description in the **Short** field.
- 5. The entry in the **Begin At** field depends on the sequence type.
 - For the **Order Sequence**, enter a number for the first order of each day.
 - Enter the beginning ticket code in the range of valid ticket codes for this particular **Ticket Sequence**.
 - Enter the beginning invoice code in the range of valid invoice codes for this particular Invoice, DM & CM Sequence.
 - For the **Quote Sequence**, enter a number for the beginning quote in the sequence.
- 6. In the Ticket Sequence's **Next** field, enter the next ticket code to use for plants using this next number sequence code. This number must be equal to or greater than the number in the Sequence Begin At field, and equal to or less than the number in the End At field. This field indicates that the assignment of ticket codes can start over with the value in the Begin At field when the value in the End At field has been reached.

- 7. In the Ticket Sequence's **End At** field, enter the ending ticket code in the range of valid codes for this particular next number sequence code.
- 8. Mark the **Perpetual** checkbox if necessary. When marked, this checkbox causes the ticket number to roll back to the number specified in the Begin At field if it reaches and passes the number in the End At field.
- 9. If desired, you can create a Project numbering sequence. The sequence will be used to number projects created through COMMANDquote, and projects that do not have a code manually entered.
- 10. This field allows the user to begin A/R batches with a number other than one. If the field is blank, the A/R sequence begins with 1. This feature is used in situations in which multiple COMMANDseries systems are replicating A/R batches to a central location. Giving each location a different range prevents the A/R record of one system from overwriting the A/R record from another system.

Note: A/R batch numbers will reset at the beginning of each day.

11. Accept the Next Numbers screen.

Document Tags

When you print an invoice or perform an export or import, there must be some sort of mechanism to extract specific information from the database. The initial component of this mechanism is a document tag.

A document tag is, essentially, a shortcut to information in the database. By placing a tag in a document format, you instruct COMMANDseries to insert the data defined by the document tag, using the layout defined by the document format. A basic document such as a delivery ticket is created by means of a document format containing the required document tags.



Document Tag	Description	Source	Field
DATLAB	Ticket Date	Current Date	n/a
CUSNAM	Customer Name	ORDR	CUST_NAME
DELVQY	Delivered Quantity	TKTL	ORDER_DELV_QTY
DELUAB	Delv Qty UOM Abbreviation	UOMS	DELV_QTY_UOM

COMMANDseries comes with an extensive set of document tags. Most users will be able to address their needs with this initial tag set. However, new tags can be created for certain functions. There are two features of the document tag that you must understand prior to creating a new tag (Document Type and Tag Type):

Document Type -- allows you to group tags by function. Any given group type, such as Statement Print or Item Data I/O, can directly access a specific set of tables. An Order Print tag, for example, can access order-related tables, but cannot access customer balances.

A tag can only be used in document formats with the same document type. Consequently, you will see duplication of tags between document types. Every document type contains a current date tag (DATLAB).

Tag Type -- determines how the tag will access data. The four tag types are:

- **Field** The tag will access a specific field in one of the tables associated with the selected Document Type. The Ticket Print tag CUSNAM, for example, prints the Customer Name from the Ticket table (TICK).
- **Lookup** In some cases, the needed information is not in an available table. For a ticket-level tag, for instance, the Customer's Tax ID code is not contained in the Order table (ORDR). However, the Order table itself contains a reference to the Customer file (CUST), which contains the Tax ID. For links that are one link from a specific table, use a Lookup tag.
- **Calculation** A Calculation tag can be one of two things:

A straightforward calculation - COD Amount, Invoice Total, etc. An advanced reference tag - In some cases, you need to link to data that is greater than one table link from the primary table (the data is in a table that is referenced by a table that is referenced by a table that is available in the selected Document Type). A Calculation tag is needed for such links.

• **Code List** - A different form of an advanced reference tag. For example, in the Order file, the Order Type entry is 1, 2, 3, etc. The number corresponds to a description of the specified Order Type. The Code List tag allows you to pull the description of the Order Type ("Charge Order", for example).

Document Tag Setup

You can create Field and Lookup tags for any data in/out function except **Order Print & Data In/Out**. Calculation and Code List tags can only be created by Command Alkon.

To enter a field document tag:

 Go to the Document Tags screen. {Files > General Information > Documents > Document Tags}

Document Tags (EDTDOCT-field)

🛅 Docume	nt Tags				_ 🗆
Document Type Tag	Ticket Print & Data In/Out CUSNAM				
Tag Des CUSNAM Cus	cription Tag Type	File ORDR 💌	Field Name CUST_NAME	T	Setup 🛃

- 2. Select a **Document Type** from the field's list. This setting determines how the tag will be used--Statement Print, Invoice Print, etc.
- 3. In the **Tag** field, enter a six-character alphanumeric code. When you tab, the system lists all tags associated with the specified Document Type.
- 4. Enter a **Description** for the tag.
- 5. Select **Field** as the **Tag Type**.
- 6. Select the **File** from which you want to pull data. The drop-down list will display all files (tables) available to the specified Document Type.
- 7. Select the **Field Name** that corresponds to that data that the tag will represent. The drop-down list displays a list of fields contained in the selected File.

Note: If the **File** and Field Name fields do not appear, then you have selected a Document Type for which you cannot create new tags.

8. Click the **Setup** button to further define the document tag. The Document Field Tag Setup screen displays.



- 9. If the field has occurrences for each product line (for example, the Customer file contains separate Discount Terms for concrete and aggregate), select **Multi-occurrence Field** to ensure that the program determines the applicable product line before retrieving the field value.
- 10. If the field will be used for sorting results (such as Customer Codes), select **Key Formatted Value** to ensure proper sorting. Key Formatted Values are formatted as follows:
 - Numeric values will be right-justified unless the value contains leading zeros.
 - Alphanumeric values and numeric values with leading zeroes will be left-justified.
- 11. Accept the Document Field Tag Setup and the Document Tags screens.

To enter a lookup document tag:

1. Go to the Document Tags screen. {Files > General Information > Documents > Document Tags}

Document Tags (EDTDOCT-lookup)

🛅 Docume	nt Tags			
Document Type Tag	Ticket Print & Data In CUSTID	'Out		
Tag Des CUSTID Cus	cription Tag tomer Tax ID Loo	ype File u - ORDR -	Field Name	Setup 🛃

- 2. Select a **Document Type** from the field's list. This setting determines how the tag will be used--Statement Print, Invoice Print, etc.
- 3. In the **Tag** field, enter a six-character alphanumeric tag. If you tab, the system lists all tags associated with the specified Document Type.
- 4. Enter a **Description** for the tag.
- 5. Select **Lookup** as the **Tag Type**.
- 6. Select the **File** from which you want to pull data. The drop-down list will display all files (tables) available to the specified Document Type.

Note: If the File field does not appear, then you have selected a Document Type for which you cannot create new tags.

7. Click the **Setup** button to further define the document tag. The Document Field Tag Setup screen displays.

Document Field Tag Setup (EDTDOCT2)

🛅 Docume	nt Lookup Tag Setup (CUSTID)	×
From File	ORDR	
To File	CUST - Customer File	•
Field Name	TAX_ID_CODE	•
🔲 Multi-occurre	ence Field	
From Field	To Field	
CUST_CODE	CUST_CODE	▼ ↓ ▲

- 8. The **From File** field will display the file selected on the previous screen.
- 9. The **To File** field lists all files available to the From File. Select the File you want to access.
- 10. The **Field Name** specifies a field from the To File.
- 11. If the field has occurrences for each product line (for example, the Customer file contains separate Discount Terms for concrete and aggregate), select **Multi-occurrence Field** to ensure that the program determines the applicable product line before retrieving the field value.

- 12. When extracting data from a secondary table, you must specify how the system should select a given record within that table. The **From Field** specifies what primary key to use in the From File when looking up the data. The **To Field** specifies the corresponding field in the To File.
- 13. Accept the Document Field Tag Setup and the Document Tags screens.

Document Formats

Document formats specify page layouts for forms (i.e. tickets, orders, invoices, statements, and quotes) that are printed with COMMANDseries applications. Also, document formats are used to identify record layouts for data out files created by the COMMANDseries applications for exporting information to an external application and for data in files created by an external system for importing into the COMMANDseries application. Your Command Alkon Representative currently designs document formats.

Document format codes are assigned to records on the following screens for the indicated use.

Topics in this section:

Tickets (plant copy and dispatch copy) Data Out and Data In Invoices, Statements, Quotes Entering Document Formats Adjusting Formats Using the Display Screen Adjusting Formats Using the Document Fields Screen Mask Characters

Tickets (plant copy and dispatch copy)

Plant Communication Setup {Files > Plant & Delivery Information > Plants > Communication > Setup}

Orders {Dispatch > Orders}

Plant Communication Setup {Files > Plant & Delivery Information > Plants > Communication > Setup}

User Order Printer Setup {Files > System Information > Users > Order Printers > Setup}

Data Out and Data In

Data Out

Order Data Out {Invoicing > Order Data Out} Ticket Data Out {Invoicing > Ticket Data Out} Master File Data Out {Files > Master File Data Out} G/L Distribution Data Out {COMMANDreceivables Manage > Application Management > G/L Distribution Data Out}

Data In

Orders & Tickets Data In {Invoicing > Order & Ticket Data In}

Invoices, Statements, Quotes

Document Format Groups {Files > General Information > Document Format Groups}

Entering Document Formats

Before entering document formats information, gather information about the way you want tickets, orders, invoices, statements, and quotes to look. Also determine if you will be importing or exporting any information to other systems for processing.

To enter document formats:

 Go to the Document Format screen. {Files > General Information > Documents > Document Formats}

🛅 Document Formats		
Document Format	CDIAGGOR	
Description Short Document Type	Command Aggregate Order Form CDIAGGOR Order Print & Data In/Out	Display List
Print Method Bottom of Form	Standard C Stand	

Document Formats (EDTDOCS)

- 2. In the **Document Format** field, enter a code for the name of the document format you wish to create.
- 3. Enter a **Description** and a **Short** description for the document format.
- 4. Select the **Document Type** from the field's list.
- 5. From the **Print Method** field's list, select Standard or Overstrike. Standard is the typical configuration; Overstrike is used to print forms with multiple passes, such as Thai characters.
- 6. The Bottom of Form field allows you to use printers that may or may not support form feeds. Enter the number of blank lines that should be inserted in between each form. Entering zero (0) will indicate that the form will be ejected from the printer using a form feed (<FF>). Entering 1 or more specifies that the form will be ejected by sending it the number of ASCII line feed (<LF>) characters you have specified in this field.
- 7. Select the **Display** button or the List button to adjust the form's appearance and/or content.

Adjusting Formats Using the Display Screen

There are two ways to adjust the appearance and content of document formats: through the Display screen or through the Document Fields screen. The Display screen allows you to adjust the form's appearance in a what-you-see-is-what-you-get (WYSIWYG) mode by granting the ability to click and drag fields to the desired location.

To adjust document formats through the Display screen:

Click on the **Display** button from the Document Formats screen. {Files
 > General Information > Documents > Document Formats > Display}

COMMAND Aggregate Order Form					
🚃 Command Aggreg	ate Order Form	<u> </u>			
************	*********************************	***************************************			
	COMMAND CONCRETE	ORDER FORM			
CUSTOMER NAME: DELIVERY ADDRESS: ORDERED BY: PHONE NUMBER:		ORDER DATE: MM-DD-YY PROJECT CODE: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			
SCHEDULED PLANT: TIME DUE ON JOB: TRAVEL TIME: TRUCK SPACING:	## HH:NN XXXX XXXX				
QUANTITY XXXX.XX XX XXXX.XX XX XXXX.XX XX XXXX.XX XX XXXX.XX XX	PRODUCT_CODE PRO XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	DUCT DESCRIPTION			
INSTRUCTIONS: XXX XXX XXX	*****				

2. Place the cursor over a field you wish to move.

Note: From the Display screen, you can toggle between Tag display and Masks display. Click the mouse's right button and select Display Tags/Masks to toggle modes.

- 3. Click and hold the left mouse button while dragging the field to the desired location.
 - **Note:** The form's title bar displays the name of the form as well as the coordinates of the last field clicked by the mouse. The coordinates are displayed in rows-to-columns format (rows:columns).
- 4. Double-click on a field to define its formatting characteristics.
- 5. When finished with adjustments, exit from the Display screen.

Adjusting Formats Using the Document Fields Screen

A complete listing of all fields and their characteristics is available on the Document Fields screen. This screen can be used to adjust the field's attributes in greater detail than the Display function.

To adjust document formats using the Document Format Fields screen:

 Click on the List button from the Document Format screen to display the Document Fields screen {Files > General Information > Documents > Document Formats > List}. The Document Fields screen displays.

	Document Fields (EDTDOCS2)						
🛅 Do	cument Fie	lds					×
Line 1 3 5 5 5 6 6 6	Field Type Literal Literal Field Literal Field Literal Field	Name COMMAND CONCRETE ORDER I CUSTOMER NAME: Customer Name ORDER DATE: Order Date DELIVERY ADDRESS: Delivery Address	Jcc.	Begin At 1 31 1 1 19 54 68 1 19 19	End At 95 57 14 43 64 75 50 50	Detail Detail Detail Detail Detail Detail Detail Detail	

- 2. In the **Line** field, enter the physical row number on which the field is to be printed for the form or section. If document format is for data out, the line number represents a record.
 - **Note:** To determine the actual row or column numbers, click the **Display** button on the Document Formats screen. The title bar at the top of the Display screen shows the coordinates in parentheses. These coordinates will automatically change as you click and drag fields around the screen to reveal the location.
- 3. Enter the field's coordinates in the **Begin At** and **End At** fields.
- 4. Click on the **Detail** button to go to the Document Format Field screen.

Document Format Field	(EDTDOCS1)
-----------------------	------------

🛅 Document Format	ield	x
Line Field Type	1 Literal	
Attributes	1 On Credit Memo Invoice Only 2	[
Begin At End At Mask or Literal Text Left Justify Value on	1 95 • ************************************]

The Line field value comes from the Document Formats screen Line field.

5. From the **Field Type** field's list, select one of the following:

Field – the field as one that changes value according to the tag associated with it.

Literal – the field as one that includes the same literal text each time, as designated in the Mask or Literal Text field.

- 6. If you selected Literal, skip to step 8 of this procedure. If you selected Field, select a name from the **Name** field's pull-down menu. This menu lists all variable field content options.
- 7. Enter the number of Occurrences, Sub Occurrences, and Sub Sub Occurrences. These numbers represent the specific occurrence and sub occurrence to appear in the current field. For example, if you selected Product Code from the Name field's list and entered 3 in the Occurrence field, the value of the third product code listed would display in the document format. Sub Occurrences are typically used for associated products and user-defined fields; Sub Sub Occurrences are typically used for user-defined fields on an item.
- 8. Define new document tags associated with this field, if necessary, on the Document Tags screen (accessible through the **Tags** button).
- 9. From the **Attributes** field's pull-down menu, select the field's attributes. The field information will only print if the attribute exists.
- 10. Change the values in the **Begin At** and **End At** fields if necessary. The values for these fields default from the Begin At and End At fields of the Document Formats screen.
- 11. Enter the field's **Mask** or **Literal Text**. A mask string may need to be entered here if the option selected in the **Name** field involves dates; literal text should be entered if the field type selected was **Literal**.

Note: Use the **Zoom** button if the entire text does not display.

- 12. Mark the **Left Justify Value on Display** checkbox if you want the value of the field to be left justified when printing key fields to a table, i.e. customer codes, project codes, and product codes.
- 13. Accept the Document Format Field, Document Fields, and Document Formats screens.

Mask Characters

The mask characters that can be used in document formats are as follows.

Mask Characte r	Field Type	Meaning, Use
#, N, 9	Numeric	Represents a numeric value. Decimal places are zero- filled; insignificant places are space filled.
%	Numeric	Represents a numeric value. All zeros are suppressed.
Z	Numeric	Represents a numeric value. Non-significant places are zero-filled.
*	Numeric	Represents a number value. Non-significant places are asterisk-filled. This would be used for example when printing an amount on a check and filling the left-most characters with asterisks.
\$	Numeric	Prints a US currency symbol in a fixed position, based on the mask (i.e. 123456.78 using a mask of "\$#,###,###.##" would result in "\$123,456.78").
\$\$	Numeric	Prints a US currency symbol in a floating position to the left of the last significant digit printed within the mask (i.e. 123456.78 using a mask of "\$\$#,###,###.##" would result in " \$123,456.78").
, and .	Numeric	Represents the thousands and decimal point separators. The comma is used as the thousands separator, and the period as the decimal separator regardless of the characters specified by the currency in use as assigned in the Configuration file.
t, p	Numeric	Represents the thousands and decimal point separators, as dictated by the currency in use as assigned in the Configuration file. For example, using a US currency code, a comma would be the thousand separator and a period would be the decimal separator.

- *n Numeric When at the end of a numeric mask and "n" is a number, multiplies the numeric field times "n," and applies the mask to the resulting product. This would be used when a number with decimal places must be printed or stored in a file with an implied decimal point (i.e. 123456.78 using a mask of "##########*100" would result in "12345678").
- MMDateRepresents the month portion of a date field,
expressed numerically.
- **DD** Date Represents the day portion of the date field, expressed numerically.
- **YY, YYYY** Date Represents the year portion of a date field, expressed numerically. "YY" uses the last two digits of the year while "YYYY" uses the century format.
 - **HH** Time Represents the hour portion of a time field in military format.
 - **NN** Date Represents the minute portion of a time field.
 - [x:y] Characte Indicates that only a portion of the character field r should be included. Where "x" and "y" are numbers, start at position "x" in the string and include "y" characters (i.e. COMMANDseries – using a mask "[1:7]" would result in "COMMAND").
 - [x,y] Characte Indicates that only a portion of the character field r should be included. Start at number "x" in the string and include through number "y" (i.e. COMMANDseries - using a mask "[8,6}" would result in "series").
- Note: If a data value is too big for the mask, for example, with 12345.678375, the form field overflows and the mask is printed out as a pound sign, #, followed by as much of the field as it can put in the mask. Using the sample mask, this case would be #12.34.

Document Format Groups

The Document Format Group Codes screen allows access to the document format groups that identify the individual document formats created with the Document Formats screen that make up invoices, statements, and quotes. {Files > General Information > Documents > Document Formats} These forms, in contrast to orders and tickets, are comprised of various sections (i.e. headers, detail lines, footers, etc.).

When utilizing the Accounting Category screen, you can specify the desired document format group for invoices, debit memos, and credit memos. Accounting categories specify a code that groups customers/projects together for invoice creation, assigning invoice document formats, assigning invoice number ranges, accounting for customer/project activity

generated by invoicing and accounts receivable, and reporting purposes. Document format group codes can also be used for the creation of quote documents.

Topics in this section:

Document Format Group Setup Invoice Format Codes Setup Statement Format Codes Setup Project Quote Format Codes Setup Receipt Format Codes Setup Invoice Out Format Codes Setup Ticket Overflow Format Codes Setup File Import/Export Format Codes Setup

Document Format Group Setup

Before entering document format groups information, gather information about the formats of your invoices, statements, and quotes.

To enter document format groups:

1. Go to the Document Format Group Codes screen. {Files > General Information > Documents > Documents Format Groups}

	nt Fo	rmat Group Lodes				
Code		Description	Short	Document Format Group Type		
1	٩	INVOICE	INV	Invoice 🔹	Formats	₽
2	٩	STATEMENT	STMT	Statement	Formats	₽
3	9	QUOTE	QUOTE	Quote 🔹	Formats	₽
FCINVC	9	Finance Charge Invoice	FCInvc	Invoice 🔹	Formats	린
INVCF012	9	Standard Invoice-Form-12 pi	StInFo12	Invoice 🔹	Formats	린
INVCNF12	9	Standard Invoice-New Form-12cpi	StInNf12	Invoice 🔹	Formats	린
INVCPL17	9	Standard Invoice-Plain-17 pitch	StInPI17	Invoice 💽	Formats	크
QUOTE	٩	Standard Project Quote	Quote	Quote 💌	Formats	₽

Document Format Group Codes (EDTDOCG)

- 2. Click on the **Add Occurrence** button to insert a new code.
- 3. Enter a document format code in the **Code** field.
- 4. Enter a **Description** and a **Short** description.
- 5. Select a **Document Format Group Type** from the field's list.
- 6. Click on the **Formats** button to format the codes. See the next section, **Invoice Format Codes Setup**.
- 7. Accept the screen to save document format group information.

Invoice Format Codes Setup

This screen is used to specify codes for the elements of the invoice document formats. Each of the elements must already be defined on the Document Format Fields screen function. {Files > General Information > Documents > Document Format Groups > Formats}

When setting up a format, consider the type of printer, the size of the type style (font), and the length of the form on which the statement will be printed to ensure that all desired information will fit in the space allowed on the form.

The Document Format Group Type field on the Document Format Group Codes screen should display **Invoice**.

To set up invoice format codes:

 Select the **Formats** button on the Document Format Group Codes screen {Files > General Information > Documents > Document Format Groups > Formats}. The Invoice Format Codes screen displays.

Invoice Format Codes (EDTDOCG1)

🛅 Invoice Format Codes (1 INV(DICE)			×
Header Line Header Detail Line Line Footer Summary Ticket Header Summary Ticket Detail Message Lines Footer	 INF01201 INF01202 INF01203 INF01204 INF01205 INF01206 INF01207 INF01208 	Std Invoice Header-Form-12 pitch Std Invoice Detail Header-Form-12 j Std Invoice Detail Line-Form-12 pitch Std Invoice Detail Footer-Form-12 pitch Std Invoice Ticket Header-Form-12 pitch Std Invoice Ticket Detail-Form-12 pitch Std Invoice Message-Form-12 pitch Std Invoice Footer-Form-12 pitch	Display	
Number of lines in body of form	30			

2. Enter the document format codes for each desired field. The table below shows the available codes and suggestions for their content.

Header - The Header is the first element printed on the form and typically contains such information as descriptive title text (such as **Sales Invoice**), page number, customer account number, and date.

It may also contain column headers for the form's detail data. These column headers may include product code, product description, quantity price, and extended price.

Line Header - The Line Header contains information to appear directly below the Invoice Header.

Detail Line - The Detail Lines typically show the individual orders for the customer or product. The detail lines may include such information as product code, product description, quantity, price, and extended price. The Detail Lines are positioned directly below the Line Header.

Line Footer - The Line Footer typically shows the subtotals. It is positioned directly below the Detail Line.

Summary Ticket Header - This field contains a header for the display of the tickets that were shipped for a particular plant. It may contain such text as **Ticket numbers shipped for plant 12**. It is positioned directly below the Line Footer.

Summary Ticket Detail - This field contains detail for tickets that were shipped for a particular plant. The Summary Ticket Detail is positioned directly below the Summary Ticket Header.

Message Lines - This field contains user-defined text. This may be, for example, **Please note the price increase effective on dd-mm-yyyy**. The Message Lines are positioned directly below the Line Footer.

Footer - The footer typically contains totals information. It may show such information as total sales amount, total sales tax, and total quantity. The Footer is positioned directly below the Message Lines.

- 3. Enter the **Number** of lines in body of form.
- 4. View and adjust the form by clicking the **Display** button.
- 5. Accept the Invoice Format Codes and the Document Format Group Codes screens.

Statement Format Codes Setup

This screen is used to specify the elements (document formats) that make up the statement document being defined. Each of the elements must already be defined using the Document Formats screen. {Files > General Information > Documents > Document Format Groups > Formats}

When setting up a statement, consider the type of printer, the size of the type style (font), and the length of the form on which the statement will be printed to ensure that all desired information will fit in the space allowed on the statement.

The information shown in the various elements of the statement is dependent upon the user-defined setup of these documents in the Document Formats screen. The Document Format Group Type field on the Document Format Group Codes screen should display **Statement**.

To set up statement format codes:

 Select the Formats button on the Document Format Group Codes screen {Files > General Information > Documents > Document Format Groups > Formats}. The Statement Format Codes screen displays.

Statement Format Codes (EDTDOCG2)					
🛅 Statement Format Codes (2 9	STATEMENT)		×		
Header Line Header Detail Line Line Footer Message Lines Footer	 STF01201 STF01202 STF01203 STF01204 STF01205 STF01206 	Std Statement Header-Form-12 pitch Std Statement Detail Hdr-Form-12 j Std Statement Detail Line-Form-12 pitch Std Statement Detail Ftr-Form-12 pitch Std Statement Message-Form-12 pitch Std Statement Footer-Form-12 pitch	Display		
Number of lines in body of form	30				

tatement Format Codes (EDTDOCC2)

Enter the document format codes for each desired field. The table 2. below shows the available codes and suggestions for their content.

> **Header** - The Header typically contains descriptive title text, such as **Customer Statement**, page number, company name and address, customer account number, and statement date.

It may also hold column headers for statement detail data. These headers may include invoice number, transaction type, transaction date, transaction amount, sales tax, discount amount, transaction total, and transaction balance.

The Statement Header is the first element printed on the statement.

Line Header - The Line Header typically shows the project name with which the statement detail will be associated. It is positioned directly below the Header.

Detail Line - The Detail Lines typically show the individual transactions for a particular project. The transaction detail may include such information as invoice number, transaction type, transaction date, transaction amount, sales tax, discount amount, transaction total, and transaction balance. The Detail Lines are positioned directly below the Line Header.

Line Footer - The Line Footer typically shows the total transaction balance for each project. The Line Footer is positioned directly below the Detail Line.

Message Lines - This field contains any desired free form text. The Message Lines are positioned directly below the Line Footer.

Footer - The footer will likely contain totals information. It may show such information as current balance due, balances in the various aging categories and total balance due. The Footer is positioned directly below the Message Lines.

- Enter the **Number** of lines in body of form. 3.
- 4. View and adjust the form by clicking the **Display** button.
- 5. Accept the Statement Format Codes and the Document Format Group Codes screens.

Project Quote Format Codes Setup

This screen is used to specify the various elements (document formats) that make up a project quotation document being defined to the system. Each of the elements must already be defined using the Document Format screen. {Files > General Information > Documents > Document Format Groups > Formats}

When setting up a project quote, consider the type of printer, the size of the type style (font), and the length of the form on which the statement will be printed to ensure that all desired information will fit in the space allowed on the statement.

The information shown in the various elements of the quote is dependent upon the user-defined setup of these documents in the Document Formats screen. The Document Format Group Type field on the Document Format Group Codes screen should display **Quote**.

To set up quote format codes:

 Select the Formats button on the Document Format Group Codes screen {Files > General Information > Documents > Document Format Groups > Formats}. The Project Quote Format Codes screen displays.

Project Quote	Format Codes	(EDTDOCG3)
---------------	--------------	------------

Project Quote Format Codes (3 QUOTE)		
Header Detail Line Footer	 ▼ QUOTHDF Std Quote Header Format Displa ▼ QUOTDET Std Quote Detail Format ▼ QUOTFTR Std Quote Footer Format 	ay
Number of lines in body of form	30	

2. Enter the document format codes for each desired field. The table below shows the available codes and suggestions for their content.

Header - The Header of a quote is generally printed at the beginning of each page and typically consists of information such as the customer name and address.

Detail Line - The Detail Line of a quote is generally printed in between the Header and Footer for each page and typically consists of product information.

Footer - The Footer of a quote is generally printed at the end of each page and typically consists of information such as the totals or terms of the quote.

- 3. Enter the **Number** of lines in body of form.
- 4. View and adjust the form by clicking the **Display** button.
- 5. Accept the Project Quote Format Codes and the Document Format Group Codes screens.

Receipt Format Codes Setup

This screen is used to specify the various elements (document formats) that make up a receipt document. Each of the elements must already be defined using the Document Format screen. {Files > General Information > Documents > Document Format Groups > Formats}

When setting up a receipt, consider the type of printer, the size of the type style (font), and the length of the form on which the statement will be printed to ensure that all desired information will fit in the space allowed on the statement.

The information shown in the various elements of the receipt is dependent upon the user-defined setup of these documents in the Document Formats screen. The Document Format Group Type field on the Document Format Group Codes screen should display **Receipt**.

To set up receipt format codes:

 Select the Formats button on the Document Format Group Codes screen {Files > General Information > Documents > Document Format Groups > Formats}. The Receipt Quote Format Codes screen displays.

T C C C I					
🛅 Receipt Format Codes (REC	EIPT Command Data Receipt - 17 pitch)	×			
Header Detail Line Footer	CDIRCHDI CDI Receipt Header-F Display CDIRCDTI CDI Receipt Detail-F CDIRCFT1 CDI Receipt Footer-Plain-17 pitch				
Number of lines in body of form	25				

Receipt Format Codes (EDTDOCG4)

2. Enter the document format codes for each desired field. The table below shows the available codes and suggestions for their content.

Header - The Header of a receipt is generally printed at the beginning of each page and typically consists of information such as the customer name and address and date.

Detail Line - The Detail Line of a receipt is generally printed in between the Header and Footer for each page and typically consists of information about the sale such as purchase order, price, project code and product code.

Footer - The Footer of a receipt is generally printed at the end of each page and typically consists of information such as the total sale.

- 3. Enter the **Number** of lines in body of form.
- 4. View and adjust the form by clicking the **Display** button.
- 5. Accept the Receipt Format Codes and the Document Format Group Codes screens.

Invoice Out Format Codes Setup

This screen is used to specify the various elements (document formats) that make up an invoice out document. Each of the elements must already be defined using the Document Format screen. {Files > General Information > Documents > Document Format Groups > Formats}

When setting up an invoice out document, consider the type of printer, the size of the type style (font), and the length of the form on which the statement will be printed to ensure that all desired information will fit in the space allowed on the statement.

The information shown in the various elements of the invoice out document is dependent upon the user-defined setup of these documents in the Document Formats screen. The Document Format Group Type field on the Document Format Group Codes screen should display **Invoice Out**.

To set up invoice out format codes:

 Select the **Formats** button on the Document Format Group Codes screen {Files > General Information > Documents > Document Format Groups > Formats}. The Invoice Out Format Codes screen displays.

Invoice Out Format Codes (EDTDOC5G)

Ľ	Invoice Out Format Codes (INVCPL17 Standard Invoice-Plain-17 pitch)					×
	File Header File Detail Invoice Header File Detail Invoice Detail	•	INPL1701 INPL1702 INPL1703	Std Invoice Header-Plain-17 pitch Std Invoice Detail Header-Plain-17 pitch Std Invoice Detail Line-Plain-17 pitch	Display	

2. Enter the document format codes for each desired field.

Header - The Header of an invoice out document is generally printed at the beginning of each page and typically consists of information such as the customer name and address and date.

File Detail Invoice Header - The Fine Detail Invoice Header of an invoice out document is generally positioned directly below the Header of each page.

File Detail Invoice Detail - The Fine Detail Invoice Detail of an invoice out document is generally printed between the Header and Footer of each page and typically consists of information such as product category, price, project code, and product code.

- 3. View and adjust the form by clicking the **Display** button.
- 4. Accept the Invoice Out Format Codes and the Document Format Group Codes screens.

Ticket Overflow Format Codes Setup

This screen is used to specify the various elements (document formats) that make up a ticket overflow document. Each of the elements must

already be defined using the Document Format screen. {Files > General Information > Documents > Document Format Groups > Formats}

When setting up an invoice out document, consider the type of printer, the size of the type style (font), and the length of the form on which the statement will be printed to ensure that all desired information will fit in the space allowed on the statement.

The information shown in the various elements of the ticket overrun document is dependent upon the user-defined setup of these documents in the Document Formats screen. The Document Format Group Type field on the Document Format Group Codes screen should display **Ticket Overrun**.

To set up ticket overflow format codes:

 Select the Formats button on the Document Format Group Codes screen {Files > General Information > Documents > Document Format Groups > Formats}. The Ticket Overflow Format Codes screen displays.

Ticket Overflow Format Codes (STMTF012 Standard Statement-Form-12 pitch)				
Header Detail Line	▼ STF01201 Std Statement Header Display ▼ STF01202 Std Statement Detail I			
Number of lines in body of form	32			

Ticket Overflow Format Codes (EDTDOCG6)

2. Enter the document format codes for each desired field.

Header - The Header typically contains information such as descriptive title text like **Ticket Overflow** and page number. It is the first element printed on the statement.

Detail Line - The Detail Lines typically show the details of the overflow. These lines are positioned directly below the Header.

- 3. Enter the **Number** of lines in body of form.
- 4. View and adjust the form by clicking the **Display** button.
- 5. Accept the Ticket Overflow Format Codes and the Document Format Group Codes screens.

File Import/Export Format Codes Setup

This screen is used to specify the various elements (document formats) that make up a file import/export document. Each of the elements must already be defined using the Document Format screen. {Files > General Information > Documents > Document Format Groups > Formats}

When setting up an invoice out document, consider the type of printer, the size of the type style (font), and the length of the form on which the statement will be printed to ensure that all desired information will fit in the space allowed on the statement.

The information shown in the various elements of the file import/export document is dependent upon the user-defined setup of these documents in the Document Formats screen. The Document Format Group Type field on the Document Format Group Codes screen should display one of the following.

> Master File In Master File Out Order Out Ticket Out Order/Ticket In Mix Design In/Out Materials Mix Design In/Out

To set up file import/export format codes:

 Select the Formats button on the Document Format Group Codes screen {Files > General Information > Documents > Document Format Group Codes > Formats}. The File Import/Export Format Codes screen displays.



File Import/Export Format	Codes (STMTFO1	2 Standard Statement-	Form-12 pitch)	×
File Header Format File Detail Format	 ▼ STF01201 ▼ STF01202 	Std Statement Header Std Statement Detail I	Display	
Number of lines in body of form	32			

2. Enter the document format codes for each desired field.

File Header Format - The Header typically contains information such as descriptive title text like **Master File In**. It is the first element printed on the document.

File Detail Format - The Detail typically shows the details of the file import or export. These lines are positioned directly below the Header.

- 3. Indicate the **Number** of lines in body of form.
- 4. View and adjust the form by clicking the **Display** button.
- 5. Accept the File Import/Export Format Codes and the Document Format Group Codes screens.

Document Formatting

Records in the document format file control the formatting of all printed forms or data-out files.

Ticket/Order Data Out/Printing Formatting

The following comments relate to how the data can be formatted during the data out (which also applies when printing tickets and/or orders).

- String fields that contain only numeric characters can be formatted with a mask of number signs (#), as many as are needed for the largest number that might be stored in the field. Therefore, the specific length can be provided for, as opposed to the total length of the field.
- String fields that contain alpha/numeric characters can be formatted with the length of the largest number of characters that might be stored in the field, or just the number needed in the data out, as opposed to the total length of the field.
- Numeric fields can be formatted with a standard, adequate numeric mask (i.e. #########).
- Boolean fields can be formatted with a length of one (1); X is input if the field is true, and a space if it is false.
- Date fields can be formatted with a standard date mask (i.e. DD-MM-YYYY).
- Time fields can be formatted with a standard time mask (i.e. **HH:NN**).

Ticket Printing and Ticket Data Out Formatting Codes

A single document format record determines the print format for tickets generated in the COMMANDconcrete application. Multiple document formats can be maintained when individual and unique formatting is required for a single plant or for a group of plants. The ticket format can be designed for a pre-printed form or to print on plain paper. Document formats allow for two types of information to be printed.

Literal fields – text that remains constant on all forms printed.

Data fields – information from the appropriate data files that varies from one form to the next.

Since tickets do not continue onto multiple forms, all literal fields and data fields for the ticket are recorded on a single document format. A list of the data fields that can be used for formatting orders is stored in the document tags table and can be viewed through the screen's detail button.

Order Printing and Order Data Out Formatting Codes

A single document format record determines the print format for orders generated in the COMMANDconcrete application. Multiple document formats can be maintained when individual and unique formatting is required for a single plant or for a group of plants. The order format can be designed for a pre-printed form or to print on plain paper. Document formats allow for two types of information to be printed.

Literal fields – text that remains constant on all forms printed.

Data fields – information from the appropriate data files that varies from one form to the next.

Since orders do not continue onto multiple forms, all literal fields and data fields for the order are recorded on a single document format. A list of the data fields that can be used for formatting orders is stored in the document tags table and can be viewed through the screen's detail button.

GL Distribution Data Out Formatting Codes

The following table identifies the field codes to use when formatting data out records based on the GL distribution data file.

Field Name	Description
ACCLAB	Account Code
BATDAT	Batch Date
BATNUM	Batch Number
BATSEQ	Batch Sequence
CHKNUM	Check Number for Cash Receipt
CMPCOD	Company
CCCLAB	Cost Center
CUSLAB	Customer Code
DATLAB	System Date
INCRCT	

Message Text

The Message Text screen allows the user (with appropriate system security) to enter and edit message text. Message text is used to communicate information to customers using COMMANDreceivables statements and COMMANDinvoicing invoices. For example, a message text code can be established with the following text.

```
Our offices will be closed Thanksgiving Day and the following Friday. Have a nice Holiday!
```

This message could be selected during invoice runs and the text would print on each invoice. Also, statements can print messages based on the oldest balance on a customer's account. For example, a customer with a balance over 120 days old could have the following message printed on their statement.

```
Your account is overdue. Please contact our credit office immediately!
```

The general message text to be printed on every order, invoice, or statement is selected during the actual preparation of each form in the Print Invoices screen in COMMANDinvoicing {Invoicing > Print Invoices}, in the Statements screen in COMMANDreceivables {Reports > Statements} and on the Edit Orders & Tickets screen in COMMANDconcrete {Options > Edit Orders & Tickets}. Aging related statement messages are assigned to aging categories in the Receivables Statement Configuration screen {Files > General Information > Configuration > Receivables > Statements}.

Message Text Setup

To enter message text:

 Go to the Message Text screen. {Files > General Information > Message Text}

🛅 Mes	sage Text				_	□×
Code	Туре			Text		
1	AR/Invoicing	-	٩	Thank you for using Command Data concrete. Call on us for any of your construction ne	₽	
2	Orders	-	٩	Thanks for your order !!!!! (MSG #1)	₽	
3	Any	-	٩	Your not full of bricks, you ordered the right mix!!!	₽	
888	AR	-	9	This is a test of the emergency message text system.	₽	
AGI1	AR	-	٩	Thank you for doing your business with Command Data Concrete. Call on us for all of you	₽	
AGI2	AR	•	٩	Thank you for using Command Data Concrete. You may call our office for any questions	늰	
AGI3	AR	-	٩	Thank you for using Command Data Concrete. Your account has past due charges that	₽	
AGI4	AR	-	٩	Your account is seriously overdue. Please call or come by our office as soon as possible	₽	•

Message Text (EDTMTXT)

- 2. Enter a message **Code**. This code identifies each message text and is used to select a message to be printed on customer forms.
- 3. Select the **Type** of message from the list of valid options.

AR – the message text is available to print on statements

Invoicing – the message text is available to print on invoices **AR/Invoicing** – the message text is available to print on statements and invoices

Orders – the message text is available to print on orders and tickets.

Any – the message text is available to print on all of the above

- 4. Enter the message **Text**. This field represents the message text that is printed on a customer form when the associated message code is selected. Multiple lines may be entered. The message automatically auto wraps the message text unless the user defines each line break by pressing <Enter>.
- 5. Accept the Message Text screen.

Initial Accounting Information

The following section addresses entry of basic accounting and sales tax information. By entering this information, you are, in effect, laying the foundation for your company's accounting operations.

Topics in this section:

Inventory Accounting Periods A/R Accounting Periods G/L Accounting Periods Bank Codes Adjustment Codes Tax Authorities Tax Authority/Locations Tax Codes Credit Codes Terms Codes Accounting Categories Sales Analysis Codes

Inventory Accounting Periods

The Inventory Accounting Periods function allows you to establish beginning and ending dates for inventory periods within an accounting year. These dates control the accounting periods for inventory activity only. While the Inventory Accounting Periods look and function similar to A/R Accounting Periods, the two are completely distinct items.

To set up inventory accounting periods:

 In COMMANDinventory, go to the Inventory Accounting Periods screen. {Files > General Information > Inventory Accounting Periods}
Inventory Accounting Periods (EDTIVPD)

📱 Inventory Acco	unting Periods			
Accounting Year	2005			
Number of Periods	12 븆			
Period Dates				
Start Date D1-Jan-2005 D1-Feb-2005 D1-Mar-2005 D1-Apr-2005 D1-May-2005 D1-Jun-2005 Defaults	End Date 31.Jan-2005 28.Feb-2005 31.Mar-2005 30.Apr-2005 31.May-2005 30.Jun-2005	 Open Open Open Open Open Open Open Open 	Start Date En Image: D1-Jul-2005 Image: D1-Aug-2005 Image: D1-Aug-2005 Image: D1-Sep-2005 Image: D1-Oct-2005 Image: D1-Oct-2005 Image: D1-Nov-2005 Image: D1-Nov-2005 Image: D1-Dec-2005 Image: D1-De	d Date Jul-2005 ♥ Open Aug-2005 ♥ Open Sep-2005 ♥ Open Oct-2005 ♥ Open Nov-2005 ♥ Open Dec-2005 ♥ Open

- 2. Enter the **Accounting Year** for which you are establishing accounting periods.
- 3. Enter the **Number of Periods**. A number of fields corresponding to that number of periods will open in the Period Dates section of the screen.
- Enter a Start Date and End Date for each accounting period. To designate a period as open (currently able to accept transactions), mark the Open checkbox beside that period.
 - **Note:** To create accounting periods that correspond to the months of the year, select the **Defaults** button. This also marks every period in the new year as open.
- 5. Accept the Inventory Accounting Periods screen.

A/R Accounting Periods

The A/R Accounting Periods function allows users to establish the beginning and ending dates for accounting periods within an accounting year.

Accounting Periods are used to determine if a period is **open** for transaction entry. When a period is **closed**, no further transactions can be made for dates within the period. Also, the periods define how data is collected and updated in the Customer History Table.

To set accounting periods within a year:

- Open the A/R Accounting Periods screen. {Files > General Information > A/R Accounting Periods}
- 2. In the **Accounting Year** field, enter the year for which you want to create accounting periods.

A/R Accounting Periods (EDTARPD)

🚡 A/R Accounting) Periods				
Accounting Year	2005				
Number of Periods	12 븆				
Period Dates					
Start Date 01-Jan-2005 01-Feb-2005 01-Mar-2005 01-Apr-2005 01-May-2005 01-Jun-2005 Defaults	End Date 31.Jan-2005 28-Feb-2005 31-Mar-2005 30-Apr-2005 31-May-2005 30.Jun-2005	 Open Open Open Open Open Open Open 	Start Date Image: Display start Image: Display start	End Date 31-Jul-2005 31-Aug-2005 30-Sep-2005 31-Oct-2005 30-Nov-2005 31-Dec-2005	 Open Open Open Open Open Open Open

- Enter the number of accounting periods you want for the specified accounting year in the Number of Periods field. That number of Period Dates fields opens below.
- 4. Enter a start date and end date in the corresponding fields for each accounting period.
 - **Note**: Select the **Defaults** button to automatically establish twelve accounting periods that correspond to the months of the year. The default setting marks all periods as open.
- 5. If an accounting period is open, mark the **Period Open** checkbox beside it. This allows entry of transactions in for that period. If the checkbox is not marked, that period is considered closed, and COMMANDseries will not accept any new transactions dated within that period.
- 6. After setting accounting periods for the year, accept the screen.

G/L Accounting Periods

The G/L Accounting Periods function allows the user to establish beginning and ending dates for general ledger accounting periods within an accounting year. These dates control the accounting periods for G/L activity only.

COMMANDseries does not currently have a G/L package. This function is provided for legacy users of COMMANDfinancials, which is no longer available.

To set up G/L accounting periods:

In COMMANDreceivables, go to the G/L Accounting Periods screen. {Files
 > General Information > G/L Accounting Periods}

	G/L Accou	nting Periods (EDTGLPI	D)	
G/L Accounting Period	ds			
Company Accounting Year	01 Command 2001	Concrete		
Number of Periods	12 🔄 Budgets O	lpen 🗖 1 🗖 2	– 3	
Period Dates Start Date	ind Date	Start Date Open Open Open Open Open Open Open Ope	End Date	Open Open Open Open Open Open Open Open Open

- 2. Enter the **Company** code that represents the company to which the accounting periods apply.
- 3. Enter the **Accounting Year** for which you are establishing accounting periods.
- 4. Enter the **Number of Periods**. A number of fields corresponding to that number of periods will open in the Period Dates section of the screen.
- 5. In the **Budgets Open** field, select which of three possible budgets is open.
- 6. Enter a **Start Date** and **End Date** for each accounting period. To designate a period as open (currently able to accept transactions), mark the **Open** box beside that period.

Note: To create accounting periods that correspond to the months of the year, select the **Defaults** button. This also marks every period as open.

7. Accept the G/L Accounting Periods screen.

Bank Codes

The Bank Codes function allows a user to define the codes that represent the various banks used by your organization. Banks are assigned to Payment Transaction Batches, indicating the financial institution to which deposits are made. Bank Codes also define the G/L Booking Code for the deposit.

To set up bank codes:

 Open the Bank Codes screen. {Files > General Information > Bank Codes}

Bank Codes (EDTBKCD)

🛅 Bank Codes		
Bank Code	1	
Description Short Company	South Trust Account 1 S'trust1 I Command Concrete	
Federal Routing Number Bank Account Number	193-2993 829112	

- 2. Enter a **Bank Code** to identify the bank and account.
- 3. Enter a description for the bank in the **Description** field.
- 4. Enter an abbreviated description in the **Short** field.
- 5. If a specific company within your organization uses the bank, enter the **Company** code in this field. Click on the detail button associated with this field to select from a list of valid companies.
- 6. The **Federal Routing Number** field is used to specify the Bank's ID number.
- 7. Enter the **Bank Account Number**.
- 8. Accept the **Bank Codes** screen.

Adjustment Codes

The Adjustment Codes function allows a user to define the codes that represent the various types of A/R adjustments that your organization uses. Adjustment Codes are assigned to each A/R adjustment transaction. It defines the nature of the adjustment and the G/L Booking Code for the transaction.

To set up adjustment codes:

- Open the Adjustment Codes screen. { File > General Information > Adjustment Codes}
- 2. Enter an **Adjustment Code**. This code can be up to three alphanumeric characters.

Note: Use an abbreviation that is easy to recognize and remember. For example, **BDW** for Bad Debt Write-off, or **NSF** for Insufficient Funds.

Adjustment Codes (EDTAJCD)

🛅 Adjustment Codes	
Adjustment Code	OVC
Description Short	Overcharges OverChrg
 Write off Adjustment Prepayment Adjustment 	

- 3. Enter a **Description** of the Adjustment Code. Enter an abbreviated version of this description in the **Short** field.
- 4. Select the **Write off Adjustment** box if the code will be used for writeoff adjustments. The Adjustment Recap Report determines which adjustments are for write-off purposes based on this field.
- 5. Accept the Adjustment Codes screen.

Tax Authorities

Tax authorities represent the main groups of taxing entities (i.e. county, state, province, federal, etc). Up to five tax authorities can be maintained in the COMMANDseries applications. Tax authorities determine the base upon which tax is calculated (on taxable sales alone or including some other tax authority's tax), whether the taxation point is origination or destination based and whether there is reciprocity between the two.

Before entering tax authorities information, gather information about the taxing entities and laws applicable to your business. Remember that the tax authority order entered during setup determines the order taxes will be entered throughout the system.

People operating in multiple state should take care to ensure that taxing authorities are entered to accomodate all areas in which business is done.

To set up tax authorities:

1. Go to the Tax Authorities screen. {Files > Sales Tax Information > Tax Authorities}

Tax Authorities (EDTTAXA)

🛅 Тах	Authorities			_ 🗆 🗵
Code 1	Description State	Prompt STATE Point of Taxation	Tax Based on Taxable sales plus previous authorities' tax Destination 💽 🗹 Allow Reciprocation	ז א ש
2	City	CITY Point of Taxation	Taxable sales Destination Image: Allow Reciprocation	J J
3	County	CNTY Point of Taxation	Taxable sales plus previous authorities' tax Destination 💌 🗖 Allow Reciprocation	- -

- 2. Enter a **Code** to identify the tax authority.
- 3. Enter a **Description** for the tax authority.
- 4. Enter a **Short** description of the tax authority in the Prompt field.
- 5. In the **Tax Based on** field, indicate whether the tax is based on **Taxable** sales plus previous authorities' tax or **Taxable** sales.
- 6. Select whether the **Point of Taxation** is the **Origination**, which is the tax location of the plant, or **Destination**, which is the tax location of the site.
- 7. Mark the **Allow Reciprocation** checkbox if you want to allow reciprocal taxing. Reciprocal taxing means that if the point of taxation is non-taxable, the other location determines the tax authority/location.

Point of taxation	Is point of taxation taxable?	Taxes determined by tax authority/location of:
Origination	Yes	Origination
Destination	Yes	Destination
Origination	No	Destination if this checkbox is checked and destination point is taxable, otherwise not taxed
Destination	No	Origination if this checkbox is checked and origination point is taxable, otherwise not taxed

- 8. Click the Add Occurrence button to add another tax authority.
- 9. Accept this screen.

Tax Authority/Locations

The Tax Authority/Locations function allows access to location-specific tax authority information. Tax authority/locations represent specific entities for any given tax authority, i.e. State of Alabama, County of Jefferson, City of Birmingham, etc. Specific tax rates and other information controlling taxation are maintained at this level.

Tax authorities are maintained on the Tax Authorities screen. {Files > Sales Tax Information > Tax Authorities} They represent the main groups of taxing

entities (i.e. states, provinces, federal, etc.). Up to five tax authorities can be maintained in the COMMANDseries applications. Tax authorities determine the base upon which tax is calculated (on taxable sales alone or including some other tax authority's tax), whether the taxation point is origination- or destination-based, and whether there is reciprocity between the two.

Tax codes are maintained in the Tax Codes screen. {Files > Sales Tax Information >Tax Codes} They provide a single code associated with every possible taxation point. That is to say that one tax authority/location code, for each tax authority, is assigned to each tax code. Tax codes are assigned to plants (the origination taxation point) and to zones/projects/customers (the destination taxation point). The plant tax code is then assigned to a ticket record, while the zone/project/customer tax code is assigned to order records.

Before entering tax authority/locations information, gather information about locations within each tax authority to enter specific tax rates. For example, some states (and their related counties and cities) have a maximum tax rule. Such a rule states that taxes are applied on amounts up to a ceiling of taxable sales. The rules differ from state to state for calculating this total.

To set up tax authority/locations:

1. Select Files > Sales Tax Information > Tax Authority/Locations.

🛓 Tax Authority/Locations		_ 🗆 🗙
Tax Authority Tax Location	I STATE	
Description Short	Alabama AL	
Tax Calculation Tax Rate Maximum Taxable Amount Non Taxable Reason	Current Rate Effective Previous Rate 6.000 01-Jan-2000 5.500 5000.00 37 NTP	
Ready Mix Delivery Exemption Delivery Exempt Non Taxable Reason Exemption Type Exemption Rate	32 Delv Exm Dollar Amount 2.00 cu yds	

Tax Authorize / Locations (EDTTAXL)

- 2. Select a **Tax Authority** for the tax location. The tax authority is set up on the Tax Authorities screen.
- 3. Enter a **Tax Location** for the new tax location. The tax location code uniquely identifies each tax location for the specified tax authority. This code, combined with the tax authority, is used to access tax authority/

location information in other programs. It is also used to sort reports that contain tax authority-related information.

- 4. Enter a long **Description** and **Short** description for the tax location.
- 5. In the Tax Calculation section, enter a **Current Rate** (from 0.000 percent to 100.000 percent) for this tax location.

Note: If the Current Rate field is left blank or is set to 0.00, then a nontax reason code must be entered.

- 6. Enter an **Effective Date** to specify when this tax rate takes effect. If you are setting up a new tax authority, enter a t to set the effective date for today.
- 7. If desired, enter the tax's **Previous Rate**. (If the Current Rate is subsequently changes, that value will automatically transfer to the Previous Rate field.)
- Some states (and their related counties and cities) have a maximum tax rule. The rule states that taxes are applied on amounts up to a ceiling of taxable sales. If this rule applies in your area, enter the Max Tax Amount.

Note: This amount is assigned to individual tax authority/locations and is applied to orders (for CODs) and invoices (for non-CODs).

- 9. If a Max Tax Amount is entered, a **Non Taxable Reason** code field will appear. This field must be populated if a Max Tax is to be accepted by the system.
- 10. If the tax rate applies to all areas of the items including delivery, accept this screen. If not, set the location as exempt from delivery taxes.

To set a tax location as exempt from delivery taxes:

1. Mark the **Delivery Exempt** checkbox. If selected, this checkbox indicates that some portion of the taxable sales amount (related specifically to ready-mix concrete sold) may be considered non-taxable because it represents the portion of the price related to the delivery of the product. In this case, the Non-Taxable, Exemption Type and Exemption Rate fields specify why and how much of the delivery price is non-taxed.

Once the Delivery Exempt field is selected, additional fields will display.

- 2. Select a **Non-Taxable Reason** to define the tax exemption.
- 3. Select the **Exemption Type** (Dollar Amount or Percentage) for the tax exemption. If you are exempting the delivery charge from taxation, select Dollar Amount.
- 4. If the exemption type is **Dollar Amount**, enter the dollar amount to exempt from taxation per measured amount (the unit of measure should match the item).

If the exemption type is **Percentage**, enter the percentage of the charge to exempt from taxation.

5. Accept this screen.

Tax Codes

The tax code unites all of the tax locations and their related authorities and allows them to be applied, together, to sales amounts. Tax codes provide a single code associated with every possible taxation point.

Before entering tax code information, gather information about the combinations of tax authority/locations needed to handle your customers.

Note: If interfacing to a batch panel, numeric tax codes should be utilized; using alphanumeric codes may cause a problem in batching.

To define a tax code:

 Go to the Tax Codes screen. {Files > Sales Tax Information > Tax Codes}

🛅 Тах С	odes		
Tax Code		3	
Descriptio Short	'n	Jefferson County JEFFC0	
Tax A	Authority STATE	Tax Location	~ ~
2 3	CITY CNTY	0 Unincorporated - No Tax 1 Jefferson County	- - -

Tax Codes (EDTTAXC)

- 2. Enter a **Tax Code** to identify this tax configuration.
- 3. Enter a long **Description** and **Short** description for the tax code.
- 4. Select each **Tax Authority** and the appropriate related Tax Location for this tax code.
- 5. Repeat Step 4 for each tax authority that applies to the tax code you are defining.
- 6. Accept the Tax Code screen to save this tax code.

Note: Alter a current tax code by using the **Add Occurrence** button to add a new tax authority/location, or using the **Delete** button to delete a tax authority/location.

Each tax code must have an entry for each Tax Authority defined in the system. To account for areas in which no tax is charged for a specific authority, you will need to create zero-rate tax locations for each authority.

Credit Codes

Credit codes dictate how orders and tickets can be generated in the COMMANDseries applications. Credit codes are assigned to customers and projects to specify the current credit status for the customer or project. When orders are established and when the first ticket is generated for an order, the credit code for the customer or project is verified. A project credit code will override a customer credit code.

Any number of credit codes can be established and maintained in the system. The Credit Type field controls the nature of the credit code and the action taken regarding orders and tickets. Before entering credit code information, gather information about the types of credit statuses you will assign to your customers and projects.

Unless noted otherwise, the features listed below are available to all users. There are some features that are available only to those users licensed for Credit Checking.

To enter a new credit code:

1. In COMMANDconcrete or COMMANDaggregate, go to the Credit Codes screen. {Files > Customer & Project Information > Credit Codes}

📄 Credit Codes	
Credit Code	1
Description Short Credit Type	AAA Okay to sell AAA Okay Charge Only 💽 🗹 Display Credit Code Description
Exceed Limit Authorization Code Verify Credit Limits	******
Concrete Do not exceed ordered quantity in Require Project on All Orders	ticketing

Credit Codes (EDTCRED)

- 2. Enter a Credit Code to identify the new customer credit classification.
- 3. Enter a **Description** and **Short** description for the zone.
- 4. Select a **Credit Type** for the credit code. The possible are:

Cash only – only cash may be received from this customer **Charge only** – only charge orders are allowed for this customer **Charge or cash** – C.O.D. or charge orders may be taken for this customer

No sale – no orders of any kind can be taken for this customer. Tickets on existing cannot be generated

5. The **Display Credit Code Description** checkbox will be automatically checked if the Credit Type is anything but Charge Only. If, for some reason, you also want the Credit Code Description to display for Charge only customers, check this flag. When an order is created for a custoemr/project with this credit code, a dialog box will appear displaying the credit code description. It's highly unlikely that you will ever need to set this flag.

To check a customer's credit:

1. If you wish to continue to sell to customers with this credit code despite exceeding the credit limit, enter an **Exceed Authorization Code**. If an order is entered for a customer with this credit code, a dialog box will display in which an authorized credit officer can enter the authorization code.

Note: As with all passwords, the Credit Code editor encrypts the Exceed Authorization Code password. The system asks you to **Confirm** the password. Type in the password again and accept the screen.

When a new **Credit Code** is entered with an authorization code, it is also encrypted on the Data Maintenance screen when the Credit Table is retrieved. (The Exceed Authorization Code is known as the Credit Override Authorization on the Data Maintenance screen.) This ensures that only users with the proper authorization may access the Exceed Authorization Code.

🛅 Data Maintenance	(View of CUST/PROJ)		_ 🗆 🗙
Tables Views YCAT YCPC YCPC YCPC YCPC YCPJ YGOA YGOA YGOA YGOA YGOC YGTA YGTC YITR YITR YJSC YOPJ YOPJ YOPL YOPR YOPR YOPR YOPR YQU0 YOU YUU YUUU YUUU YUUU YUUU YUUU	#A Field 1 CUST_CODE 2 PROJ_CODE 3 NAME 4 PROJ_NAME 5 CUST_FREQ_CODE 6 PROJ_FREQ_CODE 7 CUST_COPIES 8 PROJ_COPIES	Key Type Current Value 1 String 10 2 String 40 String 40 String 2 Number 2 Number 2 Do	✓ ✓

Data Maintenance (DBAUFLD)

- If you have purchased the Credit Check module and would like to verify the credit limits for customers with this credit code, mark the Verify Credit Limits checkbox.
- 3. The product line field coordinates with the following **Do not exceed** and **Require Project** checkboxes. The field defaults to **Concrete**; set the product line as necessary, then proceed to the following checkboxes.
- Check the **Do not exceed ordered quantity in ticketing** checkbox to ensure the delivered quantity of product does not exceed the ordered/ ticketed quantity of product.
- 5. Check the **Require Project for all Orders** checkbox, if necessary.

- 6. To modify other product lines, change the product line field to the appropriate product and repeat steps 4 and 5 above.
- 7. Accept the screen to save this credit code and its related information.

Terms Codes

Terms codes dictate when invoices are due and the payment discount, if any, which can be given if payment is made by the discount date. Terms codes are assigned at the customer and project level. When orders and tickets for the customer or project are invoiced, the appropriate terms code is assigned to the invoice and the due date, discount amount, and discount date are calculated.

Any number of terms codes can be established and maintained in the system. The **Terms Type** field controls the nature of the terms code and the rules for calculating the dates and discount amount.

Before entering terms code information, gather information about the terms you assign to your customers for invoicing and statements.

Topics in this section:

Entering Terms Codes--Basic Definitions Entering Terms Codes--Examples

Entering Terms Codes--Basic Definitions

Enter descriptions and a type:

 Go to the Terms Codes screen. {Files > Customer & Project Information > Terms Codes}

🛅 Terms Codes		
Terms Code	1	
Description Short	Net 30 Days	
Short	INet 30	
Terms Type	Prox Per Unit	•

Terms Codes (EDTTRMS)

- 2. Enter an alphanumeric **Terms Code** to identify payment terms associated with this code.
- 3. Enter a **Description** and a **Short** description for the terms code. The short description will be used on reports in situations where there is insufficient room for the full description.
- 4. From the field's list, select a **Terms Type** for the new terms code. Valid options are:

Regular Percent – the invoice is due x number of days after the invoice date. Two discount percents are available.

Prox Percent – the invoice is due on a specific day of the month following the invoicing month. One discount percent is available on the specified due date.

Double Prox Percent - this is the same as Prox Percent, but there are two date ranges (i.e. for invoices dated 1st-15th, or 16th-31st).

Regular Per Unit - this is the same as **Regular Percent**, but two discount amounts (i.e. per yard, meter, ton, etc.), not percents, are available. These two terms calculate the due date and discount date as a number of days past the invoice date.

Prox Per Unit - this is the same as **Prox Percent**, but one discount amount (i.e. per yard, meter, ton, etc.), not percent, is available. These two terms calculate the discount date as a specific day of the month following the invoice month.

Double Prox Per Unit - this is the same as Double Prox Percent, but a discount amount, not a percent, is available.

NEOM Percent - Non End-of-Month (NEOM) Percent allows a prox term due date for non-end-of-the-month closing. This permits computing a due date for next month or the month after next, depending on the range 1 or 2 in which the invoice date falls. A discount percent is available.

NEOM Per Unit - Non End-of-Month (NEOM) Per Unit is the same as NEOM , but with a discount amount instead of percent.

Double Prox Percent, Double Prox Per Unit, NEOM Percent, and NEOM Per Unit all calculate two discount dates, based on the invoice date falling into two ranges. If the invoice date falls into the first date range, the discount date is set as a specific date in the same month as the invoice months. If the invoice date falls into the second date range, the discount date is set as a specific date in the month following the invoice month.

Entering Terms Codes--Examples

The following three procedures walk you through the remaining steps involved in setting up a terms code. Locate the procedure for the type you chose in the **Terms Type** field and follow its steps to successfully complete the process.

If you chose Regular Percent or Regular Per Unit as the terms type:

1. This step is dependent upon the term's type.

If the terms type is **Regular Percent**:

- Mark the **Delivery Exempt** checkbox if necessary. When marked, this field indicates that, as defined by the Exemption Type and Exemption Rate fields, a portion of the sales amount is exempt from the calculation of a discount.
- Select an **Exemption Type** from the field's list.
- Enter an **Exemption Rate** for the exemption type.

Regular Percent Terms Type

Terms Type	Regular Percent
Delivery Exempt Exemption Type Exemption Rate	Dollar Amount 33.00 ms
Discount Date To Be Due Date To Be Discount Percent Is	Days From The Invoice Date Days From The Invoice Date

If the terms type is **Regular Per Unit**, select the **Per Unit UOM** that should be applied.

- 2. Enter the number of days, or day of month, used to compute the discount date for this terms code in the **Discount Date To Be** field.
- 3. Enter the **Due Date To Be**, the number of days from the invoice date to be used to compute the due date.
- 4. This step is dependent upon terms type:
 - If the terms type is **Regular Percent**, enter the percent to discount for the terms code in the **Discount Percent Is** field.
 - For terms type Regular Per Unit, enter the discount amount per unit for the terms code in the Discount Amount Per Unit Is field.
- Accept the Terms Code screen to save the new terms code and its settings.

If you chose Prox Percent or Prox Per Unit as the terms type:

1. This step is dependent upon the terms type.

If the terms type is **Prox Percent**:

- Mark the **Delivery Exempt** checkbox if necessary. When marked, this field indicates that, as defined by the Exemption Type and Exemption Rate fields, a portion of the sales amount is exempt from the calculation of a discount.
- Select an **Exemption Type** from the field's list.
- Enter an **Exemption Rate** for the exemption type.

Prox Percent Terms Type

Terms Type	Prox Percent
 Delivery Exempt Exemption Type Exemption Rate 	Dollar Amount 33.00 ms
Discount Date On This Day Due Date On This Day Discount Percent Is	Of The Next Month Of The Next Month

If the terms type is **Prox Per Unit**, select the Per Unit UOM that should be applied.

- Enter a value in the field that the follows **Discount Date On This Day**. This value defines the specific day used to compute the discount date for the current terms code.
- 3. Enter the **Due Date On This Day** of the next month.
- 4. This step is dependent upon terms type.
 - If the terms type is **Prox Percent**, enter the percent to discount for the terms code in the **Discount Percent Is** field.
 - If the terms type is **Prox Per Unit**, enter the amount per unit to discount for the terms code in the **Discount Amount Per Unit Is** field.
- 5. Accept the Terms Code screen to save the new terms code and its settings.

If you chose Double Prox Percent, Double Prox Per Unit, NEOM Percent, or NEOM Per Unit as the terms type:

1. This step is dependent upon the terms type.

If the terms type is **Double Prox Percent** or **NEOM Percent**:

- Mark the **Delivery Exempt** checkbox if a portion of the sales amount will be exempt from the calculation of a discount. The Exemption Type and Exemption Rate fields define this.
- Select an **Exemption Type** from the field's list.
- Enter an Exemption Rate for the exemption type.
 - If the terms type is **Double Prox Per Unit** or **NEOM Per Unit**, select the Per Unit UOM that should be applied.

NEOM Per Unit Terms Type

Terms Type Per Unit UOM	NEOM Per Unit
For Invoice Dated Between These Days Discount Date On This Day Due Date On This Day Discount Amount Per Unit Is	and Of The Next, Next Month
For Invoice Dated Between These Days Discount Date On This Day Due Date On This Day Discount Amount Per Unit Is	and Of The Next Month

 Enter the starting and ending invoice day for a double prox or non-endof-month terms type in the For Invoice Dated Between These Days fields.

- 3. Enter a value in the **Discount Date On This Day** field. This value defines the specific day used to compute the discount date for the current terms code.
- 4. Enter the **Due Date On This Day** of the next month.
- 5. This step is dependent upon the terms type.
 - If terms type is **Double Prox Percent** or **NEOM Percent**, enter the percentage of the discount in the **Discount Percent Is** field.
 - If terms type is **Double Prox Per Unit** or **NEOM Per Unit**, enter the amount of the discount in the **Discount Amount Per Unit** Is field.
- 6. Accept the Terms Code screen to save the new terms code and its settings.

Accounting Categories

Accounting categories give you an additional means of organizing and recording business activity. The Accounting Categories screen allows access to accounting category records which are assigned to customers and projects and provide for flexibility in the following areas.

Invoice creation – select customer/project for invoices by accounting category

Invoice document format – assign customer/project unique document formats for invoice printing based on accounting category

Invoice numbers – assign customer/project to independent invoice number ranges based on accounting category

General ledger booking codes – generate customer/project activity by invoicing and accounts receivable can be accounted for based on accounting category

Reporting – sort and select reports (i.e. sales analysis, aged trial balance) based on accounting category

Some customers create a single accounting category for all business activity; others create one category and one for internal business (material transfers, on site constructions, etc). Before entering accounting categories information, gather information about how you want to categorize your customers within invoicing, financial, and reporting functions.

To enter an accounting category:

1. Go to the Accounting Categories screen. {Files > Customer & Project Information > Accounting Categories}

Accounting Categories (EDTACAT)

🗂 Accounting Categories		
Accounting Category	1	
Description Short	Trade Customers Trade	
Document Format Group Codes Invoices Credit Memos Debit Memos	INVCNF12 StInNf12 INVCNF12 StInNf12 INVCPL17 StInPl17	
Next Number Sequence Codes Invoices I INVOICE Credit Memos I INVOICE Debit Memos I INVOICE		
Language	Greek	

- Enter an Accounting Category Code to identify the new accounting category.
- 3. Enter short and long descriptions for the accounting category.
- Select document format group codes for all of the Invoices, Credit Memos, and Debit Memos you will use. Your Command Alkon Project Manager sets up your document format groups.
- Select Next Number Sequence Codes for all necessary categories. Next numbers are set up on the Next Numbers screen. {Files > General Information > Next Numbers}
- 6. Select the **Language** that should be printed if different from the system language. If the field is left blank, the system default will be used.

Note: This seldom-used feature requires the Print-In-Language document tag attribute be setup. Any tag with this attribute prints.

7. Accept the Accounting Categories screen to save this category and its settings.

Sales Analysis Codes

The sales analysis codes give you a means of classifying orders for reporting purposes. Once the codes have been entered, they can be assigned to customers and projects. When an order is entered, it will automatically be assigned the appropriate sales analysis code. If a sales analysis code has not been assigned to the customer or project, it must be assigned at the order level. Sales analysis codes can be constructed to identify any type of grouping of customers and projects based on the business practices of your company.

Before entering sales analysis code information, gather information about how you want to group customers and projects for analysis purposes.

To enter a sales analysis code:

1. Go to the Sales Analysis Codes screen. {Files > Customer & Project Information > Sales Analysis Codes}

🛅 Sale	es Analysis Codes		
Code	Description	Short	
1	Commercial	СОММ	- - -
2	Residential	RES] 민 -
3	COD	COD	린
4	Strategic Accounts	STRAT	린
5	Aggregate	AGG	크린ㅡ
6	Asphalt Producer	ASP	크린
7	Concrete Producer	CON	
8	Block Producer	BLK	

Sales Analysis Codes (EDTSANL)

- 2. Enter a **Code** to identify the sales category or group.
- 3. Enter a **Description** and a **Short** description for the sales analysis code.
- 4. Use the **Add Occurrence** button, or press <F6> to add another sales analysis code -or- accept the screen to save the sales analysis codes.

The Configuration screen allows access to the configuration records that define the COMMANDseries items in the following three general categories.

Run-time environment flags – indicate the features turned on and off Run-time environment parameters – customize your system Defaults – for fields on other COMMANDseries application screens



WARNING: Once changed and accepted, the flags, parameters, and defaults in the configuration file take effect immediately or when the COMMANDseries application is restarted. Some changes may change the manner in which information is stored. If in doubt, consult a Command Alkon Customer Service Representative.

Gather information about how you want the system configured. Most configuration flags are meant to be set once and not to be changed after you begin using the COMMANDseries applications. For this reason it is important to understand each field and its affect on the applications.

Note: Some fields and tabs described in this section are controlled by the user license. Not all fields and tabs may display on your system.

Topics in this section:

Initial System Configuration Defaults Configuration Distribution Configuration Dispatch Configuration Aggregate Configuration Signaling Configuration Invoicing Configuration Inventory Configuration Receivables Configuration Receivables Aging Configuration Receivables Statements Configuration Financials Configuration Projects/Quotes Configuration Lien Configuration

Initial System Configuration

At this point in your COMMANDseries setup it is not necessary to complete the entire system configuration. However, an initial configuration is necessary to define some of the main system settings.

To enter the initial configuration:

1. Select Files > General Information > Configuration.

Receivables Aging	Statements Financials	Projects/Quotes Lien User Fields Optimization
Defaults	Uistribution Uispatch) Aggregate Signaling Involcing Inventory
System Name	CRT Industries	
Auditing Control Auditing Method Perform During Post Corder Audit Log	No audits	Archiving Control Archive Paid Invoice Transactions Archive Sales Tax Distributions for Paid Transactions Archive General Ledger Distributions for Paid
Currency Control Currency Code	USA United States [Measurement System U.S. Customary Tracking Plant Quantities Do Not Convert Use Multiple Customer Codes
Pricing Method Customary Content Item Metric Content Item Cod	Code Use Content	Pricing

Configuration – System Tab (EDTCNFXA)

2. Enter the **System Name** as you want it to appear on reports. This name should be your company name, corporation name, or the name that best represents the COMMANDseries data.

The System Name will also display in the title bar if you mark the **Show System Name in Title Bar** checkbox on the Preferences screen. {Misc > Preferences > General}

- 3. Select which actions, if any, to audit in the applications from the possible choices in the **Auditing Method**. Options are:
 - No audits
 - Audit adds only only track the creation of new records
 - Audit changes only only track changes to existing records
 - Audit adds and changes
 - Audit deletes only
 - Audit adds and deletes
 - Audit changes and deletes
 - Audit all types
- 4. If you use auditing, marking the **Perform During Posting** checkbox signifies that auditing occurs on data transferred (posted) from one data file to another.

The previous two fields deal with system-level auditing, which is a licensed option. The Order Audit Log, discussed next, is separate from system auditing and is available to anyone licensed for concrete or aggregate.

- 5. Mark the **Order Audit Log** checkbox to have the system track orderrelated activity.
- 6. If you want to prompt the user to answer customized questions set up through the **Fields** button (only visible when the Order Audit Log checkbox is marked).

Order Audit Log Questions (EDTCNFX1)

	Order Audit Log Fields Configur	ation	X
01	Field Prompt Field Prompt Employee Initials Customer Name	Required Required	<u>↑↓↓</u> ↓↓↓

The user will be prompted with these questions are asked upon acceptance of an order. Note the option to make these fields required. If no specific fields are configured, the system still logs any changes made to new or changed orders. For example, if you record telephone conversations for records, you may want to set up a required field such as **phone station** to log where the recorded conversation can be found. The Purge Orders and Tickets function removes the information in the

Order Change Log.

7. The Archiving Control checkboxes provide the ability to archive paid transactions for a period of time, instead of purging the paid transactions and never being able to reference them again. The Purge/Archive A/R Transactions function {Receivables > Manage > Application Management > Purge/Archive A/R Transactions} is controlled by these settings.

Archive Paid Transactions option enables basic archive functionality. When it is selected, two additional options display.

Archive Sales Tax Distributions for Paid Transactions archives the STXD table.

Archive General Ledger Distributions for Paid Transactions archives the GLDT table.

The archive routine creates an identical set of tables for the information to be archived, decreasing the size of the main tables that are constantly being accessed.

For example, the ITRN table (Invoice Transactions), the STXD table (Sales Tax Distribution) and the GLDT table (General Ledger Distributions) are the tables you access on a daily basis. The ITRN_9, STXD_9 and GLDT_9 tables store the archived information and are only accessed when looking up older information.

Note: The ITRN_1 table is not an archive table, but a temporary work table.

8. The currency used by the system is displayed in the **Currency Code** field. Currencies are set up on the Currency screen. {Files > System Information > Currency}

Note: Once the currency code has been set up during the initial Configuration, it cannot be changed.

- From the Measurement System field's list, select U.S. Customary or Metric as the default measurement style for the system. This is only the system default – the measurement system can be changed in Order Entry.
- 10. Select an option for **Tracking Plant Quantities**. This value controls how metric and customary quantities are totaled on the Tracking screen:

Do Not Convert -- If a plant has orders totalling 50 cubic yards and 50 cubic meters, the plant line total will read 100.

Convert to System UOM -- If a plant has orders totalling 50 cubic yards and 50 cubic meters, the system will convert the non-standard UOM to the system UOM before totalling.

11. Mark the Use Multiple Customer Codes to configure the Project file {Files > Customer & Project Information > Projects} to use a multiple customer mode. In multiple customer mode, the Customer Code field in the Projects file is replaced with the Billing Customer field. In addition, the Shipping Customer and Reference Customer fields are included at the bottom of the screen.

Two other functions are affected by the Use Multiple Customer Codes option in COMMANDseries. The customer information in both the Orders screen and Tickets screen is automatically associated with the shipping customer that has been defined in the Projects file. On the Edit Orders and Tickets screen, the customer information is associated with the billing customer defined in the Projects file.

- 12. Specify whether the system is to **Use Standard Pricing** or **Use Content Pricing** (Sack Pricing) in the **Pricing Method** field. If you select the Use Standard Pricing option for the pricing method, prices are assigned to each individual product by pricing plant and/or pricing category.
- 13. If you select **Use Content Pricing** option for the pricing method, concrete prices are calculated from a base product's price, based on the difference in the content factor for the specific product and the base product. This field will eventually specify which item to use for customary content in the **Customary Content Item Code** field and which item to use for metric content in the **Metric Content Item Code** field.

Note: These two item code fields are not filled in at this time, as items have not yet been created. Please see Appendix E for a complete description of configuring content pricing.

14. Accept the screen to save the system information.

Defaults Configuration

The information entered on the Defaults Configuration screen standardizes your COMMANDseries system. The information entered on this tab serves as the defaults for various data entry functions, making the process more efficient.

Topics in this section:

Defaults Configuration Setup Customer Sales Defaults Setup Customer Taxing Defaults Setup Customers Pricing Defaults Setup Customer Charges Defaults Setup Customer Accounting Defaults Setup Customer Invoicing Defaults Setup Customer Distribution Defaults Setup Distribution Configuration

Defaults Configuration Setup

To set the defaults configuration:

 From the Configuration screen, select the **Defaults** tab. {Files > General Information > Configuration > Defaults}

		-					
Receivables	: Aging	Statements	Financials	Projects/Quotes	Lien	User Fields	Optimization
System	Defaults	Distribution	Dispatch	Aggregate	Signaling	Invoicing	Inventory
Dispatching Concrete Product Pri Scheduled Scheduled Tracking Tr Tracking Tr	Defaults ce Load Size Plant Code ruck Color ruck Flag	Copy to All					×
Master File Data In Defaults Log Warnings/Errors & Summary Info Log Report Log Detail Messages Log Detail Messages Date Order Month before day Month before							
Customer De	ifaults	axing F	Pricing	Accounting	Invoicing	Distribution	<u>ı</u>

Configuration – Defaults Tab (EDTCNFXB)

The Dispatching Defaults fields allow you to establish "ultimate" defaults for key dispatching fields. That is, if you specify a Default Schedule Load Size,

then the system will use that value only if it cannot find a load size anywhere else in the system.

- 2. Specify the primary dispatching product line for this system in the **Dispatching Defaults Product Line** field.
- 3. Mark the **Copy To All** checkbox if the defaults should be applied to all items in the specified product line.
- 4. The **Product Price** field is not currently used. Functionality for this field will be added in future version of COMMANDseries.
- 5. Enter the default **Scheduled Load Size** to use in the Truck Types screen's **Load Size** field when entering new truck types in the system.
- 6. Select a default Scheduled Plant Code to assign to any new projects, non-project orders, or tickets. To facilitate initial setup of the configuration file, this field allows you to enter a plant code that does not exist in the plant code file. If this is the case, make sure that you subsequently enter the plant code on the Plants screen. {Files > Plant & Delivery Information > Plants}
- 7. Specify the default color for the **Tracking Truck Color** field on the Trucks screen for use in truck tracking. This is the default color when entering new trucks. Plant colors take precedence over truck colors. If Plant 1 has green trucks, a blue truck from Plant 2 turns green if clocked in at Plant 1. This occurs only if the plant has a specified color.
- 8. Set the default value for the **Tracking Truck Flag** field on the Trucks screen. The flag set for the truck is used on the Truck Tracking screen when displaying the truck.

Masterfile settings control basic Data I/O functions.

 Specify the Master File Data In Defaults to set the error message logging. Use these defaults to validate certain fields representing foreign keys to COMMANDseries tables.

When an invalid field is encountered, the Configuration Customer Default value is used. If the Configuration Default value is invalid, the Data In record is rejected. A log of all substitutions and rejections is added to the existing log of records. An option to write the log to a Database table (instead of a Log Report) is available using the pull-down menu.

- Set the default Language to use in the system. This can be overridden at the user level on the Users screen {Files > System Information > Users} or from the Preferences screen {Miscellaneous > Preferences}.
- 11. Select the **Date Format** for dates to display throughout the COMMANDseries applications.
- 12. Select **Month before day** or **Day before month** in the **Date Order** field.

Customer Defaults

The buttons along the bottom of the Defaults form allow you to establish defaults for new customers. These option cover the majority of the fields in

the customer record, so that establishing the defaults will save a great deal of time during data entry.

Customer Sales Defaults Setup

To configure customer sales defaults:

 From the Customers Defaults section at the bottom of the **Defaults** tab, select the **Sales** button. {Files > General Information > Configuration > Defaults > Sales}

Customer Sales Defaults (EDTCNFX3)

	Customer Sales D	efaults	×
Co S S	oncrete 💽 Sales Analysis Code Salesman	Copy to All Image: Commercial Image: Total Image: Total Image: Total Image: Total	•

- 2. Select a **Concrete** or **Aggregate** from the **Product Line** field's list.
- 3. Mark the **Copy To All** checkbox if necessary. When marked, this copies customer sales configuration to all available product lines.
- Enter a Sales Analysis Code. This field provides the default value for the Sales Analysis Code field on the Customers screen when adding a new customer. {Files > Customer & Project Information > Customers}
- Enter a Salesman code. This field provides the default value for the Salesman field on the Customers screen when adding a new customer. {Files > Customer & Project Information > Customers}

Customer Taxing Defaults Setup

The Customers Taxing configuration tab allows you to enter the values that will serve as defaults in the customer files.

To enter customer taxing defaults:

 From the Customers Defaults section at the bottom of the **Defaults** tab, select the **Taxing** button. {Files > General Information > Configuration > Defaults > Taxing}

🖬 Customer Taxing Defaults 🛛 🔹 🔁		×
Tax Code	▼ 1 Birmingham	
Taxable		
Non Taxable Reason	31 Location not taxable!	

- Customer Taxing Defaults (EDTCNFX4)
- 2. Select a **Tax Code** that best represents the majority of your customers' tax location. This code is the default tax code for the customer's file.
- 3. From the **Taxable** field's list, indicate whether the customer file's default is **Taxable** or **Non-taxable**.

4. Select a **Non Taxable Reason**. This should best represent the majority of your customers who are non taxable.

Customers Pricing Defaults Setup

The Customers **Pricing** configuration button allows the privileged user access to fields in the configuration file that deal with the COMMANDreceivables application. These fields provide a means of customizing COMMANDreceivables without requiring changes to the program.

To enter customer pricing defaults:

 From the Customers Defaults section at the bottom of the **Defaults** tab, select the **Pricing** button. {Files > General Information > Configuration > Defaults > Sales}

🖺 Customer Pricing Defa	ults	×
Aggregate Copy to All Price Category Pricing Plant Code Trade Discount Percent Trade Discount Amount Terms Code Zone Code Cartage Charge Rate Table	Charges 1 CENTER Type Price FOB Price ▼ 0.00 cu yds 1 Net 30	
 Apply Zone Charges Print Prices on Ticket Allow Price Change in 0/E? 	 Restrict Orders to Customer Products Apply Minimum Haul Charges 	•

Customer Pricing Defaults (EDTCNFX5)

Note: This graphic combines elements from concrete and aggregate pricing screens.

- 2. From the **Product Type** field's list, select **Concrete** or **Aggregate**.
- 3. Select a **Price Category**. This field provides the default value for the Price Category field on the Customers screen when adding a new customer. {Files > Customer & Project Information > Customers}
- Select a Pricing Plant Code. This field provides the default value for the Sales Analysis Code field on the Customers screen when adding a new customer. {Files > Customer & Project Information > Customers}
- 5. If You are configuring aggregate pricing, select a **Type Price**. The options are:
 - FOB Price
 - Fix Cartage Delivered Price
 - Fix Mat'l Delivered Price

For an explanation of these different pricing options see the **Fixed Delivered Price** section in the **Items** section of this manual.

- 6. Enter a **Trade Discount Percent** and **Trade Discount Amount**. These fields provide the default values for the Trade Discount Percent and Amount fields, respectively, on the Customers screen when adding a new customer. {Files > Customer & Project Information > Customers}
- Select a Terms Code and a Zone Code. These fields provide the default values for the Terms Code and Zones Code fields, respectively, on the Customers screen when adding a new customer. {Files > Customer & Project Information > Customers}
- 8. If the product line is Aggregate, Asphalt, or Block, the **Cartage Rate Table** field displays. Enter a code for the cartage rate table to use in pricing.
- 9. Several customer-pricing options are set up using the checkboxes at the bottom of the screen. Mark all checkboxes necessary to configure defaults according to your preference. They are as follows:
 - Apply Zone Charges (concrete only)
 - Print Prices on Ticket
 - Allow Price Change in O/E?
 - Restrict Orders to Customer Products
 - Apply Minimum Haul Charges (aggregate only)
 - Allow Automatic Price Adjustments

Customer Charges Defaults Setup

To enter customer charges defaults:

 From the Customer Pricing screen, select the **Charges** button. {Files > General Information > Configuration > Defaults > Pricing > Charges}

 Customer Charges Defaults

 Concrete
 Copy to All

 Minimum Load Charge Table
 1

 LTL Met

 Seasonal Charge Table
 1

 Unloading Charge Table
 1

 Minimum Load Charges
 Minimum Load Charges on Separate Invoice

 Apply Minimum Load Charges
 Seasonal Charges on Separate Invoice

 Apply Unloading Charges
 Unloading Charges on Separate Invoice

 Apply Unloading Charges
 Unloading Charges on Separate Invoice

Customer Charges Defaults (EDTCNFX6)

- From the Product Type field's list, select Concrete or Aggregate. Set the Copy to All flag if desired.
- 3. Select the **Minimum Load**, **Seasonal**, and **Unloading Charges** as needed.

4. Mark the **Apply Minimum Load Charges**, **Apply Seasonal Charges**, and/or **Apply Unloading Charges** checkboxes if you want to apply the charge tables specified in the fields above.

Note: The minimum load options only display if the product line is Concrete.

- 5. Mark the **Create Separate Invoice** if desired. When marked, this checkbox causes minimum load charges to be printed on separate invoices.
- 6. Mark the **Seasonal** and **Unloading Charges on Separate Invoices** checkboxes if you want to apply the charges on a separate invoice.
- 7. Accept the Customer Charges Defaults screen to save the charges defaults information.

Customer Accounting Defaults Setup

The information on this tab serves as default information for the corresponding customer file fields.

To enter customer accounting defaults:

 From the Customer Defaults tab, select the Accounting button. {Files > General Information > Configuration > Customers > Accounting}

🛅 Customer Accounting Defau	🗂 Customer Accounting Defaults		
Receivables Information Statement Cycle Accounting Category I Apply Finance Charges	Monthly I Trade Customers Print Statements		
Credit Information Credit Code Credit Limit	 AA Okay to sell 5,000.00 		
Required in Order Entry Purchase Order	Customer Job		
Suspend Order Reason Code			

Customer Accounting Defaults (EDTCNFX7)

- 2. Enter the default **Statement Cycle** and **Accounting Category**.
- 3. Mark the **Apply Finance Charges** checkbox if necessary. When marked, this checkbox causes the automatic application of finance charges.
- 4. Mark the **Print Statements** checkbox if necessary. When marked, this checkbox causes statements to print automatically.
- 5. Select a **Credit Code** and a **Credit Limit** to default for all customers.
- 6. Mark the **Purchase Order** and **Job Number** checkboxes if necessary. When marked, these checkboxes cause a purchase order and/or job number, respectively, to be required in Order Entry.

7. Select a **Suspend Order Reason Code**. This code is helpful if billing preparation begins at the plant and is completed at a billing office. In this situation, the order condition of being suspended or released may be used as a signal to the next department that some stage of billing preparation has been completed. The Suspend Order Reason Code serves as the default for all new customers entered.

Customer Invoicing Defaults Setup

The information on this screen serves as default information for the corresponding fields in the customer editor.

To enter customer invoicing defaults:

 From the Customer Defaults section at the bottom of the **Defaults** tab, select the **Invoicing** button. {Files > General Information > Configuration > Defaults > Invoicing}

Customer Invoicing Defaults		×			
Print One Invoice Per Sort and Sub Total By Print Products/Tickets	Order Detail	•			
Invoice Frequency	Daily	•			
Haul Charges Minimum Haul Charges	Print haul charge as separate line item Print total minimum haul charge	• •			
Separate Invoices by Product Lit	ne				

Customer Invoicing Defaults (EDTCNFX8)

- 2. From the **Print One Invoice Per** field's list, select the print option to default into the customer files.
- 3. From the **Print Products/Tickets** field's list, select either detail or **Summary** for the default format for printing of products/tickets.
- 4. From the **Invoice Frequency** field's list, select **Daily**, **Weekly**, or **Monthly** as the default frequency for invoicing.
- 5. From the **Haul Charge**s field's list, select to print haul charges as a separate line item or to combine them with the material price.
- 6. From the **Minimum Haul Charges** field's list, indicate whether to print the total minimum haul charge or to separate the actual and incremental haul charge.
- 7. Mark the **Separate Invoices by Product Line** if you want invoices to be separated by product line.

Customer Distribution Defaults Setup

The information on this screen serves as default information for the corresponding fields in the customer editor. These fields carry over to individual orders.

To enter customer distribution defaults:

 From the Customer Defaults section of the **Defaults** tab, select the **Distribution** button. {Files > General Information > Configuration > Customers > Distribution}

Customer Distribution	n Defaults (EDTCNFX9)	
Concrete Copy to A Default Order Type Tracking Order Color Print Mix Weights on Ticket		
Order Measurement System	Customary or Metric	

- 2. From the **Product Type** field's list, select **Concrete** or **Aggregate**.
- 3. Mark the **Copy To All** checkbox if necessary. When marked, this copies the customer distribution configuration.
- 4. Select a default Tracking Order Color.
- 5. Mark the **Print Mix Weights on Tickets** checkbox if necessary. When marked, this checkbox causes mix weights print on the tickets.
- 6. Select a default **Order Measurement System** from the field's list. The options are **Customary Only**, **Metric Only**, or **Customary or Metric**.

Distribution Configuration

This form enables feature customization of several COMMANDseries functions, to setup customer distribution defaults.

To enter distribution configuration:

1. Select Files > General Information > Configuration > Distribution.

Configuration – Distribution Tab (EDTCNFXD)

Receivables	Aging	Statements	Financials	Projects/Quotes	Lien	User Fields	Optimization
System	Defaults	Distribution	Dispatch	Aggregate	Signaling	Invoicing	Inventory
Days to Save Detail 365 Number of Days Back to Allow Dispatch 0 Change Truck Signaling Unit With Inbound Messages Cartage Frequency Monthly Default Schedule Adjustment Type Image Truck Signaling Products for Orders Apply Schedule Adjusment Type Image Truck Signaling Type							
 Dynamic Plant Fleet Size Allow Dispatch to Activate Quotes Use Shipping Address Tax FOB Shipments based on the Shipping Plant's Tax Code Require Postal Code Update Scheduled Qty Based On Ordered Qty 							
Travel Time Post Tolerance % Acceptable Travel Time Load Percentage % Total Travel Time Loads							
Allow Orde Default Mix De Mix Design Do	r Level Mix E sign Approva cument Form	Design al Status at	Mi	x Design Not Approve	ed 🔽	Q Ma	C Encryption

- 2. In the **Days To Save Detail** field, enter the number of days that detailed information on orders and tickets should be saved. The value entered here is used by the Purge Expired Orders and Tickets screen to determine the effective purge date. Value here range from 180-720 (6 months to two years).
- 3. In the **Number of Days Back To Allow Dispatch** field, indicate how many days, prior to the current date, dispatching can take place. Dispatching includes entering orders, typing tickets, etc. To allow dispatching only for the current and future days, enter zero (0). If you regularly deliver after midnight, this value should be set to one (1).
- 4. The **Change Signaling Unit Field** is used to manage a truck's autosignaling comm manager assignment.
 - Select **With Inbound Messages** to have the system update the truck's comm manager whenever an inbound message is recieved. This option is generally used in a central dispatch environment.
 - Select **With Current Plant** to have the system change the signaling unit's comm manager only when it's current plant value changes. This option is generally used in local dispatch setting, in which each plant has a commanager located at the plant.
 - Select **Never** to never automatically change the comm assignment. This option is generally used if there os only one comm manager.
- 5. Use the **Cartage Frequency** field to select the frequency that cartage payments are calculated.
- 6. The **Default Schedule Adjustment Type field** sets a default value for the Schedule Adjustment Type field on the Order Schedule screen. This

field establishes if/how the system will recalculate a delivery schedule when a ticket is printed early or late.

- 7. The **Require Order Qty on Non-primary Products for Orders** allows you to prohibit zero order quantities on extra and associated products.
- 8. The Default Schedule Adjustment Type determines what happens to the schedule for the remaining loads for an order. It has no impact on the current ticket, however. The soon-to-be-renamed **Apply Schedule Adjustment Type** determines what happens to the ticket times for the current ticket.
 - Use Schedule Adjustment Type--if a ticket is printed early, the ticket time sent to batch panel is the current time. Depending on the batch panel configuration, this setting can cause problems for customers who pre-ticket, because the ticket time reflects an updated schedule--the ticket is going to be batched at the originally scheduled time, you're just stacking it in advance.
 - **Don't Use Schedule Adjustment Type**--The relevant ticket times that print on the ticket will reflect the original schedule, not an updated one.
- 9. Select **Dynamic Fleet Size** to allow for changed in the fleet size during the course of business day.
- 10. Allow **Dispatch to Activate Quotes** enables users running the dispatch software to activate and ship based on quote records. They system will generate a corresponding project.
- 11. Select the **Use Shipping Address** checkbox if you want to get a Shipping Address form instead of a generic zoom box when detailing on the Delivery Address field of an order form.
 - **Note:** Because the Shipping Address form, unlike the standard Delivery Address field, employs fixed-width fields, it is more appropriate for certain data export needs. Command Alkon recommends that all users activate this setting. Customers using the MapPoint interface must activate this flag.
- 12. Select **Tax FOB Shipments based on the Shipping Plant's Tax Code** to tax FOB orders as origination taxing even if your tax codes are configured for destination taxing.
- 13. If Use Shipping Address is selected, **Require Postal Code** will be enabled. If this flag is set, then orders cannot be saved without a valid entry in the Postal Code field.
- 14. Enable Update Scheduled Qty Based on Ordered Qty if you want Order Entry to update associated Schedule Quantities whenever the Order Quantity is reduced.

Note: If a newly entered Order Quantity is greater than the Schedule quantity, the Schedule Quantity will always be increased, regardless of this setting.

The next three fields configure **Automatic Travel Time Posting** (see page 102 for a detailed explanation.)

- 15. Enter the Travel Time Post Tolerance.
- 16. Enter the Acceptable Travel Time Load Percentage.
- 17. Enter the **Total Travel Time Loads**.
- If you will be using Order-level Mix Design, select the Allow Order Level Mix Design checkbox. Two additional fields will appear.
- Default Mix Design Approval Status, either Mix Design Not Approved or Mix Design Approved. This identifies the mix as usable or not usable by Quality Control.

Note: Once enabled at the system level, use Order-level Mix design must be enabled for individual users. See the **Users** section for more information.

- 20. If you are using the Mix Design screen, enter a **Mix Design Document Format** to print out mix designs.
- 21. If you are using an encryption equation to provide security for your QC connection to COMMANDseries, press the QC Encryption button.

🚦 Batch Code Encry	ption Equation	×
Equation		
<batch code=""></batch>		<u> </u>
		-
Field List	<batch code=""></batch>	

Batch Code Encryption Equation (EDTCNFX2)

Enter the encryption equation and Accept the screen.

22. If you are licensed for the Material Manager, the Material Manager button will display. Press the button to call the Material Manager Configuration screen.

Material Manager Conf	iguration (EDTCNFY1)
🚦 Material Manager Conl	figuration 🛛 🗙
System Lab Location	⊥
-Volume to Weight Constants Cubic Feet to Pounds U.S. Gallons to Pounds	62.38300 8.33000

- 23. Enter the **System Lab** Location for Material Manager.
- 24. Enter appropriate Conversion constants.
- 25. Accept the screen to return to the Distribution tab.

26. Proceed to the **Dispatch** tab.

Dispatch Configuration

The Dispatch Configuration tab allows customization of the dispatching features of several of the COMMANDseries functions.

To enter dispatch configuration:

1. Select the **Dispatch** tab from the Configuration screen. {Files > General Information > Configuration > Dispatch}

	oningulation Disp		
Aggregate 💽 🗖 Copy to All			
Truck Tracking Orders-to-Load Lead	HTime 🛛	9999	
Truck Tracking Messages Allowed	Í Í	Messages and statuses 💌	
Truck Tracking Orders-to-Load Lead	d Time 🛛	480	
New Assignment Frequency	Ĩ	Plant Changed 📃	
New Assignment Timing	l I	At Plant	
Allow P.O. Change on Ticket			
Default Pricing Plant from Scher	duled Plant		
Show Delivery Methods in Orders/T	ickets 🛛 🗋	Yes	
Show Map Page in Orders/Tickets	<u>[</u>	Yes	
Show Zone Code in Orders/Tickets	<u> </u>	Yes 🔽	
Default Schedule Load Size From	Į.	Schedule 🔽	
2 Coloct Concrete	or Aggregate f	from the Droduct Line field	1/a liat

Configuration – Dispatch Tab (EDTCNFXE)

- 2. Select Concrete or Aggregate from the **Product Line** field's list.
- 3. Mark the **Copy To All** checkbox if necessary. When marked, this checkbox copies the configuration settings that are specific to this product line to all other product lines.
- From the Truck Tracking First Status field's list, select Printed or Load. This option identifies the status that causes a ticket to be displayed on the Truck Tracking screen.

Note: If tickets are typed well in advance of being loaded on a truck (pre-ticketed), use Load as the first truck tracking status.

Note: This field displays only if Concrete is the specified product line.

- 5. In the **Truck Tracking Orders-To-Load Lead Time** field, specify the number of minutes prior to an order's scheduled start time the order will appear on the display on the Truck Tracking screen. A low value keeps the on-screen data to a minimum, while a higher value keeps more orders on the Tracking screen, allowing for easier access. Typical values are 120 to 240 (2-4 hours).
- 6. Specify the type(s) of **Truck Tracking Messages Allowed** to display in the Message Area of the Truck Tracking screen from the field's list. The options are: **Messages Only, Statuses Only, Messages and Statues**.

- 7. In the **Earliest pre-ticket status** field, select a status from the list. This status is the earliest status from which a truck can be pre-ticketed.
- 8. Mark the **Allow P.O. Change on Ticket** checkbox if necessary. If marked, this checkbox allows the **Purchase Order** field, as entered on the Orders screen, to be changed on the Tickets screen. The feature allows tickets to have different purchase order numbers than their orders.
- Mark the Default Pricing Plant from Scheduled Plant checkbox if necessary.

If you do not use delivery methods, zone codes, or map pages, you can elect to eliminate them from the Order screens to prevent confusion.

- 10. Mark the **Show Delivery Methods in Orders/Tickets** checkbox if necessary. Many concrete companies do not use delivery methods, and eliminating the field form the order form simplifies order entry.
- 11. Select an option in the **Show Map Page in Orders/Tickets** field. The options are:
 - **No** The field will not be displayed.
 - **Yes** The field will be displayed.
 - **Required** The field will be displayed, and an entry will be required.
- 12. Select an option in the **Show Zone Code in Orders/Tickets** field. The options are the same as described in the previous field.
- 13. The Order Schedule screen has a button that specifies whether the Ticketing screen should take the load size from the truck or the schedule. The **Default Schedule Load Size From** field establishes the system default for that button.
- 14. If you are printing barcode cards from COMMANDseries, you will need to specify a **Truck Barcode Ticket Format**.
- 15. If you are printing barcode cards from COMMANDseries, you will need to specify a **Truck Barcode Ticket Sequence**. You can create a dummy ticket sequence that the system will use to generate barcodes.

The final two fields control how totals are diplayed on the Tracking screen.

- 16. The **Truck Tracking Plant Line Quantity** allows you to display either the Ordered Quantity or the Scheduled Quantity on the Plant Summary Line.
- 17. The **Truck Tracking Order Line Quantity** allows you to display either the Ordered Quantity or the Scheduled Quantity on the Order Line.
- 18. Accept this screen to save these configuration settings.

Aggregate Configuration

The Aggregate Configuration screen allows the privileged user access to customization options specific to COMMANDaggregate.

To enter aggregate configuration information:

 From the Configuration screen, select the Aggregate tab. {Files > General Information > Configuration > Aggregate}

		-					
System	Defaults	Distribution	Dispatch	Aggregate	Signaling	Invoicing	Inventory
Allow M Allow T Allow T Weigh Tare Ex Exceed Overhead L Show Truck	fanual Weights icketing Overlow Trailers Separat ach Load I Ordered Quant oad Out Prompt oad Out Drop Ir & Underloaded F	aded Trucks ely ities : for Load Deviation formation Prompt	1%	Edit Tons Per D)rop	×	
 Display Display Display Display Enhanced Auto Ticko Aggregate Truck Min 	PO Number on Zone on Front : Cartage Rate o Order Suggesti eting Order Copy Ticketing Orde imum Weight ov	Front Screen of Si Screen of Simplifie In Front Screen of on In Aggregate T Option r Copy Option Yer Tare for Gross	mplified Ticketin d Ticketing Simplified Ticke icketing	ting Enable Do not copy a Do not copy a	iny orders	× ×	

Configuration – Aggregate Tab (EDTCNFXF)

- 2. Mark the **Allow Manual Weights** checkbox if necessary. This checkbox enables the user to enter weights in aggregate ticketing instead of allowing the scale interface to default weights.
- 3. Mark the **Allow Ticketing Overloaded Trucks** checkbox if necessary. This checkbox allows ticketing of trucks whose max load quantity is less than the load quantity on the ticket.
- 4. Mark the **Weigh Trailers Separately** checkbox if necessary. When marked, this checkbox allows trailers to be weighed separately from the truck.
- 5. Mark the **Tare Each Load** checkbox if necessary.
- 6. Mark the **Exceed Ordered Quantities** checkbox if necessary. When marked, this checkbox allows aggregate orders to exceed the quantity specified by the customer.
- 7. In the **Overhead Load Out Prompt for Load Deviation %** field, enter the maximum percentage by which the target net weight can differ from the actual net weight. If the value is exceeded, the dispatcher will be prompted for confirmation.
- 8. In the **Overhead Load Out Drop Information**, select how you wish to control individual drops. The options are Edit Tons Per Drop and Edit Percent Drop.
- 9. If the **Show Truck Underloaded Prompt** option is enabled, then the system will display a confirmation prompt if you attempt to ticket a truck with a load size less than the minimum load size specified in the Truck file.
- 10. Mark the **Display PO Number, Zone**, and/or **Cartage Rate on Front Screen of Aggregate Ticketing** checkboxes if necessary. These
checkboxes allow you to remove unwanted fields from the Ticketing screen.

When a truck comes in to be dispatched, the system tries to determine the last order the truck hauled. If that order date is outside the range permitted by the Days Back to Allow Dispatch field, the system can resolve the conflict by useing the old order, or copying the old order to a new one. The next three fields address how certain dispatch and ticketing functions handle information.

Note: These fields are discusses in a different order from their on-screen order.

- 11. Select an option from the **Aggregate Ticketing Order Copy Option** field:
 - **Do not copy any orders**--The user must manually specify an order.
 - **Copy standing orders**--If the truck last hauled on a standing order, and that order is still active, that standing order will be copied and the truck ticketed on that copy. If there is no active standing order, the user will have to manually assign an order code.
 - **Copy all orders**--The system will automatically copy the last order the truck hauled, and dispatch/ticket the truck to that order.

This field addresses auto-ticketing functionality. The previous field addresses manual dispatch/ticketing.

- 12. If some of your plants are configured for auto-ticketing, you may want a different order copy rule in place for them. Select the option (from the same choices) in the **Auto Ticketing Order Copy Option** field.
- 13. If the **Enhanced Order Suggestion in Aggregate Ticketing** field is set to Disable, then the system will copy/not copy based on the value of the **Aggregate Ticketing Order Copy Option** field.

If the field is set to Enable, then the system will display a message box prompting the dispatcher/weighmaster to select an appropriate option.

- 14. When an auto-ticketing lane is configured as a tare/gross lane, the system must be able to distinguish between a loaded truck (to be ticketed) and an empty one (to be tared). This is accomplished through the **Truck Minimum Weight over Tare for Gross** field. Enter a value (the default UOM is tons; that can be changed by detailing on the field). Let's say that you entered 1000. When a truck drives onto the scales, COMMANDseries gets the weight and compares it to the tare weight in the truck record. If the scale weight is greater than the truck tare weight + 1000, the system concludes that the truck is loaded and tickets it using the weight as a gross weight. Otherwise, the truck is tared at the new weight.
- 15. Accept this tab to save the Aggregate Configuration settings, or select another tab to configure more information.

Signaling Configuration

The Signaling tab allows to establish system-level settings for the Mobile and Auto-Signaling systems.

		Configurat	ion Signa	ling Tab (ED	TCNFXQ)		
System	Defaults	Distribution	Dispatch	Aggregate	Signaling	Invoicing	Inventory
Default GPS GPS Indicat Map Interfac	Radius ion Symbol ce Type	50 MapPoint	T				
Truck Poll T	уре	Poll First Truck	•				
🔲 Update	Coordinates for 1	Frucks in Progress					
🔲 Default	Update Project N	Aap Coordinates					
🔲 Default	Update Order Ma	ap Coordinates					

1. **Default GPS Radius** establishes the standard radius used by Auto-Signaling to determine if a truck has reached a given destination.

Note: The UOM for this field is meters; that UOM cannot be changed.

The Tracking screen uses the **GPS Indication Symbol** to designate addresses with valid GPS coordinates. The symbol is displayed at the beginning of the Delivery Address on the Tracking screen.
 If the field is left blank, an asterisk ("*") will default.

3. The **Map Interface Type field** has three options:

- MapPoint 2001/2002
- Thomas Bros.
- Generic

The generic interface was initially identical to the MapPoint interface. As additional features are added to the MapPoint interface, the generic interface will be left unchanged, to provide map support for additional map programs.

Currently, only the Tracer NET map program has been tested with the generic interface.

Note: While COMMANDseries does nominally support MapPoint 2001, the most recent version of COMMANDmap was written specifically for MapPoint 2002.

The remaining fields address the issue of updating job coordinates. When a GPS-enabled truck sends a Pour status back to base, COMMANDseries will automatically poll the unit for updated coordinates. This feature is initially configured using the following fields.

- 4. **Truck Poll Type--**This drop-down setting determines what trucks will be polled. The options are:
 - Do Not Poll
 - Poll First Truck
 - Poll Every Truck

Note: A corresponding field in order and project records is set based on this value, allowing you to modify these values on a smaller scale.

Once polling returns updated coordinates, information is updated based on three checkbox settings:

- 5. **Update Coordinates for Trucks in Progress-**-Updates trucks en route to the site. Updated coordinates are sent to the truck and updated in the ticket record (TICK).
- Default Update Project Map Coordinates--If this box is checked, then the Update Project Map Coordinates field on all new projects will be set to True.
- 7. **Default Update Order Map Coordinates--**If this box is checked, then the Update Order Map Coordinates field on all new Updates coordinate records in the order file. All subsequent tickets on the order will receive the updated coordinates.

Invoicing Configuration

The Invoicing Configuration screen allows the privileged user access to fields in the configuration file that deal with the COMMANDinvoicing application. These fields provide a means of customizing COMMANDinvoicing without requiring changes to the program.

To enter invoicing configuration information:

1. Select Files > General Information > Configuration > Invoicing tab.

		Conne	julation – Inv	olcing lab (Li			
Aging	State	ments	Financials	Projects/Q	uotes 📔	Lien	User Fields
System	Defaults	Distribution	Dispatch	Aggregate	Invoicing	Inventory	Receivables
Invoice Form Invoice by O	nat Group Cod rder or Ticket	e Date		C FCInvc Date	intable amount	t plue total tay	
Comput	e Tax on Disc	ount Amount	fcomp	ale pre-tax discou	initable ambunit	, pius totai tax	
🔽 Separat	e/Suspend Cr	edit and Debit I	Memos				
Use Pla	nt Level Term	s Code					
Use Pro	duct Level 1 e	rms Code Disci an Thu hu Ching	ount Uverrides				
Book Sz	ales Tax Pava	s rax by shipp ble To G/L By (Shinning Plant				
	sioo raint aya	bio ro are by	ompping none				
Tax Location	n Non Taxable	Reason	▼ 34	Governmental			
Concrete Credit/Debit	Memo Reaso	Copy to All n Code	I AH	Trucking Deduc	tion		
2.	Enter the	Invoice	Format G	oup Code	. This fiel	d is used t	to specify th

Configuration – Invoicing Tab (EDTCNFXG)

 Enter the Invoice Format Group Code. This field is used to specify the code that represents the desired document layout for generating invoices.

- 3. From the **Invoice by Order** or **Ticket Date** field's list, select Order Date or Ticket Date.
- 4. Indicate whether the Terms Discount Calculation Method should be to **Compute pre-tax discountable amount** or **Compute pre-tax discountable amount plus tax amount**.
- 5. If the Terms Discount Calculations field is set to Compute pre-tax discountable amount, the **Compute Tax on Discount Amount** checkbox will be activated. When marked, this checkbox causes the tax effect of any discount offered on an invoice to be calculated and stored for the invoice.
- 6. Mark the **Separate/Suspend Credit and Debit Memos** checkbox if necessary. When marked, this checkbox allows the authorization of credit memos before they are posted to Accounts Receivable.
- 7. Mark the Use Plant Level Terms Code checkbox if necessary.
- 8. Mark the **Use Product Level Terms Code Discount Overrides** checkbox if necessary. The terms code determines the discount date. The actual discount amount or percent is assigned at the item/product level, as a default, which can be overridden by either a customer/product or project/product. This allows for each product to be discounted at a unique rate, which can vary by plant, as well.
- 9. Mark the **Store and Report Sales Tax By Shipping Plant** checkbox if necessary. When marked, this checkbox causes tax to be computed according to the tax at the plant shipping the materials.
- 10. Mark the **Book Sales Tax Payable to G/L By Shipping Plant** checkbox if necessary (only available if the **Compute Tax By Shipping Plant** checkbox is marked). When marked, this checkbox causes sales tax payable to be recorded to the General Ledger by shipping plant instead of pricing plant.
- 11. Select a **Tax Location Non Taxable Reason**. If a reason code is entered here, it will be the default reason code for any applicable non-taxable sales.
- 12. Select **Concrete** or **Aggregate** from the Product Line field's list. Mark the **Copy To All** checkbox to copy these configuration settings to all other product lines.
- 13. Select a **Credit/Debit Memo Reason Code**. The reason code allows you to more effectively track credit and debit memos.
- 14. Proceed to the **Inventory** tab.

Inventory Configuration

The Inventory Configuration option allows the privileged user access to fields in the configuration file that deal with the COMMANDinventory application. These fields provide a means of customizing COMMANDinventory without requiring changes to the program.

To enter inventory configuration information:

1. From the Configuration screen, select the Inventory tab. {Files > General Information > Configuration > Inventory}

	Configuration – Inventory Tab (EDTCNFXH)						
System Defaults	Distribution	Dispatch	Aggregate	Signaling	Invoicing	Inventory	
G/L Source Code 🚽 Costing Method	IN Inventory Standard Cost		_				
 Update Receipt Transa Update Usage Transac Update Sales Transac Update Transfer Trans Update Conversion Trans Update Adjustment Trans Automatically Create G 	actions To GL ctions To GL tions To GL actions To GL ansactions To GL ansactions To GL L Entries						

- 2. Select a **G/L Source Code**.
- 3. From the **Costing Method** field's list, select **Standard**, **Average**, or **Replacement Cost**. This field designates the costing method used for items maintained in COMMANDinventory. Once established, a change in the costing method is a change in accounting principle.

The checkboxes configure inventory GL updates. The Inventory routine creates inventory information, but does not create inventory transactions (usages). A separate routine creates the usages, which are then posted.

- 4. Select the Automatically Create GL Entries box (the last checkbox) if you want GL entries to be created when usages are posted.
- 5. If the Create GI Entries flag is enabled, the system will create entries for all of the inventory transaction type checked in the remaining fields.
- 6. Proceed to the **Receivables** tab.

Receivables Configuration

The Receivables Configuration screen allows the privileged user access to fields in the configuration file that deal with the COMMANDreceivables application. These fields provide a means of customizing COMMANDreceivables without requiring changes to the program.

To enter receivables configuration information:

 From the Configuration screen, select the **Receivables** tab. {Files > General Information > Configuration > Receivables}

		Conny					
🛅 Configura	tion						
(A =in =	1 000	1	Financials	Desirate /Oursta	. 1 .		Lines Fields
Aging	State	ments	Financials	Projects/Quote	s I L	Lien	User Fields
System	Defaults	Distribution	Dispatch	Aggregate I	nvoicing	Inventory	Receivables
Discount Gr Discount Me Chargeback G/L Source Quantity G/I Tax on Disc Receipts Fo Receipts Ne Maintai Vise Cu	ace Days ethod : Discount Adju : Code L Source Code :ount Non-tax F irmat Group Co ext Number Ser in Credit by Cor itoff Date for Si	istment Code Reason Code de quence Code mpany ubtransactions		5 = All IAJ INVADJ GL G/L PU P/U 34 Gov't RECEIPT RECE 3 CM	IPT	3	
Trial Balanc Summary F Print [Print 2	e Options Report Line Sp Discount Availa Zero Items	acing able	I	Net Revenu Post Date Invoid Balan	ue Options Code ce ce Forward ce Charge	Aging Date	· ·

Configuration Descivables Tab (EDTCNEVI)

- Enter the number of Discount Grace Days and select a default Discount Method. The discount method can be changed at the customer, project, and order level.
- 3. Enter a Chargeback Adjustment Code for invalid discounts.
- Select a G/L Source Code and Quantity G/L Source Code to indicate the source code to be used when a COMMANDfinancials transaction batch is created for COMMANDreceivables activity and quantity activity, respectively.
- Select a Tax on Discount Non-tax Reason Code. This field indicates the non-tax reason code to assign to sales tax adjustments made when a tax on discount is applied on the COMMANDreceivables Payments screen. {Transactions > Payments}
- 6. Select a **Receipts Format Group Code**. This field is used to print an AR receipt for payments and void payments.
- 7. Select a **Receipts Next Number Sequence Code**. This field indicates the numbering system to be used for the receipts. The options of this field are set up on the Next Numbers screen.
- 8. If you have multiple companies, you may want to maintain customer credit ratings by company. If the **Maintain Credit by Company** box is checked, then when customer credit information is entered (on the Customer-Accounting tab), you will be able to enter separate Credit Codes for each company.
 - **Note:** This option must be activated before any customers are entered. Once customer information has been entered in the Customer Credit table (CUCO), the field will be deactivated.

If you are maintaining credit by company, you may need to restrict customer lookups by company. You can do this by returning to the Users editor and assigned users to companies on the Options tab.

- 9. Mark the **Use Cutoff Date for Subtransactions** checkbox if necessary. When checked, and a date is entered in the **Ending Cutoff Date** field, only those subtransactions (payments, adjustments, credit/debit memos, etc.), that are dated on or before the cutoff date, are considered when computing the invoice's outstanding balance for the payment being entered.
- Enter the Summary Report Line Spacing. This field indicates the number of blank lines to be printed between each customer on the Summary Report option when running the Aged Trial Balance. {Reports > Aged Trial Balance}
- Mark the Print Discount Available checkbox if necessary. When marked, this checkbox causes the total discount available to be printed when running the Detail Report Option on the Aged Trial Balance. {Reports > Aged Trial Balance}
- 12. Mark the **Print Zero Items** checkbox if necessary. When marked, this checkbox causes transactions with a zero balance to be printed when running the Detail Report Option on the Aged Trial Balance. {Reports > Aged Trial Balance} Otherwise, they will be excluded from the report.
- 13. In the Net Revenue section, select Transaction Date or Aging Date as the **Post Date Code**.
- 14. Using the checkboxes, select which transaction types update the Net Revenue field in the customer history file. If selected, the amount of the transaction for the transaction type is posted to the **Net Revenue** field when the Post Transactions routine is performed. The Net Revenue field is used on the Percentage Outstanding Report option when calculating the percentage of an outstanding balance to its original revenue amount. {Reports > Percentage Outstanding}

Please note that you need to use the scrollbar to see all available transaction types.

15. Accept this screen, or select another tab to configure more information.

Receivables Aging Configuration

The Receivables Aging Configuration screen allows the privileged user access to fields in the configuration file that deal with the COMMANDreceivables application. These fields provide a means of customizing COMMANDreceivables without requiring changes to the program.

To enter receivables aging configuration information:

1. From the Configuration screen, select the **Aging** tab. {Files > General Information > Configuration > Aging}

Syst	em 📔 Default	s Distribution	Dispatch	Aggregate	Signaling	Invoicing	Inventory
Re	ceivables	Aging 9	Statements	Financials	Projects/Q	luotes	User Fields
Aging Aging Aging	Method By Date Code Prox Day	By Calenda Invoice Da	ar Month ite	Y			
Aging	Buckets						
1	Current Month		Description	CURRENT	_		
2	First Previous M	onth 🔄	Description	30-60 DAYS			
3	Second Previou	s Month 📃 💌	Description	60-90 DAYS			
4	Third Previous N	1onth 🔄	Description	90-120 DAYS			
5	Fourth Previous	Month 🔄	Description	OVER 120			
6	None		Description				
- 7	None		Description				

Configuration – Aging Tab (EDTCNFXJ)

- Select an Aging Method from the field's list. This field determines how aging is performed on all report options on the Aged Trial Balance Report screen and the Inquiry Report. {Reports > Aged Trial Balance} and {Credit > Inquiry Report}
- Select an Aging by Date Code from the field's list. This field determines the date to be used when aging each transaction balance on all report options on the Aged Trial Balance Report screen and the Inquiry Report. {Reports > Aged Trial Balance} and {Credit > Inquiry Report}
- 4. Enter an **Aging Prox Day**. This field is used to specify the day of the month used when **By Prox Date** is chosen for the Aging Method field on this screen.
- 5. From the Aging Buckets fields' lists, identify the group of aged balances to appear in each of the aging buckets on all report options on the Aged Trial Balance Report screen and the Inquiry Report. {Reports > Aged Trial Balance} and {Credit > Inquiry Report}

The available options in these fields are determined by the selected Aging Method.

- Enter the **Description**, or label, is to be printed in conjunction with the corresponding aging bucket on all report options on the Aged Trial Balance Report screen and the Inquiry Report. {Reports > Aged Trial Balance} and {Credit > Inquiry Report}
- 7. Proceed to the **Statements** tab.

Receivables Statements Configuration

The Receivables Statements Configuration screen grants access to fields in the configuration file that deal with the COMMANDreceivables application, provided the user has the prerequistie priviledges. These fields allow customization of COMMANDreceivables without requiring changes to the program.

To enter receivables statements configuration information:

 From the Configuration screen, select the **Statements** tab. {Files > General Information > Configuration > Statements}

🛅 Configuratio	n				_ 🗆 ×
System Aging Statement Opti Discount Day Print Proje Print Lot/E Print Zero Print Zero	Defaults Distribution Statements ion ect Totals Block Totals Balance Statements Items on Statement	Dispatch Agg Financials Pr Customer Stat	regate Invoicing ojects/Quotes ements, No Totals or E	Inventory Lien	Receivables User Fields
Statement Agin Aging Catego Aging Catego Aging Catego Aging Catego	ng Message Codes ory 1	Aging Category 5 Aging Category 6 Aging Category 7	✓ AGI5 ✓ —		
Statement Forr	mat Group Code	STMTPL17	Standard Statement-	Plain-17 pitch	

Configuration – Statements Tab (EDTCNFXK)

- 2. In the **Statement Option** field, select the manner in which A/R statements are to be formatted with respect to customers and companies.
- 3. Enter a **Discount Day**, the default day of the month that discounts are due.
- 4. Mark all desired checkboxes to define how the system groups and totals transactions for printed forms.
- Select Statement Aging Message Codes for all of the necessary Aging Categories to be printed on statements. (See "Message Text" on page 69.)
- Select a Statement Format Group Code to define the statement's layout. These codes are set up on the Document Format Group Codes screen. {Files > General Information > Documents > Document Format Group Codes}

Financials Configuration

The Financials Configuration screen allows the privileged user access to fields in the configuration file that deal with the COMMANDfinancials application. These fields provide a means of customizing COMMANDfinancials without requiring changes to the program. The code length fields, which are used by COMMANDinvoicing and COMMANDreceivables were set earlier in the File Build process. If you need to adjust these lengths after your G/L information structure has been entered, you will need to use the **Realign Accounts and Cost Centers** function (See the System Management manual for additional information).

The remaining fields (**Number of Budgets**, **Budgets Round to**, and **Multiple Companies**) relate to a financials package no longer supported by Command Alkon, and should be ignored for new systems.

		Connig					
🗂 Config	uration						_ 🗆
System	Defaults	Distribution	Dispatch	Aggregate	Invoicing	Inventory	Receivables
Aging	State	ments	Financials	Projects/Qu	uotes	Lien	User Fields
Company Co Cost Center Account Coo Sub Accoun Number of B Budgets Rou	ode Length Length de Length t Code Length udgets und To						
Multiple	Companies						

Configuration – Financials Tab (EDTCNFXL)

Projects/Quotes Configuration

The Projects/Quotes Configuration option allows the privileged user access to fields in the configuration file that deal with projects and COMMANDquote.

To enter projects/quotes configuration:

 From the Configuration screen, select the **Projects/Quotes** tab. {Files > General Information > Configuration > Projects/Quotes}

Configuration – Projects/Quotes Tab (EDTCNFXM)							
Receivables Aging Statements	Financials Projects/Quotes Lien User Fields Optimization						
Next Project Sequence Code Use Project/Product Trade Discount Rules to Calculate Suggested Price for Project Products Use Project/Zone Zone Charge Rules to Calculate Suggested Price for Project Products							
Next Job Sequence Code							
Default Quote Document Next Quote Code Sequence Code	✓ c:\cmdserie\DOC\SAMPLE~1.DOT ✓ 1 QUOTE						
 Use Quote/Product Trade Discount Rules to Calculate Suggested Price for Quote Products Use Quote/Zone Zone Charge Rules to Calculate Suggested Price for Quote Products 							

- 2. If desired, enter a **Next Project Sequence Code**. This options allows users to establish a formal next numbers sequence for new project codes.
- 3. Enter a **Default Quote Document** name. This should be the path and filename of the default document template to be used when printing quotes in Microsoft[™] Word[®].
- 4. Select a **Next Quote Code Sequence Code**. This field determines the number sequence for the assignment of quote codes.
- 5. The four checkboxes on this tab determine how the COMMANDseries calculates the product price at the project or quote level.

For example, a customer gets a \$2 per cubic yard trade discount on a particular mix. If the "**Use Project/Product Trade Discount**..." checkbox is marked, when a mix is entered on the project product tab, the price displayed will reflect the list price minus the trade discount. Mark or clear the following option checkboxes, as necessary:

 Use Project/Product Trade Discount Rules to Calculate Suggested Price for Project Products

- Use Project/Zone Zone Charge Rules to Calculate Suggested Price for Project Products
- Use Quote/Product Trade Discount Rules to Calculate Suggested Price for Quote Products
- Use Quote/Zone Zone Charge Rules to Calculate Suggested Price for Quote Products

Lien Configuration

Lien configuration has a wide array of options. In addition, lien configuration is dependent on the lien laws in the states in which the user does business. As a result, it is recommended that Lien configuration be done separately from the File Build.

For instructions regarding the configuration of the Lien application, please refer to the *Configuration* section of the *COMMANDlien User's Manual*.

User Fields Configuration

The User Fields Configuration option allows the privileged user the ability to configure custom fields in COMMANDseries. These fields provide a means of customizing COMMANDseries without requiring changes to the program.

To enter user-defined fields configuration:

1. From the Configuration screen, select the **User Fields** tab. {Files > General Information > Configuration > User Fields}

Configuration - Oser Fields Tab (EDTCM AC)							
Receivables Aging Stateme	ents Financials Projects/Quotes Lier	User Fields Optimization					
Field Prompt 01 Usage Code 02 Customer Spec 03 QC Approval 04 Maintenance Contact 05 Billing Contact	Field Types Orders Tickets Customers Orders Tickets Customers Items Tickets Customers Plants Projects Tickets	× × + + × × + + × × + + × × + + × × + +					

Configuration – User Fields Tab (EDTCNFXO)

- 2. In the **Field Prompt** fields, enter the desired title of the prompt. This is the label that will display next to the field.
- 3. Associate the field with a file group in the **Field Types** fields. When the screens in the Field Types field are accepted during every day use of the application, the question in the Field Prompt field is asked of Orders user. For example, in the screen capture example above, when the Orders

screen is accessed, fields for **Usage Code** and **Customer Spec** are added to the Other Order Information screen.

The third question, **QC Approval**, does not display because it is not set at the Items level.

4. Accept the User Fields Configuration screen to save the new user fields.

Optimization Configuration

Concrete Optimization is a licensed option in COMMANDseries that interfaces with the ORTEC's Conactive Management Optimizer through the creation of XML records for orders, tickets, truck statuses, and the truck and plant's availability.

The Optimization Configuration fields are used to configure system defaults for the COMMANDseries Optimization system. These defaults can then be modified as needed at the Customer, Project, or Order level.

To enter optimization configuration:

1. From the Configuration screen, select the **Optimization** tab. {Files > General Information > Configuration > Optimization}

Receivables Aging	Statements	Financials	Projects/Quotes	Lien	User Fields	Optimization
Default Maximum Load Size Default Priority						

- Configuration-Optimization screen (EDTCNFXR)
- 2. Enter the **Default Maximum Load Size**. This value will be used as a default during order entry.
- 3. Enter the **Default Priority**. This value establishes a default scheduling priority for orders. 1 is the lowest priority, 9 is the highest. 0 or [null] will be interpreted as 9.

4. Accept the screen.

Plant & Delivery Information

The following section address entry of basic plant and delivery information. By entering this information, you are, in effect, laying the foundation for your company's dispatching operations.

Topics in this section:

Locations Plants Haulers Truck Types Trucks Trailers Delivery Methods Pouring Methods Job Cost Phases & Jobs Zones Map Pages Deadhead Setup Task Codes Condition Codes

Locations

The Locations screen allows the user (with appropriate system security) access to add, edit, or delete locations. Locations are used to identify sites where inventory items are maintained, such as a plant's inventory or a central warehouse's inventory. In some cases, multiple plants may be assigned to a single inventory location.

To add a new location:

1. Go to the Locations screen. {Files > Item Information > Locations}

Locations ((EDTLOCN)
-------------	-----------

Locations		_ 🗆 X
Location Code	1	
Name	Birmingham Plant	
Short Name	BHAMPLT	
Address Line 1	1234 5th Ave S	
Address Line 2		
City	Birmingham	
State	AL	
Country	USA	
Postal Code	35654	
Phone Number 1	205-555-7734	
Phone Number 2		
Company	1 Command Concrete, Inc.	

- 2. Enter a number for the new **Location Code**.
- 3. Enter a **Name** and **Short Name** to describe the location.
- 4. Enter address information in the Address Line 1, Address Line 2, City, State, Country, and Postal Code fields.
- 5. Enter phone number information in the **Phone Number 1** and **Phone Number 2** fields.
- 6. Enter a **Company** code. This field represents the company or business entity to which the location belongs. A company is uniquely identified by a company code, which is edited on the Company screen.
- 7. Accept the screen.

Plants

Plants represent the physical sites from which items can be shipped and prices can be set. Plants are used in a variety of ways throughout COMMANDseries applications.

- Items are assigned to individual plants to indicate item availability at the plant.
- Pricing, cost, inventory, batching, and other information can be set at the plant level for each item.
- Plants are assigned to trucks and drivers indicating the default **home base** for each.
- Plants are assigned to customers, projects, and eventually orders as billing plants, indicating that the plant controls the prices charged and the company to which the order and its subsequent invoice are assigned.
- Plants are assigned to projects and eventually to orders as scheduled plants, which control the plant from which order schedules are developed.
- Plants are assigned to tickets as shipping plants, indicating the plant from where the items are delivered.

• Plants play a critical role in the process of charging sales tax in that they are assigned a tax code indicating the tax authority/locations used for **point of origination** taxing.

The Main tab provides basic information about plants. Through separate tabs you can access communication, batching, scheduling, and costing information about the plant. In addition, tabbed screens for plants, scales, bins, constituent order, and user fields are available.

Before entering plant information, gather information about plant locations from which you ship items including the batching capabilities of the plants and item availability at each plant.

Topics in this section:

Plant Setup Plant Main Tab Setup Plant Communication Setup Communications Port Setup Plant Batching Setup Plant Scheduling Setup Plant Costs Setup Plant Plants Setup Plant Scale Setup Plant Bins Setup Constituent Order Setup Plant User Fields

Plant Setup

To set up a new plant:

1. Go to the Plants screen. {Files > Plant & Delivery Information > Plants}

Plant header

🚦 Plants			
Plant Code	1		
Name	Birmingham Plant	Short Name	BHMPLT
Main Communica	tion Batching Scheduling Costs Plants Scales Bins	Constituent Order	

- 2. Enter a code to define the new **Plant**.
- 3. Enter a **Name** and **Short Name** to identify the plant.
- 4. Select the tab that represents the type of information that you want to set up.

Plant Main Tab Setup

The **Main** tab is used to set up basic information about the plant such as address, tax code, zone code, inventory location, etc.

To set up main information:

1. Select the **Main** tab on the Plants screen. {Files > Plant & Delivery Information > Plants}

Main Communication Batch	ing Scheduling Costs Plants Scales Bins Constituent Order
Address	I 110 21 st North Birmingham, AL, 35210
Phone Number Company Weighmaster	205-288-8733 Next Number Sequences ✓ 1 Command Con ✓ 103 Zacharia ✓ 103 Zacharia ✓ 1 ✓ 1 ✓ 1 ✓ 1 ✓ 1 ✓ 1 ✓ 1 ✓ 1 ✓ 1 ✓ 1 ✓ 1
Map Page Zone Code Inventory Location Replication Target Manager Signaling Unit	 PLT1 PLT1 Immingham Immingham

Plants – Main Tab (EDTPLNT1)

- 2. Enter an **Address** on the three lines provided.
- 3. Enter a **Phone Number** for the plant.
- Select the **Company** that owns the plant. Companies are defined on the Companies screen in the General Information section. {Files > General Information > Companies}
- Select the primary Weighmaster for this plant. Weighmasters are defined on the Employees screen. {Files > General Information > Employees}
- Select the Tax Code that applies to the plant's location. Tax codes are defined on the Tax Code screen in the Sales Tax Information section. {Files > Sales Tax Information > Tax Code}
- 7. Select the **Map Page** on which the plant is located. The system uses this information to estimate deadhead travel time between plants.
- Select the Zone Code that indicates where the plant is located. Zones codes are maintained on the Zones screen. {Files > Plant & Delivery Information > Zones}
- 9. Select an **Inventory Location**. Inventory locations are defined on the Locations screen. {Files > Item Information > Locations}
- 10. If you are using database replication, enter any unique number (that is, do not use the same number as a **Replication Target Number** for any

other replicating plant) to serve as the Replication Target Number. This number represents the manager number that COMMANDreplicator uses to communicate.

- Select Next Number Sequences for the Order Code, Ticket Code, and Invoice Code. Next number sequences are set up on the Next Numbers screen. {Files > General Information > Next Numbers}
- 12. Mark the **Tracking** checkbox if the trucks based at this plant are tracked on the Tracking and Scheduling screen.
- 13. Mark the **Scheduling** checkbox if the trucks based at this plant are available on the Tracking and Scheduling screen.
- 14. If you would like to change the default **Tracking** or **Order Truck Color** for this plant, select a new color.
- 15. Accept the screen to save the main plant information.

Plant Communication Setup

The Communications tab allows the privileged user access to communications information for the plant. This includes information specific to the remote printing and distribution of tickets, including those sent via the COMMANDcomm interface.

To set up plant communication information:

 From the Plants screen, select the **Communication** tab to go to the Plant Communication Information screen. {Files > Plant & Delivery Information > Plants > Communication}

Main Communication Batching Scheduling Costs Plants Scales Bins Constituent Order User Fields				
Device Type Eagle v8.26 (2 way) 💌 Setup				
Print Dispatch Copy				
Allow Order Printing				
Allow Report Printing Setup				
Material Transfer Inventory Transactions Shipped To This Plant Create Transfer Transaction For Manual Posting				

Plants – Communication Tab (EDTPLNT2)

- 2. Select a **Device Type** from the list for the plant's ticket. This field specifies if the tickets are passed to a printer or a batch panel.
- 3. Mark the **Print Dispatch Copy** if you want a copy of a ticket for this plant to print at the dispatch office.
- 4. Mark the **Allow Order Printing** box if you want a copy of an order for this plant to print to the plant specified on the Orders screen.
- 5. Mark the **Allow Report Printing** box if you to print reports to this plant.

- 6. Click on the **Setup** button (the upper button of the two) for each active form of plant communication in the Device Type field. The Plant Communication Setup screen appears.
 - **Note**: If a specialized interface, such as a SmartPass, is specified as the Device Type, the setup screen will be different. Please refer to the documentation for the interface in question for more information.

Plant Communication Setup (EDTPLNTA)				
📄 Plant Communication Setup (1)				
Plant Copy Manager Number Port Name Selective Address	2 LPT1 2			
Auto Dial Flag				

- 7. Enter a **Manager Number** to specify the COMMANDcomm manager number to be used when printing an order.
- 8. Enter an **LPT** or **COM Port Name** or select the proper printer from the field's list. In the case that a COM port is entered in the first field, the second field becomes the **Port** button. See the following section for more information.

Note: The Communication Port Setup screen requires that the settings match the configuration of the printer or modem.

If you wish to print orders to a device that has already been set up within Windows, select that device from the list. The **Prompt** option can also be selected if you wish to allow the user to select the device at each print command.

- 9. Enter a **Selective Address**. This field specifies the selective address code to use when printing an order through a multi-drop phone line where more than one output device exists.
- 10. If necessary, set the appropriate type of **Document Format**.
- 11. Mark the **Auto Dial Flag** if COMMANDcomm will use the information in the **Modem Phone Number** and **Modem Code** fields to send data to a remote printer.
- 12. Accept the screen.

Communications Port Setup

The Communications Port Setup screen allows you to define information about the port.

To set up communications information for the port:

1. Go to the **Communications** tab on the Plants screen. {Files > Plant & Delivery Information > Plants > Communication}

- 2. Configure each of the **Device Types**, as necessary, using the Device Type **Setup** button.
- 3. Click the lower **Setup** button, located in the Allow Report Printing section. The Plant Communication Setup screen displays.
- 4. Enter a **Manager Number** and a **Port Name** (1 4). The **Prompt** field changes to a **Port** button.
- 5. Click the **Port** button on the Plant Communications Setup screen. The Communication Port Setup screen displays.

Communication Port Setup (EDTPLNTD)				
🗖 Communcation Port Setup (00005) 🛛 🛛 🔀				
Baud Rate 115200 💌				
Data Bits 8				
Parity None 💌				
Stop Bits 1				
Flow Control Xon/Xoff				

- 6. In the **Baud Rate** field, select the number that represents the bits of data that the port can transfer per second.
- 7. In the **Data Bits** field, enter the number of bits that comprise a unit (byte) of data.
- 8. In the **Parity** field, select the type of parity that is used to check for errors during transmission. The options are Even, Odd, None, Mark, or Space.
- 9. In the **Stop Bits** field, select the number of bits that indicate a byte has been transmitted.
- 10. In the **Flow Control** field, select the process used to control the flow of information. The options are as follows.

None – no flow control method is used.

XON/XOFF – the receiving port sends an XOFF signal when the buffer (a temporary storage area) is full; the port stops sending data; the receiving port sends an XON signal when it is ready to receive more data.

Hardware – flow control is determined by the hardware

11. Accept the screen to return to the Plant Communications Setup screen.

Plant Batching Setup

To set up plant batching information:

 From the Plants screen, select the **Batching** tab. {Files > Plant & Delivery Information > Plants > Batching}

		Р	lants – Ba	atching	lab (E	DIPLNI	3)		
Main	Communication	Batching	Scheduling	Costs	Plants	Scales	Bins	Constituent Order	User Fields
Maxim Mixer Batch U U U M M M W	um Batch Size Fime Interface Polling S pload Weights from pdate Batchwatch djust Mix by Ticke /eighed Water	ileep Time m Batch Interf ner t	10.00 c 9 Sec 10 Mi ace	ou yds onds nutes					
Trim P Acce Hot \ Air Supe	ercent Herator Mater r Plasticizer		100.000 % 100.000 % 100.000 %	6 6 6					
2.	Select a N any single	1aximur batch o	n Batch f ready-	Size mix c	. This oncret	is the te pro	e maxi duct a	mum size all It the plant.	owed for

- 3. Enter the **Mixer Time**. This is the time, in seconds, to allow for the plant's mixer drum operation, per one yard or meter of ready-mix concrete.
- 4. Enter the **Batch Interface Polling Sleep Time**, in minutes, which the COMMANDcomm process sleeps, or waits, before polling the batching computer for actual weight information.
- 5. Mark the **Upload Weights From Batch Interface** checkbox if necessary. When marked, this checkbox causes the batching system to update, or send back, actual weights for each ticket produced. You must have a two-way batch interface in order to use this feature.
- 6. Mark the **Update Batchwatch** to enable coping batch weight information to ConAd. This field will not be active unless ConAd is in the system license.
- 7. Mark the **Adjust Mix by Ticket** checkbox if necessary. When marked, this checkbox causes weights for constituent products to be sent with each ticket that is sent to the batching system.
- 8. Enter the default **Trim Percent** information for the Accelerator, Hot Water, Air, and Super Plasticizer. Each field specifies the trim percentage for each category of admixtures, for the plant, when interfacing to a batching computer.

Plant Scheduling Setup

To set up plant scheduling information:

 From the Plants screen, select the **Scheduling** tab. {Files > Plant & Delivery Information > Plants > Scheduling}

Plants – Scheduling Tab (EDTPLNT4)

Main Communication Batching	Scheduling Costs Plants Scales Bins Constituent Order User Fields
Driver Lead Time Pre-Load Time Load Time Post-Load Time Load Time Usage On Job Wash Time	15 Minutes 6 Minutes 5 Minutes 10 Minutes Loading • 5
Default Number of Trucks Specified Plant Capacity Current Plant Capacity	60 12 10

2. Enter the plant's **Times**. The times specify the following.

Driver Lead Time – the average time, in minutes, a driver needs prior to loading the first ticket of the day at this plant

Pre-Load Time – the average time, in minutes, that the driver needs to get his truck into loading position

Load Time – the average time, in minutes, required to load a truck and be ready to load the next truck

Post-Load Time – the average time, in minutes, needed by a driver after the truck is loaded before leaving the plant

- 3. The Orders screen and the Tracking and Scheduling screen to create default scheduling information for orders and tickets use the information in Times.
- 4. From the Load Time Usage field's list, select how the load status is to be treated in all scheduling functions for this plant. Loading indicates that the load status time is from when the loading was started; Loaded indicates that the load status time is from when the loading was finished.
- 5. Enter the **On Job Wash Time** to indicate the average time, in minutes, required to wash the truck.
- 6. Enter the **Default Number of Trucks**. This field designates the number of trucks, or fleet size, assigned to this plant. It is used to default the fleet size on a daily basis for scheduling purposes on the Orders and Tracking & Scheduling screens for orders and tickets.
- 7. Enter the **Specified Plant Capacity** to indicate the maximum cubic meters that can be batched per hour.
- 8. Enter the **Current Plant Capacity** to indicate the number of cubic meters actually being batched per hour.

Plant Costs Setup

Plant costs information is used by the COMMANDexecutive reporting module to generate contribution and gross margin reports.

To set up plant costs information:

1. From the Plants screen, select the **Costs** tab. {Files > Plant & Delivery Information > Plants > Costs}

Plants – Costs Tab (EDTPLNT5)				
Main	Communication Batching Scheduling Costs			
Cost F Adm Sale Disp Plan	Per Quantities: inistration s atch t t	3.49 1.12 0.62 3.78		
Variab	le Truck Cost Per Hour	28.00		
Yearly Truck	Interest Rate Productive Factor	9.00 % 65.00 %		
Desire	d Profit Per Quantity	3.50		

- 2. Enter the **Administration Cost Per Quantities** specifying the estimated administrative cost per yard or meter to use in the calculation of projected costs for profit reporting. This value is multiplied by the number of yards or meters to determine the estimated administrative cost per ticket.
- 3. Enter the **Sales Cost Per Quantities** specifying the estimated sales cost per quantity to use in the calculation of projected costs for profit reporting. This value is multiplied by the number of yards or meters to determine the estimated sales cost per ticket.
- 4. Enter the **Dispatch Cost Per Quantities** specifying the estimated dispatch cost per quantity to use in the calculation of projected costs for profit reporting. This value is multiplied by the number of yards or meters to determine the estimated dispatch cost per ticket.
- 5. Enter the **Plant Cost Per Quantities** specifying the estimated plant cost per quantity to use in the calculation of projected costs for profit reporting. This value is multiplied by the number of yards or meters to determine the estimated plant cost per ticket.
- 6. Enter the **Fixed Truck Per Quantities** specifying the fixed truck cost per quantity to use in the calculation of projected costs for profit reporting. Fixed trucking costs are those costs that do not vary significantly with the number of hours of operation of the vehicle. This includes depreciation, insurance, licenses, etc.
- 7. Enter the **Variable Truck Cost Per Hour** specifying the variable truck cost, such as expenses for labor, fuel, oil, maintenance, and tires, per quantity to use in the calculation of projected costs for profit reporting. The total round trip time is calculated on each ticket and multiplied by this rate to determine variable trucking for profit reporting.

- Enter the **Yearly Interest Rate** specifying the estimated yearly interest 8. rate in order to calculate the cost of carrying receivables, based on the customer's normal payment time.
- Enter the **Truck Productive Factor** specifying the estimated truck 9. productivity factor, which is multiplied by the fixed trucking cost to add the cost of non-productive time.
- 10. Enter the **Desired Profit Per Quantity** specifying the desired profit per quantity, which is added to the cost to show the projected selling price.

Plant Plants Setup

The Plants Plant tab allows to specify what product lines are available at this plant.

To establish a plant's product lines:

1. From the Plants screen, select the **Plants** tab. {Files > Plant & Delivery Information > Plants > Plants }



2. Select the appropriate checkboxes.

Plant Scale Setup

To set up plant scale information:

From the Plants screen, select the **Scales** tab. {Files > Plant & Delivery 1. Information > Plants > Scales}

	Plants - Scales Tab (EDTPL	.NIO)
Main Communication	Batching Scheduling Costs Plants Scal	es Bins Constituent Order User Fields
Scale Number Description Short Scale Type Weighmaster	1 First Scale FS 2 Cardinal Scale 103 Zachariah Wildhare	Communication Bins
Port Name Selective Address Scale Manufacturer Scale Model Weight Division Manual Weight	COM1 Port 2 Horsey H111 Scale Seria ✓ 1.00 to Weight Cap	al Number 343 pacity I 33333.00 to II II

Diante Scalos Tab (EDTDI NTS)

2. Enter a **Scale Number** to identify the scale you are defining.

- 3. Enter a **Description** and a **Short** description for the scale.
- 4. Select a **Scale Type**, or detail on the field to select from a list of available scale types.
- 5. Select a **Weighmaster**. A complete list of possible weighmasters is available through this field's detail button.
- 6. Enter a **Port Name**. This name represents the logical port that COMMANDcomm uses when producing plant or dispatch copies of the ticket, order, or report.
- 7. Enter a **Selective Address** for the specific plant output device to use when sending a ticket, order, or report through a multi-drop phone line.
- 8. Enter the Scale Manufacturer, Model, and Serial Number.
- 9. Enter the scale's **Weight Division and Capacity** according the scale's specifications.
- 10. Mark the **Manual Weight** checkbox if necessary. When marked, this checkbox allows the weighmaster to enter weights manually.
- 11. Click the **Communication** button to go to the Scale Communication Information screen.

Scale Communication Information (EDTPLNTC)						
🖬 Scale Communication Information (1 First Scale) 🛛 🔀						
Primary Ticketing Device Device Type	Printer	Setup				
Secondary Ticketing Device Device Type	XCI Disk Output	Setup				
Temporary Ticketing Device Device Type	XCI Disk Output	Setup				

- 12. Select a **Device Type** for the Primary, Secondary, and Temporary Ticketing Device from the fields' list.
- 13. Click the Primary Ticketing Device **Setup** button to go to the Plant Communication Setup screen.

Plant Communication S	Setup (EDTPLNTA)				
Plant Communication Setup (1)					
Plant Copy Manager Number Port Name	2 LPT1				
Selective Address	2				
Auto Dial Flag					

14. Enter a **Manager Number** to represent the manager number that COMMANDcomm will use to communicate. The manager number can be

found in the properties file of COMMANDcomm (highlight the COMMANDcomm icon and press <Alt+Enter>).

15. Enter an **LPT** or **COM Port Name** or select the proper printer from the field's list. If a COM port is entered in the first field, the second field becomes the **Port** button. Select the button to setup the printer or modem that COMMANDcomm will use to print orders.

Communication Port Setup (EDTPLNTD)				
🖬 Communcation Port Setup (00005) 🛛 🛛 🔀				
Baud Rate Data Bits Parity Stop Bits Flow Control	115200 8 None 1 Xon/Xoff	x x x		

Note: The Communication Port Setup screen requires that the settings match the configuration of the printer or modem.

If you wish to print orders to a device that has already been set up within Windows select that device from the pull-down menu. The **Prompt** option can also be selected if you wish to allow the user to select the device at each print command.

- 16. Enter a **Selective Address** specifying the selective address code to use when printing an order through a multi-drop phone line where more than one output device exists.
- 17. Enter a **Document Format** specifying the format in which the document will print.
- Mark the Auto Dial Flag checkbox if necessary. When marked, this checkbox specifies that COMMANDcomm will use the information in the Modem Phone Number and Modem Code fields to send data to a remote printer.
- 19. Accept the Plant Communication Setup screen.
- 20. Repeat steps 14 through 20 for the Secondary Ticketing and Temporary Ticketing devices, as needed.
- 21. Accept the Scale Communication Information screens.

Plant Bins Setup

Depending on your plant setup, you may need to create and configure loading bins.

To configure bins:

 From the Plants screen, select the **Bins** tab. {Files > Plant & Delivery Information > Plants > Bins}

Main	Communication Batchir	ng	Scheduling Costs Plants Scales Bins	Constitue	nt Order 🛛 U	ser Fields
Bin	Dispensing Type		Description		Short	
1	Cement Bin	-	Cement bin #1		CE#1	린 🖻
2	Cement Bin	•	Cement bin #2		CE#2	<u> –</u>
2	Aggregate Bin	•	Aggregate		AGG	<u> </u>
3	Cement Bin	•	Cement bin #3		CE#3	린
3	Admixture Bottle	•	Admix		ADMIX	₽
4	Cement Bin	•	Flyash Bin #4		FL#4	₽
4	Water Meter/Bin	•	Water		WATER	₽

Plants – Bins Tab (EDTPLNT7)

2. Enter a **Bin** code.

- 3. Select a **Dispensing Type**. The options are: Cement, Aggregate, Admixture Bottle, Water Meter/Bin.
- 4. Enter a **Description** of the bin.
- 5. Enter a **Short** description of the bin.
- 6. Press the **Add Occurrence** button to enter another bin, if necessary.

Constituent Order Setup

By default, COMMANDseries will batch constituents in the order in which they appear in the mix design. If constituents must be added in a specific order for the plant, enter that order on this tab, and the settings will override the order in the Item record.

To set up plant constituent order information:

 Click on the **Constituent Order** tab. {Files > Plant & Delivery Information > Plants > Constituent Order}

Plants – Constituent Order Tab (EDTPLNT8)									
Main	Communication	Batching	Scheduling	Costs	Plants	Scales	Bins	Constituent Order	User Fields
lte	em Code					Bin			
- S	AND-2							•	▲▲
	OCK-3							•	<u>↑</u> ++
	EMENT-A							•	<u>↑</u> ↓

2. Enter one or more constituent **Product Codes** for the plant in order of how they should be sent to the batch plant.

Note: The up and down arrows allow you to change the order of the products.

3. Enter the **Bin** number that is required for COMMANDseries to store and include for each constituent sent in the adjusted mix ticket.

Plant User Fields

If your system has been configured for plant-specific user fields, you may edit those fields on the **User Field** tab. For information about user fields, see the system Configuration section.

Haulers

The Haulers screen allows access to hauler records that identify people or companies outside of your organization who are assigned to tickets and deliver items in their own truck. If you plan to use haulers, it is necessary for you to set up a hauler code for your company. Name this hauler "Company Truck", and assign it to all trucks your company owns when setting up the actual trucks.

Before entering hauler information, gather information about the people or companies that you contract with to deliver your items.

To add a new hauler:

1. Go to the Haulers screen. {Files > Plant & Delivery Information}

🛅 Haulers		_ I ×
Hauler Code	100	
Name Contact Phone Number Company Insurance Carrier Name Insurance Expiration Date	Li'l Aggner John Cromeans - Charge & Pay 879-3282 02 Command Aggregates	

Haulers (EDTHLER)

- 2. Enter a **Hauler Code** to identify the new hauler.
- 3. Enter the **Name** of the hauler or hauling service, such as Acme Trucking.
- 4. If possible, enter a **Contact** name for reference with the hauling service name.
- 5. Enter a **Phone Number** to accompany the hauling service name and contact.
- 6. Identify the **Company** for which the hauler normally works. If the hauler does not work primarily for a specific company or if your system contains only one company, leave this field blank.
- 7. Enter the **Insurance Carrier Name** and **Insurance Expiration Date**.
- 8. Accept the Haulers screen to save the new hauler information.

Truck Types

A truck type specifies a user-definable grouping of trucks by function, materials carried, and/or capacity. For example, truck types could be defined for the following trucks.

- Nine-cubic-yard capacity rear-discharging ready-mix truck
- Eight-cubic-yard capacity rear-discharging ready-mix truck
- Nine-cubic-yard capacity front-discharging ready-mix truck

Each of these trucks normally has its own truck type. Various reports and screens use the truck type grouping. In addition, when scheduling an order, you have the option of specifying a specific truck type.

Before entering truck type information, gather information about the types of trucks you own or use for the delivery of items.

To define a new truck type:

 Go to the Truck Types screen. {Files > Plant & Delivery Information > Truck Types}

🛓 Truck Types		_ 🗆 🗙
Truck Type	10	
Description Short Maximum Load Size Minimum Load Size Scheduled Load Size Job Wash Time Truck Tarp Time Unload Time Number of Drops Percent Drop 1 Percent Drop 2 Percent Drop 3 Percent Drop 3 Percent Drop 5 Percent Drop 5 Percent Drop 6		

Truck Types (EDTTTYP)

- 2. Enter a **Truck Type Code** to identify the new truck type.
- 3. Enter a **Description** and **Short** description for the truck type.
- 4. Specify the default **Maximum Load Size** (maximum amount the truck can carry) for this type of truck. If necessary, use the detail button to select a unit of measure.
- 5. Specify the default **Scheduled Load Size** (amount the truck usually carries) for this type of truck. If necessary, use the detail button to select a unit of measure.

- 6. Enter an average **Job Wash Time** for this type of truck. This value determines the amount of time after the end unloading time status and the to plant time status.
- 7. Enter the **Truck Tarp Time** specifying the default job washdown time, in minutes, for this truck type. This estimate is used when scheduling an order using this truck type. It determines the amount of time after the end unloading time status and the to plant time status.
- 8. Enter the **Unload Time**. This field specifies the default unload time (for a full load), in minutes, for this truck type. This estimate is used when scheduling an order using this truck type if an unloading rate is not specified.
- 9. If the truck is an aggregate truck in an overhead loadout environment, you can use the **Number of Drops** field to achieve greater control over truck loading. Enter the number of drops (maximum of 6) necessary to fully load the truck. An equal number of Percent Drop fields will activate immediately below. Spread the lad across the loads as necessary. These values will be sent to the loading interface when the truck is ticketed.
- 10. Accept this screen to store the Truck Type data.

Trucks

Information regarding trucks, including assigned drivers, assigned plants, and truck tracking defaults, etc., is assigned to trucks in the Trucks editor. These assignments act as defaults for tickets using this truck.

Before entering truck information, gather information about the size and type of trucks you use. You will also need to know who is driving each truck and which plant each is scheduled out of at the beginning of each day.

Topics in this section:

Entering a New Truck Truck Scheduling Setup Truck Tracking Setup Overhead Load Out User Fields

Entering a New Truck

To enter a new truck:

1. Go to the Trucks screen. {Files > Plant & Delivery Information > Trucks}

Trucks (EDTTRUC1)

Truck Code	1				
Owner Name Description Short	Mack, 1998 MACK98				
Main Scheduling Tracking	Overhead Load Out User Fields				
License Number License Expiration Date Hauler Code Driver Code Plant Code Trailer Code 1 Trailer Code 2 Insurance Carrier Name Insurance Expiration Date Setup Date	BR549 31-Dec-2099 I CDI Redi Mix Trucks 29 Randy Odoms I Main Plant I Image: Constraint of the second se				

2. Enter a **Truck Code** to identify the new truck.

Note: If using an Eagle interface, numeric truck codes should be used. The Eagle ignores alphanumeric truck codes.

- 3. If the truck has a unique owner, assign an **Owner Name** to the truck.
- 4. Enter a **Description** and **Short** description of the truck. Include, for example, the make, model, and year of the truck.
- 5. On the **Main** tab, enter the **License Number** of the truck and the license's **Expiration Date**.
- 6. Assign a **Hauler Code** to the truck. If your company owns the truck, set the hauler code to **Company Truck**.
- 7. Enter the **Driver Code** of the person who usually drives this truck. If no employee is the normal driver of this truck, leave the field blank.
- 8. Select the **Plant Code** for the plant to which the truck is assigned or from which it normally operates. If the truck does not have a plant from which it typically operates, leave this field blank.
- 9. Enter the code(s) for the trailer(s) usually associated with this truck in the **Trailer Code 1** and **2** fields if necessary.
- 10. Enter the **Insurance Carrier Name** and the **Insurance Expiration Date** for this truck.
- 11. Enter **t** in the Setup Date field to indicate today as the day the truck is added to the file.

Truck Scheduling Setup

To set up truck scheduling:

1. On the Trucks screen, select the **Scheduling** tab.

Trucks (EDTTRUC2)						
Main Scheduling	Fracking 🖡 Overhead Load C	Dut User Fields				
Truck Type REAR Product Line Concrete						
Minimum Load Size Scheduled Load Size Maximum Load Size	 ▼ 7.00 cu yds ▼ 9.00 cu yds ▼ 10.00 cu yds 	Tare Weight Tare Date Tare Time Days Tare is Valid Tare Type				
Delivery Method	🗾 🛛 Company	F.O.B. Only				

2. Specify the **Truck Type**. This field assigns a type code to the truck and is used to categorize your trucks. This is helpful when choosing a truck to assign to an order or ticket when the order or ticket requires a specific type of truck.

Truck types are uniquely identified by a truck type code. This code is set up on the Truck Types screen. {Files > Plant & Delivery Information > Truck Types}

- 3. Select a **Product Line** from the field's list.
- 4. Enter a **Minimum Load Size**. This field represents the smallest load size that the truck normally carries. Trucks that carry a load below this size may be assessed a minimum load charge, depending on how the customer, project, order, and/or ticket are flagged for minimum load charges.
- 5. Enter a **Scheduled Load Size** to represent the optimum load size for the truck. When truck-based scheduling is used, such as for aggregate scheduling, this load size is defaulted for scheduling this truck.
- 6. Enter a **Maximum Gross** to represent the largest load size that the truck should carry. The maximum load size is used in ticketing to display a warning message when a load size is entered that exceeds the maximum load size.
- 7. Enter **Tare Weight** information including the Date, Time, Days Tare is Valid, and the Tare Type.
- 8. Enter a **Delivery Method** to indicate whether the truck is a company truck, a hauler truck, an F.O.B. truck, etc.
- 9. Mark the **F.O.B. Truck** checkbox if necessary. When marked, this checkbox marks this as a freight-on-board truck and haul charges do not apply.

Truck Tracking Setup

To set up truck tracking information:

1. Select the **Tracking** tab on the Trucks screen. {Files > Plant & Delivery Information > Trucks > Tracking}



- Enter a character in the Flag field. The flag identifies the character to be displayed for this truck on the Tracking and Scheduling screen {Dispatch > Tracking & Scheduling}. For example, a \$ could be printed with a truck that needs to collect money. This character prints to the left of the truck code on the tracking display.
- 3. Select a truck **Color** to be used for this truck on the Tracking and Scheduling screen.

Note: As a general rule, you will leave the two previous fields blank and use system defaults, changing colors and flags on a case-by-case basis.

- Select a Permanent Color for the truck. The Color may change during the course of a day's business, at the end of the day the truck Color will be reset to the Permanent Color.
- 5. Enter the **Badge/Card Number** of the truck. This number may be retrieved through auto-ticketing from a barcode on the truck.
- 6. Select a **Signaling Unit**, if necessary, to assign one to the current truck.
- 7. Select a **Radio Code**. This field identifies the radio truck code for this truck (which may be different than the entry in the Truck Code field) sent to the COMMANDconcrete application the mobile signaling system in use.

Note: Detailing displays a list of non-printable characters (CR, LF, etc.) which can be acknowledged as part the truck identification received from the mobile signaling system.

- 8. Mark the **Automatic Signaling** checkbox if necessary. When marked, this checkbox causes that this truck to be moved automatically from one time status to the next, based on the time factors in the appropriate order and plant records.
- 9. Accept the Trucks Information screen to save the new truck information.

Overhead Loadout

To configure a truck for Overhead Loadout:

1. Select the **Tracking** tab on the Trucks screen. {Files > Plant & Delivery Information > Trucks > Tracking}

Overhead Loadout (EDTTRUC7)

Main Scheduling	Tracking Overhead Load Out	User Fields
Number of Drops Percent Drop 1 Percent Drop 2 Percent Drop 3 Percent Drop 4	3 33.000 34.000 33.000	
Percent Drop 5 Percent Drop 6		

- 2. Enter the **Number of Drops** it should take to load the truck.
- 3. The corresponding number of Percent Drop fields will become active. By default, the percentage for each will be roughly the same; the distribution can be edited manually.
- 4. Accept the screen.

Note:The Overhead LoadOut tab will only appear if Overhead Load Out is in the system license.

Truck User Fields

If your system has been configured for truck-specific user fields, you may edit those fields on the **User Field** tab. For information about user fields, see the system Configuration section.

Trailers

The Trailers screen allows users to enter codes and important information for the trailers they use to deliver aggregate products. Trailers are used in the COMMANDaggregate system as attachments to trucks or independently with a hauling truck.

Before entering trailer information, gather information about the trailer including owner, hauler, and license information.

Topics in this section:

Trailer Setup Trailers Scheduling Setup Trailer Tare Setup

Trailer Setup

To enter a new trailer:

 Go to the Trailers screen. {Files > Plant & Delivery Information > Trailers}

📱 Trailers						
Trailer Code	101PUP					
Owner Name Owner Address	101 PUP					
Owner City Owner State Owner Zip	Owner Country					
Hauler Sche	eduling Tare Overhead Load Out					
Hauler Code License Number License Expiration Date	 ✓ 1 ☑ 22-Jul-2006 					

Trailers (EDTTRLR1)

- 2. Enter a **Trailer Code** to uniquely identify the new trailer. This code is used to access truck information in other programs. It is also used to sort reports that contain truck-related information.
 - Note: To insure that proper sorting takes place in lookup windows and reports, make ALL trailer codes either all numbers, all letters, or all numbers and letters; do not make some codes all numbers and other codes all letters, etc. Make all codes the same length; that is, put the same number of characters in each code.
- 3. Enter the **Owner Name**, **Address**, **City**, **State**, and **Zip** information if applicable. This information prints on trailer listings only.
- 4. On the **Hauler** tab, select a **Hauler Code** to assign a hauler to the trailer. If this is a company trailer, assign the hauler code setup for company trucks. {Files > Plant & Delivery Information > Haulers}
- 5. Enter the **License Number** found on the trailer's license plate.
- 6. Enter the **License Expiration Date** found on the trailer's license plate.

Trailers Scheduling Setup

To enter hauler scheduling information:

 Select the Scheduling tab on the Trailers screen. {Files > Plant & Delivery Information > Trailers > Scheduling}

Trailers (EDTTRLR2)

Hauler	Scheduling	Tare	Overhead Load Out
Minimum Load Size	ze 1 5.00	tons	
Scheduled Load Si	1 9.00	tons	
Maximum Gross	1 10.00	tons	

- 2. Specify **Minimum Load Size**, **Scheduled Load Size**, and **Maximum Gross information** for use in the Scheduling screen.
- 3. In an **Overhead Loadout** environment, enter the **Number of Drops** normally required to fill the truck.

Trailer Tare Setup

To enter trailer tare information:

1. Select the **Tare** tab on the Trailers screen. {Files > Plant & Delivery Information > Trailers > Tare}



- 2. Enter the **Tare Weight** of the trailer. If necessary, use the detail button to select the appropriate unit of measure.
- 3. Enter the date and time the tare weight was taken in the **Tare Date** and **Time** fields.
- 4. Enter the **Days Tare Valid**.
- 5. Select the Tare Type: Apply Manually or Apply Automatically.
- 6. Accept the Trailers screen to save the new trailer information.

Trailer Overhead Loadout Setup

To enter trailer overhead loadout information:

 Select the Overhead Loadout tab on the Trailers screen. {Files > Plant & Delivery Information > Trailers > Overhead Loadout}
Trailers - Overhead Loadout tab (EDTTRLR4)

Hauler	Scheduling	Tare	Overhead Load Out
Number of Drops Percent Drop 1 Percent Drop 2 Percent Drop 3 Percent Drop 4 Percent Drop 5 Percent Drop 6	3 33.000 34.000 33.000		

- 2. Enter the **Number of Drops** generally needed to fill the trailer.
- 3. The corresponding number of **Percent Drop** fields will become active. By default, the percentage for each will be roughly the same; the distribution can be edited manually.
- 4. Accept the screen.

Delivery Methods

The Delivery Methods function allows users to define multiple methods of aggregate product delivery for use in the COMMANDaggregate Ticketing functions. Aggregate companies typically support F.O.B. orders, when the customer picks up the aggregate product(s). The Delivery Methods function allows user defined detail for variations of these two scenarios.

To set up delivery methods:

 In COMMANDaggregate, open the Delivery Methods screen. {Files > Plant & Delivery Information > Delivery Methods}

Delivery Methods (EDTDLMT)

🛅 Deli	very Methods		
Code	Description	Short	Delivery Type
1	Delivered in Hired Truck	Hired	Delivered 💽 🛃
2	Delivered in Company Trucks	Company	Delivered 💽 🛃
3	Picked Up	Picked U	F.O.B.

- 2. Under the **Code** field, enter the code that represents the delivery method you are entering.
- 3. Under the **Description** field, enter a description for the delivery method.
- 4. Under the **Short** field, enter an abbreviated description for the delivery method.
- 5. Under the **Delivery Type** field, select the delivery type associated with the delivery method. The options are Delivered, F.O.B., or Both.
- 6. Select the **Add Occurrence** button to enter another delivery method.
- 7. When you are finished, accept the Delivery Methods screen.

Pouring Methods

Pouring methods allow for more standardization in the use of pouring methods, by allowing you to establish a number of common pouring methods and linking them to an appropriate unloading time. Having these values available prevents the order taker from having to estimate unloading rates while talking to the customer.

Pouring Methods are entered into the system in the Files > Plant & Delivery Information menu. Some examples of possible Pouring Method options are:

Pouring Method	Rate/CY	Comment
Standard	5 min	A baseline rate, particularly useful if all the company's trucks are the same type
Pump	2 min	We're going for volume here, not neatness
Curb	15 min	Curbs take time to do properly.
Wheel barrow	10 min	In some cases, mix must be poured into a wheelbarrow and transported to its destination.
Front loader	4 min	If the you have different truck types, you might need separate pouring methods for each.

There are two basic ways of setting up pouring methods:

- Based on **method of delivery** (front loader, pump, etc.)
- Based on the **type of construction** being made (slab, sidewalk, etc.).

It's not an either/or proposition, however; you can set them up any way you want.

Once a Pouring Method has been established, it can be used by entering its assigned code in the **Pouring Method** field on the main Scheduling screen.

In addition to considering what pouring methods are needed, customers might also want to consider if their unloading charge practices should mirror their pouring rates. If a company can let you know ahead of time that more pouring time is necessary, do you want to charge him the same as another customer that cannot supply advance notice?

You might end up with one or two unloading charge tables for each pouring method.

Pouring methods cannot be set at the project level.

To enter pouring methods:

 Open the Pouring Methods screen. {Files > Plant & Delivery Information > Pouring Methods}

Pouring Methods (EDTPMET)

🛅 Ροι	iring Methods			_ 🗆 🗙
Pouring Method	Description	Short	Unload Rate per Hour	
WALL	WALL	WALL		₽ ▲
SLAB	SLAB	SLAB	🗾 5.00 cy	린
CURB	CURB	CURB	🗾 15.00 CV	┙
WHEE	WHEEL	WHEEL	💌 🚺 су	┛
STD	Standard Pouring Rate	STD	🗾 (5.00 cy	린

- 2. Enter a **Pouring Method** code to identify the entry. The code can be alphanumeric, up to four characters in length.
- 3. Enter a **Description** of the method.
- 4. Enter a **Short** description of the method.
- 5. Enter an **Unload Rate per Hour**. Detail on this field to select a rate UOM (the default will be cubic yards).
- 6. Press **Add Occurrence** to add another pouring method, or accept the screen.

Job Cost Phases & Jobs

You may have a construction job of you own, whether it is building a new plant or expanding a current one. In such cases, it can be useful to track your material expenditures on the project. COMMANDseries allows you to do this through establishing Job Cost tracking information.

This feature operates through two components:

Job Cost Phases identifies different stages in the job cycle: bed, flatwork, foundation, walls, etc.

Job Cost Jobs identifies a specific job/project.

Once these records are created, they can be used whenever you ship material to an internal job. By selecting the order type, Job Transfer, you indicate material to be used for internal work. The job Cost/Phase fields then appear on the order screen.

This feature provides two benefits: Better tracking of a job through its stages, and reduced invoicing costs (Job Transfer orders will not be invoiced).

Note: To enter Job Cost Phases or Jobs, you must

- Have aggregate in the system license
- Be in Aggregate, Invoicing, or Receivables

To enter a Job Cost Phase:

 Go to the Job Cost Phase screen {Files > General Information > Job Cost Phases}.

Job Cost Phase (EDTPHSE)

📱 Job Cost	Phase		_ 🗆 🗙
Job Cost Phase	Description	Short	
[크린즈

- 2. Enter a **Job Cost Phase** code. This code is a character string of up to 16 characters.
- 3. Enter a **Description** (40 characters).
- 4. Enter a **Short Description** (8 characters).
- 5. Select the Add Occurrence button to enter another phase, or Accept the screen.

Creating a Job Cost Job is a matter of creating a job code, and then assigning specific Job Cost Phases to that code. Once that is done, the job can be tracked within COMMANDseries.

To enter a Job Cost Job:

 Go to the Job Cost Job screen {Files > General Information > Job Cost Job}.

🖺 Job Cost Jobs/Phases			- 🗆 🗙
Job Cost Job	test		
Description Short			
Job Cost Phase	Description	Short	T A

Job Cost Jobs (EDTJCJB)

- 2. Enter a **Job Cost Job** code, or detail on the field to select from a list.
- 3. Enter a **Description** of the Job.
- 4. Enter a **Short Description**.
- 5. Enter a **Job Cost Phase** or detail on the field to select from a list.
- 6. Select the Add Occurrence button to enter another phase or Accept the screen.

Zones

The Zones screen allows access to zone records that represent the large, geographical areas into which deliveries are made. Characteristics can be assigned to a zone, such as its tax code (for destination-based taxing), its assigned pricing plant code, and its scheduled plant code. Also, you can establish relationships between a zone and plants for computing and applying price adjustment amounts, by price category, for deliveries from the plant to the zone.

Zones are assigned to customers, projects, and eventually to orders to identify the zone to which deliveries are made.

The geographical layout of zones is wholely up to a customer. Some customers match zones to map pages, and others divide the delivery area into very broad regions. Customers with a single plant, or two plants close together, may set up the zones as a series of concentric circles surrounding the plant.

Before entering zone information, gather geographical information about your company's delivery area. Also, you need to determine how this area is divided for tax and plant purposes.

To enter a zone:

1. Go to the Zones screen. {Files > Plant & Delivery Information > Zones}

🛅 Zones			_ 🗆 🗵
Zone Code	2		
Description Short Scheduled Plant Code Tax Code Price Adjustment UDM	Shelby County East ESHELBY 3 River Road 3 Jefferson Count 40003 Cubic Ya	y	
Plant Code	Price Category Adjustme	nt Effective 23-Jul-2001	Previous Price Adjustment 22.00

Zones (EDTZONE)

- 2. Enter a **Zone Code** to identify the new zone.
- 3. Enter a long **Description** and **Short** description for the zone.
- 4. Select a plant to use as the default **Scheduled Plant Code** for non-project orders using this zone.
- 5. Select a **Tax Code** associated with this zone.
- 6. Select the **Price Adjustment UOM** for all price adjustment amounts.
- Enter a Plant Code to identify standard price adjustment amounts for this zone and associate price category adjustments for deliveries to this zone. Entering # sets the price adjustment(s) for all plants.

- 8. Enter the **Price Category** for this zone. The default (blank field) is All.
- 9. Enter your zone travelling charge in the **Price Adjust** field.
- 10. Use the **Effective Date** to set a time for the new rate to apply, or enter **t** (for today) to immediately apply the price adjustment.
- 11. Enter the **Previous Price Adjustment** for reference purposes if desired.
- 12. Continue setting price adjustments for a specific plant(s). Set price adjustments for the price categories you have defined. {Files > Item Information > Price Categories}
- 13. Repeat Steps 7 12 as necessary for other plants from which you deliver.
- 14. Accept the Zone screen to save the zone and any price adjustments.
- **Note:** When entering zones for cartage, you do not need to enter plant and rate information. Just create the zones. The rates will be set in the cartage tables.

Map Pages

Map pages provide a travel time system that incorporates locations, dictated by their map page, and plants with a dynamic timing system that accounts for varying travel times throughout the day and the changes to the travel time throughout the day. Through communications with COMMANDcomm, the travel times dynamically account for the actual time spent traveling to a map page from a specific plant at a specific time of day.

Before setting up map pages, you must enter map page time periods {Files > General Information > Map Page Time Periods}. These time periods reflect the periods during the day when travel times to a map page from a plant are affected by traffic, rush hour, lunch hour, etc.

Topics in this section:

Map Page Time Periods Setup Map Pages Setup Map Pages Zones Setup Map Pages Coordinates Automatic Travel Time Posting

Map Page Time Periods Setup

The Map Page Time Periods screen allows users to define periods of the day when travel times are consistently unique. Users can setup a separate time classification for all possible travel times, according to the time of day. For example, a separate time period should exist for morning rush hour, average morning traffic, lunch traffic, normal afternoon traffic, evening rush hour, etc.

To enter map page time periods:

 Go to the Map Page Time Periods screen. {Files > General Information > Map Page Time Periods}

📑 Мар	Page Tir	ne Peri	_ 🗆 🗙
Code	Start Time	End Time	
$\begin{bmatrix} 1 \\ 2 \end{bmatrix}$	00:00	05:59	리
3	09:00	11:29	리고
5	13:30	15:44	I I I I
7	19:00	20:59	Ð
18	21:00	23:59	ШШ

Map Page Time Periods (EDTMAPP)

- 2. For each **Code**, enter the **Start Time** and **End Time** for the specific time period you wish to define. The times you enter here determine what is displayed on the Map Pages screen to distinguish the time periods.
- 3. Accept the screen to save the map page time periods.

Map Pages Setup

To enter map pages:

 Go to the Map Pages screen. {Files > Plant & Delivery Information > Map Pages}

🛅 Map Pages									[- 🗆 ×
Map Page	1									
Description Short	North 280 N280									
Travel Times Zones	Coordinates									
Plant Code Distance	✓ 1 Main Plant 10.00								Clea	r
From Date	Change Percentage Thru Date 31-Dec To Job Calc'ed To Plant Calc'ed	100.00 00:00 05:59 30 0.0 20 0.0	100.00 06:00 08:59 40 0.0 30 0.0	100.00 09:00 11:29 30 0.0 20 0.0	100.00 11:30 13:29 40 0.0 30 0.0	100.00 13:30 15:44 30 0.0 30 0.0	100.00 15:45 18:59 30 0.0 40 0.0	100.00 19:00 20:59 25 0.0 25 0.0 25 0.0	100.00 21:00 23:59 31 0.0 33 0.0	٦ ۲

Map Pages (EDTMAPS1)

- 2. Enter a Map Page code. The actual page number is generally used for this code.
- 3. Enter a **Description** and a **Short** description of the page.

Travel Times Setup

 On the Travel Times tab, select a Plant Code to assign a distance and travel times to the current map page from the selected plant. Plants are set up on the Plants screen. {Files > Plant & Delivery Information > Plants}

Note: The **Add Occurrence** button at the bottom of the screen allows assigning multiple plants to a map page.

- 2. Enter the estimated **Distance** between the selected plant and a central area in the current map page. When scheduling an order to this map page from this plant, the distance will default into the Order Schedule screen.
- 3. The **Change Percentage** fields give you a means to simplify initial entry of map page times. In the screen shot above, the **100** represents the base time, during the early morning hours when traffic isn't a problem. From 6:00-8:59, you have to deal with rush hour traffic. The **115** tells the system to multiply the travel time value in the first field by 115% to get an adjusted value for rush hour. The subsequent fields allow for adjustments during the other map page time periods, allowing for the ebb and flow of traffic.
- 4. Specify a **From Date**, or a beginning date, for the travel times from the plant to the map page to apply. Multiple dates may be entered to account for changing travel times throughout the year.
- 5. Specify a **Thru Date**, or an ending date, coordinating with the **From Date**, for the travel times from the plant to the map page to apply. Multiple dates may be entered to account for changing travel times throughout the year; however, the entire year must be accounted for with assigned travel times.
- 6. Enter estimated **To Job** travel times for travel from the specified plant to the map page during the time period set up on the Map Page Time Periods screen {Files > General Information > Map Page Time Periods}. If Change Percentages have been entered, then when a value is entered in the first field, the rest of the fields on that line will be automatically calculated.
 - **Note:** These times do not have to be exact because the dynamic travel time system incorporated in COMMANDseries statistically finds the average travel time to this map page from the specified plant during specific time periods. The average times calculated by the system are displayed on the Calc'ed line.
- 7. Enter estimated **To Plant** travel times for travel from the job site back to the plant. Theoretically, drivers already know where the plant is, so the To Plant time may be a little less than the To Job time.
- 8. Use the inner **Add Occurrence** button to add a new date Range.
- 9. Use the outer **Add Occurrence** button to add travel times for another plant.
- 10. Accept the screen to save the map page.

Map Pages Zones Setup

To enter map pages zones information:

1. Select the **Zones** tab on the Map Pages screen. {Files > Plant & Delivery Information > Map Pages > Zones}



Note: Remember, zones are not associated with travel times; they are strictly used for applying travel surcharges.

Select a Zone Code to associate with the current map page. The zone allows users to apply travel surcharges to orders during order entry and can be set up on the Zones screen. {Files > Plants & Delivery Information > Zones}

Note: Click the Add Occurrence button to set up multiple zone codes.

Map Pages Coordinates

To set up map pages coordinates:

 Select the **Coordinates** tab on the Map Pages screen. {Files > Plant & Delivery Information > Map Pages > Coordinates}

	Мар	Pages (EDTMAPS	3)		
Travel Times Zones Cool	dinates				
Upper Left Coordinate Lower Right Coordinate Radius	, Latitude Latitude	4 31 19 N 4 31 19 N 1	Longitude Longitude	000E 000E	

2. Accept the Map Pages screen to save the new map page information.

Automatic Travel Time Posting

The initial travel times are generally estimates. Once map page travel times have been entered and the trucks start rolling, COMMANDseries can monitor the travel times and update them based on the actual travel times.

Establishing this functionality takes two steps:

- Configure COMMANDseries with rules for time posting and processing.
- Create a COMMANDcomm manager to process the time posting.

Travel Time Posting Configuration

COMMANDseries averages the travel times based on three fields in the Configuration file:

Note: These fields are discussed in reverse order compared to their order on the screen.

Total Travel Time Loads—This value represents the maximum number of loads to be used in calculating the travel time for any given map page/travel time/date range/plant combination. Each Map Page Travel Time record has fields to maintain a running total for travel time--total travel time and number of loads. When the update routine runs, it scans tickets created during a specified interval for any that are assigned to a map page. When such a ticket is found, the travel times are added to the totals, and the load count is increased by one. The system then averages to the travel time totals and uses the result to update the travel time.

The Total Travel Time Loads field prevents the running totals from growing to the point that the average is effectively static-if you are averaging 10,000 loads, it will take a lot of tickets to effect a change. At the other end of the spectrum, if you are averaging only 10 loads, the travel time will bounce all over the place. 100 loads is the suggested value.

Acceptable Travel Time Load Percentage—This field might be better described as "Travel Time Load Reduction Rate." At some point, the number of stored loads will exceed the amount specified by the Total Travel Time Loads field. When that happens, the total load time and the number of loads in the affected map page travel time record will be reduced by the specfied percentage.

For example, If you have Total Travel Time Loads set to 100 and an Acceptable Travel Time Load Percentage value of 40, then if you have 100 loads totaling 1460 minutes, then when another load is processed, the system will:

- 1. Reduce to 60 loads with a total time of 876.
- 2. Process the new load.

Travel Time Post Tolerance—The goal of the update process is to maintain accurate travel times. One thing that can disrupt that goal are travel times that are extrended due to external factors (truck breakdown, traffic jam, etc.). This field is used to identify and discard travel times that are so anomalous that using them would disrupt the accuracy of the average.

The value entered is a percentage. When evaluating a travel time, the system validates the new time to see if it is within the specified percentage of the current travel time.

New Travel Time	Current Travel Time	Acceptable Travel Time Load %	Allowable Range	Accepted Y/N
30	20	50	10-30	Y
30	20	25	15-25	N

Some users will start with this value set relatively high (75-100), and slowly reduce the value down to 50 as more live ticket data becomes available.

To configure COMMANDseries with rules for time posting & processing:

 Go to the Distribution Configuration screen. {Files > General Information > Configuration > Distribution}

Receivables Aging Statements Financial	s Projects/Quotes Lien User Fields Optimizatio
System Defaults Distribution Dispate	ch Aggregate Signaling Invoicing Inventory
Days to Save Detail Number of Days Back to Allow Dispatch Change Truck Signaling Unit Cartage Frequency Default Schedule Adjustment Type Require Order Qty on Non-Primary Products for Orders Apply Schedule Adjusment Type	365 0 With Inbound Messages • Monthly • •
Dynamic Plant Fleet Size	Allow Dispatch to Activate Quotes
Use Shipping Address	Tax FOB Shipments based on the Shipping Plant's Tax Code
Require Postal Code	Update Scheduled Qty Based On Ordered Qty
Travel Time Post Tolerance Acceptable Travel Time Load Percentage	

Configuration – Distribution Tab (EDTCNFXD)

- 2. Enter the Travel Time Post Tolerance.
- 3. Enter the Acceptable Travel Time Load Percentage.
- 4. Enter the **Total Travel Time Loads**.
- 5. Accept the screen.

Time Posting Comm Manager

Smaller companies can run the COMMANDcomm manager on their system's COMMANDcomm server. However, time posting can be a processor-intensive task. Larger companies may need a dedicated workstation to handle this function.

To create a COMMANDcomm manager to process time posting:

- 1. Start by creating a Windows shortcut. Right-click in an empty space on the Windows desktop.
- 2. Select New > Shortcut.
- 3. The correct path is:

```
C:/cmdserie/bin/cmdserie.exe cmdserie /a=cx /M=n /t=mm
```

cx – COMMANDcomm

n — Any unique manager number

mm — Polling interval (in minutes); a good starting point is 60, so that travel times are posted every hour.

- 4. Change the Start in to C:/CMDSERIE/CLIENTS.
- 5. Select **OK** to save the shortcut.
- 6. Double-click the shortcut to start the COMMANDcomm manager. You can place the shortcut in the Windows Startup folder so that it will launch automatically.

Process Flow

When the comm manager activates, it will do the following:

- 1. Identify completed tickets whose trucks have clocked in since the last update (or since the comm manager was started).
- 2. Sort tickets by map page.
- 3. Validate the travel times using the Travel Time Post Tolerance value. Tickets with excessive times are discarded.
- 4. Validate the number of new tickets for each map page/travel time/date/ plant combination against the existing number of loads. If the new loads will exceed the specified Total Travel Time Loads, the load count and total time for that map page will be reduced by the precentage specified in the Acceptable Travel Time Load Percentage field.
- 5. Add new load times to the running total and the load count field is incremented accordingly.
- 6. Divide the total load times by the number of loads to get averages.
- 7. Update the travel times on the map page with the new averages.

Deadhead Setup

COMMANDseries now supports deadheading in the Tracking & Scheduling system. Deadheading support is provided through several different functions:

- Tasks
- Conditions
- Driver Overtime

Details on configuring each of these features are provided immediately after this section

To set up deadheading:

- Load the Task Codes { Files > Plant and Delivery Information > Task Codes } and edit, add, or subtract from them as necessary. Accept the form (your data will not be saved unless you accept the form). For detailed instructions on this step, refer to the Task Codes section of this document.
- Load the Condition Codes { Files > Plant and Delivery Information > Condition Codes } and edit, add, or subtract from them as necessary. Confirm the Deadhead condition color and flag match customer preference. Accept the form (your data will not be saved unless you accept the form). For detailed instructions on this step, refer to the Condition Codes section of this document.
- 3. Set up a Driver Overtime Code { Files > General Information > Driver Overtime }. You must provide the Description and Short Description, but the Calculate section is optional. For detailed instructions on this step, see the Driver Overtime Tables section of this document.
- Add the Driver Overtime Code to the employee code record for each driver. { Files > General Information > Employees }

Task Codes

COMMANDseries uses Task Codes to more accurately track driver times. Tasks not only give you a clearer idea of what the driver is doing; in addition, because you have a better idea of a driver's work at any given time, it is easier to avoid having to pay driver overtime.

A default set of task codes is provided on system install. These initial settings cannot be deleted; however, they can be modified, and additional tasks can be added as needed. As you become more proficient with the system, it may be advantageous to modify the task configuration.

To set up a new task code:

1. Open the Task Codes screen {Files > Plant & Delivery Information > Task Codes}.

📳 Task C	odes														_	×
Code	Description	Short	Task Type	×	Truck	Time	s*	×	[Drive	r Times		×	Condition		_
BDOWN	Breakdown	BDOWN			Clock		Prod	\mathbb{M}	Clock		Prod		DUT		븬	
BREAK	Break	BREAK			Clock		Prod		Clock		Prod		DOT	J	┛	
DEAD	Deadhead	DEAD	Both 🔄		Clock		Prod		Clock		Prod		DOT	DEAD	┛	
INSVC	In Service	INSVC	Both 🔄		Clock		Prod		Clock		Prod		DOT		₽	
LUNCH	Lunch	LUNCH	Driver 💽		Clock		Prod		Clock		Prod		DOT	LUNCH	+	
ONLOD	On Load	ONLOD	Driver		Clock		Prod	$\mathbf{\nabla}$	Clock	$\mathbf{\nabla}$	Prod	$\mathbf{\nabla}$	DOT		+	
OOSVC	Out of Service	OOSVC			Clock		Prod		Clock		Prod		DOT		+	
SHOP	Shop	SHOP			Clock		Prod		Clock		Prod		DOT		≁	

Task Codes (EDTETSK)

2. Press the **Add Occurrence** button, or press <F6>. A new line will appear on the form.

3. Enter a **Code** for the new task. This code can be comprised of alphanumeric characters and can be up to 5 characters in length. This code will be used internally to track the task.

Note: Codes for the default Tasks cannot be edited.

- 4. Enter a **Description** of the task. The description can be up to forty characters in length; practically, however, a maximum of twelve is recommended.
- 5. Select a **Task Type** to determine if the task applies to a Truck, a Driver, or Both. If teh field is left blank, the system will read it as Both.
- 6. Enter a **Short** description of the task. This will generally be the same as the task **Code**, but does not have to be. This description will be used in reports in areas where the full description will not fit.
- 7. Classify the task with regard to **Truck Times**. Each task can be flagged as **Clock** or **Productive** time. These flags control automatic time logging. For example, if **In Service** is a task that is flagged as **Clock** time, then any time an **Out of Service** truck has its task changed to **In Service**, the system will check its clock status. If the truck is not currently clocked in, the system will automatically clock it in.
- 8. Classify the task with regard to **Driver Times**. The concept here is the same as with Truck Times; however, there is an additional field: **DOT**. Driver time associated with tasks flagged as DOT will be tallied and monitored independently of Clock time. And given task can be classified as both Clock and DOT time.

Clock Time is used to calculate both daily and weekly overtime; DOT Time is used to calculate rolling overtime.

Note: The **Productive Time** flag is currently not used by COMMANDseries; functionality using these flags will be implemented in future releases.

9. Double-click in the **Condition** field to associate an existing Condition with this task. Assigning a condition to a task allows you to monitor that task on the Tracking & Scheduling screen.

Note: You cannot edit the Conditions associated to the default tasks.

10. Accept the screen to save the new task.

Condition Codes

Condition Codes are used to display certain truck and/or driver conditions on the graphic Tracking & Scheduling screen. Doing so provides dispatchers with a much more accurate picture of overall fleet status. Condition codes can also be associated with Task Codes to provide even more real time information to dispatchers.

The primary use of conditions is to allow real-time monitoring of driver overtime. When a driver's on-road hours reach a specified limit, the system will attach a warning condition to the driver; that condition can result in the truck token to which the driver is assigned turning a warning color, such as orange, to alert the dispatcher that the driver's hours are getting close to the limit for overtime, and should not be used again unless absolutely necessary.

A default set of conditions is provided when the system is installed. These conditions can be edited to a degree, but they cannot be deleted.

To edit a condition code:

 Open the Condition Codes screen. {Files > Plant & Delivery Information > Condition Codes}

			· ·	,		
📱 Condition Code	es					_ 🗆 ×
Code Descrip LUNCH Lunch PRETK Pre-tick RMAX Rolling RNDTP Round RWRN Rolling WMAX Weekl WWRN Weekl	keted truck Max Trip Truck Warning y Max y Warning	Short LUNCH PRETK RMAX RNDTP RWRN WMAX WWAX	Estimated Minutes	Color	Flag Priority	

Condition Codes (EDTTCND)

- 2. The **Code** is used internally to track the condition. These codes cannot be changed.
- 3. Edit the **Description** of the condition if necessary. The description can be up to forty characters in length; practically, however, a maximum of twelve is recommended.
- 4. Edit the **Short** description of the condition. This description will generally be the same as the Condition Code, or an abbreviation of the Description. This short description is used in reports in areas where the full description will not fit.
- 5. The Estimated Minutes field is currently unused. In future releases of COMMANDseries, it will enable users to link default time values to certain conditions and tasks. For example, when a driver punches his Lunch Out button on the signaling unit, not only would the truck token change color to reflect that the driver is on lunch, but the token's timer will automatically be set to the number of minutes allowed for lunch—making it easier for the dispatcher to predict when the driver should be available again.

For the default conditions, only Lunch allows the user to enter an Estimated Minutes value. That field will be available on all user-created conditions.

 Select a Color code, or press <Enter> in the Color field to get a list of available colors. Select the color you wish to be associated with a condition.

The Tracking & Scheduling screen is limited to sixteen colors. Be judicious

in selecting conditions for color tagging. Moreover, very dark colors result in truck tokens that are illegible.

7. If so desired, enter a **Flag** for the condition. The selected flag will be displayed on the Tracking and Scheduling screen at the far right of the truck token.

The flag character will be right next to the truck code. Take care to select flags that will not confuse the dispatchers. If, for example, your truck codes are numeric, avoid numeric flags, as the result would be very confusing for the dispatcher.

If the truck codes are all numeric, then avoid numeric flags. If codes use both numbers and letters, it is recommended to use special characters $(!@#\$\%^{,}, etc.)$ to avoid confusion.

- **Tip:** It is not necessary to employ both a color and a flag on every condition. Users might want to use flags for lower priority conditions, and colors for higher priority conditions. For example, if your truck codes are numeric, you might use a **D** flag to indicate a Daily Overtime Warning. If the driver's hours exceed the daily limit, you could then combine the **D** flag with a warning color. Such an approach gives you more flexibility in assigning flags and codes.
- 8. Assign the condition a **Priority** rating, **1** being the highest priority. Priority ratings are used to resolve conflicts in condition displays. That is, if a truck ends up being in two conditions at once, for example, **Deadhead** and **Hourly Warning**, then the condition that is displayed on the screen will be the condition with the highest priority. In the event that both conditions have the same priority, then the system will display the most recent condition.
- 9. Accept the screen to save the condition.

Driver Overtime Tables

COMMANDseries allows users to keep better track of drivers' on-clock time, particularly as they approach the necessary number of hours for different times of overtime pay. It does so through the use of conditions (discussed earlier) and Driver Overtime Tables. As a driver accrues on-road hours, the system compares the amounts with values in the driver's assigned overtime table. If a certain plateau has been reached, the driver is set to an appropriate condition. **Daily Warning**, for example, is the condition that denotes that the driver is approaching the number of hours necessary for daily overtime pay.

The condition can also trigger a change in the appearance of the driver's assigned truck token on the Tracking & Scheduling screen. The change in appearance alerts the dispatcher as to the driver's overtime status, and can make a note to avoid using the driver for the remainder of that day if at all possible.

Because of the differences in state and federal transportation regulations, along with union rules, COMMANDseries supports track for three different types of overtime: Daily, Weekly, Rolling. Rolling overtime totals the time for a specified number of previous days, and is used, to an extent, as a safety device, to help prevent a driver from logging too many hours during a seven-day period.

To set up a new Driver Overtime Table:

1. Open the Driver Overtime Table screen. {Files > General Information > Driver Overtime}

		Billion Over		DICOI)			
📄 Driver Overtime	е							
Driver Overtime Cod	le	2						
Description Short		Saint Pa SPOT	aul union ove	ertime				
Week Begins		Ом	⊙ T ⊂) w	O Th	O F	O Sa	O Su
Calculate	Rolling Days	Alert Hours	Overt	ime Hou	urs			
☑ Daily☑ Weekly☑ Rolling	7	1.00 3.00 5.00	2.1 4.1 6.1	00 00 00				

Driver Overtime (EDTDROT)

- 2. Enter a **Driver Overtime Code** of up to four characters.
- 3. Enter a **Description** of the table.
- 4. Enter a **Short** description of the table. This short description will print on reports in areas that are too small for the full description.
- 5. Select the day of the week on which your scheduling **Week Begins**. This information is used to calculate if current hours approach the limit for weekly overtime.
- 6. Select **Daily** if you want the table to flag daily hours. There are two fields associated with daily overtime. **Alert Hours** represents the number of hours at which you want to be warned that a driver is approaching the limit for daily overtime. The warning allows you to get the driver off the road and out of service before overtime kicks in. **Overtime Hours** indicates the point at which the driver is actually accruing overtime.
- 7. Select **Weekly** if you want to flag weekly overtime limits. Enter the appropriate Alert Hours and Overtime Hours.
- 8. Select **Rolling** if you want to track rolling overtime (based on DOT regulations). Enter in the **Rolling Days** field the number of days back you wish to track hours for. If you enter **7** in this field, then hours toward Rolling Overtime at any given point will be comprised of the current day's hours along with the previous six days. Enter the appropriate Alert Hours and Overtime Hours.
 - **Note:** Rolling Overtime is based on time values flagged as **DOT Time** in the Tasks file; Daily and weekly overtime are based on time values flagged as Clock Time.

9. Accept the screen to save the table. Users can create multiple overtime tables as needed. A driver's assigned overtime table is specified in the Driver's Employee file.

The following section addresses entry of basic Item information. This information controls item entry, pricing, and additional charges.

Of particular note is the information on Units of Measure (UOM). Units of Measure determine how material is measured for ordering, pricing, reporting, etc.; accordingly, establishing UOMs may well be the most critical part of the File Build process. Please read the introductory UOM material carefully before attempting to enter items or item categories.

Topics in this section:

Price Categories Usage Codes Units of Measure (UOM) UOM Related Fields Item Categories Items Minimum Load Charge Tables Seasonal Charges Unloading Charges Sundry Charges Vendors Freight Methods

Price Categories

Price categories provide for tiers, or groups, of prices that are assigned at the item level. This provides greater flexibility in pricing: An Item can be priced at the Project or Customer level, or they can be priced at the Item level, based on Price Category.

Price categories are also used as a sorting option for many reports. Before entering price category information, gather information about how you will categorize prices for reporting purposes.

To enter a new price category:

 Go to the Price Categories screen. {Files > Item Information > Price Categories}

Price Categories (EDTPRCC)

Price	Categories	
Code	Description	Short
1	Cash Retail	CASH-R 🛃 🔺
2	Cash Commercial	CASH-C 🚽
3	Residential	RESID 🛃
4	Light Commerical	COMMER 🛃
5	Industrial	INDUST 🛃
6	Goverment Contract	GOVT 🛃

- 2. Enter a **Code** for the new price category.
- 3. Enter a **Description** and **Short** description for the price category.
- 4. To enter another price category, click on the **Insert Occurrence** button or press <Shift+F6>.
- 5. Accept this screen to save the price categories.

Usage Codes

Usage codes indicate how the type of construction for which a given concrete mix was designed. Usage code are assigned to mixes at the Item level, but the usage code assigned to an item can be overridden in the Orders screen. {Dispatch > Orders}

The usage code helps make sure that the proper item is sold for the requirement. It is also used as part of the sales and profit analysis reporting system.

Before entering usage code information, gather information about the uses of the items you use or sell.

Usage Code Setup

To enter a new usage code:

 Go to the Usage Codes screen. {Files > Item Information > Usage Codes}

🛅 Usag	e Codes	
Code	Description	Short
701	ALL USES Residential flatwork	RESID
702	Above-grade walls (ICF) Low rise C-I-P/tilt-up	LOW RISE
704	Parking areas	
705	Highways	HWYS I
707	Streets/local roads	

Usage Codes (EDTUSGE)

- 2. Enter a **Code** for the new usage.
- 3. Enter a **Description** and **Short** description for the usage code as desired.
- To enter another usage code, click on the Add Occurrence button or press <Shift+F6>.
- 5. Accept this screen to save the usage codes.

Units of Measure (UOM)

In a program such as COMMANDseries, in which many different things get measured and calculated in many different ways, it is important to have a mechanism to ensure that items, prices, and amounts get measured correctly. Complicating things further, certain items get measured differently in different parts of the business process. Cement, for example, is often measured in pounds for batching, but measured in tons for inventory. And of course, some customers may purchase material in US Customary measurements, while others require metric amounts.

COMMANDseries controls how items are measured by assigning each item several of Unit of Measure (UOM) codes. This section provides an overview of the different UOM options and how they impact the system. This information will be used in entering both Item Categories and Items.

WARNING: It is critical that you understand how Units of Measure work before proceeding to Item Category and Item setup. Incorrectly configured UOMs can cause serious errors in product and price calculations.

The UOM selection screen is invoked in different ways, depending upon the screen from which you are calling the UOM selector. Regardless of how the UOM screen is accessed, it will always look the same:

🛅 Possible Stan	dard Units-of	Measur	e		×
Key △ Description 40001 Cubic Inches 40002 Cubic Feet 40003 Cubic Yards 40011 Cubic Millimete 40012 Cubic Centime 40013 Cubic Meters	rs ters	Short cu inch cu feet cu yds cu mm's cu cm's cu meter	Abbr ci cy ms c3 m3	Type Dry Volume Dry Volume Dry Volume Dry Volume Dry Volume Dry Volume	*
C All Types C Length C Distance	 C Area ● Dry Volume ○ Wet Volume 	(((D Weig D Stren D Othe	ght ngth r	

UOM Selection screen (FNDUOMS)

To use the UOM Selection screen:

1. Select the UOM type with the radio buttons on the bottom of the screen. The groups are self-evident with two exceptions:

Strength lets you select from pounds per square inch (psi),
Newtons per square millimeter (N/mm²), or Megapascals (MPa)
Other contains a number of UOMs that do not fit into a clear category, such as Each, Per Load, and Dosage.

- 2. Scroll through the list until you find the correct UOM.
- 3. Double-click on the UOM code to close the UOM screen and apply the UOM setting.

UOM Related Fields

When creating Items and Item Categories, there is more than just a single UOM to be entered. The screen below shows the UOM settings for a typical aggregate constituent.

				Item eo	ditor (ED	DTIMST2))			
Main	UOM	Conversions	Sales	Tax Override	Location	ns Costs	Prices	Inventory	Batching	Batch Codes
Order	ed Quanti 60003	ty Tons	Ordered (Per Unit	Quantity Extensi	on Code	•				
Delive	ered Quar 60003	ntity Tons	Ticket Qu Delivered	iantity Extension I Quantity	n Code	•	□ Ac	cumulate		
Price	Quantity 60003	Tons	Price Qua Delivered	antity Extension I Quantity	Code	•				
Batch	60002	pounds	Invent	ory/Cost 0003 Tons		Purchase	03 To	ns	Reporting	03 Tons

There are seven different UOM settings. In addition, there are three **Quantity Extension Codes**, which determine how various totals are represented.

Topics in this section:

Ordered Quantity Delivered Quantity Price Quantity Batch Quantity Inventory/Cost Quantity Purchase Quantity Reporting Quantity

Ordered Quantity

The Ordered Quantity defines how the item is measured at Order Entry. When an order taker enters **3** for the amount of pea gravel ordered by the customer, the Ordered Quantity UOM determines if that **3** designates three pounds, three tons, three cubic yards, three metric tons, etc.

The Ordered Quantity value is extended to three different fields. The value extended to each of these fields may differ depending upon your needs. The three fields are: Delivered Quantity, Ticket Quantity, Pricing Quantity.

The Ordered Quantity has an assigned **Order Quantity Extension Code** that determines how the Delivered Quantity will be calculated. These extensions are preset within the application and calculate the Delivered Quantity as follows:

Per Unit -- Delivered Quantity = Ordered Quantity.

Per Mix Cubic Quantity -- Delivered Quantity = Ordered Quantity * Mix Ordered Quantity. Note that this extension should only be used for associated products.

Per Load -- Delivered Quantity = Ordered Quantity. Note that this extension differs from the Per Unit extension in that the delivered quantity will be calculated for each load. The Per Unit extension will not continue to calculate a delivered quantity once the ordered quantity has been met or exceeded.

Per Weight of Cement -- Delivered Quantity = Quantity of Cement in the mix product divided by the divisor indicated in the adjacent field. Note that the adjacent divisor field is only displayed if a "per weight" type extension code is selected. If the Ordered Quantity unit of measure is set to dosage a separate field will be displayed which allows the user to define the dosage quantity per weight. This extension should only be used for associated products.

Per Weight of Cementitious Material -- Delivered Quantity = Quantity of Cementitious materials in the mix product divided by the divisor indicated in the adjacent field. Note that this extension code will include all cement and cementitious (fly ash) products in the mix. The adjacent divisor field is only displayed if a per weight type extension code is selected. If the Ordered Quantity unit of measure is set to **Dosage**, a separate field will be displayed which allows the user to define the dosage quantity per weight. This extension should only be used for items associated to a mix product, i.e. associated products.

Delivered Quantity

This value, based on the Order Quantity Extension Code, is calculated at the time of ticketing. The calculated value is stored in the DELV_QTY field of the TKTL or TLAP tables. This value is also accumulated in the DELV_QTY field of the ORDL or OLAP tables. The value in these fields (from the ticket tables) is printed on the delivery ticket using the document format tag LOADQY. The delivered quantity will be subsequently used to for calculating cost and for

posting to inventory. The delivered quantity may be converted to a different inventory unit of measure.

The Delivered Quantity has a **Ticket Quantity Extension Code** that determines how the Ticket Quantity value will be printed. The ticket quantity value is stored in the TKT_QTY field of the TKTL or TLAP tables. The value in these fields is printed using the document format tag TKTQTY. The ticket quantity is only used for display purposes. The quantity can be displayed on the ticket or ticket data out forms. These extensions are preset within the application and calculate the ticket quantity as follows:

Delivered Quantity -- Ticket Quantity = Delivered Quantity

Delivered Quantity per Mix Cubic Quantity -- Ticket Quantity = Delivered Quantity / Mix Ticket Quantity

Dosage Per Mix Cubic Quantity -- Ticket Quantity = Ordered Quantity * Order Dosage Quantity

Doses Per Load -- Ticket Quantity = Ordered Quantity * Mix Ticketed Quantity

Ordered Quantity -- Ticket Quantity = Ordered Quantity

Blank Quantity -- Ticket Quantity = null value. Note that this extension will set the ticket quantity to a blank value and prevent the printing of a ticket quantity.

Price Quantity

This setting defines the amount of material for which the customer will be charged. Under normal circumstances, the value for the Price Quantity will be the same as the Delivered quantity. But if you want to give a customer a reduced price to compensate for poor service, you could accomplish this task during invoice prep by reducing the Price Quantity. This way, the customer is not charged full price, but because the Delivered Quantity is not changed, your inventory records remain accurate.

The Price Quantity has a **Price Quantity Extension Code** that determines how the Price Quantity will be calculated. The Price Quantity value is stored in the PRICE_QTY field of the TKTL or TLAP tables. The value in these fields is printed using the document format tag PRCQTY. These extensions are preset within the application and calculate the price quantity as follows:

Delivered Quantity -- Price Quantity = Delivered Quantity
Mix Delivered Quantity -- Price Quantity = Mix Ticketed Quantity
Ordered Quantity -- Ticket Quantity = Ordered Quantity
One (Per Load) -- Price Quantity = One
Doses Per Load -- Price Quantity = Ordered Quantity * Mix Ticketed Quantity

Batch Quantity

This setting specifies how the item is measured by the batch computer. Aggregate may be ordered by the ton, but it is batched by the pound.

Inventory/Cost Quantity

This setting specifies how the material is to be measured for purposes of inventory and cost calculation. An aggregate may be batched by the pound, but inventoried and costed by the ton.

Purchase Quantity

This setting specifies how the material is to be measured when purchased from vendors.

Reporting Quantity

This setting specifies how the material is to be measured on COMMANDseries reports. When you set up a dispatching report, you will see a checkbox labeled **Use Reporting Units of Measure**. If that checkbox is selected, all items will be reported using each item's Reporting Quantity UOM. If the checkbox is not selected, the report will print the Delivered Quantity.

Item Categories

Item Categories are used to classify items according to general use and function for reporting and analysis. Examples include:

- Ready-mix concrete
- Aggregate
- Admixture
- Extra charges

Unit of measure and other information associated with each category defaults into the corresponding fields on the Items screen when a new item is created and assigned a particular category {Files > Item Information > Items}.

Before entering Item Category information, gather information about the items that you use and decide how you want them organized for lookup and reporting purposes.

Topics in this section:

Item Types Item Categories Setup Item Categories UOM Setup Item Categories Mix Defaults Setup Item Categories Tax Override Setup

Item Types

An important part of creating an Item Category is assigning the category an **Item Type**. The Item types correspond to general product classifications: Cement, ready mix, coarse aggregate, etc., and provide an underlying layer

of consistency to the item setup process, which in turn allows for greater flexibility in setting up Item Categories.

Item Types can only be assigned at the Item Category level. They cannot be assigned at the Item level.

Selecting an Item Type has a number of effects:

- The Item Type defaults a base set of UOM entries. These entries can be edited at either the Item Category or Item level.
- The Item Type affects the appearance of the Item Category and Item screens. For example, the **Mix Defaults** tab only appears on the Item Category screen if the Item Type is either **asphalt** or **concrete**. Similarly, there are a number of tabs, such as Batch Codes and Constituents, that only appear on the Items screen if the item belongs to an Item Category with an Item Type of asphalt or concrete.

Item Categories Setup

To enter a new item category:

- Go to the Item Categories screen. {Files > Item Information > Item Categories}
- 2. Enter an Item Category code.

Item Categories (aggregate) – UOM Tab (EDTICAT)

🛅 Item Categorie	S		_ 🗆 ×
Item Category	10		
Description Short Item Type UOM Tax Override	Coarse Aggregates, Lb Agg, Lb Aggregate (Coarse)	Taxable	Taxable
Ordered Quantity	Ordered Quantity Extension Code Per Unit		
Delivered Quantity	Ticket Quantity Extension Code Delivered Quantity	Batch Inventory/Cost	✓ 60002 pounds ✓ 60003 Tons
Price Quantity	Price Quantity Extension Code Delivered Quantity	Purchase Reporting	▼ 60003 Tons ▼ 60003 Tons

- Enter a **Description** and **Short** description for the item category as desired.
- 4. From the list, select an **Item Type** to assign to this item category. Generic UOM settings will default for certain Item Types.
- 5. Select a **Taxable** status (taxable or non-taxable) for the category.
- 6. Proceed to the **UOM** tab.

Item Categories UOM Setup

Items are assigned units of measure (UOM) and quantity extension codes to determine the method for converting the value the user enters in the Ordered Quantity field on the Item Units of Measure screen. {Files > Item Information > Items > UOM} The Ordered Quantity value, which may differ depending upon the user's needs, is extended to three fields:

Delivered Quantity Ticket Quantity Pricing Quantity

To define UOM information:

1. Select the **UOM** tab.

Item Category (concrete) UOM (EDTICAT1)

UOM Mix Defaults Tax	Override		
Ordered Quantity	Ordered Quantity Extension Code Per Unit		
Delivered Quantity	Ticket Quantity Extension Code Delivered Quantity	Batch	▼ 40003 cu yds
Price Quantity 40003 cu yds	Price Quantity Extension Code Delivered Quantity	Purchase	✓ 140003 Cu yus ✓ 40003 cu yus

- 2. In the **Ordered Quantity** field, enter the code that represents the unit of measure for an ordered quantity of the item. You can detail on the field to call the UOM Selection screen.
- 3. Select an **Ordered Quantity Extension Code** from the list. This field determines how the delivered quantity is calculated. Possible choices, preset within the application, are as follows.
 - Per Unit
 - Per Mix Cubic Quantity
 - Per Load
 - Per Weight of Cement
 - Per Weight of Cementitious Materials
 - Percent of Weight of Cement
 - Percent of Weight of Cementitious Materials
 - Per Weighted Item(s) Quantity
- 4. In the **Delivered Quantity** field, enter the code that represents the unit of measure for a delivered quantity of the item. You can detail on the field to call the UOM Selection screen.
- Select a Ticket Quantity Extension Code from the list. This code determines how the ticket quantity value is printed and then stored in the database. Possible choices, which are preset within the application, are as follows:

- Delivered Quantity
- Delivered Quantity Per Mix Cubic Quantity
- Ordered Quantity
- Mix Delivered Quantity
- Print Nothing for the Ticket Quantity
- Per Pricing Content
- 6. In the **Price Quantity** field, enter the code that represents the unit of measure for the price quantity of the item.
- 7. Select a **Price Quantity Extension Code** from the list. Possible choices, which are preset within the application, are as follows:
 - Delivered Quantity
 - Mix Delivered Quantity
 - One
 - Ordered Quantity
 - Per Pricing Content
- 8. In the **Batch** field, enter the code that represents the unit of measure for batching.
- 9. In the **Inventory/Cost** field, enter the code that represents the unit of measure for inventory and cost.
- 10. In the **Reporting** field, enter the code that represents the unit of measure for reporting.
- 11. Accept this screen to save UOM information.

Item Categories Mix Defaults Setup

Note: This tab only appears if the Item Type is Concrete or Asphalt.

To define mix defaults information:

 Select the Mix Defaults tab to access and adjust fields specifically applicable to concrete and asphalt mix item type categories. {Files > Items > Item Categories > Mix Defaults}

	Item Cate	egories – Mix Defaults Tab (EDTICAT2)
UOM	Mix Defaults	Tax Override
Streng Slump	th	

 Enter a default Strength value. This value is used as the default for the strength when items, using the concrete/asphalt mix item category, are added on the Item Ready Mix/Asphalt Information screen, respectively. {Files > Items > Mix}

This fields is of particular use if you have so many mixes that you need to sort them by strength.

Note: You may click on the detail button associated with this field to select from a list of valid units of measure for the strength.

- 3. Enter a default **Slump** value. This value is used as the default for the slump when concrete mix items, using this item category, are added on the Item Ready Mix Information screen. {Files > Items > Mix}
- 4. Proceed to the **Tax Override** tab, or accept the screen.

Item Categories Tax Override Setup

The Item Categories Tax Override screen allows you to specify tax-related information for the specific item category that will override the taxability and/ or tax rate of the general order. For example, a tax override may be used when a user is shipping between states when the material is taxable in one state but not in the other. These settings will apply to all items belonging to the item category unless specific overrides are assigned to an item.

To enter tax override information:

 Select the **Tax Override** tab on the Item Categories screen. {Files > Items > Item Categories > Tax Override}



- 2. Select the **Tax Authority** and **Tax Location**. When the item is in this tax authority/location, the override takes effect.
- Select the Override Taxable Status. This status taxable or nontaxable – takes effect when the item is taxed under the selected tax authority/location.
- Select the Override Tax Rate Location. This location's rate is used as an override when the item is taxed under the selected tax authority/ location.
- 5. Accept the Item Categories screen to save the new information.

Items

Items can be added, changed, deleted, or listed, depending on user privilege and system license settings. Items represent the goods and/or services that are sold to customers. To facilitate the proper setup of each item record, the Items screen is organized using tabs. Refer to the table below to learn each tab's function.

Tab	Function
Main	Is the item salable or a constituent (or both)? The Item Category is also assigned on this tab.
UOM	Assign Units of Measure and extension codes. These default from the Item category, but can be edited at the Item level.
Conversions	Establish non-standard conversions. For example, converting a cubic yard of a mix to a specific number of blocks.
Sales	Tax and discount information
Tax Override	Use to override tax information entered on the Sales tab
Mix	Only available if the Item Type is concrete or asphalt. This tab holds reference and batching information about the mix: strength, slump, aggregate size, etc. for concrete; strenght, asphaltic cement type, minimum temperature, etc. for asphalt.
User Fields	Enter information in item-specific user-defined fields. The specific fields must first be created on the Configuration-User Fields tab.
Locations	Specify which locations have the item. A plant cannot ship an item if the item does not exist at the location(s) associated with the plant.
Costs	plant-level cost information
Prices	Record price information for the item at each plant
Inventory	Record inventory information for the item at each plant
Batching	Record batching information at each plant
Constituents	Record cost information about constituent products
Batch Codes	Record batch codes for each plant
Automatic Products	Item-level associated products

Information can be recorded for customers and/or items. When orders are placed for a customer or project for a specific item, the customer/project specific item information is used in lieu of the generic item information. Before entering item information, gather information about the items you will be shipping and the constituents that make up some of those items.

Topics in this section:

Initial Item Entry Item Entry Item Main Tab Setup Item UOM Setup Item Conversions Setup Item Sales Setup Item Tax Override Setup Item Mix Setup Item User Fields Setup Item Locations Setup Item Costs Setup Item Prices Setup Item Inventory Setup Item Batching Setup Item Constituent Setup Item Batch Codes Setup Hints for Entering Items

Initial Item Entry

When entering items for the first time, it is important to realize that these files must be built like a tower, from the bottom up. So, to effectively enter your company's mixes as items, you must first enter all the constituents (sand, water, cementitious material, admixes, etc.) in each mix as an item. Once the constituents have been entered, you can go back and enter the mixes.

Note: On each Item tab, not all options will display at all times. The fields that display are dependent on the Item Type, assigned via the Item Category.

Item Entry

To enter an item:

1. Go to the Items screen. {Files > Item Information > Items}

		Items – Main Ta	ab (EDTIMST)		
🛓 Items					_
Item Code	TEST				
Description Item Category	_			Short Descr	

- 2. Enter an **Item Code**. This entry is user-defined, but it may be helpful to group the item codes by type, such as water, aggregate, cement, admixes, etc.
- 3. Enter a **Description** and **Short Description** for the item.
- Select an Item Category for the item. {Files > Item Information > Item Categories} The Item Type associated with the selected Item Category determines what tabs and fields are available.

Item Main Tab Setup

The **Main** tab is used to enter general information about the item. The image below shows all fields. The fields available for a given item are determined by the Item Type (specified via the Item Category).

Items-Main tab (EDTIMST1)					
	Invento	ry .		Batching	
Main	UOM	Conversions	Sales	Tax Override	
Inventory	Item Code	_			
Keer Seria Sale Use Cons Adm Allov	o in Inventory al Number able Item Do not allow ti Lot Number stituent Item sture As Part I v Minimum Cer v Constituent S	cketing Df Volume Calculatic ment Content Overric Substitution	in de		

To enter information on the Main tab:

- 1. Select the **Main** tab.
- 2. If you are entering multiple versions of a single item (water in gallons and water in liters, for example), you can enter the item code to be used for inventory purposes. If metric water was Item Code 1 and standard water was Item Code 2, you could enter 2 as the Inventory Item Code for both items to combine the inventory totals.
- 3. Mark **Keep in Inventory** if this item is to be tracked for Inventory purposes.
- 4. If the Item Category cooresponds to the Kit or Pipe Item Types, the **Serial Number** field will display.
- 5. Mark the **Saleable Item** checkbox if the item is saleable. The value will initially default from the selected Item Category.

Note: Items not marked as salable will not be available in order entry.

6. If the Saleable Item field is flagged, the **Do not allow ticketing** flag becomes available. COMMANDseries allows users to assign price by item category. This modification is effected by creating a dummy item record for a item category. If you are creating an item category item for this purpose, select the Do Not Allow Ticketing flag.

Note: Additional information on this field can be found in the appendices.

7. Mark **Use Lot Number** if the item is to be tracking using Lot Numbers. This flag is often used for block products.

Note: This field will not be available if the Serial Number flag is set.

8. Mark **Constituent Items** if the item is a mix constituent. When you later enter mixes, you will fill out a mix Constituents tab. Only items flagged as Constituent Items will be available on that tab.

Note: The next three fields relate to Materials Manager. If it is not in the license, these fields will not display.

- Mark Admixture As Part Of Volume Calculation if the material is added to a mix in volumes sufficient to significantly afffect yield calculations.
- 10. Mark **Allow Minimum Cement Content Override** to enable a Materials Manager user to reduce the cement content less than the specified minimum. This box is unchecked by default.
- 11. Mark **Allow Constituent Substitution** to allow Materials Managers to substitute constituents.

Item UOM Setup

The **UOM** tab is used to enter unit of measure information that is specific to the item. This is different from the UOM tab on the Item Categories screen in that information on the Item Categories UOM tab is defined for a category and information on the Items UOM tab is defined for an item.

To define UOM information:

1. Select the **UOM** tab.

Items – UOM Tab (EDTIMST2)			
Main UUM Conversion	s Sales Tax Override Locations Costs Prices Inventory Batching Batch Codes		
Ordered Quantity	Ordered Quantity Extension Code Per Unit		
Delivered Quantity	Ticket Quantity Extension Code Delivered Quantity		
Price Quantity	Price Quantity Extension Code Delivered Quantity		
Batch	Inventory/Cost Purchase Reporting 60003 Tons 60003 Tons 60003 Tons		

2. The UOM information defaults from the Item Categories file. Make any necessary changes.

Note: If you need help making changes, refer to the **Item Categories** section in this manual.

Item Conversions Setup

The **Conversions** tab is used to enter information about converting from one unit of measure to another. For example, in order to use the Volume

Calculator effectively with aggregate products, the system must be able to convert a given aggregate from weight to volume.

To define conversions information:

1. Select the **Conversions** tab.



 To convert the unit of measure, enter the UOM code in the Convert From UOM field or select <Enter> to display the Possible Standard Units-of-Measure screen.

Possible Standard Units-of-Measure				×	
Key ▲ Description 40001 Cubic Inches 40002 Cubic Feet 40003 Cubic Yards 40011 Cubic Millimeters 40012 Cubic Centimeter 40013 Cubic Meters	5	Short cu inch cu feet cu yds cu mm's cu cm's	Abbr ci cf cy ms c3 m3	Type Dry Volume Dry Volume Dry Volume Dry Volume Dry Volume	-
C All Types C Length D Distance	C Area ● Dry Volume © Wet Volume	(() Weig Stren	ht gth	Y

Possible	Standard	LIOM	(ENDLIOMS)	۱
Possible	Stanuaru		(FINDUUMIS))

- 3. Select a code from this screen, then press <Enter> to return to the UOM tab. The code will display in the Convert From UOM field.
- 4. Repeat steps 2 and 3 from the Convert To UOM field.
- 5. In the **Multiplier** field, enter a number (factor) to be used to convert the UOM.

Item Sales Setup

The **Sales** tab is used to enter information about the item such as tax status, terms, trade discounts, and usage.

To define sales information:

1. Select the **Sales** tab.

	Items – Sales Tab (EDTIMST4)	
Main UOM Conve	rsions Sales Tax Override Mix Us	er Fields Locations Costs
Taxing Information Taxable Non Taxable Reason	Non-taxable	
Discountable Trade Terms		
Usage Code Expiration Date		

- 2. Indicate the **Taxable** status of the item: Non-taxable, Taxable, or Always Taxable.
- 3. If the item is non-taxable indicate the reason in the **Non Taxable Reason** field. If the item is marked as taxable, this field will not display.
- 4. In the **Discountable** section, indicate if the item is eligible for **Trade** and **Terms** discounts by marking the applicable checkbox. If a customer who has a standard discount orders an item that is not discountable, the system will not discount the item.
- 5. In the **Usage Code** field, enter the code that represents the primary usage for the item. If you do not know the code, detail on the field to select from a list.
- If this item will be available for a limited time only, enter the Expiration Date. The system will not allow a customer to order an expired item. If you do not want the item to expire, leave the field blank.

Item Tax Override Setup

Tax laws can get complex. In some cases, certain types of items get taxed differently than others. The Tax Override tab is used to further define the taxability information entered on the Sales tab.

To define tax override information:

1. Select the **Tax Override** tab.



Items – Tax Override Tab (EDTIMST5)

2. In the **Tax Authority** field, enter a code that represents the tax authority for which taxable status is being changed. If you do not know the code,

press <Enter> to select a code from the Choices (Tax Authorities/ Locations File) screen.

- 3. The location code associated with the tax authority automatically displays in the **Tax Location** field.
- 4. In the Override Taxable Status field, indicate if the item is Non-taxable, Taxable, or Always Taxable for this tax authority/location. The purpose of this field is to override the status entered on the Sales tab in the event that the status is not applicable to this tax authority/location.

If the status is non-taxable, indicate the reason in the **Non Taxable Reason** field.

- 5. In the **Override Tax Rate Location** field, enter a code that represents the tax rate location, or press <Enter> to select a code from the Choices (Tax Authorities > Locations File) screen.
- 6. Click the **Add Occurrence** button to repeat this procedure for other tax authorities, or accept the screen.

Item Mix Setup

The Mix tab is used to enter information about how the item is batched. This tab will only be available if the Item Type is asphalt or concrete.

To define mix information for asphalt:

1. Select the **Mix** tab.



Items – Mix Tab (Asphalt) (EDTIMST6)

- 2. Enter the **Strength** of the mix. This field represents the average design strength of the mix product.
- 3. Enter the **Asphaltic Cement Type** of the mix.
- 4. Enter the mix's **Aggregate Size**. This is the maximum size of the aggregate filler in the mix.
- 5. Enter the **Minimum Temperature** required in batching the asphalt.
- 6. The mix's **Percent Recycle** value represents the percentage of recycled asphalt included in the mix.
To define mix information for concrete:

1. Select the **Mix** tab.

Items – Mix Tab (Concrete) (EDTIMST6)								
Main UOM	Conversions Sales Tax Overrid	le Mix User Fields	Locations Costs Prices					
Strength Slump Water/Cement Ratio	▼ 2500.00 psi 4 .44	Aggregate Size Cement Type Days to Strength	3/4					
Pricing Information	Pricing Cement Content							
Batching Information Maximum Water Percent Air Volume 6.000 Min Cement Content Lightweight Cu Ft Water Holdback Material Manager Sort Code								

- 2. Enter the **Strength** of the mix. This field represents the average design strength of the mix product.
- 3. Enter the **Slump** of the mix. The slump is a measure of the cohesion, plasticity, water content, and solidity of the mix.
- 4. Enter the mix's Water/Cement Ratio. This ratio represents the amount of water in the cement. It can be printed on the ticket by specifying the document format field on the Document Formats screen. {Files > Document Formats}
- 5. Enter the mix's **Aggregate Size**. This is the maximum size of the individual particles of aggregate filler in the mix.
- 6. Enter the **Cement Type**. This field identifies the type of cement in the mix product.
- 7. Enter the mix's **Days to Strength**. This field specifies the number of days of hydration required for the mix to reach the strength specified in the Strength field.
- 8. Enter the **Maximum Water** that the mix can contain. When the mix is batched, the actual batched water amount can be subtracted from this amount and printed on the ticket as the maximum amount of water that can be added on site.
- 9. Enter the **Percent Air** contained in the mix.
- 10. If the mix contains lightweight aggregates, enter the **Lightweight Cu Ft**.
- 11. Enter the **Minimum Cement Content** in the mix.
- 12. Enter the **Water Holdback** in the mix.

Item User Fields Setup

The fields on this tab are configured on the Configuration screen. {Files > General Information > Configuration} If there are no user-defined fields flagged for item-level display, this tab will not display.

To enter user fields information:

1. Select the **User Fields** tab.

Items – User Fields Tab (EDTIMST8)									
Main	UOM	Conversions	Sales	Tax Override	Mix	User Fields	Locations	Costs	Prices [
QC Appro	oval		٩						-

2. Enter the appropriate information.

Item Locations Setup

The **Locations** tab is used to indicate which locations carry the item in inventory.

To define locations information:

1. Select the **Locations** tab.



- 2. Mark the checkbox next to the plant that carries the item in its inventory.
- 3. The subsequent tabs on the Item editor allow separate entries for each location. Mark the **Set all functions to copy to all** checkbox if you want a change to a field on one location to be copied to the corresponding field for all other selected locations.
- 4. The **Copy** button allows a one-time copy of information between locations. When the button is pressed, the Item Location Copy screen appears.

Item Location Copy (EDTIMSTG)

📱 Iten	n Locatio	on Copy	×
Copy F	rom Loc		
Сору Т	o Locatio	n Code	
	1	Birmingham Plant	
	2	Hoover Plant	
	3	Bessemer Plant	
	4	Alabaster Plant	
	5	Trussville Quarry	
	All	J	
L			

- 5. Select the location from which you want to copy information in the **Copy From Loc** drop-down field.
- 6. Select the checkboxes to indicate the locations to which the information is to be copied. Select the All button to select/deselect all the locations.

Note: This screen will only display those locations that are already flagged on the Item-Locations screen.

7. Accept the screen.

Item Costs Setup

The Costs tab is used to enter standard cost and cost extension information about the item. This information is used in generating gross margin information.

To define costs information:

1. Select the **Costs** tab.

			())	, , ,	· ·					
Invento	ry 🔰		Batel	hing			Batch Codes			
Main UOM	Conversions	Sales	Tax O	verride	User Fie	elds 📔	Locations	Costs	Pric	ces
Location Standard Cost Cost Extension Standard Cost Effectiv	1 Per /el 🔟 20-9	SHELB 8.56 unit Gep-2000	Y 30 to T	Previou: Previou:	s Standard s Cost Exter	Cost nsion	Per un	2.850 it	to T	
Location Standard Cost Cost Extension Standard Cost Effectiv	2 	N SUBL 8.56 unit Sep-2000	JRB 30 to	Previou: Previou:	s Standard s Cost Exter	Cost nsion	Per un	2.850 it	to •	_
Copy to All										

Items – Costs Tab (aggregate) (EDTIMSTA-agg)

- 2. Enter the **Standard Cost** for the item at the plant specified in the Location field.
- In the **Cost Extension** field, select the quantity for which the standard 3. cost is applied from the drop-down list.
- Enter the **Standard Cost Effective** date. This date represents when the 4. standard cost becomes effective.
- If you change the standard cost, the original value will be automatically 5. transferred to the Previous Standard Cost field.
- 6. If you change the cost extension, the original value will be automatically transferred to the Previous Cost Extension field.
- If you want the cost or extension change to be applied to all locations, 7. mark the **Copy to All** checkbox.

If the item is a mix, then cost information will be calculated based on the entered cost information of the constituents. Cost information is displayed, but cannot be edited.

Main UOM	Conversions Sales Tax Override Mix User Fields Locations Costs	Prices					
Location Standard Cost Cost Extension	1 BHAMPLT 36.686 cy Per unit	_					

Itoma Coata Tab (mix) (EDTIMETA mix)

Item Prices Setup

The Prices tab is used to enter price information about the item such as current and previous price and current and previous price extension.

To define price information:

1. Select the **Prices** tab.

	Items – Prices Tab (EDTIM	STB)	
Main UOM Conversions Sales	Tax Override Locations Costs	Prices Inventory Batching Bat	ch Codes 📔
Location Code 1 BHAMP	LT		-
Price Category Price # 10.80 tn	Price Extension Effective Per unit 💌 🔟 01-Jan-1999	Previous Price Extension	
Override Terms Code Discount	Discount Rate Discount Rate	Type Amount 💌	tn 🔻
Copy to All			

- 2. Enter a code for the **Price Category** or press <Enter> to select a code from the Choices (Price Category File) screen. If you enter a pound sign (#) for the Price Category, the system will use that as a wild card. If there is one price line, and "#" (the system wildcard) is entered in the Price Category Fields, then the entered price will be applied to all Price Categories. If there are entries for some price categories as well as a wildcard price, then the wildcard price will be used for any price categories without an individual entry.
- 3. Under the **Price** field, enter the current price of the item.
- 4. Under the first **Price Extension** field, enter the current extension.
- 5. Under the **Effective** field, enter the date on which this price becomes effective.
- 6. The last price of the item is displayed under the **Previous** field.
- 7. The last price extension of the item is displayed under the second **Price Extension** field.
- 8. If the **Use Product Level Terms Code Discount Overrides** flag is set on the Configuration-Invoicing tab, three fields display that allow you to override customer or project discounts.

Select the **Override Terms Code Discount** to override standard terms discounts established in customer or project files. When the box is selected, the **Discount Rate Type** and the **Discount** fields appear.

Note: To make an item immune from any terms discounts, set the override amount to zero.

9. Mark the **Copy to All** checkbox to make this change effective at all locations, or enter pricing information for the other locations.

Item Inventory Setup

The Inventory tab is used to enter inventory information for a specific location. These fields do not contain the current inventory amount for an item, but specify the parameters needed to track and manage the inventory.

To define inventory information:

1. Select the **Inventory** tab.

Main	ООМ 🛛	Conversions	Sales	Tax Override	User Fields	Locations	Costs	Prices
	Invento	ry		Batching		Batel	h Codes	
Storage L Maximum Minimum	.ocation Quantity Quantity	1	SHELBY to to	Reorder Q Reorder Po Lead Time	uantity pint in Days		to	^
Storage L Maximum Minimum	ocation Quantity Quantity	2	to to	Reorder Q Reorder Po Lead Time	uantity pint in Days		to	
Conu	Uto All							

Items – Inventory Tab (EDTIMSTC)

- 2. In the **Storage Location** field, enter the plant where the item is stored. In some cases, the item may be sold from one location and stored at another.
- 3. Enter the **Maximum Quantity** of the item that can be stored at this location.
- 4. Enter the **Minimum Quantity** of the item that should be stored.
- 5. In the **Reorder Quantity** field, enter the amount that should be reordered when the reorder point is reached.
- 6. Enter the minimum quantity of the item that can be reached before reordering in the **Reorder Point** field.
- 7. Indicate the number of days in advance of expected need that the item should be ordered in the **Lead Time in Days** field.
- 8. Mark the **Copy to All** checkbox to copy this information to all locations.

Item Batching Setup

The Batching tab is used to enter information about the batching systems used at your plants, to ensure that the mix is batched properly at all locations. Options on this tab depend on the type of item you are entering.

To define batching information for a mix:

1. Select the **Batching** tab.

	Items -	- Batching Tab (IIIIX)		
Inventory	Batching	Batch Codes	Constituents	Automatic Product
Location	1 BHAM	PLT Maximum Mixer Time Percentag IV Down	Batch Size 0 c 0 e Contribution to Cement load to Batch System	
Batch System UOM	▼ 40003 Cubic	:Ya	-	
Location	2 HVRPI	_T Maximum Mixer Time Percentag I⊽ Down	Batch Size 0 e 0 e Contribution to Cement load to Batch System	

Itoma Batching Tab (mix) (EDTIMETD)

- 2. Enter the **Maximum Batch Size** for the location.
- 3. Enter the minimum amount of **Mixer Time** required for this mix.
- 4. If you want to download the information to the batch system, mark the **Download to Batch System** checkbox.
- 5. In the **Batch System UOM** field, enter the code for the system's UOM or press <Enter> to select from a list of codes.
- 6. Mark the **Copy to All** checkbox if you want to copy this information to all locations.

To define batching information for aggregate:

1. Select the **Batching** tab.

Items – Batching Tab (agg) (EDTIMSTD)							
Inventory	Batching	Batch Codes					
Location 1 Specific Gravity 2.58 Moisture Percent 2.8 Batch System UOM I 60002	BHAMPLT Percentage Co 00 IV Download pounds	Intribution to Cement					
Location 2 Specific Gravity 2.58 Moisture Percent 2.8 Batch System UOM G0002	HVRPLT Percentage Co 00 IV Download pounds	Intribution to Cement Intribution to Cement Intribution to Batch System					

- 2. Enter the **Specific Gravity** of the aggregate. This value is used by the Materials Manager to convert between weight and volume.
- 3. Enter the standard **Moisture Percent** for the item.
- 4. In the **Batch System UOM** field, enter the code for the system's UOM or press <Enter> to select from a list of codes.

5. Select **Download to Batch Systems** is you want COMMANDseries to transmit this information to the batch computer during a mix download.

Mark the **Copy to All** checkbox if you want to copy this information to all locations.

Item Batch Codes Setup

The Batch Codes tab is used to enter batch codes and batch code descriptions.

To define batch code information:

1. Select the **Batch** tab.

		10	enis – Do	atti coues lab				
Main	UOM	Conversions	Sales	Tax Override	Mix	User Fields	Locations	Costs
Pric	es 🛛	Inventory		Batching	Bato	h Codes	Constitue	ents
Location (Code	1 SHELBY				·		-
Batch Co	de D	escription			SI	hort Descr		
1							<u>+</u>	<u>1</u>
								⊢
🔲 Сору	to All							_

Itoma Batch Codes Tab (EDTIMETE)

2. In the **Batch Code** field, enter a code that you want to represent the item.

Note: When interfacing with an Eagle, batch codes can be no longer than eight alphanumeric characters.

- 3. The second line batch code is used as a reserve code. For example, if dispatch sends one batch code and the batcher has none in inventory, the batcher will use the reserve code and send this information back to dispatch. Dispatch will always send the primary code but it will accept either the primary or reserve code.
- 4. In the **Description** field, enter text that describes the batch code.
- 5. Enter an abbreviated description in the **Short Description** field.
- 6. Mark the **Copy to All** checkbox to copy this information to all locations.
- 7. Accept the screen or proceed to the next tab.

Item Constituent Setup

The Constituents tab is used to enter information about the quantity of constituent products at each location. The tab is only available for concrete and asphalt item types.

To define constituents information:

- 1. Select the **Constituents** tab.
- 2. The **Cost Display Option** drop-down field defaults to Cost to This Product. As each constituent is added, the system will calculate the cost of that constituent, based on the entered quantity. The system maintains a running total of the cost of all constituents in the Total Mix Cost field. The other cost display option, changes the column to display the cost per order quantity.

Main UOM	Conversions	Sales	Tax Override	Mix	User Fields	Locati	ons 🗍 C	Costs
Prices	Inventory	B	Batching	Bato	h Codes	Co	onstituents	;
Location Code	1 SHELBY				Cos	t to This P	roduct 💽	3 🛋
Constituent Pro	duct		Q	luantity	Cost			
CEMENT	Cement T II-Lbs		_	470.00 lb	18.33		₩₽	▲
FLYASH	Fly Ash-Lbs			75.00 lb	1.80	1	<u>।</u> मिमि 1	
WATER	Water (G)			34.00 94	a 0.03	1	▶₩₽	
SAND	Sand (Lbs)			190.00 lb	5.07	E	1++	-
			Total	Mix Cost	33.15	су		

Items – Constituents Tab (EDTIMSTE)

- 3. In the field at the top right of the screen, indicate whether this is a Constituent Product or a Cost to This Product.
- 4. Under the **Constituent Product** field, enter a code for the product or press <Enter> to select a code from the Possible Items screen.
- 5. Enter the **Quantity** held in inventory at the indicated location.
- 6. Select the **Copy to All** button if you want to copy this information to all locations.
- 7. Accept the screen or proceed to the next tab.

Caution: Copying constituent information to all locations will overwrite the information currently stored in the other locations.

Note: If any of the constituents are not available at every location, you are notified of the relevant constituent(s) and which location(s).

Automatic Products

The Automatic Products function allows you to configure items to be added automatically. Previously, this functionality was accomplished through customer- or project-level associated products. This feature extends that ability to the Item Level.

You can have an admixture automatically added to a given mix, or have a delivery charge automatically attach to an item. In each case, the automatic item will be displayed separately on the order and ticket.

 \square

The Automatic Products tab will only display for primary products and extra charges.

To add an automatic product to an item:

1. Select the **Auto Products** tab.

× 1		Y Y	- Y - Y - Y
Main UOM	Conversions Sales Tax Override Mix	User Fields Location	ns Costs Prices
Inventory	Batching Batch Codes	Constituents	Automatic Products
Location Code	1 BHAMPLT		-
Auto Product	Description	Quantity	
55	Superplasticizer (US) (per cubic yard)	y /y	₽ ►
Copy To All			

Automatic Products (EDTIMSTH)

- 1. Select the required **Location** (or select the **Copy to All** button).
- 2. Enter the **Auto Product** code or detail on the field to select from a list.
- 3. The Description will default from the Item file. This description can be edited. If it is edited, the edited description will only be used when the item is added to an order via the Auto Product function.
- 4. Enter the **Quantity** to be added.
- 5. Accept the screen.

Hints for Entering Items

For quick entry of multiple mixes:

- Open an existing mix and click on the **Save As** button. This clears the item code, while retaining the rest of the mix's information.
- Enter a new item code and change the price, strength, constituents, and other necessary fields accordingly.

To set up a mix with a non-taxable haul charge:

- Include the haul charge on all mixes as usual.
- Setup a new tax location for the existing tax location (create two identical tax locations).
- Set the new tax rate as exempt and the exemption amount for your haul charge.
- Select new tax rate for customers who receive tax-free hauling.
- If zone charges are included, the zone charges are taxed, but the amount is minimal.

Do not worry too much about the pricing. When entering prices for items, remember that these prices can be customized for each customer and project, allowing you freedom in making bids and rewarding loyal customers with better prices for items.

Minimum Load Charge Tables

A minimum load (or short load) is a load that falls on or below the size specified on the Truck screen as the minimum load size for the truck. Minimum load charges are assessed on the Orders and/or Ticketing screen(s) to make up for the fact that such loads are not an efficient or cost-effective use of a truck and driver's time. These charges are added to an order and/or ticket by adding a specific minimum load charge item (acting like a service charge) to the order.

Before entering minimum load charge information, gather information about your company's policy regarding minimum load charges.

Minimum Load Charge Table Setup

It is useful to have more than one minimum load charge table for different levels of charges. If you do both customary and metric work, you will need at least one charge table for each measurement system.

Note: Before you can create a minimum load charge table, you must set up an item for small load charges.

To set up a minimum load charge table:

 Go to the Minimum Load Charges screen. {Files > Item Information > Minimum Load Charges}

		1.111	minun	I LOUU CI	iai ge		icito)				
🛅 Minimum L	.oad Char <u>c</u>	jes								Þ	<
Minimum Load	Charge Tab	le	3								
Description			Smal	l Load COD) - Metr	ic					
Short			COD	Met							
Item Code		-	196		Sma	all Load C	harge-Metric	:			
Unit of Measur	e	<u> </u>	1000)2 feet							
Minimum Quan	tity										
Minimum Load:	S										
Price Exempt L	.oads										
Load		L	oad			Load			Load		
Qty	Charge	Q	ty	Charge		Qty	Charge		Qty	Charge	
1 .20	120.00	7	1.40	90.00	13 [2.60	60.00	19 [3.80	30.00	
2 .40	115.00	8	1.60	85.00	14	2.80	55.00	20 [4.00	25.00	
3 .60	110.00	9	1.80	80.00	15	3.00	50.00	21			
4 .80	105.00	10	2.00	75.00	16	3.20	45.00	22			
5 1.00	100.00	10	2.20	70.00	10 0	3.40	40.00	23			
6 <u>1.20</u>	95.00	12	2.40	65.00	18	3.60	35.00	24			

Minimum Load Charges (EDTMCHG)

- 2. Enter a **Minimum Load Charge Table** code to identify the new minimum load charge table.
- 3. Enter a **Description** and **Short** description for the table as desired.
- 4. Enter the **Item Code** for the small load charge item, or detail on the field to select from a list. Minimum load charges are added to a order/ticket just like any other associated item. Adding this item code to an order/ticket attaches this minimum load charge table.
- 5. Select a **Unit of Measure** for the table. This dictates the unit of measure for the Load Qty fields.

The next three fields allow you to set up parameters to provide exmptions for large orders.

- 6. Enter the **Minimum Quantity** (based on the Order Delivered Quantity) required to be shipped before any minimum load charge exempt loads are allowed on an order.
- 7. Enter the **Minimum Loads** required to be shipped before any minimum load charge exempt loads are allowed on an order.
- 8. In the **Price Exempt Loads** field, enter the number of loads to be exempt from minimum load charges after the targets in either the Minimum Quantity or Minimum Loads fields have been met.

The rest of the form allows you to specify the various charges. As the image shows, you can break the charges down to small increments. Most people, however, have a much smaller number of charge ranges.

- 9. Enter a **Load Qty** and a corresponding monetary **Charge**. This amount is added to loads that fall on the load amount or between the load amount and the previous amount.
- 10. Accept the Minimum Load Charges screen to store this minimum load charge table.

Seasonal Charges

The Seasonal Charges screen allows users to assign price increases according to a season. Seasons are defined by specific dates, and the price increase associated with the season can be applied to single products or all products.

After defining a seasonal charge, the Orders screen allows users to apply the charge according to the order. {Dispatch > Orders > Pricing} Also, customers can be set up with default seasonal charges as a default by marking the Apply Seasonal Charge checkbox in the Customer File. {Files > Customer & Project Information > Customers > Pricing}

Seasonal charges can also be assigned using Sundry Charges.

To enter a new seasonal charge:

 Go to the Seasonal Charges screen. {Files > Item Information > Seasonal Charges}

Seasonal Charges (EDTSCHG)

🛅 Seasonal Charges	×
Seasonal Charge Table	2
Description Short Descr Active Range Item Code Unit of Measure Price	Winter (summer) service- US Winter S ID-Nov thru ID-Nov

- 2. Enter a **Seasonal Charge Table** code to identify the new seasonal charge table.
- 3. Enter information in the **Description** and **Short** description fields to describe the seasonal charge table.
- 4. Enter a range of dates for this seasonal charge to apply in the **Active Range** fields.
- 5. Select a **Product Code** to which the seasonal charge applies. If applying the charge to all products, enter **#** in the field.
- 6. Select the **Unit of Measure** to use when applying the seasonal charge. The UOM applies the seasonal charge per the specified unit.
- 7. Specify the amount of the seasonal charge in the **Price** field. When applied, this amount is added to each measured unit of the order. Using the above screen shot as an example, a 12.50-cubic-yard order ticketed between November 15 and April 30 would have Item Code 292 added to the order. The charges on the tickets would total \$75.00.
- 8. Accept this screen to store the new seasonal charge information.

Unloading Charges

The Unloading Charges screen is used to set up additional unloading charges (or wait charges) and to edit unloading charges already in existence.

Seasonal, sundry, and minimum load charges are all created when an applicable load is ticketed. Unloading charges, however, cannot be calculated until the materials has been delivered. They are generally calculated as part of the invoice prep process.

To enter a new unloading charge:

 Go to the Unloading Charge Table screen. {Files > Item Information > Unloading Charge Table}



Unloading Charge Table (EDTUCHG)

- 2. Enter a **Unloading Charge Table** code to identify the new unloading charge table.
- 3. Enter information in the **Description** and **Short** description fields to describe the unloading charge table.
- 4. From the **Beginning Tracking Statuses** and **Ending Tracking Statuses** fields' lists, select the points between which the unloading times should be calculated.
- 5. In the **Allowance Per Load** field, specify the amount of time to be allowed on a per load basis.
- 6. In the **Allowance Per Unit** field, specify the amount of time to be allowed on a per unit basis if necessary. This field's detail button allows you to change the unit upon which the allowance is based.

Note: If values are placed in both of the previous two fields, the allowance will be accumulated. For example, 20 minutes per load with an additional 5 minutes per yard.

- 7. In the **Minimum Allowance Per Load** field, specify the minimum amount of time to be allowed for any ticket using this charge table.
- 8. From the **Calculation Method** field's list, select whether the charges should be based on the ticket, order, or project.
- 9. Determine how the delivered quantity, in units, should be rounded, if necessary, from the **Round Delivered Quantity** field's list. The quantity can be rounded up, down, or left as the actual amount.
- 10. If desired, enter an amount of time in the **Writeoff Per Charge** field. This field represents a grace period during which excess charges will not

be applied.If the grace period is exceeded, though, the customer is charged for the full amount.

- 11. Specify the number of minutes that make one unit (for charging purposes) in the **Unloading Charge Increment** field.
- 12. Determine how the unloading charge should be rounded, if necessary, from the **Round Unloading Charge** field's list. The charge can be rounded up, down, or left as the actual amount.
- Enter the unloading charge item code in the **Item Code** field. Use this code to print descriptions on invoices, reports, and general ledger entries. Select the detail button to list unloading charge item codes. New items can be entered on the Items screen. {Files > Item Information > Items}

🗖 Possible Iter	ns		×
Q			
v			
Product code	Product description	Short product description	Pricing plant code
25466	2500#, 3/4 limestone, air	2500#, 3/4I, 6%	#
30656	3000 psi, 3/4, 6% AEA	3000 psi,3/4, 6%	#
207	3/4" Gravel	3/4'' Gravel	#
202	3/4" Gravel	3/4'' Gravel	#
30656	3000 psi, 3/4, 6% AEA	3000 psi,3/4, 6%	#
SUPERP	Superplasticizer (oz)		
			_
•			<u> </u>
From Project	From Customer	C From Item	

Possible Items (FNDIMST)

14. From the **Create Unloading Charge On** field's list, select the ticket to include the unloading charges in a multiple-ticket.

Note: This field will not display if Calculation Method is set to Ticket.

- 15. Specify a price per unit in the **Price** field.
- 16. Accept the screen to save the new unloading charge information.

Sundry Charges

Sundry charges are additional charges associated with the sale or delivery of a product, such as extra hours, environmental, and Saturday/Sunday charges. These charges are based on charge types (per unit, flat amount, percent of ticket, or minimum ticket) with time and day constraints established for each sundry charge. Sundry charges can be flagged to appear on the first load only, or they can be flagged to automatically appear on all loads. Any **automatic** sundry charges default into the order, without the needtor setting up the charge on the customer or project. This prevents the billing departments from having to set up these charges manually and reduces the chance of billing errors.

Prices for sundry charges can be entered on a number of different levels, so it is important to understand the hierarchy used when pricing sundry charges:

- 1. The system checks for an order-level sundry charge override (on the Order Pricing screen). This value, if present, takes precedence over any other setting or override.
- 2. Next, the system looks for a project-level override on the charge table (Project-Pricing).
- 3. Customer-level override on the charge table (Customer-Pricing).
- 4. Project-level price for the sundry charge item (Project-Products)
- 5. Customer-level price for the sundry charge Item (Customer-Products)
- 6. The Item Master File. Only here are Price Categories considered.
- 7. If no pricing exists at any of the prior levels, then the price is set from the charge table itself.

Note: "No price" means that the field must be null (empty); the system will process a zero price as a valid price.

To enter a new sundry charge:

 Go to the Sundry Charges screen. {Files > Item Information > Sundry Charges}

Sundry Charges
Sundry Charge 3
Description Weekend Delivery Charge/m3
Short WKND-M3
Item Code 🔄 198 Weekend Charge/Id
Uharge Type Per Unit
Lombine with Material Price Do not Include
Time Tollse
From Date II January Thru Date II 31 December
Start End
Time Time Days to Apply Charge
00:00 23:59 All Mon Tue Wed Thu Fri 🗹 Sat Sun 🛌
Current Amount Effective Province Amount
20.00 BI 17.4uz 2000 19.00
First load only
Apply Automatically to all Orders Concrete Aggregate

Sundry Charges (EDTPCHG)

2. In the **Sundry Charge** field, enter the sundry charge table code.

- 3. Enter a **Description** and **Short** description.
- 4. Enter the **Item Code** to which you are assigning this sundry charge.
- 5. Select a **Charge Type** from the list. The charge types to be applied to this sundry charge are:
 - Per Unit
 - Flat Amount
 - Percent of Ticket
 - Minimum Ticket.
 - Minimum Product
- 6. You can control whether the charge appears as a separate line item on anticket/invoice, or if the charge is to be added to another price. Select a **Combine with Material** option from the field's list. Valid options follow.

Do not Include (default) – the sundry charge and the material price appear separately on the ticket, invoice, and data out.

Combine on Ticket, Invoice, and Data Out – combines the extended material price and the sundry charge on the ticket, invoice, and data out; if customers wish to combine charges, this is the most common choice.

Combine on Ticket and Invoice – combines the extended material price and the sundry charge on the ticket and invoice; they are separated on the data out.

Combine on Ticket and Data Out – combines the extended material price and the sundry charge on the ticket and data out; they are separated on the invoice.

Combine on Invoice and Data Out – combines the extended material price and the sundry charge on the invoice and data out; they are separated on the ticket.

Combine on Ticket – combines the extended material price and the sundry charge on the ticket; they are separated on the invoice and data out.

Combine on Invoice – combines the extended material price and the sundry charge on the invoice; they are separated on the ticket and data out.

Combine on Data Out – combines the extended material price and the sundry charge on the data out; they are separated on the ticket and invoice.

- 7. Select the **Target Unit of Measure** when a charge type of **Per Unit** is selected.
- 8. Select **Scheduled Load Time** or **Ticket Typed Time** from the list in the **Time to Use** field.
- 9. Enter the **Start Time** and **End Time**. These fields automatically display the default times of 00:00 to 23:59 for all sundry charges. Based upon the selection for Time to Use, sundry charges are applied for each ticket if that ticket's Scheduled Load Time and Ticket Typed Time are within these ranges.

- 10. Check the **Days to Apply Charge**. Depending upon the days of the week the sundry charge is to apply, check the day when these charges are to be applied to the tickets. If the checkbox for **All** is flagged, the checkboxes for all days are marked.
- 11. Enter the **Current Amount/Percent/Minimum Ticket**. This is the dollar amount of the sundry charge if the charge type is either Per Unit or Flat Amount. If the sundry charge type is Percent of Ticket, enter the percentage rate (i.e. 10 percent, 12.5 percent). If the charge type is Minimum Ticket, enter the total minimum ticket dollar amount. Do not enter a percent rate for a Per Unit, Flat Amount, or Minimum Ticket Charge Type.
- 12. Enter the **Effective Date** for the amount, percent, or minimum ticket values entered above to take effect on current day orders and tickets.
- 13. The **Previous Amount/Percent/Minimum Ticket** field displays any changes made to Current Amount/Percent/Minimum Ticket for reference purposes only.
- 14. Mark the **Apply to the first Load Only** checkbox to indicate that the sundry charge is to be calculated and appear on the first load only. Any succeeding loads will not have this charge.
- 15. If the **Apply Automatically to all Orders** checkbox is checked, this sundry charge would appear on every ticket for every order if the ticket's scheduled or typed time meets the requirements for Begin Time and End Time and Days to Apply Charge.
- 16. The **Concrete**, **Aggregate**, **Asphalt**, and **Block** checkboxes only appear when the Apply Automatically to all Orders checkbox is selected. Check the product line(s) to which this automatic charge is to be applied.
- 17. The **Item Categories** button only appears for the **Percent of Ticket Charge Type**. The Item Categories screen displays all item categories currently established with a checkbox beside each item category. Select the item categories for which a Percent of Ticket Sundry Charge applies by marking the checkboxes. Only those items for the item categories selected are charged a Percent of Ticket Sundry Charge.
- 18. Accept this screen.

Vendors

A vendor is any company from which your company purchases materials. Records for these vendors are created, added, or edited on the Vendors screen. Before new vendors can be added, however, vendor types must be defined.

Note: You must be in COMMANDinventory for Vendor and Vendor Types to display as menu options.

Vendor Types Setup

The Vendor Types screen allows the user to create and edit vendor types.

To create a vendor type:

 In COMMANDinventory, go to the Vendor Types screen. {COMMANDinventory > Files > Item Information > Vendor Types}

Vendor	Types	(EDTVNTY)
--------	-------	-----------

🛅 Vei	🖬 Vendor Types 📃 📃 🗙								
Туре	Description	Short	Vendor Class						
6	Rail Car Hauler	Rail Car	Haul Vendor 💌 🛃 🔺						
7	Helena Rock Quarry	Rock Qua	Material & Haul 💌 🛃						
8	Miscellaneous Supplies	Misc Sup	Material 💽 🚽						
9	Brick Manufacturer	Brick	Material 💽 🛃						
5	Sand Vendor	Sand	Material 💽 🛃						
1	Cement Vendor	Material	Material 💽 🛃						
2	Independent Hauler	Independ	Haul Vendor 💌 🛃						
3	Contract Hauler	Contract	Haul Vendor 💌 🛃 💌						

- 2. Enter an alphanumeric code in the **Type** field. This code uniquely identifies this vendor type in the COMMANDinventory system.
- 3. Enter a **Description** for this vendor type. Enter an abbreviated version of this description in the Short field.
- 4. Select a **Vendor Class** for this type.

Material Vendor – the vendor sells you material.

Haul Vendor – the vendor transports material.

Material & Haul Vendor – the vendor transports material for you and sells material to you.

- 5. To enter another vendor type, select the **Add Occurrence** button.
- 6. When you finish entering types, accept the Vendor Types screen.

Vendor Setup

The Vendors screen allows the user (with appropriate system priviledges) to add, change, or delete vendor records.

To enter a vendor:

 In COMMANDinventory, go to the Vendors screen. {COMMANDinventory > Files > Item Information > Vendors} Vendors (EDTVNDR)

TVendors 🔁	
Vendor Code	2
Sort Name	A&A
Name	A & A Trucking Inc.
Address	1220 North Main Street
City	Pelham
State	Alabama
Country	USA
Postal Code	34889
Phone Number	664-3498
Contact	Bill Horrell
Vendor Type	Independent Hauler
Vendor Class	Haul Vendor
Location Code	✓ 1 Shelby

- 2. Enter an alphanumeric **Vendor Code**. This code uniquely identifies the vendor in COMMANDinventory.
- 3. Enter a **Sort Name** for the vendor. This name is used to select or sort vendors on COMMANDseries reports.
- 4. Enter the vendor's **Name** as it should appear on purchase orders, checks, reports, etc.
- 5. Enter **Address**, **Phone Number**, and **Contact** information for the vendor.
- 6. Indicate the type of vendor by selecting from the **Vendor Type** field's list.
- 7. Enter the **Location Code** for the vendor. Note that this field is not required. If you select a location code, this vendor is not able to deliver to any of your other locations. If the field is left blank, the vendor is able to deliver to any of your locations.
- 8. Accept the Vendors screen.

Freight Methods

This screen allows you to edit freight methods already in existence and create new freight methods.

To set up freight methods:

1. Go to the Freight Methods screen. {COMMANDinventory > Files > Item Information > Freight Methods}

Freight Methods (EDTFRMT)

📄 Fre	Freight Methods								
Туре	Description	Short	Freight Class						
1	Contract Hauler	Contract	Hauler 💽 🛃 🛌						
2	Company Truck	Co Trk	Truck 🗾 🛃						
3	Material Vendor Truck	Mat Vnd	Hauler 🗾 🚽						
4	Rail Car	Rail Car	Truck 🗾 🛃						
5	Barge	Barge	Truck 💽 🛃						
6	Independent Hauler	Independ	Hauler 🗾 🚽						
7	US Postal Service	US Post	Other 💽 🛃						
			v						

- 2. Enter the **Type**, a numeric code that corresponds to the freight method.
- 3. Enter a **Description** for this freight type. Enter an abbreviated version of this description in the Short field.
- 4. Choose the **Freight Class**. This field specifies the numeric code that corresponds to the freight method. There are three freight methods supported by COMMANDseries.

Truck – The truck is owned by your company.

Haul – The truck is owned by another company that has been hired to do one of your jobs.

Other – The truck is neither owned by your company nor hired from another company.

5. Accept the Freight Methods screen.

Cartage & Delivery Information

The following topics address the entry of cartage and additional delivery information.

Topics in this section:

Cartage Accounting Periods Cartage Rate Codes Cartage Surcharge Codes Quoted Cartage Pay Hauler/Truck Information Deduction Codes Quoted Deductions

Cartage Accounting Periods

Cartage accounting periods correspond to the frequency with which you pay your haulers, and should not be confused with your regular A/R accounting periods. Cartage Accounting Periods are required for hauler pay.

To set cartage accounting periods within a year:

1. In the **Accounting Year** field, enter the year for which you want to create accounting periods.

Cartage	Accounting	Periods	(EDTCTPQ)
			(

🖹 Ca	🗄 Cartage Accounting Periods 📃 🗖 🗙						
Acco	Accounting Year 2005						
Num	ber c	of Periods	ĺ	12 븆			
Perio	od D a	ates					Defaults
		Start Date		End Date			
1	▣	01-Jan-2005		31 Jan-2005		Open	<u> </u>
2	▣	01-Feb-2005		28-Feb-2005		Open	
3		01-Mar-2005		31-Mar-2005		Open	
4		01-Apr-2005		30-Apr-2005		Open	
5		01-May-2005		31-May-2005		Open	
6		01-Jun-2005	<u> </u>	30-Jun-2005		Open	
7		01-Jul-2005	<u>1</u>	31-Jul-2005		Open	
8		01-Aug-2005	<u>1</u>	31-Aug-2005		Open	
9		01-Sep-2005	<u>13</u>	30-Sep-2005		Open	
10	12	01-0ct-2005	13	31-0ct-2005		Open	
11	12	01-Nov-2005	13	30-Nov-2005		Open	
12	12	01-Dec-2005	13	31-Dec-2005		Open	

- To create an accounting period for each month, press the **Defaults** button. Otherwise, rnter the number of accounting periods you want for the specified accounting year in the **Number of Periods** field. That number of **Period Dates** fields appears below.
- 3. Enter a start date and end date in the corresponding fields for each accounting period.
- 4. If a period is open, mark the **Period Open** box beside that period. This allows entry of transactions for that period. If the checkbox is not marked, that period is considered closed and will not accept any new transactions.

Cartage Rate Codes

Users define cartage rate codes for haul charges and hauler pay using the Cartage Rate Tables screen. Cartage rates are later applied to orders, along with the detailed information specified during the cartage rate setup. A cartage rate code may be assigned to an order when the order is taken; it may also be assigned at the Customer or Project level, so that the appropriate cartage rate table is used whenever a specific Customer places an order.

The system currently supports seven types of cartage rates:

Hourly Productive – Cartage rate is calculated at an hourly rate for the time the truck/driver is productive.

Hourly Clock – Cartage rate is calculated at an hourly rate for the time the truck/driver is punched in. The table is available for hauler pay only.

Load – Driver is paid a flat cartage rate per load.

Quantity/Distance – Quantity and Distance are calculated with a base rate and additional charges based on the distance traveled. Rates may be multiplied by the quantity or quantity/distance.

Plant/Zone – Cartage rate is determined by a rate table using the plant, zone, and truck type.

Quantity – Cartage rate is calculated according to the rate multiplied by the quantity of the load or load size.

Custom – The user constructs the calculation equation to use with a set of pre-defined variables. This table is available for hauler pay only.

Before entering cartage rate codes, you need to gather information about each type of cartage rate you pay. You may enter as many different cartage rate tables as desired.

Topics in this section:

Hourly Cartage Rates Per Load Cartage Rates Quantity/Distance Cartage Rates Plant/Zone Cartage Rates Quantity Cartage Rates Setting up a Custom Cartage Rate Table w/ Equation

Hourly Cartage Rates

If paying for truck usage by the hour, use Hourly Cartage Rates. Hourly cartage rates can be calculated as **Productive** or **Clock**, and do not necessarily include travel time or distance. Hourly productive cartage rates calculate cartage rates by the hour according to the time the driver or truck is actually productive, meaning the truck is involved in loading, delivering, or returning from a load. The formula for calculating hourly cartage rates is:

CARTAGE = TIME x RATE

Hourly clock rates are based on the entire time the driver or truck is on the clock, regardless of whether any of that time is nonproductive.

To enter a new hourly productive or clock cartage rate:

- Go to the Cartage Rate Codes screen. {Files > Cartage Information > Cartage Rate Codes}
- 2. Enter a **Cartage Rate Table** to identify the new cartage rate.
- If the table is intended for a single customer or project, enter the appropriate Customer and Project Codes.
 If a cartage table is assigned to a specific customer/project, the table can only be assigned to orders for that customer/project. The table will not show up in a cartage lookup for other customer/projects.
- 4. Enter a **Description** and **Short** description for the cartage rate.

Cartage Rate Tables (EDTCTRT1)

🖥 Cartage Rate Tables		- 🗆 ×
Cartage Rate Table	H Customer Code Project Code	
Description Short Description Rate Type	Per Hour HOUR Hourly (productive)	
Main		
Default Rate	20.00 Effective 🔟 18-Jan-2005 Previous Rate 40.00	
Rate UUM Cartane Type	Both	
Item Code	102 Cartage	
Minimum Charge Option	Minimum Quantity	
Minimum Pay Option	Minimum Pay Amount	
Minimum Charge/Pay Additional Per Load Amount	30,00 Minimum Quantity 20,00	
Additional Tel Eoad Allouni		

- 5. Select **Hourly (productive)** or **Hourly (Clock)** as the Rate Type.
- Enter the Default Rate for the table. The date of the change will default. If you change an existing rate, the old rate will move to the Previous Rate field.
- 7. The **Rate UOM** will default to 80001 -- each, and cannot be changed.
- 8. Set the **Cartage Type** as:

Payment if the cartage fee is directly paid to the hauler **Charge** if the cartage fee is to be charged to the customer **Both** if the cartage fee is sometimes paid and sometimes charged

- **Note:** Setting the cartage type to Both (for any rate type) does not mean that the table will automatically be used for both payment and charge, but that it can be used for both payment and charge.
- 9. Select a haul charge **Item Code**. This code will appear on the customer invoice; it is used to define the taxability of the cartage rate table and for determining where to book GL entries. The Item Code must be set up prior to setting up the Cartage Rate Table.
- 10. Select a **Minimum Charge** Option. This field gives you a number of options to establish a minimum haul charge, regardless of load size or clock time. The options are:

No Minimum Charge Minimum Charge Amount Truck's Minimum Load Size times Charge Rate Truck's Schedule Load Size times Charge Rate

11. Select a **Minimum Pay** Option. This field gives you a number of options to establish a minimum payment, regardless of load size or clock time. The options are:

No Minimum Charge Minimum Pay Amount Truck's Minimum Load Size times Pay Rate Truck's Schedule Load Size times Pay Rate

- 12. If either of the two previous fields is set to a minimum amount, the **Minimum Charge/Pay** field displays. This value will be used to calculate minimum charges and payments, based on the above two settings.
- 13. If either of the minimum charge/pay option fields is set to Minimum Quantity, the **Minimum Quantity** and **Maximum Quantity** fields display. The **Minimum Quantity** indicates the smallest cartage chage that will be calculated.
- 14. If desired, you can also enter a **Maximum Quantity** to set a cap on cartage changes for the table.
- 15. Enter an amount in the **Additional Per Load Amount** if an additional charge applies. This amount will be added to the charge/pay amount.
- 16. Accept this screen to save the cartage rate table.

Per Load Cartage Rates

To pay haulers a flat rate per load, use a cartage rate table that charges on a per load basis. Per load cartage rates are calculated using the following method:

CARTAGE = RATE

To enter a new per load cartage rate:

- 1. Go to the Cartage Rate Codes screen.
- 2. Enter a **Cartage Rate Code** to identify the new cartage rate.
- 3. If the table is intended for a single customer or project, enter the appropriate **Customer** and **Project Codes**.

If a cartage table is assigned to a specific customer/project, then when attempting to assign a cartage table to an order on another customer or project, the dedicated rate table will not display in the table lookup screen.

- 4. Enter a **Description** and **Short** description for the cartage rate.
- 5. Select Load as the **Rate Type**.

Per Load options (EDTCTRT1)

Main		
Default Rate Rate UOM Cartage Type Item Code	45.00 Effective Image: Control of the second seco	evious Rate

- Enter the Default Rate for the table. The date of the change will default. If you change an existing rate, the old rate will move to the Previous Rate field.
- 7. Set the Rate UOM to 80001 (each) or 80002 (per load).
- 8. Set the Cartage Type as:

Payment if the cartage fee is directly paid to the haulerCharge if the cartage fee is to be charged to the customerBoth if the cartage fee is sometimes paid and sometimes charged

- 9. Select a haul charge **Item Code**. This code will appear on the customer invoice; it is used to define the taxability of the cartage rate table and for determining where to book GL entries. The Item Code must be set up prior to setting up the Cartage Rate Table.
- 10. Accept this screen to save the cartage rate and related information.

Quantity/Distance Cartage Rates

Cartage may be charged to the customer based on the quantity and/or quantity/distance of the materials hauled, or based on the distance the materials will be hauled. Cartage charges on a quantity/distance cartage rate table are based on the quantity or distance of the haul, and include ranges that are summed or not summed, meaning that the rate can be calculated four different ways. Each example is based on the delivery of 10 tons to a location 24 miles away using the following rate range table:

Note: Your last range should extend to 9999 to be certain to cover all distances.

- Quantity Based, ranges are not summed BASE RATE + DISTANCE RATE = RATE PER UOM; RATE PER TON x UNITS HAULED = TOTAL CARTAGE Example: \$2.00 + \$0.20 = \$2.20/ton \$2.20/ton x 10 tons = \$22.00
- Quantity Based, ranges are summed BASE RATE + DISTANCE RATE + ABOVE RANGE RATES = RATE PER UOM; RATE PER UOM x UNITS HAULED = TOTAL CARTAGE Example:

\$2.00 + \$0.20 + \$0.25 = \$2.45/ton \$2.45/ton x 10 tons = \$24.50

- Distance Based, ranges are not summed

 (TOTAL MILES BASE MILES) x DISTANCE RATE = NEW RATE;
 BASE RATE + NEW RATE = RATE PER UOM;
 RATE PER UOM x UNITS HAULED = TOTAL CARTAGE
 Example: (24 10) x \$0.20 = \$2.80
 \$2.00 + \$2.80 = \$4.80/ton
 \$4.80/ton x 10 tons = \$48.00
 - Distance Based, ranges are summed BASE = BASE RATE + (# OF MILES IN RANGE 1 × RANGE 1 RATE) + (# OF MILES IN RANGE 2 × RANGE 2 RATE) + (# OF MILES IN RANGE 3 × RANGE 3 RATE) + This pattern continues until the total miles from the schedule file is reached. *Example:* $$2.00 + (10 \times $0.25) + (4 \times $0.20)$ \$2.00 + (\$2.50) + (\$0.80) = \$5.30/ton $$5.30/ton \times 10 tons = 53.00

To enter a new quantity/distance cartage rate:

- 1. Go to the Cartage Rate Code screen.
- 2. Enter a **Cartage Rate Table** to identify the new cartage rate.
- 3. Enter a **Description** and **Short** description for the cartage rate.
- 4. Select **Quantity/Distance** as the Rate Type.

Quantity/Distance options (EDTCTRT1)

Main Range		
Rate UOM Cartage Type Item Code Minimum Charge Option	✓ 60003 tons Charge ✓ 102 Cartage Minimum Quantity ✓	
Additional Per Load Amount	Minimum Quantity Maximum Quantity Maximum Quantity	

- 5. Enter **Rate UOM** for the rate table. (The rates are entered on the **Range** tab.)
- 6. Set the Cartage Type as:

Payment if the cartage fee is directly paid to the hauler **Charge** if the cartage fee is to be charged to the customer **Both** if the cartage fee is sometimes paid and sometimes charged

7. Select a haul charge **Item Code**. This code will appear on the customer invoice; it is used to define the taxability of the cartage rate table and to

determine where to book GL entries. The Item Code must be set up prior to setting up the Cartage Rate Table.

8. Select a **Minimum Charge Option**. This field gives you a number of options to establish a minimum haul charge, regardless of load size or clock time. The options are:

No Minimum Charge Minimum Charge Amount Truck's Minimum Load Size times Charge Rate Truck's Schedule Load Size times Charge Rate Minimum Quantity

- If the Minimum Charge Option is Minimum Charge Amount, the Minimum Charge/Pay field displays. This value will be used to calculate minimum charges and payments, based on the above two settings.
- If either of the minimum charge/pay option fields is set to Minimum Quantity, the Minimum Quantity and Maximum Quantity fields display. The Minimum Quantity indicates the smallest cartage chage that will be calculated.
- 11. If desired, you can also enter a **Maximum Quantity** to set a cap on cartage changes for the table.
- **Note:** To establish a pure per mile rate, set both the Minimum and Maximum Quantity to 1.
- 12. Enter an amount in the **Additional Per Load Amount** if an additional charge applies.
- 13. Select the **Range** tab to develop a rate table based on quantity or distance.

Main Range					
Base	From thru	Rate Eff Date	Prev. Base Rate		
Rate Type Range Range	Distance Base Rate 5 10 10 20	1.25 1.10	Min (Quantity 3.00 3.00	Max Quantity
Sum Range Rate to Base Rate					

Quantity/Distance-based Cartage (EDTCTRT2)

- 14. Enter your **Base** rate information.
- 15. Select a **Rate Type** from the drop down menu.
- 16. Select the **Sum Range Rate to Base Rate** checkbox if necessary. If this checkbox is checked, the cartage rate will be the sum of all applicable ranges.

Minimum and maximum quantities can be specified for each distance band.

17. Accept this screen to save the cartage rate and related information.

Plant/Zone Cartage Rates

Cartage can be paid based on the location of the plant, the truck type, or delivery zone. Occasionally, zones may overlap; it is critical that the zone and plant match. Do not use a zone code not associated with the plant in question. Charges will not be calculated correctly.

Plant/zone cartage rates are determined by (1) the destination zone, (2) the shipping plant, and (3) the truck type. Values for these three factors are set up on the Zones tab.

The rate is then multiplied by the quantity:

CARTAGE = RATE x QUANTITY

For example, truck type **A** from plant 5, shipping to zone 1000, carries 15 tons of pea gravel. The haul charge is calculated as follows:

 $5.00/ton \times 15 tons = 75.00

Hauler pay is calculated as follows:

```
4.15/ton \times 15 tons = 62.25
```

To enter a new plant/zone cartage rate:

- 1. Go to the Cartage Rate Codes screen.
- 2. Enter a **Cartage Rate Table** to identify the new cartage rate.
- 3. Enter a **Description** and Short description for the cartage rate.
- 4. Select **Plant/Zone** as the Rate Type.

Plant/Zone Cartage (EDTCTRT1)

Main Zones	
Rate UOM	▼ 60003 tons
Cartage Type	Both
Item Code	▼ 102 Cartage
Minimum Charge Option	Minimum Charge Amount
Minimum Pay Option	Minimum Quantity
Minimum Charge/Pay	0.00 Minimum Quantity
Additional Per Load Amount	Maximum Quantity
Calculate Unloading Charge	per hour 🔽 Use Pricing Plant

- 5. Enter the **Rate UOM** for the rate table.
- 6. Set the Cartage Type as:

Payment if the cartage fee is directly paid to the hauler **Charge** if the cartage fee is to be charged to the customer **Both** if the cartage fee is sometimes paid and sometimes charged

7. Select a haul charge **Item Code**. This code will appear on the customer invoice; it is used to define the taxability of the cartage rate table and for determining where to book GL entries. The Item Code must be set up prior to setting up the Cartage Rate Table.

8. Select a **Minimum Charge Option**. This field gives you a number of options to establish a minimum haul charge, regardless of load size or clock time. The options are:

No Minimum Charge Minimum Charge Amount Truck's Minimum Load Size times Charge Rate Truck's Schedule Load Size times Charge Rate Selected Minimum Charge from Cartage Zone Minimum Quantity

 Select a Minimum Pay Option. This field gives you a number of options to establish a minimum payment, regardless of load size or clock time. The options are:

> No Minimum Charge Minimum Pay Amount Truck's Minimum Load Size times Pay Rate Truck's Schedule Load Size times Pay Rate Selected Minimum Pay from Cartage Zone Minimum Quantity

- If the Minimum Charge Option is Minimum Charge Amount, the Minimum Charge/Pay field displays. This value will be used to calculate minimum charges and payments, based on the above two settings.
- 11. If either of the minimum charge/pay option fields is set to Minimum Quantity, the **Minimum Quantity** and **Maximum Quantity** fields display. The **Minimum Quantity** indicates the smallest cartage chage that will be calculated.
- 12. If desired, you can also enter a **Maximum Quantity** to set a cap on cartage changes for the table.
- 13. Enter an amount in the **Additional Per Load Amount** if an additional charge applies.
- 14. Mark the **Calculate Unloading Charge** checkbox if necessary. This checkbox indicates that the customer will be charged the rate per hour that you specify for unloading the truck. A rate/hour field will appear when the checkbox is checked.
- 15. Select the **Zones** tab to specify prices according to the destination zone and plant of origin. Cartage rates can be assigned to a zone, from a plant, or to a zone from a specific plant.

Main	Zones	;											
Zone (Code		Plant Code	Truck Type	Charge Rate	Effective Date	Previous Charge	Minimum Charge	Pay Rate	Effective Date	Previous Pay	Minimum Pay	
2001		Z1	9	#	4.75	29-May-2004	4.25		4.65	29-May-2001	4.45		크 🔳
2001	— (.21 221	10	#	5.00	29-May-2004	4.75		4.90	29-May-2001	4.50		비
2001		Z1	16	#	5.50	29-May-2004	0.00		5.40	29-May-2001	0.00		크
2002	— (.Z2 .Z3	#	#	4.00	29-May-2004	0.00		3.50	29-May-2001	0.00		비
2003		Z4	#	#	5.00	29-May-2004	0.00		4.50	29-May-2001	0.00		┛╹
2004]#	#	5.00	29-May-2004	0.00		4.50	29-May-2001	0.00		ॻ॒

Cartage Rate Tables (EDTCTRT3)

- 16. Select a destination **Zone** to which a cartage rate should be assigned.
- Select an origin plant to which a cartage rate should be assigned {Files > Plant & Delivery Information > Plants}. To apply the rate to all plants, <Tab> through this field; a # will appear in the field—this is a wildcard indicating all plants.
- Select the truck type to which this rate should be applied {Files > Plant & Delivery Information > Truck Types}. To apply the rate to all truck types, <Tab> through this field; a # wildcard will appear in the field.
 - **Tip:** Use the system wildcard to simplify data entry. For example, if you have one rate for Plant 1 and another rate for all of your other plants, Enter one rate for Plant **#**, and another for Plant 1.
- 19. Enter the cartage rate for hauler pay and haul charges.
- 20. If the Minimum Charge Option on the Main tab is Selected Minimum Charge from Cartage Zone, the Minimum Charge field will be active, allowing you to assign a minimum cartage charge for individual plant/ zone combinations.
- 21. If the Minimum Pay Option on the Main tab is Selected Minimum Pay from Cartage Zone, the Minimum Pay field will be active, allowing you to assign a minimum cartage pay for individual plant/zone combinations.
- 22. Accept the Cartage Plant/Zone Information and Cartage Rate Tables screens to save the cartage rate and related information.

Quantity Cartage Rates

Cartage may be charged based on the quantity of the materials being hauled. Quantity cartage rates can be determined simply by multiplying the cartage rate by the load size:

```
CARTAGE = RATE x LOAD SIZE
```

For example, with a load size of 18.24 tons at a rate of \$2.00/ton, the total cartage would be \$36.48. Additional charges and minimum quantities can also be included as factors.

To enter a new quantity cartage rate:

- 1. Go to the Cartage Rate Code screen.
- 2. Enter a **Cartage Rate Table** to identify the new cartage rate.
- 3. Enter a **Description** and a **Short** description for the cartage rate.
- 4. Select **Quantity** as the Rate Type.

	Cartage Rate Tables (EDTCTRT1-quantity)	
Main		
Default Rate Rate UOM Cartage Type Item Code Minimum Charge Option Minimum Pay Option Minimum Charge/Pay Additional Per Load Amount	7.00 Effective Image: Territory in the second	

- Enter the Default Rate for the table. The date of the change will default. If you change an existing rate, the old rate will move to the Previous Rate field.
- 6. Enter **Rate UOM** for the rate table.
- 7. Set the **Cartage Type** as:

Payment if the cartage fee is directly paid to the hauler **Charge** if the cartage fee is to be charged to the customer **Both** if the cartage fee is sometimes paid and sometimes charged

- 8. Select a haul charge **Item Code**. This code will appear on the customer invoice; it is used to define the taxability of the cartage rate table and for determining where to book GL entries. The Item Code must be set up prior to setting up the Cartage Rate Table.
- 9. Select a **Minimum Charge Option**. This field gives you a number of options to establish a minimum haul charge, regardless of load size or clock time. The options are:

No Minimum Charge Minimum Charge Amount Truck's Minimum Load Size times Charge Rate Truck's Schedule Load Size times Charge Rate

10. Select a **Minimum Pay Option**. This field gives you a number of options to establish a minimum payment, regardless of load size or clock time. The options are:

No Minimum Charge Minimum Pay Amount Truck's Minimum Load Size times Pay Rate Truck's Schedule Load Size times Pay Rate

- 11. If either of the two previous fields is set to a minimum amount, the **Minimum Charge/Pay** field displays. This value will be used to calculate minimum charges and payments, based on the above two settings.
- 12. If either of the minimum charge/pay option fields is set to Minimum Quantity, the **Minimum Quantity** and **Maximum Quantity** fields display. The **Minimum Quantity** indicates the smallest cartage chage that will be calculated.
- 13. If desired, you can also enter a **Maximum Quantity** to set a cap on cartage changes for the table.

- 14. Enter an amount in the **Additional Per Load Amount** if an additional charge applies.
- 15. Accept the Cartage Rate Tables screen to save the cartage table or proceed to the Range tab.

Setting up a Custom Cartage Rate Table w/ Equation

Users can create custom cartage tables that use equations to calculate the cartage amount. The custom rate can be set up as a simple per quantity equation, or it can be set up to calculate based on a set of ranges. Custom cartage tables are used for hauler pay only.

To enter a new cartage rate equation:

- 1. Go to the Cartage Rate Tables screen.
- 2. Enter a **Cartage Rate Code** to identify the new cartage rate.
- 3. Enter a **Description** and **Short** description for the cartage rate.
- 4. Select **Custom (user defined)** from the Rate Type field's pull-down menu.

Custom Setup (EDTCTRT1)

Main Range Equation	
Default Rate Rate UOM Cartage Type Item Code	Effective Previous Rate
Minimum Pay Option	
Additional Per Load Amount	

 Enter the Default Rate for the table. The date of the change will default. If you change an existing rate, the old rate will move to the Previous Rate field.

The rate can be incorporated into the equation.

- 6. Enter the **Rate UOM** for the rate table.
- 7. Set the **Cartage Type** as **Payment**.



- 8. Select a haul charge **Item Code**. This code will appear on the customer invoice; it is used to define the taxability of the cartage rate table and for determining where to book GL entries. The Item Code must be set up prior to setting up the Cartage Rate Table.
- 9. If the Cartage Type is either Payment or Both, the **Minimum Pay Option** field will display. This field gives you a number of options to establish a minimum payment, regardless of load size or clock time. The options are:

 \square

No Minimum Charge Minimum Pay Amount Truck's Minimum Load Size times Pay Rate Truck's Schedule Load Size times Pay Rate

- 10. If the Minimum Pay Option is set to Minimum Amount, the **Minimum Charge/Pay** field displays. This field is the minimum pay allowable with this table.
- 11. If the Minimum Pay Option is set to Minimum Quantity, the **Minimum Quantity** and **Maximum Quantity** fields display. The **Minimum Quantity** indicates the smallest cartage chage that will be calculated.
- 12. If desired, you can also enter a **Maximum Quantity** to set a cap on cartage changes for the table.
- 13. If desired, go to the **Range** tab. The Range tab is configured just like a standard range-based cartage table. The various rates listed on the range tab can be incorporated into the equation.
- 14. Select the **Equation** tab to enter a user-defined equation for determining the cartage rate.

		Equation Tab				
Main	Range Equation					
Equati	on					
2× <dis< td=""><td>tance>*<def rate=""></def></td><td></td><td></td></dis<>	tance>* <def rate=""></def>					
1						
Field L	ist		Insert			
		,				

15. To enter equations, type in any numbers and mathematical symbols that you need.

To enter field information into the equation, select the field from the **Field List** drop-down list, then select **Insert**.

In the table above, \$0.85 is the **Default Rate**, the **Rate UOM** is US tons (meaning that the rate is per ton), and the equation is 2*<distance>*<def rate>.

If a load of 15 tons was hauled to a site 30 miles from the plant, the cartage would be calculated as follows:

```
2 \times 30 = 60 miles (round trip distance)

60 \times \$0.85 = \$51.00 (per ton rate)

15 \times \$51.00 = \$765 (total cartage for the load)
```

16. Accept this screen to save the cartage rate and related information.

Cartage Surcharge Codes

The Cartage Surcharge Codes represent additional payments applied to a cartage transaction. Such charges, called surcharges, are common in

situations where environmental charges, fuel, labor, or truck expenses are required for a certain load.

To enter a cartage surcharge code:

- Go to the Surcharge Code screen. {Files > Cartage Information > Cartage Surcharge Codes}
- 2. Enter a **Surcharge Code** to identify the new cartage rate.

Cartage Surcharge Codes (EDTCTSG)

📱 Cartage Surcharge Codes	
Surcharge Code	ENV
Description Short Cartage Type Item Code Rate Type Rate Rate Unit of Measure	Environmental Surcharge ENVIRON Payment 97 Surcharge Per quantity 0.40 80001 each
 Rate is a Percent First load only Print charge separately Use scheduled load as minimum Auto assign 	

- 3. Enter a **Description** and **Short** description explaining the cartage surcharge.
- 4. Set the **Cartage Type** as:

Payment if the cartage fee is directly paid to the haulerCharge if the cartage fee is to be charged to the customerBoth if the cartage fee is sometimes paid and sometimes charged

- 5. Select a surcharge **Product Code**. This code will appear on the customer ticket and/or invoice; it is used to define the taxability of the surcharge and for determining where to book GL entries. The Product Code must be set up prior to using the surcharge.
- 6. Select a **Rate Type** to specify the way the surcharge is applied. In the example above, the environmental surcharge is assigned per load.

Note: The appearance and values of certain fields on this screen may change depending on what Rate Type is selected.

- 7. Enter a **Rate** to apply as the surcharge amount. If the Rate is a Percent of the haul charge, mark the checkbox.
- 8. Select the **Rate Unit of Measure** according to the rate type. The UOM for a Per Load or Hourly rate type should be set to Each; a Per Quantity or Per Each rate type should be set to a weight UOM.

Note: The Rate Unit of Measure will default for certain Rate Types.
- 9. Select the **First Load Only** checkbox if the charge should only be applied to the first load of the order delivered. If this box is left unmarked, the surcharge will be applied to each ticket.
- 10. Select the **Print Charge Separately** checkbox if you wish to print surcharges separately on an invoice and ticket. If this box is left unmarked, surcharges will be included on the invoice and ticket under **Haul**.

Note: The ticket and invoice must be formatted accordingly.

11. Select the **Use scheduled load as minimum** checkbox if necessary.

Note: This field only appears if the Rate Type is per quantity.

12. Select the **Auto Assign** checkbox if you want to automatically apply the charges to every order and/or ticket. Surcharges can be applied to COD orders only or to a range of products, product categories, or truck types. A pull-down menu allows you to assign those charges more specifically:

General - applies the surcharge to all tickets.

Product - applies the surcharge to any tickets that include the product specified.

Product Category - applies the surcharge to any tickets that include any product belonging to the product category specified.

Truck Type - applies the surcharge to any tickets delivered by the truck type specified.

- 13. After an assignment has been made, click the **Apply** button and specify the necessary codes for the surcharge.
- 14. Accept this screen to save the cartage surcharge and related information. Repeat these steps for all possible surcharges.

Quoted Cartage Pay

The Quoted Cartage Pay screen allows users to assign cartage pay along with associated information— such as waiting charges and premium charges— to customers, projects, haulers, trucks, or drivers for the purpose of paying haulers. Quoted cartage pay is used to override default cartage pay rates set up on the hauler/truck information screen (below). Either the hauler/truck information or the quoted cartage is required.

To enter quoted cartage pay:

- 1. Click Files > Cartage Information > Quoted Cartage Pay.
- 2. Enter a **Customer Code**, **Project Code**, **Hauler Code**, **Truck Code**, and/or **Driver Code** that you want to associate with the cartage rate. You can enter any one field or combination of fields you choose. If a field is left blank, the system will assume a wildcard for that field.

Quoted Cartage Pay (EDTCTJB)								
Customer Code Project Code Hauler Code Truck Code Driver Code	10000 1 1 1 1	ABC Construction Inc Convalescent Center CDI Redi Mix Trucks Valvoline Cummins Ford Steve Park						
Cartage Rate Table Rate Apply Minimum Ha Products Categorie	✓ 3 Pe 45.00 aul Pay S Truck Type	r load charge rate) Effect Date 🔟 16-Jul-2001 es]	Previous Rate					
Item Code 30659	3000 psi,3/	Code /4, 6% ▼ FSG Perload	Rate					

- 3. In the **Cartage Rate Table** field, assign a cartage code to the hauler or truck to define the rate for all cartage transactions completed with this hauler/truck/customer/project/driver combination.
- Enter a cartage Rate to be associated with the cartage code or leave blank to let the rate table calculate the rate. If necessary, enter an Effective Date. If you do not enter a date manually, the current date will default.

The three tabs allow you to assign Cartage Surcharges at three different levels: Products, Item Categories, and Truck Types.

- 5. Select the **Products** tab to enter surcharges or increased rates for certain products.
- 6. Select the **Categories** tab to apply a cartage surcharge to entire product categories.
- 7. Select the **Truck Types** tab to apply a cartage surcharge to entire truck types.
- 8. Accept the Quoted Cartage Rates screen.

Hauler/Truck Information

The Hauler/Truck Information screen allows you to specify a cartage table for a hauler, truck, or driver. Haulers, trucks, and drivers are defined during the initial COMMANDseries system setup. This information must be set up for hauler pay.

To enter hauler/truck information:

- 1. Go to the Hauler/Truck Information. {Files > Cartage Information > Hauler/Truck Information}
- 2. Enter a **Hauler Code**, **Truck Code**, **Driver Code**, or any combination thereof. If for example, you only enter a Hauler Code, then the cartage tble selected below will be applied to all trucks and drivers hauling for the specified company.

Hauler/Truck Information	n		
Hauler Code Truck Code Driver Code	100 19 17	Li'l Aggner Volvo, 1993 Dale Earnhardt	
Name Address	Dale Earnhardt		
City State Country Postal Code Phone Number 1 Phone Number 2 Phone Number 3 Phone Number 4 Vendor Code Payroll Cartage Rate Table	Birmingham		

Hauler / Truck Information (EDTCTHT)

- 3. Enter the **Name**, **Address**, and **Phone Number** information associated with the Hauler, Truck, and/or Driver.
- 4. Enter a **Vendor Code** associated with the vendor or truck for use in an external accounts payable system. If desired, enter a **Payroll** code.
- 5. In the **Cartage Rate Table** field, assign a cartage code to the hauler or truck to define a rate for all cartage transactions completed with this hauler or truck.
- 6. Accept the Hauler/Truck Information screen.

Deduction Codes

Once the system has calculated the revenue a hauler has earned, it can adjust that amount through the use of Deduction Codes. Deduction Codes allow users to identify and implement organized deductions from the earned revenue of a hauler, truck, and/or driver. It allows systematic deductions for loans, penalties, fuel, or other items purchased from your company. It can also be used to levy administration fees against a hauler.

To enter deduction codes:

- Go to the Deduction Codes screen. {Files > Cartage Information > Deduction Codes}
- 2. Enter a new type of **Deduction** code or select an already existing Deduction code to edit or display its information.

Deduction Codes (EDTCTDE)

🛅 Deduction Cod	les	
Deduction	В	
Description Short Reason Code Account Code Default Maximum Default Amount	Fuel & Oil (Outside) FUEL AH Trucking Deduction 5060 Gas, Oil & Tires	

- 3. Enter a **Description** of the deduction code. Enter an abbreviated version of that description in the **Short** field.
- 4. Select a **Reason Code** for the deduction.
- 5. In the **Default Maximum** field, enter the maximum allowable amount for this deduction.
- 6. Enter the **Default Amount** for all deductions with this deduction type.
- 7. Accept the Deduction Codes screen.

Quoted Deductions

The standard deductions are applied as needed. But just as you can quote prices to a customer, you can also quote deductions to haulers. The Quoted Deductions screen allows users to establish "quoted deductions", deductions to be applied to the cartage transactions of a hauler, truck or driver over time.

To enter quoted deductions:

 Go to the Quoted Deductions screen. {Files > Cartage Information > Quoted Deductions}

Quoted	Deductions	(EDTCTDT)
--------	------------	-----------

📱 Quoted Deductio	ons					_ 🗆 🗙
Customer Project Code Hauler Code Truck Code Driver Code	10000 10004 100	ABC Constructio DOT: I-35W I McKinley Trucking	n Exit Ramp			
Deduction Image: Image shows the second seco	Rate/P	eriod 25.00 🔽 Percent	Maximum Amt	Balance 400.00	Current Balance	

- 2. Enter a **Hauler Code**, **Truck Code**, **Driver Code**, or any combination thereof.
- 3. Select a **Deduction Code** for the transaction.
- The Rate/Period defaults from the Default Amount field in the deduction record. The Maximum Amt also defaults from the deduction record. Both fields can be adjusted as needed.

- 5. If you are editing a deduction rate and want to enter it as a percentage of the balance, mark the **Percent** checkbox.
- 6. Enter the total **Balance** to deduct from the hauler, truck, or driver. This is the target amount for the quoted deduction.
- 7. In the **Current Balance** field, enter the total amount of deductions remaining for the hauler, truck, or driver. This field will be updated as cartage charges and payments are processed.
- 8. Select the **Add Occurrence** button to add another row of deduction information.
- 9. When finished, accept the Quoted Deductions screen.

This section provides information on entering customer and project information.

Topics in this section:

Sales Analysis Codes Customers Projects Fixed Delivery Pricing Payment Forms

Sales Analysis Codes

The sales analysis codes give you a means of classifying orders for reporting purposes. Once the codes have been entered, they can be assigned to customers and projects. When an order is entered, it will automatically be assigned the appropriate sales analysis code. If a sales analysis code has not been assigned to the customer or project, it must be assigned at the order level. Sales analysis codes can be constructed to identify any type of grouping of customers and projects based on the business practices of your company.

Before entering sales analysis code information, gather information about how you want to group customers and projects for analysis purposes.

To enter a sales analysis code:

 Go to the Sales Analysis Codes screen. {Files > Customer & Project Information > Sales Analysis Codes}

🛅 Sale	es Analysis Codes		_ 🗆 ×
Code	Description	Short	
1	Commercial	СОММ	
2	Residential	RES	된 📊
3	COD	COD	린
4	Strategic Accounts	STRAT	린
5	Aggregate	AGG	민 —
6	Asphalt Producer	ASP	₽
7	Concrete Producer	CON	₽
8	Block Producer	BLK	

Sales Analysis Codes (EDTSANL)

- 2. Enter a **Code** to identify the sales category or group.
- 3. Enter a **Description** and a **Short** description for the sales analysis code.
- 4. Use the **Add Occurrence** button, or press <F6> to add another sales analysis code -or- accept the screen to save the sales analysis codes.

Customers

Customers represent the people or businesses to which items are sold. To facilitate the proper setup of each customer record, the Customers screen is split into several screens that can be accessed by clicking on the related tab.

Before entering customer data, gather information about each customer to be entered in the system including basic information, such as addresses and phone numbers, as well as sales, taxing, pricing, accounting, etc.

Topics in this section:

Customer Main Tab Setup – basic information about each customer Customer Address Setup - invoice and statement address information Customer Sales Setup - information for customer sales analysis Customer Taxing Setup - information to properly tax the customer Customer Pricing Setup - information relative to item pricing Customer Charges Setup - information related to charges Customer Accounting Setup - information about credit and receivables Customer Invoicing Setup - information relative to invoicing Customer Distribution Setup - customer distribution information Customer User Fields Setup - enter user-defined fields Customer Products Setup - information related to products Customer Notes - record notes about the customer

Customer Main Tab Setup

To enter basic customer information:

1. Select Files > Customer & Project Information > Customers.

	Customers (LDTC031)
🛅 Customers	
Customer Code	99123
Name Sort Name	Nationwide Concrete Delivery Inc. NATION

Customore (EDTCUST)

- 2. Enter a **Customer Code** to identify the customer in reports and customer lookup screens.
- 3. Enter the customer's full name in the **Name** field.
- 4. Enter a **Sort Name** by which to identify the customer.

The Main tab allows you to enter information such as address, contact person, and phone number.

To set up main information:

1. From the Customers screen, select the **Main** tab.

	Customers – Addresses Tab (EDTCUSTA)								
Main Ad	dresses	Sales	Taxing	Pricing	Charges	Accounting	Invoicing	Distribution	Products
Address City State Country Postal Coo Contact Phone Nu Phone Nu Phone Nu Phone Nu Setup Dat	de mber 1 mber 2 mber 3 mber 4 e		3838 Norl Birmingha AL USA 35202 Jim Smith 555-6666	th Lyndal	e				

- 2. Enter the customer's **Address**, **City**, **State**, **Country**, and **Postal** (ZIP) Code.
- 3. Enter the name of a **Contact** person for this customer.
- 4. Use the **Phone Number 1-4** fields to enter the customer's phone number and any other related numbers, such as fax, cellular, or e-mail.
- 5. Enter t in the **Setup Date** field to specify today as the creation date for this customer.
- 6. Accept the screen to save the information entered on the Main tab.

Customer Address Setup

The Addresses tab allows you to enter address information related to the customer's invoices and statements.

When COMMANDseries generates an invoice or a statement, it checks the customer record to see if there is an specified address for statements/ invoices. If there is no address, the system will use the address from the Main tab.

To define customer address information:

- From the Customers screen, select the Addresses tab. {Files > Customer & Project Information > Customers > Addresses}
- Enter the Name and mailing Address information specific to the customer's invoices.
- Enter the Name and mailing Address information specific to the customer's statements.

			Cus	tomers	- Auure			5)		
Main	Addresses	Sales	Taxing	Pricing	Charges	Accounting	Invoicing	Distribution	User Fields	Products
				_						
Invoice	Э	Name								
		Address								
		City							_	
		State								
		Country			· · · · · ·					
		Postal Cod	е							
Statem	ient	Name							_	
		Address								
		City								
		State		i –						
		Country								
		Postal Cod	-							
		FUSIALLOG	e							

Customore - Addrossos Tab (EDTCUSTR)

4. Proceed to the next tab, or accept the screen to save the customer information.

Customer Sales Setup

Select the Sales tab to enter customer specific sales information. Specify the types of items that the customer primarily buys, along with a sales analysis code and a regular salesperson (if applicable).

To define customer sales information:

 From the Customers screen, select the Sales tab. {Files > Customer & Project Information > Customers > Sales}

Customers – Sales Tab (EDTCUSTC)									
Main Addresses	Sales Taxing Prici	ng 🛛 Charges 🗍 Accountir	g [Invoicing]	Distribution	User Fields				
Concrete 💽 Sales Analysis Code Salesman	Copy to All	Commercial Jason Cromv	vell						

- 2. Select a **Product Line** from the field's list.
- 3. Mark the **Copy To All** checkbox, if necessary, to copy information entered for one product type to all other product types.
- 4. Select a **Sales Analysis Code**. This code is used to group sales for one customer with sales for other customers with the same sales analysis code. Sales reports can then be produced by sales analysis code.
- 5. Select a **Salesman**. This field identifies the salesman assigned to the customer. Sales reports and some COMMANDreceivables reports can be grouped by salesman.
- 6. Proceed to the next tab, or accept the screen to save the customer information.

Customer Taxing Setup

The Taxing tab allows you to enter the customer's tax information.

To define customer tax information:

1. From the Customers screen, select the **Taxing** tab. {Files > Customer & Project Information > Customers > Taxing}

	Customers – Taxing Tab (EDTCUSTD)
Main Addresses Sales	Taxing Pricing Charges Accounting Invoicing Distribution User Fields Produc
Tax Code Taxable Non Taxable Reason	■ 1 BHAM Non-taxable ■
Tax ID Code Tax Exempt ID	CITY COUNTY STATE

- 2. Select a **Tax Code** for the customer.
- 3. Specify if the customer is Taxable or Non-taxable in the **Taxable** field.
- 4. If the customer is non-taxable, select a **Non Taxable Reason**. The field will not display if the customer is taxable.
- 5. Enter the **Tax ID Code** and use the Tax Exempt ID to record the taxexempt ID or certificate number for each tax authority level.
- 6. Accept the screen.

Customer Pricing Setup

The Pricing tab includes information related to trade discounting, terms code assignment for payment discounts, plant and price category assignment that control aspects of pricing, and flags that control automatic pricing charges.

Customer pricing can be set by product line. Certain options available to one product line may not be available for others.

To define customer pricing information:

- 1. From the Customers screen, select the **Pricing** tab. {Files > Customer & Project Information > Customers > Pricing}
- 2. Select a **Product Line** from the field's list.
- 3. Mark the **Copy To All** checkbox, if necessary, to copy the selected product type to all files associated with the customer.
- 4. Select a **Price** Category. This field designates a price category for the customer. It is used in the COMMANDconcrete pricing procedure when a price is derived from the product record. Prices are assigned to products on a plant and price category basis.
- 5. Select a **Pricing Plant Code**. This field designates a pricing plant for the customer. The pricing plant is used in COMMANDconcrete pricing logic

when a price is derived from the product record, not the customer or project record.

6. Select a **Trade Discount Percent** or a **Trade Discount Amount**, if necessary. These fields establish a trade discount percent/amount for the customer.

A Trade Discount is a discount that will always be applied to the customer's orders. It differs from a Terms Discount, which is dependent on the customer paying in a timely manner.

				custon		icing iub (L		-)		
Main	Addresses	Sales	Taxing	Pricing	Charges	Accounting	Invoicing	Distribution	User Fields	Products
Conc Price Prici Trac Trac Tern Zone	rete e Category ng Plant Code le Discount Pe le Discount Ar ns Code e Code	ercent	Copy to A 5 1 2 2 1000	II INDUS SHELB (2%,10th	T Y .000 21000	Cartage F Override I Override I Previous	late Table Charge Rate Charge Effe Rate	e stive Date		
Surc	harge Code									
 Apply Zone Charges Print Prices on Ticket Allow Price Change in 0/E? 					☐ Rest I Apply	rict Orders to Minimum H	o Customer Pri Iaul Charges	oducts		
	Allow Automatic Price Adjustments Quoted Cartage									
	7. Sele	ct a T	Terms	Code	. The te	erms cod	e dictat	es the di	scount d	ate, due

Customers – Pricing Tab (EDTCUSTE)

- 7. Select a **Terms Code**. The terms code dictates the discount date, due date, and discount amount assigned to invoices.
- 8. Select a **Zone Code**. This field identifies the zone where deliveries are normally made to the customer. If the majority of the customer's deliveries are not made to a single zone, leave this field blank.
- 9. Select a **Cartage Rate Table** and a **Surcharge Code** if the product line for this item is aggregate.
- 10. Enter an **Override Charge Rate**. This charge will be used instead of the normal charge.
- 11. Enter the date this charge will be effective in the **Override Charge Effective Date** field.
- 12. When the Override Charge Rate is changed, the old rate is automatically transferred to the **Previous Rate** field.
- 13. Select a code from the list in the **Surcharge Code** field.
- 14. In the **Rate** field, enter the rate for the surcharge.
- 15. Mark the **Apply Zone Charges** checkbox if necessary. When marked, this checkbox causes the selected zone charge table to be included with the customer's orders.

Note: This field is only available when concrete is the selected product line.

16. Mark the **Print Prices on Tickets** checkbox if necessary. When marked, this checkbox causes prices to be printed on all delivery tickets for the customer. Prices for C.O.D. or cash delivery tickets are always printed. Prices for charge delivery tickets are only printed when this checkbox is selected.

This field is also used to determine access to non-COD prices during Order Entry. (See *Non-COD Price Changes* for additional information.)

- 17. Mark the **Allow Price Change in O/E?** checkbox if necessary. This field is used to determine access to non-COD prices during Order Entry. (See *Non-COD Price Changes* for additional information.)
- 18. Mark the **Restrict Orders to Customer Products** checkbox if necessary. When marked, this checkbox causes the Orders screen, for non-project based orders, to allow only those products that are entered as customer-specific products. Products cannot be added to the order from the product file.
- 19. Mark the **Apply Minimum Haul Charges** checkbox if necessary When marked, this checkbox causes the minimum haul charge to be applied to this customer if the calculated haul charge is less than the calculated minimum haul charge. A charge table is assigned to each aggregate order; each charge table has an associated minimum haul charge.

Note: This checkbox is only displayed when **Aggregate** is the selected product line.

- 20. Mark the **Allow Automatic Price Adjustments** checkbox if necessary. This checkbox sets the default **Allow Automatic Price Adjustments** value for any new items added to the customer record. Changing this field has no effect on items previously entered.
- 21. Click the **Quoted Cartage** button to go to the Quoted Cartage Rates screen. See the *Quoted Cartage Rates* section of this manual for more information.
- 22. Proceed to the next tab, or accept the screen to save the customer information.

Customer Charges Setup

The Charges tab allows you to define certain charges to be billed to the customer.

Some customers prefer to have non-material charges billed on a separate invoice. To accommodate this need, each charge has a flag that indicates that it should be billed separately. If needed, run the Create Orders & Tickets for Separate Invoices routine during invoice prep. It will identify charges flagged for separate invoicing, and move those charges to new orders, which can then be invoiced separately.

To define customer charge information:

 From the Customers, select the **Charges** tab. {Files > Customer & Project Information > Customers > Charges}

Customers – Charges Tab (EDTCUSTF)

Main Addresses Sales Taxing	Pricing Charges A	ccounting Invoicing Distributio	n 🗍 User Fields 🗍 Products
Concrete Copy to Minimum Load Charge Table Seasonal Charge Table Unloading Charge Table	All 1 LTL Met 1 WINTRME 2 UNLD/CY	Create Separate Invoice Create Separate Invoice Create Separate Invoice	
Automatic Sundry Charges Sundry Charge Sundry Charge	 ■ 1 ENV/M3 ■ 2 ENV/CY 	 Create Separate Invoice Create Separate Invoice Create Separate Invoice 	Pricing + _

- 2. Select a **Product Line** against which specified charges apply for this customer.
- 3. If you want your selections for one product line to be copied to the other product lines, set the **Copy to All** flag.
- 4. Enter **Minimum Load**, **Seasonal**, and/or **Unloading Charge Table** codes, if necessary, to specify the table(s) to be used, in each situation, to calculate total charges.

Note: The Minimum Load Charge line will only display if the product line is Concrete.

- 5. Mark the **Create Separate Invoice** for each charge table to indicate that a separate invoice should be created for each table.
- 6. There is a single Create Separate Invoice flag for all automatic Sundry charges that you may have configured.
- 7. If you wish to add additional charges, detail on a Sundry Charge field and select from the list of available charges.
- 8. If you wish to use a different sundry charge rate than that specified in the sundry charge table, press the **Pricing** button, to display the Customer Sundry Charge Pricing screen.

Customer Sun	dry Charge Pricing (2 AFTHR)	×
Price Price Extension Effective Previous Price Price Extension		

Enter the customer-specific charge rates, and accept the screen to return to the Customer-Charges tab.

9. Proceed to the next tab, or accept the screen to save the customer information.

Customer Sundry Charge Pricing screen (EDTCUST5)

Customer Accounting Setup

The Accounting tab allows you to enter accounting information for the customer.

To enter customer accounting information:

1. From the Customers screen, select the **Accounting** tab. {Files > Customer & Project Information > Customers > Accounting}

Customers – Accountir	ng Tab (EDTCUSTG)
Main Addresses Sales Taxing Pricing Charges Acc	ounting Invoicing Distribution Products
Statement Cycle Monthly Accounting Category 1 Trade Apply Finance Charges Print Statements	Credit Card Name Credit Card Number Responsible Name Expiration Date Expiration Date
Company Credit Code Change Date Credit Limi # <u>1</u> AAA (13-Mar-2002 <u>100</u>	t High Balance Credit Person),000.00 400.00 I 200 I A
Required in Order Entry Pre-Lien Date Calculation Number Purchase Order Lien Required Not F Customer Job External Liens	per of days After Pre-Lien Compare Date
Suspend Order Reason Code 📃 🗾	

- 2. Enter a **Statement Cycle**. This is the cycle code for the printing of customer statements. Statement cycle codes can be Weekly, Bi-weekly, Semi-monthly, or Monthly.
- 3. Enter an **Accounting Category**. This field is used to specify a code that groups customers/projects together.
- 4. Mark the **Apply Finance Charges** checkbox if necessary. If marked, the Create Finance Charges routine in COMMANDreceivables will process this customer's account to see if finance charges are warranted.
- 5. Mark the **Print Statements** checkbox if necessary. When marked, the Statement Print function will include this customer when statemeths are run for all customers or for a range of customers (when that range includes the current customer). If the customer is not included in normal statement printing, it must be requested individually on the Statements screen.
- 6. Enter all necessary **Credit Card** Information.
- 7. If the system is configured to maintain credit at the company level, you will be able to enter separate credit information for each company. Otherwise, the system wildcard, *#*, will default as the **Company Code**.
- 8. Enter a **Credit Code**. This field assigns a credit code to the customer for the current company. The credit code controls how orders can be taken and shipped for the customer.

- 9. Enter the **Credit Limit**. This is the dollar amount of credit established for the customer.
- 10. Enter the **High Balance**. This field represents the highest balance a customer has attained for the current company. This amount can be entered when setting up customers. This field is automatically updated when
- 11. Enter a **Credit Person**. This field is used to assign one of your employees as the person responsible for credit matters with the customer.
- 12. Mark the **Purchase Order** checkbox if necessary. When marked, this checkbox causes a customer purchase order number to be required on the Orders screen. {Dispatch > Orders} This information is required for an order to be taken for this customer. Some customers (or your company) may require that a P.O. number be associated with any work done for the customer.
- 13. Mark the Customer Job checkbox if necessary. When marked, this checkbox causes a customer job number to be required on the Orders screen. {Dispatch > Orders} This job number is assigned and used by the customer to track and account for the business. Some customers (or your company) may require that a job number be associated with any work done for the customer.

Note: The following two steps are only needed if you are licensed for COMMANDIen.

- 14. Select a **Pre-Lien Calculation** method from the drop-down list. The options are:
 - Number of Days After Pre-Lien Compare Date (default)
 - Specific Day of 1st Month Following Pre-Lien Compare Date
 - Specific Day of 2nd Month Following Pre-Lien Compare Date
 - Specific Day of 3rd Month Following Pre-Lien Compare Date

The first option is by far the most common. The other options allow for "prox" dates, which are required in certain states.

This setting is used in conjunction with the **Days/Day of Month for Preliminary Notice Required** field, found on the Configuration screen {Lien > Pre-Lien Rules}.

- 15. Select a Lien Required option. These options determine how how the system will respond when a new order is created without an assigned lien location.
 - **Not Required** denotes that the creation of a lien location is not required for orders for this customer.
 - **Required (Man)** denotes that the creation of lien locations is required at all times, but must be created manually. Note that this selection is rarely used because dispatch is slowed greatly by having to create the lien locations.
 - **Required (Auto)** denotes that the creation of lien locations is required at all times, but takes place automatically.

Required (Auto, Exempt) denotes that the creation of lien locations is automatic, but the lien locations are automatically marked exempt.

This option is useful for storing lien location information for customers that do not necessarily warrant lien locations in the preliminary stages. If the need arises to issue lien notices, the correct data will have been maintained for implementing preliminary and lien notices.

See the COMMANDIIEN User's Manual for additional information regarding lien configuration.

- 16. Select the **External Liens** flag if liens for this customer will be handled outside of COMMANDseries.
- 17. When a valid reason code is entered in the Suspend Order Reason Code field and saved, all new non-project orders entered for the customer default to a suspended state. If no reason code is entered, new non-project orders should default to a released state. This option is useful if the customer's pricing varies substantially from week to week, so that you always want to make sure the prices are fully reviewed prior to invoicing.
- 18. Proceed to the next tab, or accept the screen to save the customer information.

Customer Invoicing Setup

Customer invoicing information is used when invoices are created to determine the following aspects of invoicing.

- Number of orders and tickets are included on a single invoice
- Sub-totals to be printed on the invoice
- Level of detail printed for items and tickets
- Business for single or multiple days on a single invoice
- Customers included in the invoice run, based on assigned frequency code

Please keep in mind that for the various formatting options, you must both set the option on this screen and create a document group & format that will support it.

To enter customer invoicing information:

 From the Customers screen, select the **Invoicing** tab. {Files > Customer & Project Information > Customers > Invoicing}

		breestin)	
Main Addresses Sales	Taxing Pricing Charges Accounting	Invoicing Distribution	User Fields Products
Print One Invoice Per Sort and Sub Total By Print Products/Tickets	Order None Detail	•	
Invoice Frequency Copies to Print	Daily	T	
Haul Charges Minimum Haul Charges	Print haul charge as separate line item Print total minimum haul charge	•	

Customers – Invoicing Tab (EDTCUSTH)

Separate Invoices by Product Line

- 2. From the **Print One Invoice Per...** field's list, define the contents of printed invoices. This field selects and groups tickets and orders into a single invoice for the customer.
- 3. Depending on your selection in the Print One Invoice Per... field, the following three fields appear or disappear. Please select the settings based on these values.

Sort and Sub Total By – the criteria by which the invoices are sorted and sub totaled

Print Products/Tickets – tickets and products listed on an invoice print, Detail or Summary

Days on One Invoice – invoices are created for single days or for multiple days

- 4. From the **Invoice Frequency** field's list, select the cycle code for the printing of customer invoices. Options are:
 - Daily
 - Weekly
 - Monthly

When you print invoices, you can specify when frequency's to run.

- 5. If you need more than one copy of this customer's invoices to print, enter the number of **Copies to Print**.
- 6. From the Haul Charges field's list, select the method for printing haul charges, **Print haul charges as a separate line item** or **Combine haul charges with material price**.
- 7. From the Minimum Haul Charges field's list, select the method for printing minimum haul charges, **Print total minimum haul charge** or **Separate actual and incremental haul charge**.
- 8. Mark the **Separate Invoices by Product Line** checkbox if necessary. When marked, this checkbox causes each product included on the invoice to be displayed as a separate line.
- 9. Proceed to the next tab, or accept the screen to save the customer information.

Customer Distribution Setup

The Distribution tab allows access to miscellaneous dispatching information for the customer. This information is used as a default to the corresponding fields on projects, orders, and tickets subsequently created for the customer.

To define customer distribution information:

 From the Customers screen, select the **Distribution** tab. {Files > Customer & Project Information > Customers > Distribution}

	Customers – Distribution Tab (EDTCUSTI)									
Main	Addresses	Sales	Taxing	Pricing	Charges	Accounting	Invoicing	Distribution	User Fields	Products
Concr Trac	Concrete Copy to All Tracking Order Color Find Mix Weights on Ticket									

- 2. Select a **Product Line** against which specified charges apply for this customer.
- 3. If you want the same selections for all product lines, select the **Copy to All** checkbox.
- 4. Select the **Tracking Order Color**. This field designates the color code to be used when displaying orders for this customer on the Tracking and Scheduling screen.
- 5. Mark the **Print Mix Weights on Tickets** checkbox if necessary. When marked, this checkbox causes the weight of each component (ingredient or constituent) of any ready-mix product on an order for this customer to be printed on each delivery ticket.
- 6. Proceed to the next tab, or accept the screen to save the customer information.

Customer User Fields Setup

The user fields feature allows you to store and communicate different types of information on different aspects of your day-to-day business.

Note: The User Fields tab will not display on the Customers form unless you have configured user fields on the system Configuration screen {Files > General Information > Configuration > User Fields}. Any user fields entered into the User Fields tab of the Configuration screen will display on the User Fields tab on the Customer screen. On this screen, you can enter information into the user fields.

To enter information in customer user fields:

 From the Customers screen, select the User Fields tab. {Files > Customer & Project Information > Customers > User Fields}

Customers – User Fields Tab (EDTCUSTJ)

Main Addresses Sales Taxing Prici	ing Charges Accounting Invoicing Distribution User Fields	Products
Usage Code Customer Spec Billing Contact	ब ब ब	

- 2. Enter the field information, based on your own company policies.
- 3. Proceed to the next tab, or accept the screen to save the customer information.

Customer Products Setup

The Products tab allows you to set up mix and aggregate products for the customer.

To define customer products:

 From the Customer screen, select the **Products** tab. {Files > Customer & Project Information > Customers > Products}

Main Addresses Sales Taxing Pricing Ch	harges Accounti	ng Invoicing Dia	stribution L	Jser Fields	Products
Plant All	•	Ready	Mix Product	ts	•
Mix Products Product Description	Product Entr	y Format field			
▼ 30659	MIX [All		Pricing	
Associated Products line]]	Pricing	<u> </u>	Ready Mix	
Extra Products					<u>-</u>
8816L Block, Common, 8	BLOCK	All	-	Pricing	_ ₽ _

Customers – Products Tab (EDTCUSTK)

- Select a **Plant** from the field's list. This field is used to determine the products displayed on the screen. If **All** plants are indicated, then all products, regardless of their plant assignment, are displayed. If a specific plant is entered, then only those products assigned to that specific plant are displayed below.
- Select a Product Entry Format from the field's list. The product options are as follows.
 - **Ready Mix Products** displays mix products, along with each mix's associated products, in one section, and extra products in a separate section

- **Summary Ready Mix Products** displays mix products with a button to access the mix's associated products in one section, and extra products in a separate section
- Aggregate Products displays all non-mix products in a single section
- 4. Enter a **Product** for the Mix Products line. This code identifies each mix product assigned to a customer. The same mix product can be assigned multiple times to a customer, when varying groups of associated products are combined with each entry of the mix.
- 5. Select a Mix Products **Plant** from the field's list. This field identifies the plant from which this product can be sold. If the product is available at all plants, choose the **All** plants option.
- 6. Click on the **Pricing** button to go to the Customer Product Pricing Information screen.

🖺 Customer Product Pricing Information (2500 2500 - 3/4, 3/8)	×
Estimated Quantity Cubic Ya Default Load Quantity Cubic Ya Price 140.00 Cubic Ya Price Extension Per unit Effective 101.Jan-2000 Previous Price 3.00 Cubic Ya Price Extension Per unit Allow Automatic Price Adjustments	
✓ Override Terms Code Discount Discount Rate ▲ ✓ Cubic Ya	UOM Extensions
Aggregate Copy to All Surcharge Code ENV ENVIRON Rate	₽ × ×
Sundry Charge 🗾 🔁 AFTHR 🗖 Create Separate Invoice Pricing	

Customer Product Pricing Information-concrete (EDTCUST1)

- 7. Enter the **Estimated Quantity** of the product. This field contains the estimated quantity the customer intends to buy for this product. You may click on the detail button associated with this field to select a unit of measure to assign to the estimated quantity.
- 8. Enter the product **Default Load Quantity**, as well as the **Price**, **Price Extension**, **Effective Date**, **Previous Price**, and **Price Extension**.
- 9. Mark the **Allow Automatic Price Adjustments** field if you plan to adjust this item's price using the Calculate Price Change function.
- Select the Override Terms Discount Code field to adjust customer trade discounts for this item. When this field is selected, the Discount Rate Type and the Discount Rate fields will display.

- 11. Define the **Product Line, Surcharge Code**, and **Surcharge Rate** at the bottom of the screen.
- 12. Accept the Customer Product Pricing Information screen.
- 13. Select the **Ready Mix** button to enter the Batch Code and Slump for the mix product, and accept the Customer Product Ready Mix screen.

Customer P	roduct Ready	Mix Information (E	DTCUST2)
	🛅 Customer	Product Read 🗙	
	Batch Code Slump	2	

- 14. Enter a **Product** for the Associated Products line. This code uniquely identifies each associated product assigned to each customer specific mix product.
 - **Note:** Associated products are so closely related to the shipment of the mix product, in that they are automatically included on orders and tickets with the mix. The best example of an associated product is an admixture that is to be batched with the mix product but is not included in the mix product's list of constituent products.
- 15. Select the **Associated Products Pricing** button, if available, and define customer product pricing information.

	Customer As	ssociated Product I	nformation	(EDTCUST3)	
🛅 Custo	mer Associate	d Product Informatio	n (30659 30	00 psi,3/4, 6%)	×
Item 54	Code	Description 1%Accelerator	Category Accel, o	Pricing +	

- 16. Enter any necessary **Extra Products**. This code uniquely identifies each extra product assigned to a customer. More than one extra product can be assigned to a customer. Extra products are not specific to any one mix product assigned to a customer and can be added to any order for the customer.
- 17. Accept the screen.

Pricing options for Associated and Extra Products

The Customer Product Pricing information will have some additional fields if the item in question is an associated or extra product.

🛓 Customer Product Pricing Informat	ion (50 AEA (US))	×
Estimated Quantity Default Load Quantity Price 3.36 Price Extension Effective 101-Jan-200 Previous Price Price Extension Per unit I Allow Automatic Price Adjustments	Dosage Dosage per c/yd T per c/yd	
Print on Separate Invoice	Price Included in Mix Price	UOM Extensions

Customer Product Pricing Information - associated product (EDTCUST1)

- The **Print on Separate Invoice** allows users to flag an item to be invoiced separately from the main order.
- If the **Price Included in Mix Price** is selected, then the price of the admixture will not be added to the mix price. This field is only available if trhe product in question is an associated product.

Projects

Projects represent specific jobs for customers, and contain delivery, product, and pricing information that assists the user in delivering materials and billing the customer. To ensure that projects created through the quote module are consistent with those entered manually, the Job and Quotes screens have been patterned after the main Projects screen. The Projects screen is divided into several screens that can be accessed by clicking on the related tab.

The level of detail provided for each project is user-defined. Before entering project information, gather information about specific jobs for customers to be entered as projects.

Note: Fields on the Projects screen that are duplicated from the Jobs and/or Quotes screen are populated with information from those screens. The Projects screen contains many fields that are not available on either of those screens, however, and should be edited carefully. These additional fields, specific to the Projects screen, allow you to customize information to better define the project for the specific customer.

Topics in this section:

Project Initial Setup - Entering primary project information **Entering Project Main Tab Information** - project information **Entering Project Address Information** - invoice and statement addresses

Entering Project Pricing Information - to properly price the project

Entering Project Accounting Information - credit and receivables **Entering Project Invoicing Information** - relative to project invoicing **Entering Project Distribution Information** - COMMANDseries distribution

Entering Project User Fields Information -

Entering Project Distances Information - relative to project distances **Entering Project Products Information** - record project specific products

Fixed Delivery Pricing - Quoting fixed prices to customer **Entering Project Forecasting Information** - material delivery times

Project Initial Setup

General information about the project defaults from the Quotes screen. Any default information can be edited to customize this project for this specific customer's requirements.

To enter basic project information:

- Go to the Projects screen. {Quotes > Quotes > Projects > New / Detail} or {Files > Customer & Project Information > Projects}
- If the Projects screen is accessed from the Quotes screen, the Customer Code will default from the Quote file; if the Projects screen is accessed directly, a Customer Code must be entered manually.

		. 0)0	
	Projects		
Cu: Pro	stomer Code ject Code	1 1	0000 ABC Construction Inc
Na	me	ſ	Convalescent Center
M C C	ain Addresses Pricing A Quote Code Delivery Address nstructions	ارددەر م	unting Invoicing Distribution Distances Products Forecast
F C N C	Purchase Order Customer Job Measurement System To Use Contact		10178-95A 9800-11 Customary Only Jason Dean
F F F	Phone Number 1 Phone Number 2 Phone Number 3 Phone Number 4	_	
E	Setup Date Begin Date Expiration Date		01.Jan-2000

Projects – Main Tab (EDTPROJ)

- 3. Enter a **Project Code** to identify the project in reports and project lookup screens. If a Project Next Number sequence has been created, Tab through the Project Code field and a code will be automatically assigned.
- 4. Enter a **Name** to identify the project.

Entering Project Main Tab Information

The Main tab on the Project screen allows you to enter information such as the project's address, contact person, and setup date.

To define main information:

- Select the Main tab on the Projects screen. {Quotes > Quotes > Projects > New / Detail > Main} or {Files > Customer & Project Information > Projects > Main}
- 2. The **Delivery Address** will default from the quote; edit it if necessary.
- 3. If your system is configured to Use Shipping Address, detailing on the Delivery Address field will display the Shipping Address Information screen. (The Shipping Address can also be entered on the Addresses tab.)

Shipping Address (EDTSADR)						
🖻 Shipping Address Information 🛛 🛛 🔀						
Street Address	1800 International Park Drive Suite 400					
City	Birmingham					
State	AL					
Postal Code	35243					
Latitude	000N					
Longitude	000E					
Radius						

If the shipping address option is not active, detailing on the field will display a simple text entry box.

- If necessary, enter specific delivery **Instructions** to be included on all orders assigned to this project. These instructions are frequently directions.
- 5. If the customer uses purchase order numbers, enter the **Purchase Order** code.
- 6. If the customer uses a job number, enter one in the **Customer Job** field.
- 7. Select the **Measurement System to Use** for this project. The system default will default here.

Note: The use of the measurement system must be consistent. If a project is created as a metric order, the system will not allow any non-metric items to be ordered against the project.

8. Enter the name of the **Contact** for this project. Because the project contact is usually different from the initial bidding contact, quote or job information will not default into this field.

- Use the Phone Number 1-4 fields to enter a project-specific phone number and any other related numbers, such as fax or cellular. Append a single letter suffix to each number to indicate what type of number it is; for example, you might enter 205-234-5436 F to indicate a fax number.
- 10. The date the project was created will default into the **Setup Date** field.
- 11. Enter a **Begin Date** and an **Expiration Date** to establish a time frame for the project. The system will not accept project orders outside an established date range. If no dates are entered, the system will accept orders on the project regardless of the date.
- 12. Accept the screen to save the project, or proceed to the Addresses tab.

Entering Project Address Information

The Addresses tab allows you to enter address information related to the customer's invoices and statements for this project. The system allows for four different project addresses:

Delivery Address (on the **Main** tab) — The default address for the project. The system will use this address if more specific addresses are not available.

Invoice — Prints out on all invoices for this project.

Statement — Prints out on all statements printed for this project **Shipping** — The shipping/delivery address for all project orders. The data is populated from the Job Address information from the Quote file.

To define project address information:

 From the Projects screen, select the Addresses tab. {Quotes > Quotes > Projects > New / Detail > Addresses} or {Files > Customer & Project Information > Projects > Addresses}

Main Addresses	^s Pricing Accounting	Invoicing Distribution Distances Products Forecast	
Invoice	Name Address City State Postal Code	Country	•
Statement	Name Address City State Postal Code	Country	•

Projects – Addresses Tab (EDTPROJB)

2. Enter the **Name** and mailing **Address** information specific to the customer's invoices.

- 3. Enter the **Name** and mailing **Address** information specific to the customer's statements.
- 4. Enter the **Name** and mailing **Address** information specific to this customer's shipping location.
- 5. Accept the screen to save the project, or proceed to the **Pricing** tab.

Initially only the Invoice and Statement addresses are visible. Use the scroll bar to display the shipping address.

Entering Project Pricing Information

The Pricing tab includes information related to trade discounting, terms code assignments for payment discounts, plant and price category assignments that control aspects of pricing, and flags that control automatic charges related to pricing.

Pricing settings are an integral part of the quote process; accordingly, all of the settings on this tab will default from the quote file. They can be subsequently edited as needed.

To define project pricing information:

 From the Projects screen, select the Pricing tab. {Quotes > Quotes > Projects > New / Detail > Pricing} or {Files > Customer & Project Information > Projects > Pricing}

Main Addresses Pricing	Accounting Invoicing Distribution	Distances Products Forecast
Concrete Salesman Sales Analysis Code Pricing Plant Code Price Category	Copy to All T Commercial T SHELBY T RESID	Trade Discount Percent Trade Discount Amount ▼ 0.00 Cubic ` Terms Code ▼ 6 2cy10/25 Zone Code ▼ 1000 Zpply
Charges Minimum Load Charge Table Seasonal Charge Table Unloading Charge Table Sundry Charge	Winter S	Minimum Cartage Pay Table F Haul Pay
Apply Zone Charges	Allow Price Change in O/E?	Print Prices on Ticket Restrict Orders to Project Products
Allow Automatic Price	Adjustments	Quoted Pay
Tax Code	✓ 1 BHAM	Taxable Taxable

Project Pricing Information tab (EDTPROJF)

2. Select a **Product Line** from the field's pull-down list; you can also move from product line to product line by using the scroll bar on the far right side of the screen.

Note: Your system license determines the available product lines.

3. If you want to use the same selections for all product lines, mark the **Copy To All** checkbox.

Switch between available product lines using either the drop down field or the scroll bar.

- 4. Enter the **Salesman** responsible for this project. This field is required.
- 5. Enter a **Sales Analysis Code**. COMMANDexecutive uses this field for sales reporting purposes. This field is required, even if you are not licensed for COMMANDexecutive.
- 6. Select a **Pricing Plant Code**. If a plant code is entered here, all project orders will be priced as though they were shipped from this plant, regardless of what plant they actually shipped from. If the field is blank, the pricing plant will be determined by system settings.
- 7. Select a **Price Category**. Price categories allow users to establish different pricing tiers (for example, residential sales versus commercial sales); product pricing can be assigned based on shipping plant/price category.
- Select a Trade Discount Percent or a Trade Discount Amount. A trade discount is one that is given to the customer automatically. Detail on the Trade Discount Amount field to select a UOM for the discount.
- 9. Select a Discount **Terms Code** or detail on the field to select from a list. The terms discount code dictates the discount date, due date, and discount amount assigned to invoices.
- 10. Select a **Zone Code** or detail on the field to select from a list. This field identifies the zone which contains the project delivery address, and can identify applicable tax authorities as well as zone-specific charges.
- 11. If necessary, select a **Minimum Load Charge** table. This field will only be visible when the Product Line is Concrete.
- 12. If necessary, select a **Seasonal Charge Table**. Seasonal charges will be applied to customer's orders based on the settings in the specified charge table.
- 13. If necessary, select an **Unloading Charge Table**. Unloading charges will be applied to customer's orders based on the settings in the specified charge table.
- 14. Checkboxes next to each of the previous three charges give you the option to flag a charge to be billed on a **Separate Invoice**. An invoice prep routine, Create Orders for Separate Invoices, creates new orders and transfers the charges to them.
- 15. If necessary, select a **Sundry Charge**. To modify the charge amount, press the **\$** button. If additional sundry charges are needed, select the Add Occurrence button to the immediate right of the Sundry Charge field.
- 16. If necessary, select a **Preferred Hauler** (Aggregate only).
- 17. If necessary, select a **Cartage Pay Table** if the product line for this item is aggregate. This code specifies the cartage fees that will be paid to the hauler. The **Apply Minimum Haul Pay** checkbox to the right denotes, if checked, that the project order will be subject to at least the minimum charge specified in the cartage table.

- 18. If necessary, select a Charge Cartage Table (Aggregate only). This code specifies the cartage fees that will charged to the customer. The Apply Minimum Haul Charges checkbox to the right denotes, if checked, that the project order will be subject to at least the minimum charge specified in the cartage table.
- 19. Enter an **Override Charge Rate** if necessary. This rate will supplant the rate specified in the selected charge table.
- 20. If necessary, select a **Surcharge Code** field (Aggregate only). If additional sundry charges are needed, select the Add Occurrence button to the immediate right of the Surcharge Code field.
- 21. Mark the **Apply Zone Charges** checkbox if necessary (Concrete only). When marked, this checkbox causes the selected zone's charge table to be levied against the customer's orders.
- Mark the Allow Price Change in O/E? field if necessary. This field determines access to non-COD prices during Order Entry. (See Non-COD Price Changes for additional information.)
- 23. Mark the **Print Prices on Tickets** checkbox if necessary. When marked, this checkbox causes prices to be printed on all delivery tickets for the customer. Prices for C.O.D. or cash delivery tickets are always printed. Prices for charge delivery tickets are only printed when this checkbox is selected. This field is also used to determine access to non-COD prices during Order Entry. (See Non-COD Price Changes for additional information.)
- 24. Mark the **Restrict Orders to Project Products** checkbox if necessary. When marked, this checkbox causes the Orders screen to allow only those products that are entered on the Project-Products tab.
- 25. Mark the **Apply Minimum Haul Charges** checkbox if necessary (Aggregate only). When marked, this checkbox causes the minimum haul charge to be applied to this customer if the calculated haul charge is less than the calculated minimum haul charge. A charge table is assigned to each aggregate order; each charge table has an associated minimum haul charge.
- 26. Mark the Allow Automatic Price Adjustments checkbox if necessary. This checkbox established the default value for the Allow Automatic Price Adjustments field on any items added to the project. Changing this field will not effect any items already entered in the project. {Manage > Application Management > Calculate Price Change}
- 27. Click the **Quoted Pay** button; the Quoted Cartage Rates screen appears. See the Quoted Cartage Rates section for more information.
- 28. Select a **Tax Code** for the project.
- 29. Specify if the project is Taxable or Non-taxable in the **Taxable** field.
- 30. If the project is non-taxable, select the **Details** button To display the Project Taxing Details screen.

Project Taxing Detail screen (EDTPROJ9)

🚦 Project Taxing Details (ABC)	×
Non Taxable Reason Tax Exempt ID	CITY COUNTY STATE	×

- Pick a Non Taxable Reason.
- Enter the **Tax Exempt ID** to record the tax-exempt ID or certificate number for each tax authority level.
- Accept the Project Taxing Details screen.
- 31. Select the **Compute Max Tax based on Life of Project** if neccessary. The system default is to calculate max tax (established at the Tax Authority/Location) by invoice.
- 32. Accept the screen to save the project or proceed to the **Distribution** tab.

Entering Project Accounting Information

The Accounting tab allows you to enter accounting information for the project.

To enter project accounting information:

 From the Projects screen, select the Accounting tab. {Quotes > Quotes > Projects > New / Detail > Accounting} or {Files > Customer & Project Information > Projects > Accounting}

			5 (/	
Main 🛛 Addresses 🗍 Pr	icing Accounting Ir	voicing Distributio	n User Fields Distances	Products Forecast	
Accounting Category Prepayment Percentag		Trade (F	Credit Card Name Credit Card Number Responsible Name Expiration Date	व व व ष ष	
Credit Information Credit Code	. ∎ 1	AAA Okay (Credit Effective Date	🔟 01-Jun-1995	
					A V
Required in Order Entry Purchase Order Customer Job		Pre-Lien Date Calo Lien Required Allow Multiple	culation Number of days A Not Required	fter Pre-Lien Compare Date	Lien Locations
Suspend Order Reason	Code 🔄 🧾				

Projects – Accounting Tab (EDTPROJH)

 Enter an Accounting Category. This field is used to specify a code that groups customers/projects together. It is commonly used to distinguish internal jobs from trade customers.

- 3. Enter necessary credit card information, including **Credit Card Name**, **Credit Card Number**, **Responsible Name**, and **Expiration Date**. This information is used for reference only; the system will not automatically call in credit card charges.
- 4. Enter a **Credit Code**. This field assigns a credit code to the customer for the current company. The credit code establishes how reliable you consider the customer or project. You can limit the project to Cash Only sales, for example.
- 5. Enter the date the credit code takes effect in the **Credit Effective Date field**. The current date will default.

Note: The following five steps are only needed if you are licensed for COMMANDIIen.

- 6. Select a **Pre-Lien Calculation** method from the drop-down list. The options are:
 - Number of Days After Pre-Lien Compare Date (default)
 - Specific Day of 1st Month Following Pre-Lien Compare Date
 - Specific Day of 2nd Month Following Pre-Lien Compare Date
 - Specific Day of 3rd Month Following Pre-Lien Compare Date

The first option is by for the most commonly used. The other options allow for "prox" dates, which are required in certain states.

This setting is used in conjunction with the **Days/Day of Month for Preliminary Notice Required** field, found on the Configuration screen {Lien > Pre-Lien Rules}.

7. In the **Lien Required** field, select one of the following.

Not Required denotes that the creation of a lien location is note required for orders on this project.

Required (Man) denotes that the creation of lien locations is required at all times, but must be created manually. Note that this selection is rarely used because dispatch is slowed greatly by having to create the lien locations.

Required (Auto) denotes that the creation of lien locations is required at all times, but takes place automatically.

Required (Auto, Exempt) denotes that the creation of lien locations is automatic, but the lien locations are automatically marked exempt.

This option is useful for storing lien location information for customers that do not necessarily warrant lien locations in the preliminary stages. If the need arises to issue lien notices, the correct data will have been maintained for implementing preliminary and lien notices.

8. To enter lien location information for this project, select the **Lien Locations** button to access the Lien Location Manager screen. This screen is available only if you have a COMMANDlien license. For instructions on how to use the screen, see the COMMANDlien User's Manual.

- 9. Mark the **Allow Multiple Lien Locations** checkbox to allow more than one lien location for this project.
- 10. Mark the **External Liens** checkbox to allow externally managed liens.
- 11. Mark the **Purchase Order** and/or **Customer Job** checkbox if these items are required in order entry for this project. If selected, the system will not accept an order against the project unless the required information has been entered. The system will shade the field to indicate that the field is required.
- 12. When a valid reason code is entered in the **Suspend Order Reason Code** field and saved, all new entered for the project default to a suspended state. If no reason code is entered, new project orders default to a released state.

When an order is suspended, it is essentially removed from the invoicing process, thus providing an opportunity to review the order and make sure that all information is correct. Please consult the COMMANDinvoicing manual for additional information regarding suspending and releasing orders.

13. Accept the screen to save the project, or proceed to the **Invoicing** tab.

Entering Project Invoicing Information

Project invoicing information is used when invoices are created to determine the following aspects of invoicing:

- Number of orders and tickets included on a single invoice.
- Sub-totals to be printed on the invoice.
- Level of detail printed for items and tickets.
- Business for single or multiple days on a single invoice.
- Customers included in the invoice run, based on assigned frequency code.

To enter project invoicing information:

From the Project screen, select the **Invoicing** tab. {Quotes > Quotes > Projects > New / Detail > Invoicing} or {Files > Customer & Project Information > Projects > Invoicing}

Projects – Invoicing Tab (EDTPROJI)							
Main Addresses Pricing	Accounting Invoicing Distribution Distances	Products Forecast					
Print One Invoice Per	Order	<u> </u>					
Print Products/Tickets	Detail	<u>·</u>					
Invoice Frequency Copies to Print	Daily	•					
Haul Charges Minimum Haul Charges Separate Invoices by Pro	Print haul charge as separate line item Print total minimum haul charge oduct Line	•					

- From the Print One Invoice Per field's list, define the contents of printed invoices. This field selects and groups tickets and orders into a single invoice for the project.
- 3. Depending on your selection in the Print One Invoice Per field, the following three fields appear or disappear. Select the settings based on these values.

Sort and Sub Total By allows you to select the criteria by which the invoices are sorted and sub totaled.

Print Products/Tickets allows you to select whether products and tickets listed on an invoice print in Detail or Summary.

Days on One Invoice allows you to choose whether invoices are created for single days or for multiple days.

- 4. If available, select the cycle code for the printing of customer invoices for this project from the **Invoice Frequency** field.
- 5. If you want the system to automatically print more than one copy of invoices for this project, enter the appropriate number in the **Copies to Print** field.
- 6. From the **Haul Charges** field, select the method for printing haul charges: Print haul charges as a separate line item or Combine haul charges with material price.
- 7. From the **Minimum Haul Charges** field, select the method for printing minimum haul charges: Print total minimum haul charge or Separate actual and incremental haul charge.
- 8. Mark the **Separate Invoices by Product Line** checkbox if necessary. When marked, this checkbox causes each product included on the invoice to be displayed as a separate line.
- 9. Accept the screen to save the project or proceed to the **Distribution** tab.
- Caution: Selecting options on this screen in and of itself will not produce a specific invoice layout. The options selected must also be reflected in the Invoice Document Group/Formats.

Entering Project Distribution Information

The **Distribution** tab allows access to miscellaneous dispatching information for the project. This information is used as a default to the corresponding fields on customers, orders, and tickets subsequently created for the project.

To define project distribution information:

 From the Projects screen, select the Distribution tab. {Quotes > Quotes > Projects > New / Detail > Distribution} -or- {Files > Customer & Project Information > Projects > Distribution}

Main Addresses Pricing Accounting	Invoicing	Distribution	User Fields	Distances	Product
Project Type Stage Map Page Estimated Travel Time Truck Poll Type Update Project Map Coordinates Update Order Map Coordinates		8 o Not Poll	T		
Concrete Copy to All Default Order Type Scheduled Plant Code Truck Type Delivery Method Tracking Order Color Print Mix Weights on Ticket	Ri V 1 V 2 6	egular Sale BHMPLT REAR Company	2		

Projects – Distribution Tab (EDTPROJJ)

- 2. The **Project Type** and **Stage** fields are not currently used; functionality for these fields will be added in future releases of COMMANDseries.
- 3. If necessary, enter the **Map Page** on which the delivery address is located. This code can be printed on the delivery ticket so that the driver can look up the specified page in the map book.
- 4. Enter an **Estimated Travel Time** to use as a default for scheduling all orders associated with this project.

Note: If a project has both estimated travel times and a map page with travel times, then when an order is entered the Order Schedule Information screen will use the Map Page travel times.

The next three fields relate to Mobile Signaling.

- 5. Select a Truck Polling Type. The options are:
 - **Do Not Poll**--The system will not ask for updated coordinates from GPS-enabled trucks.
 - **Poll First Truck**--When the first truck on an order signals Pouring status, the system will poll the truck for updated GPS coordinates.
 - Poll Every Truck--Every truck will be polled when it enters Pouring status.

- 6. If **Update Project Map Coordinates** is selected, the project will be updated with new coordinates.
- 7. If **Update Order Map Coordinates** is selected, the order will be updated with new coordinates.

The rest of the screen has information for different project lines. Use the **Product Line** drop down field or the scroll bar to select individual product lines, or select **Copy to All** to have the settings for one product line copied to the others.

- 8. Enter the **Scheduled Plant Code**. This will become the default plant from which materials for the project are delivered.
- 9. If the customer needs a specific **Truck Type**, enter the appropriate code.
- 10. Indicate the default **Delivery Method** to be used for this project.
- 11. If desired, select the **Tracking Order Color**. This field designates the color code to be used to display orders for this project on the Tracking and Scheduling screen.

Note: In practical terms, it is best not to assign a specific color to project orders; the Tracking screen becomes harder to read. Assigning project colors should be the exception rather than the rule.

- 12. Mark the **Print Mix Weights on Tickets** checkbox if necessary. When this checkbox is checked, all delivery tickets for the project will include constituent weights.
- 13. Accept the screen, or proceed to the **User Fields** tab.

Entering Project User Fields Information

The **User Fields** tab allows you to enter information for the project in your system's user-defined fields. User Fields are created and configured for the entire system through the User Fields tab on the main Configuration screen. {Files > General Information > Configuration} User fields can be restricted to specific uses: Customers, Orders, Tickets, etc. For a user field to appear on the project screen, it must be created with a Field Type of **Project**. If the field is created with Field Types of Project and Orders, then the field can be used to communicate between order entry/dispatch personnel and account management personnel.

If there are no user-defined fields flagged as project-related, the User Fields tab will not be displayed.

To enter project user field information:

 From the Projects screen, select the User Fields tab. {Quotes > Quotes > Projects > New / Detail > User Fields} or {Files > Customer & Project Information > Projects > User Fields}

Projects – User Fields Tab (EDTPROJK)



- Enter the information required by the user field. If the text of the message is longer than the field, you can press <Enter> or select the Zoom button to the left of the field to open a larger text box.
- 3. Accept the screen, or proceed to the **Distances** tab.

Entering Project Distances Information

The **Distances** tab allows you to record the distances from various plants to the project site. If entered, this information will default into the Order Scheduling screen, speeding up order entry and making scheduling more accurate, particularly if Map Pages are not used.

To define project distances:

From the Projects screen, select the Distances tab. {Quotes > Quotes > Projects > New / Detail > Distances} or {Files > Customer & Project Information > Projects > Distances}

	Projects – Distances Tab (EDTPROJL)									
Main	Addresses Pricing	Accounting	Invoicing	Distribution	User Fields	Distances	Products	Forecast		
PI	ant Code				Distance	Estimated	l Travel Tim	e		
1	Main Plant				8.00	14	Minutes			
2	North Side				26.00	35	Minutes			
3	River Road				31.00	45	Minutes			
4	West End Plant				72.00	110	Minutes			

- 2. Enter the **Plant** code.
- 3. Enter the **Distance** between this plant and the project site.
- 4. Enter the **Estimated Travel Time**, in minutes, between this plant and the project site.
- 5. Press the **Add Occurrence** button to enter another plant, or accept the screen to save the project, or proceed to the Products tab.

Entering Project Products Information

The Products tab allows you to set up mix and aggregate products for the project.

To define project products:

 From the Projects screen, select the **Products** tab. {Quotes > Quotes > Projects > New / Detail > Products} or {Files > Customer & Project Information > Projects > Products} 2. Select a **Plant** from the field's list. This field is used to determine the products to be displayed in the screen areas below. If **All** plants are indicated, then all products, regardless of their plant assignment, are displayed. If a specific plant is entered, then only those products assigned to that specific plant are displayed.

There are three different product entry screens in the Project editor, each with specific functions. The three screens are:

- Ready Mix Products
- Summary Ready Mix Products
- Aggregate Products

To use the Ready Mix Product entry screen:

1. Select **Ready Mix Products** in the unlabeled product entry format field. The Ready Mix Products screen displays.

Main	Addresses	Pricing Ac	counting I Inv	oicing Distribution	User Fields Dis	tances Products	Forecast		
Plant	All			V	Read	y Mix Products	· · ·]	
Mix Pr P	roducts roduct	Plant		Description	Category	Price			
	5466	All		2500#, 3/41, 6%	MIX	62.0	D Pricing	Ready Mix	
	0050			1 10000	MIV			<u></u>	<u>-</u>
	0656		<u> </u>] 3000 psi,374, 6%	MIA	J 62.0			니 티
Extra	Products	_							
	07			3/4" Gravel 3/4" Gravel	Agg, Lb Agg, Lb	0.0	D Pricing D Pricing		
	102			3/4" Gravel	Agg, Lb	0.0	D Pricing Pricing	7	

Projects – Products Tab (EDTPROJM-mix)

Aggregate Products displays all non-mix products in a single section. There is a different product entry screen for aggregate products, documented below in the section entitled *Fixed Delivery Pricing*.

- 2. Enter a **Product** for the Mix Products line. This code identifies each mix product assigned to a customer. The same mix product can be assigned multiple times to a customer when varying groups of associated products are combined with each entry of the mix. When the Product code is entered, the product's Description is retrieved from the item master file.
 - **Note:** Detailing on a the description fields will bring up the Project Product Description information screen.
Project Product Description Information (EDTPROJ4)

 Project Product Description Information (25466 2500#, ... X

 Description
 2500#, 3/4 limestone, air

 Short
 2500#, 3/4I, 6%

 Usage Code
 1

This screen allows you to make project-specific changes to the product's descriptions and usage code.

- 3. Select a Mix Products **Plant** from the field's list. This field identifies the plant from which this product can be sold to this project. If the product is available at all plants, choose the **All** plants option.
- 4. Click on the **Pricing** button to go to the Project Product Pricing Information screen.

Project Product Pricing Information (2500 2500 - 3/4, 3/8)	×
Estimated Quantity Default Load Quantity Price 68.00 cy Price Extension Effective 103-Aug-2004 Previous Price 65.00 cy Price Extension Per unit	UOM Extensions
Allow Automatic Price Adjustments	
Aggregate Copy to All	
Sundry Charge 👤 📔 SATSUN Pricing	t A A
Surcharge Code 🔄 ENVIRON Rate	₽ Ă ▼ ▼
Override Terms Code Discount Discount Rate Type Discount Rate Cy	

Project Product Pricing Information (EDTPROJ1)

5. Enter the **Estimated Quantity** of the product that the customer intends to buy.

Note: You can click on the detail button associated with this field to select a unit of measure to assign to the estimated quantity.

Enter the product **Price** as well as the **Price Extension**, and **Effective** date. Whenever the price is changed, the old price and price extension will be automatically moved into the **Previous Price** and **Price Extension** fields.

Project prices will override pricing information from the item master file and customer file whenever this product is ordered for this project.

- 6. Mark the **Allow Automatic Price Adjustments** field you plan to adjust this price using the Calculate Price Change function.
- 7. Enter any **Sundry Charges** applicable to this project.
- 8. If necessary, select the Project Sundry Charge **Pricing** button to override the standard pricing for the sundry charge.

🖥 Project Sundry	Charge Pricing (1 SATSUN)	×
Price Price Extension Effective Previous Price Price Extension Create Separate	Cubic Ya	

Sundry Charge Pricing (EDTPROJ5)

- 9. Mark the **Create Separate Invoice** checkbox if you want the sundry charge to be billed separately.
- 10. Accept the screen when your are done.
- 11. Additional sundry charges can be added by pressing the Add Occurrence button.
- 12. Enter Any **Surcharge Codes** applicable to this project (Aggregate only).
- 13. If a Surcharge is specified, a field will apear that will allow you to override the surcharge **Rate**.
- 14. If necessary, set the **Override Terms Discount** flag. The box is selected, two additional fields display.
- 15. The **Discount Rate Type** lets you select between a discount amount and a discount percentage.
- 16. The **Discount Rate** is the override rate.
- 17. Accept the Project Product Pricing Information screen.
- 18. Select the **Ready Mix** button to enter the **Batch Code** and **Slump** for the mix product, and accept the Project Product Ready Mix screen.

Project Pro	oduct Ready	Mix Information (EDTPROJ2)
	🛅 Project	t Product 🗙
	Batch Code Slump	4

- 19. If necessary, enter a **Product** for the Associated Products line (the single-field line below the Mix Products line). This code uniquely identifies each associated product assigned to each project-specific mix product.
 - **Note:** If an admixture is entered as an associated product in a project file, then whenever the relevant mix is placed on a product order,

the associated product(s) will automatically be added to the order. To simply give the customer a specific price for an inconsistentlyused admixture, then enter the admixture in the project as an extra product—doing so will give the customer the preferential pricing, but will not automatically put the admixture into a mix.

- 20. Press the associated product **Pricing** button to enter pricing information for this item on this project.
- 21. If necessary, press Add Occurrence to add more associated products.
- 22. Enter any necessary **Extra Products**. This code uniquely identifies each extra product assigned to a customer. More than one extra product can be assigned to a customer. Extra products are not specific to any one mix product assigned to a customer and can be added to any order for the customer.
- 23. Select a **Plant** from which the extra product may be ordered.
- 24. Enter project-specific pricing for the extra product by pressing the **Pricing** button.
- 25. Accept the screen to save the project, or proceed to the **Forecast** tab.

To enter products using the Ready Mix Summary Products screen:

1. Select **Summary Ready Mix Products** in the product entry format field.

			110,000	0 1 1 0		(0411	innan, i	(cuu)		211110	,,,,			
Main	Addresses	Pricing	Accounting	Invoicing	Distribution	User F	ields Dist	ances	Products	Forecast				
Plant	All				•		Summ	ary Rea	dy Mix Produ	ucts	•			
Mix Pr Pr 22 44 • 3	oducts ioduct 500 000 000	Plant All All All	•	De 29 40 30	escription 500 - 3/4, 3/8 500 PSI 500 - 3/4, 3/8		Category CONCUS CONCUS CONCUS	Price	68.00 60.00 115.00	Pricing	Assoc Prods	Ready Mix	र र र	4
Extra F 9 2 7 1	Products D 8 D 1	All All All All + Indic	▼ ▼ ■ ates Item Categ		loves, Leather 1/2'' Stone olor - Red elSand - (Lbs)		EXTPROD CAGGUS DthrA SNDUS		0.00 7.00 12.00 8.00				t t t t	A F

Projects-Products tab (Summary Ready-Mix-EDTPROJN)

- 2. Enter the **Product** code or detail on the field to select from a list.
- 3. Select a **Plant** from the drop-down list.
- 4. The product **Description** and **Category** will default from the Product file.
- 5. The **Price** will default from the product file. Edit the price for the project as needed.
- 6. Press the **Pricing** button to display the Project Product Pricing screen. Edit the information as necessary.
- 7. Press the **Assoc Prods** button to add an associated product to the mix.
- 8. Press the **Ready Mix** button to display the Project Product Ready Mix Information screen. Edit the information as necessary.

- 9. Press Add Occurrence to add another mix, or proceed to the Extra Products section of the screen.
- 10. Enter the **Extra Products** item code or detail on the field to select from a list.
- 11. Select a **Plant** from the drop-down menu.
- 12. The extra product **Description** and **Category** will default from the Product file.
- 13. The **Price** will default from the product file. Edit the price for the project as needed.
- 14. Press the **Pricing** button to display the Project Product Pricing screen. Edit the information as necessary.
- 15. Press Add Occurrence to add another mix, or accept the screen.

Because the third product entry screen, Aggregate Products, is linked to an aggregate-specific pricing option, that screen is discussed in the next section.

Fixed Delivery Pricing

COMMANDaggregate users need the ability to quote a fixed delivered price to customers. Once the price is fixed, either the cartage rate or the material price is adjusted to achieve the quoted price.

You have three pricing options for aggregate products. These options are selected with the Price Type field:

FOB Pricing - The material price plus the cartage rate equals the delivered price. The delivered price can vary from load to load.

Fixed Cartage Delivered Pricing - The delivered price minus the cartage (calculated or specified) equals the material price

Fixed Material Delivered Pricing - The delivered price minus the material price equals the cartage.

Fixed delivered pricing can be established as the Job, Quote, or Project level. When you go to the **Products** tab of the **Projects** screen, you have the option to select a **Product Format Type**. If you select **Aggregate Products**, the screen changes:

Main 🗍 Ac	ddresses	Pricin	g 🛛 Accounting 🗍 In	voicing Distribut	tion User Fields	Distances	Products F	orecast		
Plant All Aggregate Products Default Price Type FOB Price										
Product		Plant	Description	Quantity	Truck Type	Material Price	Cartage Table	Rate	Fix Cartage Deliv Fix Mat'l Deliver	vered Price ed Price
90 93		ALL ALL	Gloves, Leather 1/2'' exp joint		A	15.00) 2) 2	0.00 ×	15.00 9.00	\$ • + •

Projects-Products tab (Aggregate Products-EDTPROJO)

To establish aggregate pricing:

1. Select a **Default Price Type** for the project. This selection simply specifies the project default. Pricing options can be changed at the product level.

Note: Changing the Default Price Type for an existing project does not affect products already entered. The change will only affect new products added to the project.

- 2. Enter a **Product Code**, or detail on the field to select from a list.
- 3. Enter the **Plant** from which the customer will order the product. To select all plants, enter ALL or #.
 - **Tip:** If the same product is entered once for all plants and once for a specific plant, the specific plant setting will have precedence.
- 4. The product **Description** will default from the product file.
- 5. Enter the **Quantity** of the product that the customer expects to buy during the course of the project. This value is entered for reference only.
- 6. Enter the preferred **Truck Type**, or detail on the field to select from a list. To select all truck types, enter #.
- 7. The function of the next four fields depends upon the Default Price Type. The image below illustrates the different options.



Project-Product Pricing (Fixed Delivery-EDTPROJO-detail)

1	FOB (Standard) Pricing	Enter the Material Price (or accept the default from the Item file) and assign a Cartage Table and Rate . If the cartage table is a straight per quantity charge, the Delivered Price will be calculated as the Material Price plus the Cartage Rate. If cartage is charged using another method, the Material Price will default as the Delivered Price.
2	Fixed Material	Enter the Cartage Table and the quoted Delivered Price . The cartage Rate will be calculated and displayed.
3	Fixed Cartage	Enter the Cartage Table and the quoted Delivered Price . The Material Price will be calculated and displayed.

Note: Pricing calculations can only be done on this screen if the Cartage Rate Type is quantity-based. If another type of cartage, such as per load or per hour, is being used, then the default values will display. Pricing adjustments for the fixed delivered price will be made during ticketing.

8. Press the **Add Occurrence** button to add another product, or accept the screen.

Adjusting Cartage Rates

For many people, the settings on the initial Projects-Products tab is sufficient. Some people need additional flexibility in configuring cartage charges at the product level.

To adjust cartage charges for a single product on a project:

1. Press the dollar sign button s on the product line. The Project Product Cartage Charges screen will display. The Cartage Table and Plant are displayed in the upper left of the screen. These values cannot be edited.

		110jeet110				<i>'</i>)				
🗂 Project Product Cartage Charges (202 3/4" Gravel)										
Cartage Table	2	Aggregate Ton/mile								
Plant	#	ALL								
Material	Effective	Previous	Truck	Cartage	Effective	Previous	Delivered			
Price	Date	Rate	Туре	Rate	Date	Rate	Price			
4.25			T	0.50			4.75	₽		

Project Product Cartage Charges (EDTPROJ7)

- 2. If necessary, enter a new **Truck Type**, or detail on the field to select from a list.
- 3. If necessary, enter a new **Cartage Rate**.
- 4. Enter an **Effective Date**. The current date will default.
- 5. If you have changed the Cartage Rate, the existing rate will be automatically transferred to the **Previous Rate** field.
- 6. The **Delivered Price** will be calculated based on existing pricing settings.
- 7. Press the **Add Occurrence** button to add another entry, or accept the screen.

Note: If the product is being priced using Fixed Material pricing, you cannot access this screen.

Changing Price Types

The **Default Price Type** field established the default pricing for all subsequently entered products. If the default price type is changed, it will have no effect on existing products.

To change a product's Price Type:

1. Press the detail button in on the product line. The **Project Product Pricing Information** screen displays.

(EDTPROJ1-detail)								
🛅 Project Product Pr	Project Product Pricing Information (28 1-1/2" Gravel)							
Estimated Quantity Default Load Quantity Price Price Extension Effective Previous Price Price Extension Fince Extension Fince Extension Fince Extension Fince Extension Fince Extension	250.00 3.12 tn Perunit • tn	Fix Cartage Delivered	×					

- 2. Change the **Price Type** as needed.
- 3. If other information on the screen has changes, change it as well.
- 4. Accept the screen.

Entering Project Forecasting Information

The Forecast tab allows you to predict not only how much of a product a customer will be ordering during the life of a project, but also how those deliveries will be spread out over time. Once project forecasting information has been entered, the Sales Forecast Display will provide projection forecast information for quantities and gross revenues.

Note: Project Begin and Project Expiration dates must be entered accurately on the Projects **Main** tab for forecasting to function properly.

To enter project forecasting information:

From the Projects screen, select the **Forecast** tab. {Quotes > Quotes > Projects > New / Detail > Forecast} or {Files > Customer & Project Information > Projects > Forecast}



Projects - Forecast Tab (EDTPROJP)

- 2. Select a Product Line from the drop-down list. Your selection will determine what products will be available for display.
- 3. Enter a primary product, or detail on the **Product** field to select from project products. The product's Short Description and assigned Plant will default in automatically.
- 4. The Estimated amount will display for reference purposes. Enter a Forecasted amount. This amount can be the entire estimated amount, or you could do forecasting for just the first month or so, then adjust the forecast once you have a better idea of actual material demand.

- 5. If the **Auto Spread** checkbox is selected, the system will automatically distribute the forecast amount evenly across the forecasting periods. These amounts can be adjusted as needed.
- 6. Press the **Add Occurrence** button to add another product to the display, or accept the screen to save the project.

Payment Forms

Payment forms allows you to define the forms of payment accepted by your company. These forms are then assigned to individual orders, allowing you to accurately determine how customers are paying.

If you establish multiple COD payment forms, you can run a COD Recap report at the end of the day to reconcile cash, checks, and credit slips collected.

COMMANDseries is installed with four default payment forms (see screen shot below). If you are installing COMMANDseries for the first time, and are installing V5.53.17 or greater, then you may edit or delete these defaults as needed. If you are upgrading from any version prior to V5.53.17, Command Alkon recommends that you retain the defaults and add whatever forms are required.

Each Payment form is assigned a Payment Method. The available payment methods are:

- Charge
- Cash
- Check
- Credit Card

To enter a payment form:

1. Open the Payment Forms screen. {Files > Customer >Payment Forms} The payment forms editor appears.

Payment Forms (EDTPMTF)

📱 Paym	ent Forms		
Code	Description	Short	Payment Method
1	Charge	CHARGE	Charge 💽 🛃 📥
2	Cash	CASH	Cash 💽 🛃 🗌
3	Check	CHECK	Check 🔽 🛃
4	Credit Card	CREDIT	Credit Card 🔽 🕂

- 2. Use the **Add Occurrence** command to create a new line.
- 3. Enter a **Code** for the new payment form.
- 4. Enter a **Description** for the new form.
- 5. Enter a **Short** description of the new form.

- 6. Assign the new form to a Payment Method. The Payment method determines what payment forms will display during order entry (based on the customer's (or project's) credit), and what payment forms can be reported on the COD Recap Report.
- 7. Use the Add Occurrence command to add a new line, or accept the screen to save your changes.

This sections covers the setup of your General Ledger (GL) information. The information will control how COMMANDseries sorts, records and balances all financial and inventory transactions in the system.

It is important to have clean and current printouts of your current GL information before entering this information. If you are considering making changes to your account structure, it is best to do so before entering the information in the system. While you can modify your account structure from within COMMANDseries, it will be much easier if changes are made before business activity begins in COMMANDseries.

Topics in this section:

Account Types Source Codes Cost Centers Account Codes G/L Booking Codes

Account Types

The Account Types screen records account types, which are used to organize account codes into logical groups. For each group, you can classify the account type and all account codes assigned to it. This classification can be balance sheet, profit & loss or statistical.

To enter a new account type:

- 1. Select Files > GL Information > Account Types.
- Enter an alphanumeric account code in the Account Type field. This code is used to access account type information in other programs. It is also used to sort various reports that contain account type information. To insure that proper sorting takes place in lookup windows and reports, always follow the guidelines described below:
- 3. Make **ALL** account types either **all** numbers, **all** letters, or **all** numbers and letters; don't make some codes all numbers and other codes all letters, etc.
- 4. If your codes contain any letters, make **ALL** codes the same length; that is, put the same number of characters in each code

Account Types (EDTACTY)

📑 Ace	count Types		_ 🗆 X
Ассок Туре	unt Description	Account Class	
E	Expenses	Profit & Loss 📃 💌	
	Liabilities	Balance Sheet 📃 💌	₽
S	Sales	Profit & Loss 📃 💽	₽
ST	Statistical Data	Statistical Data 📃 💌	₽
A	Assets	Balance Sheet 💽	린

- 5. Enter a brief **Description** of the account type. This field fully describes, or names the account type. Where space permits, it is used on screens and reports when the account type is referenced.
- 6. The **Account Class** field is used to specify one of the three account classes that can be assigned to account types. The account class can be one of the three following choices:
 - Balance Sheet
 - Profit & Loss
 - Statistical

Account classes define how the account codes belonging to an account type are treated with respect to the following functions:

Recording the Net Profit effect of a journal entry - for accounts belonging to an account type with a Profit & Loss account class, all journal entries are recorded in the company's Net Profit account and cost center, as designated by the **Net Profit Account** field in the Companies function. {Files > General Information > Companies}

Establishment of beginning balances for new accounting years - accounts belonging to an account type with a Balance Sheet account class have beginning balances established equal to the ending balance of the accounting year being closed; accounts belonging to an account type with a Profit & Loss account class have a zero (**0**) beginning balance established.

Handling of statistical data separate from financial data - accounts belonging to an account type with a Statistical account class are separated from the other accounts, that are financial in nature. This separation is evident on various reports, as well as in the Journal Transactions function.

7. The most common set of account types, and their account class assignments, are:

Account Type	Account Class
Assets	Balance Sheet
Liabilities & Equity	Balance Sheet
Sales & Revenue	Profit & Loss
Costs & Expenses	Profit & Loss
Quantities	Statistical Data

- 8. To add another account type, select the **Add Occurrence** button at the end of the last line.
- 9. When you are finished entering account types, accept the screen to save the information.

Source Codes

The Source Codes form allows you to set up source codes that identify the accounting area, or sub-ledger, from which G/L transactions originated.

The source code is printed on the detail Trial Balance Report for each transaction.

To set up a new source code:

- Open the Source Codes screen. {Files > GL Information > Source Codes}
- 2. Enter a **Source Code** to identify the G/L transaction source. This code is used to access source code information in other programs. It is also used to sort various reports that contain source code information.

The source code is alphanumeric. To insure that proper sorting takes place in lookup windows and reports, always follow the guidelines described below:

- Make ALL source code either all numbers, all letters, or all numbers and letters; don't make some codes all numbers and other codes all letters, etc.
- If your codes contain any letters, make **all** codes the same length; that is, put the same number of characters in each code.

			•	,		
🛅 So	ource Codes					_ 🗆
Sourc Code CR	e Description COMMANDreceivables	Short CR		Force Balance	Maintain Quantity	린스
	General Ledger Inventory	IG/L	ן ע	Force Balance	Maintain Quantity	티
QT PR	Quantities Payroll	IQTY IP/R		Force Balance Force Balance	Maintain Quantity Maintain Quantity	비
PU AP	Purchasing Accounts Payable	P/U A/P	I ⊲ ≤	Force Balance Force Balance	Maintain Quantity Maintain Quantity	린
JAR	Accounts Receivable	A/R		Force Balance	Maintain Quantity	

Source Codes (EDTSRCD)

- 3. Enter a **Description** of the accounting area that the source code represents (such as Accounts Payable or Payroll). Where space permits, it is used on screens and reports when the source code is referenced. Enter an abbreviated version of that description in the **Short** field that is used on screens and reports where the Description will not fit.
- 4. Mark the **Force Balance** checkbox if debits and credits must balance before the batches using this source code can be posted. It is highly recommended that you use the Force Balance feature, as it greatly

reduces the number of errors that make their way into the general ledger.

- 5. Mark the **Maintain Quantity** checkbox if data from this source will contain quantity (statistical) values rather than financial or monetary values.
- 6. To add another source code, select the **Add** or **Insert Occurrence** button at the end of the last line.
- 7. When you're finished entering information, accept the screen to save the source codes.

Cost Centers

Cost Centers identify the locations within your business where accounting activity takes place. For example, you can create cost centers that represent such entities as plants, pits, the maintenance shop, the main office, etc. Cost centers can be grouped together on financial reports in any fashion to accommodate divisional, regional or company totals.

To set up a cost center:

- 1. Open the Cost Centers screen. {Files > GL Information > Cost Centers}
- 2. Enter a Cost Center number. This code is used to access cost center information in other programs. It is also used to sort various reports that contain cost center information. Note the following:
 - The cost center is alphanumeric. The required length of cost centers is defined with the Cost Center Length field in the Financials Configuration screen {Files > General Information > Configuration > Financials}.
 - The required length of the company code is defined with the Company Code Length field in the Financials Configuration screen {Files > General Information > Configuration > Financials}.
 - **Caution:** Cost centers should be assigned to a single company, to avoid problems in balancing your data. Command Alkon recommends that you use an established company code {Files > General Information > Companies} as the first characters of the cost center code. This will serve as an aid in ensuring you don't assign a cost center to the wrong company.

Cost Centers (EDTCOST)

🛅 Cost Center	s		_ 🗆 🗙
Cost Center	Abbreviation	Description	
010	CDIAL	Command Data Birmingham	린▲
011	CDIAL1	CDI Birmingham Plant 1	린
012	CDIAL2	CDI Birmingham Plant 2	린
013	CDIAL3	CDI Birmingham Plant 3	린님
014	CDIAL4	CDI Birmingham Plant 4	린
015	CDIAL5	CDI Alabama Plant 5	린
016	CDIAL6	CDI Alabama Plant 6	<u>+</u>
020	CDITX	Command Data Dallas	┛┓

- 3. Enter an Abbreviation for the cost center. This field is used to specify a free form, short name of the cost center being defined. If desired, this abbreviation can be used in place of the cost center code when specifying the desired cost center on system screens.
 - **Tip:** Use abbreviations that are easy to remember. If you forget the cost center code on system screens, you can enter the abbreviation instead.
- 4. Enter a **Description** for the cost center.
- 5. To add another cost center, select the **Add Occurrence** button.
- 6. When you are finished entering information, accept the screen.

Account Codes

The Account Codes function defines the general ledger accounts used by COMMANDreceivables. Use the Account Codes screen to edit general ledger accounts to suit the needs of your business.

To enter a new account code:

- 1. Select Files > GL Information > Account Codes.
- 2. Enter a unique account code in the **Account** field.

Account	Codes	(FDTACCT)
Account	Coucs	(LDIACCI)

Account Codes		
Account	1014	
Description Short GL Summarize Flag Account Type Normal Sign	Cash in Southtrust Bank STRUST No summarizations A Assets Normal Debit Balance	
Source Codes	CR CR Summarize monthly QT QTY Summarize monthly	
☑ Limit Cost Centers	O22 Agg Haulers Cost Center	비즈

- Enter a Description of the account (i.e., Sales Ready Mix or Cash in Central Bank). Enter an abbreviation of this description in the Short field.
- 4. Select a **GL Summarize Flag**. The summarize flag causes multiple detail transactions from the COMMANDreceivables application to be recorded in your general ledger at the chosen level of summarization. Without a summarization, the account records and prints all of the details of each transaction.

Caution: If you are using the COMMANDseries G/L Distribution Data Out routine, make sure that your summarization option is relfected in your Data Out document format.

- 5. Select an **Account Type** (see *Account Types* for more information).
- Enter either a plus sign or a minus sign in the Normal Sign field based on whether the account normally has a debit (+) or a credit (-) balance.
- In the Source Codes fields, enter the sources that can be used to post transactions to this general ledger account. Press <Enter> in each field to open a list of possible source codes.

Note: This field restricts the COMMANDseries functions that can post to a given account.

- 8. Select a summarization code for each source code that you enter. Press <Enter> in the field that appears beside the source code field to open a list of possible summarization codes.
- Mark the Limit Cost Centers checkbox if you want only specific cost centers to enter and post transactions to this account. When the box is marked, fields appear below allowing entry of applicable cost center numbers. Add new cost center fields by selecting on the Add Occurrence button at the end of each line.
- 10. Accept the Account Code screen to record the current data and clear the form, allowing entry of another account code.

G/L Booking Codes

The G/L booking file assigns a specific account code and cost center to each type of transaction supported within COMMANDreceivables. The General Ledger Booking Codes screen lists a series of detail levels for each type of G/L entry. These detail levels get more specific from top to bottom, left to right across the screen. You can assign account codes and cost centers among these levels of detail in the manner that best suits your general ledger system.

Each selected radio button displays a detail screen that allows for the entry of account codes and/or cost centers. When you make a G/L entry, the system searches for account codes and cost centers up through the various detail levels, from most specific to least specific. As soon as it finds both an account code and cost center for an entry, it terminates the search.

Note: See the appendix for sample GL Booking Codes.

To set up G/L booking codes:

- 1. Select Files > GL Information > GL Booking Codes.
- 2. Enter a code in the **Type of Entry** field.
- 3. Choose a radio button from the list that appears below the Type of Entry field to specify the detail level of account code and cost center assignment. The detail levels get more specific from top to bottom, left to right across the screen.
- **Note:** Remember that you can assign an account code for one type of entry to a certain detail level and the cost center for the same type of entry to another detail level. (For example, for Charge Sales, you could list the account codes under the Product Category detail level and the cost centers under the Plant Code detail level.)

🛅 G/L Booking Codes		_ 🗆 ×
Type of Entry	ounts Receivable	
 Company Plant Code Product Category Product Plant/Product Category Plant/Product Customer Customer/Product Categor 	C Customer/Product C Accounting Category C Accounting Category/Product Category C Accounting Category/Product	

G/L Booking Codes (EDTGLCD)

4. On the detail sheet that appears, select a category to configure and enter an account code, sub-account code, and/or a cost center for that category. To open a blank line, select the **Add Occurrence** button.

	G/L Booking Codes (EDTGLCDA)					
Г	Comp	any	Account	Sub Account	Cost Center	
	01	Concrete	Accounts R	eceivable from	010 Command Data Birmingham	된 🖻
	02	Aggregat	1032 Accounts R	eceivable from	O13 CDI Birmingham Plant 3	Ð
E						Ð

C/L Dealing Codes (EDTCL CDA)

- 5. When you finish configuring the detail level, accept the detail screen.
- Repeat the process, selecting one or more radio buttons for each type of 6. entry you want to format, then accept the GL Booking Codes screen.

This section demonstrates how to set user-specific preferences. These settings are stored at the workstation-level; they do not follow the username.

Functionality Preferences

The Preferences screen allows you to change aspects of application functionality, including the following:

- User preferences, such as language, date display options, and print model options that are set initially by your username
- Initialization preferences that control On-line Help display, order entry functions, and the initial display of the application logo
- Sounds, colors, fonts, keys, toolbar and network options

Except where noted, changes on this screen affect the current workstation.

When you accept this screen you are prompted to restart COMMANDseries. Language, date format and order, and sound changes take effect immediately; color changes only take effect when and you log out and back into the application.

Topics in this section:

General Preferences Setup User Preferences Setup Sound Preferences Setup Color Preferences Setup Tracking Preferences Setup Font Preferences Setup Keys Preferences Setup Toolbar Preferences Setup

General Preferences Setup

To define general preferences:

1. Go to the **General** tab. {Misc > Preferences > General}

Preferences – General Tab (SYSPREF1)

Preferences			
General User Sounds Colors Tracking Fonts Keys Toolbar Forms			
Logo Time 1 COMMAND series Image Activate Editor Forms Multiple Instances of Each Editor Allowed			
Use Order Prefix Screen			
🗖 Use Toolbar			
Show System Name in Title Bar			
Clear Message Frame Frequently (Conserve Memory)			
Default Order Lookup User Order File 🔹			

- 2. In the **Logo Time** field, enter the number of seconds the application logo is to be displayed when you log into any application. To keep the application logo from displaying, enter zero.
- 3. The field to the right of the Logo Time allows users to select an alternate splash screen. Currently only one pre-defined splash screen ships with COMMANDseries.

If you wish to design and display your own splash screen, create a 16 or 256 color bitmap and change the LOGO16 parameter in the [application] section of USYS72.INI to LOGO16=@x:\dir\<name>.bmp. Be sure to fully qualify the location of the bitmap to be displayed and precede it with an "at" (@) character.

- 4. Mark the **Simplified Orders** checkbox to make the Simplified Orders screen the default orders screen.
- Mark the Use Order Prefix Screen checkbox if necessary. When selected, this checkbox causes the Customer > Project-Order > Lookup screen (CPOL screen) to displayed as the first screen on the Orders screen. {Dispatch > Orders} This screen allows for a fast access to customers, projects, and existing orders, at the initial setup in of new orders.
- 6. Mark the **Use Toolbar** checkbox to enable the COMMANDseries toolbar.
- 7. Mark the **Show System Name in Title Bar** checkbox to cause the system name (Entered on the Configuration System tab) to display on the COMMANDseries title bar. This feature is particularly useful in environments with multiple COMMANDseries databases.
- 8. Mark the **Clear Message Frame Frequently (Conserve Memory)** checkbox, if necessary. When marked this checkbox instructs COMMANDseries to clear the Message Frame whenever a new form is started. This prevents the message frame from building up a very large amount of data and consuming the available memory on the system.
- 9. Select a **Default Order Lookup** from the list. The options are: **Use Order File**, **Use Standing Order File**, **Use Order/Schedule File**.
- 10. Accept this screen to confirm the general preferences.

User Preferences Setup

The User preferences tab allows you to define COMMANDseries preferences specific to a username.

To define user preferences:

1. Click Misc > Preferences > User.

Preferences – User Tab (SYSPREF2)

General User Sounds	Colors Tracking Fonts Keys Toolbar Forms		
User	SYSTEM		
Password	*****		
Language	English 🔹		
Date Format	mm-dd-yyyy or dd-mm-yyyy		
Date Order	Month before day		
Century Date Cutoff	70 😫		
Coordinate Format	Degrees, Minutes, & Seconds 📃 💌		
Print Model 📃 🚽	OKI-17		
🔽 Only Allow This Print Model			
Dispatching Assigns Truck to Loading Status			
Limit Aggregate Ticketing to Dispatch Only			

- 2. The **User** name established the default user name for this workstation. If COMMANDseries Security is enabled, then when the login screen appears this username will already be entered.
- 3. If you are using COMMANDseries security, the **Password** field displays. This field allows you to change the password for the current user.

Note: There is no direct link between the User and Password fields.

- 4. Enter the **Language** to be used in the COMMANDseries system or click on the field to reveal a drop-down list with the following options: English, Dutch, French, German, Greek, Italian, Spanish, Canadian French, Norwegian.
- 5. Enter the **Date Format** to be used to display dates throughout the COMMANDseries system or click on the field to select from a list of acceptable date formats.
- 6. Enter a **Date Order** or click on the field to select from a list of acceptable date orders.
- 7. Enter a Century Date Cutoff or scroll to select a number. The number entered in this field determines whether the system recognizes a two-digit year as 19xx or 20xx. For example, if the number 70 is entered, the system will recognize a year entry of 69 as 2069, and it recognizes a year entry of 71 as 1971.
- 8. If you are using GPS tracking, you may need to select a **Coordinate Format**. Consult with your Command Alkon project manager to determine of what setting is appropriate for your needs.
- 9. If necessary, select a default **Print Model**. This feature is particularly useful in systems with a large number of print models.

- 10. Select the **Only Allow This Print Model** to restrict the user to the default model.
- 11. The **Dispatching Assigns Truck to Loading Status** flag determines whether dispatching a truck will change its status.
- 12. The **Limit Aggregate Ticketing to Dispatch Only** flag enables an aggregate operation to restrict a dispatcher to dispatch functions only. This option allows the company to use just the Aggregate Ticketing screen.
- 13. Proceed to the next tab, or accept the screen.

Sound Preferences Setup

This tab allows users to configure COMMANDseries to play Windows sound files (.WAV files) at certain COMMANDseries events.

To define sound preferences:

1. Click Misc > Preferences > Sounds.

Preferences – Sounds Tab (SYSPREF3)				
Preferences		. 🗆 🗙		
General User Startup File Shutdown File Help File Message File Mail File	Sounds Colors Tracking Fonts Keys Toolbar Forms	2		

2. Select a sound file for all desired COMMANDseries events. Available events are as follows.

Startup File – the sound that plays when COMMANDseries initiates **Shutdown File** – the sound that plays when COMMANDseries is exited

Help File – the sound that plays when COMMANDseries On-line Help is activated

Message File – the sound that plays when a message dialog box appears

Mail File – the sound that plays when a message is received from another COMMANDseries application

3. Click on the **Test** button to listen to the selected sound.

Color Preferences Setup

The Colors Preferences tab allows you to change the colors that are used to display the various parts of the screen in your COMMANDseries applications, such as windows, available and unavailable screen fields, bright fields, and **invisible** fields. Also, user-defined colors, tracking colors, and scheduling colors can be set, each on separate screens.

Note: To reset color defaults, go to the Options menu from this screen, and select **Defaults**.

To define color preferences:

Go to the **Colors** tab on the Preferences screen. {Misc > Preferences > Colors}

Preferences	
General User Sounds Colors Tracking Application Background	Fonts Keys Toolbar Forms
Window Display XXX Unavailable Field XXX Unavailable Label XXX Unavailable Button XXX Bright Field XXX	User Color 2 XXX User Color 3 XXX User Color 4 XXX User Color 5 XXX User Color 6 XXX
Bright Button XXX Progress Bar XXX Game Background XXX	User Color 9 User Color 10 User Color 11 Xxx
Normal Button Display Unavailable Button Bright Button	User Color 12 XXX User Color 13 XXX User Color 14 XXX User Color 15 XXX 🗸

Preferences – Colors Tab (SYSPREF4)

- For each listed field (Label, User, etc.) select a display color by clicking on the Colors button. You will be prompted for two colors: Foreground Color—The color of the text Background Color—The background color
- 3. Select a display color for each button display (**Normal**, **Unavailable**, and **Bright**). You can toggle through the color options by clicking on the buttons. Each time the button is clicked, it changes to the next color.

Tracking Preferences Setup

The Truck Tracking Preferences tab allows you to distinguish trucks from each other by assigning a specific color to each truck in Tracking and Scheduling.

Note: To reset color defaults, go to the Options menu from this screen, and select **Defaults**.

To define tracking preferences:

1. Go to the **Tracking** preferences tab. {Misc > Preferences > Tracking}

🛅 Preferences	
General User Sounds Colors Tra	racking Fonts Keys Toolbar Forms
Screen Background Xx	Scheduling Information
	Truck Report Line
Tracking Information	Quantity Report Line Xxx
Clock Display	🗙 Full Display Header Line 🛛 🕺 📉
Message Header Line 🛛 📉 🗙	🗙 🛛 Full Display Grid Title Line 🛛 📉 📉
Order Header Line 🛛 📉 🗙	🗙 Grid Border Tags
Truck Status Header Line 🛛 🗙	🗙 Total Fleet Lines 🛛 🔀 🗙
Load Sequence Header Line 🛛 🗙	🗙 Plant Fleet Lines 🛛 🕺
Trucks Returning Header Line 🛛 🗙	🗙 Plant Truck Demand Graph 🛛 🕺
Plant Lines 🛛 📉 🗙	🗙 Plant Willcall Demand Graph 🛛 🕺
Trucks on Break 🛛 🗙	🗙 Total Truck Demand Graph 🛛 🕺
Trucks on Overtime 🗙	🗴 Total Willcall Demand Graph 🛛 🕺
Late Time Display	🗙 Special Display Graph 🛛 🕺 🕺
Willcall Order Display 🛛 🗙	🗴 Fleet Adjustment Graph
On-Hold Order Display	🗴 Preload Demand Graph

Preferences – Tracking Tab (SYSPREF5)

2. Select a **Screen Background** color to be used for the Tracking and Scheduling screens.

When you select an item, you are prompted to select both a foreground and background color.

- 3. Select **colors** for each item on the Tracking screen.
- 4. Select **colors** for each item on the Scheduling screen.
- 5. Proceed to the next tab, or accept this screen.

Font Preferences Setup

The **Font Preferences** tab allows the fonts (type styles) used in various portions of the system to be changed including the following.

- The font used in workspace areas of the system.
- The font used to display labels for buttons.

Note: For the previous two groups, be very careful when changing fonts, particularly font sizes. If a font is set too large, it will not display properly.

- The font used on Tracking and Scheduling screens. Only the CMDtracking fonts should be used.
- The font used to display reports on screen. The default, Lucida Console Regular, 7 point, will enable an etire report page to fir on the screen. But unless that screen is a 20-inch monitor, it's won't be very legible. Font sizes around 9 work well.
- Note: To reset font defaults, go to the Options menu from this screen, and select **Defaults**.
- To define font preferences:
- Go to the **Fonts** tab on the Preferences screen. {Misc > Preferences > Fonts}

🛅 Preferences			
General User Sounds Colors Workspace Font Label Font Field Font Button Font Message Line Font Tracking/Scheduling Font Edit Window Font	Tracking Fonts Keys Toolbar Forms Courier New,8,Regular MS Sans Serif,8,Regular MS Sans Serif,8,Regular MS Sans Serif,8,Regular MS Sans Serif,8,Regular CMDtracking 10 Point,8,Regular Lucida Console,7,Regular		
Large Button Font	Lucida Console,9,Regular MS Sans Serif,20,Bold		
Case Manipulation on Edit Fields Data Manipulation on Edit Fields	Uppercase on Short Fields Only Auto Select Text When Focusing Field		

Preferences – Fonts Tab (SYSPREF6)

- 2. Select each font detail button to define the user-specific font preferences.
- 3. From the **Case Manipulation on Edit Fields** drop-down list, select one of the following options: **Case Accepted as Entered**, **Uppercase on Short Fields Only, Uppercase All Fields**.
- 4. From the **Data Manipulation on Edit Fields** drop-down list, select one of the following: **Auto Select Text when Focusing Fields, Erase on First Input in Field**.

5. Proceed to the next tab, or accept the screen.

Note: To reset font defaults, go to the Options menu from this screen, and select **Defaults**.

Keys Preferences Setup

The Keys preferences function allows you to assign forms within the COMMANDseries applications to <Alt> or <Alt+Shift> function key combinations, so that the form runs by entering the assigned keystroke. This functionality exists even when you are in another form. Thus, the speed by which the desired form can be accessed is greatly increased.

To define key preferences:

Go to the Keys tab on the Preferences screen. {Misc > Preferences > Keys}

T Preferences	
General User Sounds Colors Tracking Fonts	Keys Toolbar Forms
Function EDTORDR Orders	Key Alt+F1 💽 🛃 🛋
	<u>v</u>
Press right-mouse button over "Function" field to display a	a menu of choices!

Preferences - Keys Tab (SYSPREF7)

- 2. Enter a system Function for which you want to assign a shortcut key. This field is used to enter the form name to be assigned to a keystroke. For example, the form name for the Orders screen is **EDTORDR**. The easiest way to accomplish the task is to right-click on the field to reveal the actual application menu options and select the desired function.
- 3. From the **Key** field's drop-down list, select the function key that displays the function.

Toolbar Preferences Setup

The Toolbar Preferences tab allows you to assign toolbar buttons to appear on the COMMANDseries toolbar. Each screen that is run automatically provides **screen specific action buttons** (i.e. accept, Clear, Exit, etc.). This screen allows you to determine other buttons that are always present on the toolbar, regardless of the form currently in use. The buttons that can be displayed fall into three groups.

- Screen and Field Edit Options (i.e. Add Occurrence, detail, Cut, etc.)
- Menu Options (i.e. Orders, Tickets, Customers, COMMANDinvoicing, etc.)
- Program Manager Options (i.e. MS Word, File Manager, MS-DOS, etc.)

To define toolbar preferences:

1. Go to the **Toolbar** preferences tab. {Misc > Preferences > Toolbar}

Preferences
General User Sounds Colors Tracking Fonts Keys Toolbar Forms Standard Options Edit Options Edit Options Edit Options Edit Options Edit Options Image: Clear Image: Clear<
Menu Options Image: EDTROST Truck Rostering Image: DBATRAC Tracking & Scheduling Press right-mouse button over "Form" field to display a menu of choices!
Program Manager Options Description Command Line Working Directory
Display Language List on Toolbar Display Help on Toolbar

Preferences – Toolbar Tab (SYSPREF8)

- 2. In the **Standard Options** section, mark the checkboxes of all standard options you want placed on the toolbar. The arrow buttons to the right of the checkboxes allow the order of the button options to be changed.
- 3. In the **Edit Options** section, mark the checkboxes of the editing options you want placed on the toolbar.
- 4. Enter a system **Menu Option** for which you want to assign a toolbar button. You can do this in two ways:
 - Right-click on the blank field. The COMMANDseries menu will appear in the context menu. Navigate to the screen you want to include on the menu.
 - Enter a specific form name.



Caution: Do not enter a sub-form in this field. (EDTORDR is the main Orders form. EDTORDR4 is the Scheduling screen, and, as the form name suggests, is a subform of the Orders screen). For a subform to work properly, it must be called from its parent form.

Program Manager Options--The next three fields allow you to create a toolbar button that will launch an external windows programn, such as Microsoft Word.

- 5. Enter the **Description** of an external application or program to which you wish to assign a toolbar button. This can be the description, as it would be entered if run from the Windows Program Manager.
- 6. Enter the **Command Line** of an external application or program to which you wish to assign a toolbar button. This can be the command line, as it would be entered if run from the Windows Program Manager.
- 7. Enter the **Working Directory** of an external application or program to which you wish to assign a toolbar button. This can be the working directory, as it would be entered if run from the Windows Program Manager.

Additional Toolbar Options

- 8. Mark the **Display Language List on Toolbar** checkbox, if desired, to display the language list on the toolbar.
- 9. Mark **Display Help on Toolbar** checkbox, if desired, to display the help options on the toolbar.
- 10. Accept this screen to confirm the changes.

COMMANDexecutive is a sales reporting module that can help you analyze how your business is performing. If you are licensed for COMMANDexecutive, you will need to enter two key components.

Topics in this section:

Sales Data Periods

Sales Data Configuration

Sales Data Periods

Sales Data Periods are user-defined periods that dictate time periods used as a grouping segment for information stored in the Data Warehouse tables. In addition, Sales Data Periods are used during the Compress Sales Data operation, creating one record for each period compressed. The Sales Data Periods setting is a one-time, initial setting that should not be changed following the implementation of COMMANDexecutive. Sales Data Periods are completely independent of A/R and G/L Accounting Periods.

The Sales Data Periods screen allows users to control the sales data posting routine. To post sales data to the data warehouse, the sales data period must be marked as open.

To set sales data periods:

1. Go to the Sales Data Periods screen. {Reporting > Sales Data Periods}

📱 Sales Data Perio	ods				_ 🗆 🗙
Accounting Year	2005				
Number of Periods	12 🛡				
Period Dates					
Start Date 01-Jan-2005 01-Feb-2005 01-Mar-2005 01-Apr-2005 01-Apr-2005 01-Jun-2005 01-Jun-2005	End Date 31.Jan-2005 28-Feb-2005 31.Mar-2005 30-Apr-2005 31-May-2005 30.Jun-2005	 Open Open Open Open Open Open Open 	Start Date Image: Display start Image: Display start	End Date 31-Jul-2005 31-Aug-2005 30-Sep-2005 31-Oct-2005 30-Nov-2005 31-Dec-2005	 Open Open Open Open Open Open Open

Sales Data Periods (EDTSLSP)

- 2. Enter the **Accounting Year** associated with the sales data periods you are defining.
- At this time you may select the **Defaults** button to set 12 periods with dates beginning on the first day and ending on the last day of each month, and accept the screen.
 -or-

Enter the **Number of Periods** (maximum of 13) you wish to create for the specified accounting year. Typically the number of periods is dictated by months of the year, quarters, or other standard accounting periods. However, remember that the Sales Data Periods settings are independent of any other COMMANDseries system accounting or GL period settings.

- 4. Enter a **Start Date** and **End Date** for each of the periods created by the Number of Periods value. To post sales data for a given period, ensure that the Open checkbox adjacent to the dates is marked. By default all newly created sales periods will be open.
- 5. Accept the screen to save the new sales data period information.

Sales Periods may be closed to prevent any additional sales from being posted to the period. Closing Sales Periods has no impact on A/R Accounting Periods. Similarly, closing A/R Accounting Periods, whether manually or by the Period End Processing routine in COMMANDreceivables, has no effect on any Sales Data Periods. Attempting to post sales data to a closed period will result in an error message.

To close sales data periods:

- 1. Go to the Sales Data Periods screen. {Reporting > Sales Data Periods}
- 2. Enter the **Accounting Year** associated with the sales data period(s) you wish to close.
- 3. Unmark the **Open** checkbox(s) next to the period(s) you wish to close.
- 4. Accept the screen to close the fields and exit the screen.

If necessary, closed periods may be re-opened by opening the Sales Data Periods screen, marking the checkbox associated with the sales period(s) you wish to open, and accepting the screen.

Sales Data Configuration

The Sales Data Configuration screen allows users to define the layout of the database tables used for COMMANDexecutive reports. When sales data is posted, the data is written to the data warehouse according to the field combinations specified in the sales data configuration. Reports then can be generated by these levels and separated into sections according to differences in the levels. Therefore, the sales data configuration dictates how Sales Reports, Gross Margin Reports and Contribution Reports may be designed.

When entering sales data configurations, it is helpful to understand the effect they have on a report. Sales data configurations determine the available settings to sort reporting data in the various report selections screens. The last entry in the configuration is the entry that the related report will generate. However, designing reports and their related sorting options operates from the top down, so multiple reports with varying levels of detail may be created from a single configuration.

For example, imagine a sales data configuration is set with the following levels: 1) Company Code, 2) Plant Code, 3) Customer Code, 4) Project Code, 5) Product Code. There are many different report options with this configuration, including a product sales listing sorted by company, plant, customer and project, or a project listing sorted by company, plant and customer.

Available Configuration Fields

Accounting Category Code	Customer Code
Delivery Address	Delivery Method Code
Delivery Type	Driver Employee Code
Hauler Code	Item Category
Item Code	Lien Location Code
Map Page	Pricing Company Code
Pricing Plant Code	Project Code
Quote Code	Reference Customer Code
Sales Analysis Code	Salesman Employee Code
Shipping Company Code	Shipping Customer Code
Shipping Plant Code	Truck Code
Truck Type	Usage Code
Zone Code	

Important Notes

- Remember: configuration settings allow reports with top-down sorting options. You cannot create a report from a configuration and skip a setting in the middle; a different configuration is required.
- Configurations may be added at any time, but all existing sales data must be re-summarized after changing the sales data configuration.
- All Sales Data Configuration entries for Contribution Reports must have Delivery Type as the first option.

To set the sales data configuration:

1. Go to the Sales Data Configuration screen. {Reporting > Sales Data Configuration}

Sales	Configuration	Data	(EDTSLSC)
00.00	00	2 0.00	(

🛅 Sa	es	Data Configuration
Code	1 2 3 4	Field Name Salesman employee code Customer code Project code Item code
2	1 2 3 4	Salesman employee code

- 2. Enter a unique **Code** for the configuration. For example, you may start with the number one (1) and increase by one.
- 3. From the drop-down **Field Name** list, select the first field variable you wish to use to sort and select a report. This list is limited to significant fields from order and ticket files.
- 4. Use the **Add** or **Insert Occurrence** button next to the Field Name list to add the next field variable.
- 5. Continue adding field variables (up to five) until all desired variables are present.
- 6. Use the **Add** or **Insert Occurrence** button at the bottom of the configuration list to define another configuration.
- 7. When finished entering configurations, accept the screen to save the Sales Data Configuration settings.

If you are licensed for COMMANDquote, there are some Quote-specific data that must be entered.

Topics in this section:

Job Types Job Source Codes Contacts Setting Up Quote Printing

Job Types

Job Types indicate the type of work to be performed in the prospective job. Job Types are user-defined; you can set them up in whatever manner will be the most useful for your company.

To enter job types:

1. Go to the Job Types screen. {Files > General Information > Job Types}

	·····	
🛅 Job Tyj		
Job Type	Description	Short
1	Strategic Account	SA 🛃 📥
2	Large U.S. Provider	LP-US 🛃
3	Dodge Report Reference	DODGE 🛃
4	Residential Jobs	RESIDEN"
5	Commercial Job	СОММ 🛃
6	General Contractor	GENERAL
7	Customer Referral	REFERRA

Job Types (E	DTJBTY)
--------------	---------

- Enter a Job Type code. The code can be one or two alphanumeric characters.
- 3. Enter a **Description** of the job type.
- 4. Enter a **Short** description. This abbreviation will be used on reports when there is not sufficient room to include the complete description.
- 5. Press the **Add Occurrence** button to enter another job type, or accept the screen.

Job Source Codes

Job Source Codes are used to indicate the initial resource for this job. A company can learn of a job from an internal employee such as a salesman, or

from an external source such as Dodge Reports[®]. Job source codes can be created or edited at any time, but ideally they are set up at the time of installation.

To enter a new job source code:

 Go to the Job Sources screen. {Files > General Information > Job Sources}

	Job Sources (EDIJBSC)	
📱 Job So	urces	
Source	Description	Short
DO	Dodge Reports	DODGE 🛃 📥
MK	Marketing	MARKET 🛃
RF	Referral	REFER 🚽
SL	Salesperson Lead	SALESLD 🛃

2. Enter a **Source** code to identify the job source.

. . .

- 3. Enter a **Description** of the job source.
- 4. Enter a **Short** description of the job source.
- 5. Click the **Insert Occurrence** button, if necessary, to add another job source.
- 6. Accept the screen to save the job sources.

Contacts

Contacts are people that are associated with a job or a quote in some fashion—they may be architects, contractors, owners, even bank loan managers. The primary reason to enter anyone in the system as a contact is because he or she may be able to provide that little bit of additional information that will allow you to make the most attractive bid possible.

Setting Up Contact Types

Contact Types are categories of contacts. Establishing Contact Type Codes allows you to save time during Contact entry by simply entering a contact code on the Contacts tab. Contact Types should be established at the time of installation.

To enter contact types:

 Go to the Contact Type Codes screen. {Files > Contact Information > Contact Types}

Note: Contacts and Contact Types are available through the Files > Contact Information menu. This menu is only available if you are in the COMMANDquote module.

Contact Type Codes (EDTCTTY)

📱 Cor	itact Type Codes		×
Code AD AR DT EN GC OW SC	Description Administrative Architect Department of Transportation Official Engineer General Contractor Owner Subcontractor	Short ADMIN ARCHIT DOT ENGIN GENCON OWNER SUBCON L	

The screen displays all contact types entered in your system. You can enter new codes or edit codes already in existence.

- 2. Enter a **Code** to represent the contact type.
- 3. Enter a **Description** for the contact type.
- 4. Click the **Add Occurrence** button, if necessary, to add another contact type.
- 5. Accept the screen to save the new contact type information.

Setting Up Contacts

Contacts can be entered at any time. Data entered in the Contact Information screen is available to you on the **Contacts** tab of the Jobs screen.

To enter a new contact:

Go to the Contact Information screen. {Files > Contact Information > Contacts}

🛅 Contact Inform	mation	_ 🗆 ×
Contact Code	1	
Customer Code		
Company Name	Lindhurst Engineering	
Name	Peter Napalm	
Address	1254 4th ave N	
City	Freewater	
State	KS Country	
Postal Code	32587	
Phone Number 1		
Phone Number 2		
Phone Number 3		
Phone Number 4		
E-mail Address	pnapalm@lindhurst.com	
Contact Type		

- 2. Enter a **Customer Code** to associate this contact with an existing customer.
- 3. Enter a **Contact Code** to identify the new contact. You can also use this screen to edit an existing contact code. To view a list of existing codes, click the detail button.
- 4. Enter information for the contact including Name, Address, City, State, Postal Code, Phone Number(s) and E-mail Address.
 - **Tip:** You may want to make a note in each phone number field as to what type of number it is: (205) 555-1212 F for a fax number, for example.
- 5. Enter a **Contact Type**, or detail on the field to display a list of available contact types.
- 6. Accept the screen to save the new contact information.

Setting Up Quote Printing

Quote Print allows you to print quote information into a Microsoft Word 2000/ 2003 document, allowing users the greater formatting flexibility of the word processor. Depending on your quoting practices, you can have one template document that you modify for each quote, or you can have a set of quote templates from which you can select.

There are a number of steps involved in configuring Quote Print to run on your system:

- Install the Microsoft Data Access libraries
- Modify the COMMANDseries assignment file
- Create/Modify a Microsoft Word document template
- Configure COMMANDquote

Installing Microsoft Data Access libraries

The Microsoft Data Access libraries enable Microsoft Word to access the Oracle database to extract the quote information. These files need to be installed on any workstation that will print quotes to Microsoft Word. The library installation file, MDAC_TYP.EXE, is typically located in the directory X:\CMDSERIES\UTILS, where X is the mapped drive to the COMMANDseries server. Simply double-click on the installation file to install the libraries.

Editing the Assignment File

The COMMANDseries assignment file CMDSERIE.ASN installs with the COMMANDseries application. It is usually located in the CMDSERIE\CLIENTS directory. This file controls the database locations and the paths for associated applications. It is necessary to edit the cmdserie.asn file for the quote print function to include the paths to Microsoft Word documents and templates, and also the path to the COMMANDseries application that allows the interface between Word and COMMANDquote.

To edit the CMDSERIE.ASN file:

1. Using Explorer, locate the CMDSERIE.ASN file in the CMDSERIE\CLIENTS directory.

Note: This directory path may be different if COMMANDseries was installed somewhere other than the default directory.

- 2. Double-click the file to open it for editing.
- 3. It may be necessary to associate the file with an application before editing it. If so, the **Open With** program selection dialog box automatically appears. Select **Notepad** to view the CMDSERIE.ASN file.
- 4. Enter *.dot= and the path for Microsoft Word templates. COMMANDseries will automatically create a \DOC folder in the COMMANDseries root directory, and will create a number of sample quote templates there. Example:

*.dot=x:\cmdserie\doc

5. Enter *.exe= and the path for the CADocPrint executable application. Example:

*.exe=x:\cmdserie\bin



WARNING: As is the case for all .ASN file entries, be certain that all spelling is correct.

- **Note**: These settings can also be entered through the Assignment File Wizard, which can be invoked from the COMMANDseries Program menu.
- 6. Save and close the assignment file.

Creating Document Templates

The Word Quote templates are standard Microsoft Word templates that contain special formatting to control the placement of database fields and tables. The SAMPLEQUOTEALL.DOT file contains all the fields and tables available for placement in a word quote template. You can copy and paste from this template to your own template to create a customized quote template. This template may contain company logos, headers and footers.

There are three parts to formatting a document template:

- General Document Layout
- Formatting for non Table-Related fields
- Formatting for Table-Related fields

General Document Layout

Quote layouts are set up according to the standard procedures for Microsoft Word. Adjust margins, select fonts, insert company logos—anything you want to do to give your quote a more professional appearance. For specific formatting instructions, consult your Microsoft Word manual.
Formatting for Non-table Related Fields

The Quote Print function operates by the use of the Search and Replace function. Once the template is loaded and the database accessed, each field variable listed in the template is replaced with its corresponding value from the database. Each field in the database is noted in the template by the format: ~TBLE_field_name~

- TBLE is the quote system database table that contains the field
- field_name is field in the database table.
- Tildes (~) are placed at each end to ensure that only the field variables get replaced.

Note: There are zero spaces within the field layout.

Ex: ~YMCH Min Loads~

For a list of all available table/field combination see the SAMPLEQUOTEALL.DOT template. The font type or size you assign to the field format will use for the information in that field.

Formatting Minimum Load, Cartage Zone, and Cartage Range Table

Bringing data in from the various COMMANDseries tables requires special formatting considerations. Remember these rules:

- 1. Each table requires a minimum of 2 rows.
- 2. The first row contains the name of the table in the first column.

Sample Min Load table format with generic column headers:

```
~MinLoadTable~
~YMCH Load Size~~YMCH Price~
```

Because no column headers have been supplied, Quote Print will automatically insert column headers based on the table field descriptions.

Sample Min Load table format with custom column headers:

```
~MinLoadTable~
Load SizePrice
~YMCH Load Size~~YMCH Price~
```

Row 1, Column 1 contains the table name. This row will be deleted during the population of the template. This is required to populate the table.

If there are only 2 rows in the table then the table will be populated with column headers before the data is inserted into the table. See above sample.

Setup/Troubleshooting Tips

General

• If you encounter problems running QuotePrint after updating MDAC, you may need to re-register Microsoft Word. From a dos window, type the following:

```
C:\WINNT\REGTLIB.EXE "C:\Program Files\Microsoft
Office\Office\MSWORD9.OLB"
```

The above path is for Microsoft Word 2000. The path and number on the MSWORD#.OLB may be slightly different for more recent versions.

SQL Server Setup

- REGTOOL5.DLL needs to be among Command Series DLLs and needs to be registered on the client workstation. To register, run the following commands from the start/run menu option on the client workstation: regsvr32 regtool5.dll
- The DSN used for Command Series needs to be a system DSN.
- Windows NT/ Windows 2000/Windows XP users need to have privilege to read registry. To verify if the user has the Read access to the Registry Run regedt32 and choose the Security option.

SQL Server Troubleshooting

- "ActiveX component can't create object" error when printing a quote. A reason for the error is missing or unregistered regtool5.dll. A resolution is to add/register regtool5.dll.
- "Table or view does not exist " error.

A reason for the error is a missing Quote print view. Run the Create Views option of the Database Updates and check the message frame for dberror() after "create view" statements associated with the Quote Print views.

The Quote Print views are as follows:

YQHD, YQPR, YCRG, YCTR, YCZN, YMCH, YQPC, YUCH.

An additional view in CmdSeries Plus is YQPP.

• "Invalid object name..." error.

A reason for the error is that the view specified in the error message does not exist. Run the Create Views option of the Database Updates and check the message frame for dberror() after the "create view" statement associated with the view.

You can run this statement using SQL + as well. The "create view" scripts are saved as MSG_Q.... messages in the Uniface application. MSG_QORA0.. are for the Oracle scripts, MSG_QMSS0.. - for the MSS SQL.

• Certain quotes don't show some information in the Quote document.

A reason is missing records in the view. Make sure that the tables referenced in the "create view..." script have information needed to populate the view.

Example:

create or replace view yqpc as select

qprd.quote_code, qprd.rev_num, qprd.unique_line_num, gprd.item code, gprd.prod descr item description, decode(qprd.price_plant_code,'#','Any', qprd.price_plant_code) plant, to char(gprd.matl price, \$999.99) item price, to_char(qprd.price, '\$999.99') delivered_price, qprd.est_qty, uoms.short_descr uom_desc, qpct.truck_type, to_char(qpct.chrg_cart_rate,'\$999.99') Cartage_Rate from qprd, qpct, uoms where (qprd.quote_code = qpct.quote_code(+) and gprd.rev num = gpct.rev num and gprd.unique line num = gpct.unique line num and qprd.order_qty_uom = uoms.uom(+))

If QPCT or UOMS that satisfy the where clause are missing, the occurrence of YQPC for the quote_code.qprd will not be created.

• "Method '~' " error.

A reason for the error is a mistake in the Quote Print template. Make sure that all tables in the template have "~" around their names and fields have the following structure: ~viewname_fieldname~.

Setting Up the System Quick Reference

Note: There may be slight variances in page numbers.

Concrete Invoicing Licensing Licensing	Invoicing Licensing		Receivables Licensing	Inventory Licensing	Executive Licensing	Aggregate Licensing	Cartage Licensing
Jsers Users	Users		Users	Users	Users	Users	Users
Printers Printers Currency Currency	Printers Currency		Printers Currency	Printers Currency	Printers Currency	Printers Currency	Printers Currency
Set Company Set Company Code Length Code Length	Set Company Code Length		Set Company Code Length	Set Company Code Length		Set Company Code Length	
Companies Companies	Companies		Companies	Companies		Companies	Companie
Employees Employees	Employees		Employees	Employees		Employees	Employees
Reason codes Reason codes	Reason codes		Reason codes	Reason codes		Reason codes	Reason code
Modem codes Modem codes rarely used) (rarely used)	Modem codes (rarely used)		Modem codes (rarely used)	Modem codes (rarely used)		Modem codes (rarely used)	Modem code (rarely used)
Signaling units						Signaling units	
						Auto-ticketing units	
						Scale types	
Vext numbers Next numbers	Next numbers		Next numbers			Next numbers	Next number
Document Document Tags	Document Tags		Document Tags	Document Tags		Document Tags	Document Ta
Jocument Document ormats formats	Document formats		Document formats	Document formats		Document formats	
Document forma groups	Document forma groups	t	Document format groups				
Message Text Message Text	Message Text		Message Text			Message Text	

Cartage						s Tax authoritie	Tax authority/	locations	Tax codes	Configuration		Plants		Haulers	Truck types	Trucks	Trailers		es			
Aggregate						Tax authoritie	Тах	authority/ locations	Tax codes	Configuration	Locations	Plants	Map Pages	Haulers	Truck types	Trucks	Trailers	Delivery methods	Condition Cod	Task Codes	Pouring Methods	
Executive										Configuration												
Inventory	Inventory accounting periods									Configuration	Locations	Plants		Haulers	Truck types	Trucks						
Receivables		A/R accounting periods	G/L accounting periods	Bank codes	Adjustment codes	Tax authorities	Тах	authority/ locations	Tax codes	Configuration	Locations	Plants										
Invoicing		A/R accounting periods				Tax authorities	Tax	authority/ locations	Tax codes	Configuration	Locations	Plants		Haulers	Truck types	Trucks	Trailers	Delivery methods				Driver Overtime
Concrete						Tax authorities	Tax authority/	locations	Tax codes	Configuration	Locations	Plants	Map Pages	Haulers	Truck types	Trucks	Trailers		Condition Codes	Task Codes	Pouring Methods	Driver
#d	108	109	110	111	112	113	114		117	127	158	159	104	172	173	174	178	181	194	193	182	196

#d	Concrete	Invoicing	Receivables	Inventory	Executive	Aggregate	Cartage
183						Job Cost Phases	
183						Job Cost Jobs	
77						Auto-ticketing units	
186	Map page time periods	Map page time periods	Map page time periods			Map page time periods	Map page time periods
187	Map pages	Map pages	Map pages			Map pages	Map pages
65	Employees (revisit to set	Employees (revisit to set up	Employees (revisit to set up	Employees (revisit to set up		Employees (revisit to set	Employees (revisit to set
	up defaults for	defaults for	defaults for	defaults for		up defaults for	up defaults for
	plant, truck, driver OT)	plant, truck, driver OT)	plant, truck, driver OT)	plant, truck, driver OT)		plant and truck)	plant and truck)
199	Price categories	Price categories	Price categories	Price categories		Price categories	Price categories
200	Usage codes	Usage codes	Usage codes	Usage codes		Usage codes	Usage codes
205	Item categories	Item categories	Item categories	Item categories		Item categories	Item categories
209	Items	Items	Items	Items		Items	Items
227	Minimum load charges	Minimum load charges	Minimum load charges			Minimum load charges	
228	Seasonal charges	Seasonal charges	Seasonal charges			Seasonal charges	
229	Unloading charges	Unloading charges	Unloading charges			Unloading charges	
231	Sundry Charges	Sundry Charges					
234				Vendors			
236				Freight methods			
185	Zones	Zones	Zones	Zones		Zones	Zones
84	Plants (revisit to place default zone)	Plants (revisit to place default zone)	Plants (revisit to place default zone)	Plants (revisit to place default zone)		Plants (revisit to place default zone)	Plants (revisit to place default zone)

#d	Concrete	Invoicing	Receivables	Inventory	Executive	Aggregate	Cartage
238			Cartage Accounting Periods				
239		Cartage rate codes	Cartage rate codes			Cartage rate codes	Cartage rate codes
251		Cartage surcharge codes	Cartage surcharge codes			Cartage surcharge codes	Cartage surcharge code
253		Quoted cartage rates	Quoted cartage rates			Quoted cartage rates	Quoted cartage rates
120	Credit codes	Credit codes	Credit codes			Credit codes	
120	Terms codes	Terms codes	Terms codes			Terms codes	
124	Accounting categories	Accounting categories	Accounting categories			Accounting categories	
258	Sales analysis codes	Sales analysis codes				Sales analysis codes	
300		Source codes	Source codes	Source codes			
258	Customers	Customers	Customers			Customers	Customers
274	Projects	Projects	Projects			Projects	Projects
298		Account types	Account types	Account types			
301		Cost centers	Cost centers	Cost centers			
302		Account codes	Account codes	Account codes			
304		G/L booking codes	G/L booking codes	G/L booking codes			
254							Hauler/truck information
255							Deduction codes
256							Quoted deductions
316					Sales data periods		

Cartage		
Aggregate		
Executive	Sales data configuration	
Inventory		
Receivables		
invoicing		
Concrete I		
#d	317	

Appendix B: Field Level Security

Field-Level Security Worksheet

The following list indicates which screens allow you to set field-level security. You can make copies of this section and use the worksheet to record your site access policies for the different screens.

Topics in this section:

Processing Forms (DBA)

Edit Forms (EDT)

Find or Lookup Forms (FND)

Selection Forms (SEL)

System Forms (SYS)

Note: The appearance of "N/A" in the **Configuration** column (or there is no Configuration column in the table) indicates screens that do not permit field-level security configuration.

Processing Forms (DBA)

Purge, Post, Data Out/In

Form Name	Screen Name	Configuration
DBAAUDT	Audit Purge	N/A
DBACNOT	Purge Customer Notes	N/A
DBACRPS	Post Transactions	N/A
DBACTPD	Update Period Deductions	N/A
DBACTTK	Update Cartage Tickets	N/A
DBAEXOR	Export Orders and Tickets	N/A
DBAEXPR	Export Data	
DBAFCHG	Calculate Finance Charges	N/A
DBAIMOR	Import Orders and Tickets	N/A
DBAIMPR	Import Data	
DBAINIT	Initialize/Analyze Files	
DBAJBQU	Purge Closed Jobs & Quotes	N/A
DBALNLI	Lien Legacy Invoice Manager	N/A
DBALNSU	Lien Location Substitution	N/A
DBALNUP	Lien Locations Update	N/A
DBALOCK	Database Locks	N/A
DBAORDR	Purge Expired Orders and Tickets	N/A

Form Name	Screen Name	Configuration
DBAPDWN	Mix Design Interface	N/A
DBAPROJ	Purge Expired Projects	N/A
DBAQUEF	Queue Entries	N/A
DBAQUOT	Quote	N/A
DBAREAL	Realign Accounts & Cost Centers	N/A
DBARSSD	Resummarize Sales Data	N/A
DBASIGM	Signaling Operations	N/A
DBASLSF	Sales Forecast Display	N/A
DBASLSP	Compress Sales Data	N/A
DBASLSS	Post Sales Data	N/A
DBASQLW	Database SQL Worksheet	N/A
DBASSPQ	Database Stored Procedure Interface	N/A
DBATSOP	Tracking & Scheduling Operations	N/A
- DBATSOPA	Change Truck Status Tab	
- DBATSOPB	Change Truck Info Tab	
- DBATSOPC	Change Order Status Tab	
- DBATSOPD	Change Plant Info Tab	
- DBATSOPE	Punch In/Out Truck Tab	
- DBATSOPF	Punch In/Out Driver Tab	
- DBATSOPG	Reset Trucks Tab	N/A
- DBATSOPH	Display Trucks Tab	N/A
- DBATSOPI	Display Loads Tab	N/A
- DBATSOPJ	Display Trip Profile Tab	
- DBATSOPK	Change Task Tab	N/A
- DBATSOPL	Driver Overtime Tab	N/A
DBAUFLD	Data Maintenance	N/A
DBAVOUT	G/L Distribution Data Out	N/A

Edit Forms (EDT)

Master file editors, order, or transaction entry.

Form Name	Screen Name	Configuration
EDTACAT	Accounting Categories	
EDTACCT	Accounts Codes	
EDTACTY	Account Types	
EDTADIO	Automated Data In/Out	
EDTADJC	Cost Adjustments	
EDTADJH	Adjustments Batch Information	N/A
- EDTADJH1	Adjustment Transactions Detail	N/A

Form Name	Screen Name	Configuration
- EDTADJH2	Invoice and Tax Adjustments	N/A
- EDTADJH3	Open Adjustments	N/A
EDTADJQ	Quantity Adjustments	N/A
EDTAJCD	Adjustment Codes	
EDTARPD	A/R Accounting Period	
EDTARTB	Customer Invoice	N/A
EDTASNH	Assignment Batch Information	N/A
- EDTASNH1	Assignment Transactions Detail	N/A
EDTATKD	Dispatch Truck	N/A
EDTATKF	Full Scale Ticketing	
- EDTATKFB	Truck & Trailer Information	
EDTATKO	Overhead Load Out	N/A
- EDTATKO1	Other Information	N/A
EDTATKS	Aggregate Ticketing	
- EDTATKS1	Other Information	N/A
EDTAUDT	Audit Records	
EDTAUPR	Audit Profile	
EDTAUTK	Auto-Ticketing Units	
EDTBEGI	Beginning Inventory	
EDTBKCD	Bank Codes	
EDTBWDH	Balance Forward Batch Information	N/A
- EDTBWDH1	Balance Forward Transactions Detail	N/A
EDTCCEA	Enter Cartage Values	N/A
EDTCNFX	Configuration	
- EDTCNFXA	System Configuration	
- EDTCNFXB	Defaults Configuration	
- EDTCNFXC	Customer Defaults Configuration	N/A
- EDTCNFXD	Distribution Configuration	
- EDTCNFXE	Dispatch Configuration	
- EDTCNFXF	Aggregate Configuration	
- EDTCNFXG	Invoicing Configuration	
- EDTCNFXH	Inventory Configuration	
- EDTCNFXI	Receivables Configuration	
- EDTCNFXJ	Aging Configuration	
- EDTCNFXK	Statements Configuration	
- EDTCNFXL	Financials Configuration	
- EDTCNFXM	Project / Quotes Configuration	
- EDTCNFXN	Lien Configuration	N/A
- EDTCNFXO	User-Defined Fields Configuration	
- EDTCNFXP	Koller Tax Breakout	N/A
- EDTCNFX1	Order Audit Log Fields Configuration	N/A

Form Name	Screen Name	Configuration
- EDTCNFX2	Batch Code Encryption Equation	N/A
- EDTCNFX3	Customer Sales Defaults	N/A
- EDTCNFX4	Customer Taxing Defaults	N/A
- EDTCNFX5	Customer Pricing Defaults	
- EDTCNFX6	Customer Charges Defaults	N/A
- EDTCNFX7	Customer Accounting Defaults	N/A
- EDTCNFX8	Customer Invoicing Defaults	N/A
- EDTCNFX9	Customer Distribution Defaults	N/A
- EDTCNFZA	Lien General Configuration	
- EDTCNFZB	Lien Notices Configuration	
- EDTCNFZC	Lien Releases Configuration	
- EDTCNFZD	Lien Events Configuration	
- EDTCNFZE	Lien Locations Configuration	
- EDTCNFZF	Lien Owners Configuration	
- EDTCNFZG	Lien Lenders Configuration	
- EDTCNFZH	Lien Contractors Configuration	
- EDTCNFZI	Lien Trusts Configuration	
- EDTCNFZJ	Lien Locations Configuration	
- EDTCNFZK	Lien Prelien Rules Configuration	
- EDTCNFZL	Lien Rules Configuration	
EDTCNOT	Addition/Selection of Notes	N/A
- EDTCNOT1	Customer Notes	N/A
- EDTCNOT2	Apply Projects	N/A
- EDTCNOT3	Customer Notes	N/A
EDTCOMP	Companies	
- EDTCOMP1	Company Cost Centers Tab	
- EDTCOMP2	Company Finance Charges Tab	
EDTCONV	Item Conversions	
EDTCOST	Cost Centers	
EDTCRED	Credit Codes	
EDTCRIN	Customer Inquiry Display	N/A
- EDTCRIN0	Transaction Balances	N/A
- EDTCRIN1	Customer Balances	N/A
- EDTCRIN2	Transaction Balances	N/A
- EDTCRIN3	Transaction Details	N/A
- EDTCRIN4	Payment Details	N/A
- EDTCRIN5	Ticket Details	N/A
- EDTCRIN6	Ticket Summary	N/A
- EDTCRIN7	Product Details	N/A
- EDTCRIN8	Customer Credit History Display	N/A
- EDTCRIN9	Customer Credit Aging	N/A

Form Name	Screen Name	Configuration
EDTCTCT	Contact Information	
EDTCTDE	Cartage Deduction Codes	
EDTCTDT	Cartage Hauler (Quoted) Deductions	
EDTCTHT	Cartage Hauler / Truck Information	
EDTCTJB	Quoted Cartage Pay	
- EDTCTJB1	Products Cartage Information	
- EDTCTJB2	Categories Cartage Information	
- EDTCTJB3	Truck Type Cartage Informatio	
EDTCTKF	Concrete Tickets	
- EDTCTKF1	Other Ticket Information	
- EDTCTKF2	Ticket Time Information	
- EDTCTKF3	Ticket Line Associated Products	
- EDTCTKF9	Dumped / Reused Concrete	N/A
- EDTCTKFA	Remove Reason Code	N/A
- EDTCTKFB	Test Ticket Print	N/A
- EDTCTKFC	Next Ticket Code	N/A
- EDTCTKFD	Loads	N/A
- EDTCTKFE	Retrieve Ticket	N/A
- EDTCTKFF	External File Lookups	N/A
- EDTCTKFG	Lot Numbers	N/A
EDTCTPD	Cartage Period Deduction	N/A
EDTCTPQ	Cartage Accounting Period	
EDTCTRT	Cartage Rate Table (Codes)	N/A
- EDTCTRT1	Main Tab	
- EDTCTRT2	Range Tab	
- EDTCTRT3	Plant/Zone Tab	
- EDTCTRT4	User-Defined Fields Tab	
EDTCTSG	Cartage Surcharge Codes	
- EDTCTSG1	Automatic Surcharges - By Product	N/A
EDTCTTK	Cartage Ticket Edit	N/A
- EDTCTTK1	Cartage Surcharges	N/A
EDTCTTY	Contact Type Codes	
EDTCUHS	Customer History	N/A
EDTCURR	Currency	
EDTCUST	Customers	
- EDTCUST1	Product Pricing Information	
- EDTCUST2	Product Ready-Mix Information	
- EDTCUST3	Associated Products Information	
- EDTCUST4	Product Description Information	
- EDTCUST5	Sundry Charge Pricing	
- EDTCUST6	UOM / Quantity Extensions	

Form Name	Screen Name	Configuration
- EDTCUSTA	Main Tab	
- EDTCUSTB	Addresses Tab	
- EDTCUSTC	Sales Tab	
- EDTCUSTD	Taxing Tab	
- EDTCUSTE	Pricing Tab	
- EDTCUSTF	Charges Tab	
- EDTCUSTG	Accounting Tab	
- EDTCUSTH	Invoicing Tab	
- EDTCUSTI	Distribution Tab	
- EDTCUSTK	Ready-Mix Tab	
- EDTCUSTL	Ready-Mix Tab	
- EDTCUSTM	Aggregate Tab	
EDTDLMT	Delivery Methods	
EDTDOCG	Document Format Groups	
- EDTDOCG1	Invoice Format Codes	
- EDTDOCG2	Statement Format Codes	
- EDTDOCG3	Project Quote Format Codes	
- EDTDOCG4	Receipt Format Codes	
- EDTDOCG5	Invoice Out Format Codes	
- EDTDOCG6	Ticket Overflow Format Codes	
EDTDOCS	Document Formats	
- EDTDOCS1	Document Format Fields	
- EDTDOCS2	Document Fields	
EDTDOCT	Document Tags	N/A
- EDTDOCT1	Document Field Tag Setup	N/A
- EDTDOCT2	Document Lookup Tag Setup	N/A
- EDTDOCT3	Document Calcualtion Tag Setup	N/A
- EDTDOCT4	Document Code List Tag Setup	N/A
EDTDROT	Driver Overtime	
EDTEMPL	Employees	
EDTETSK	Task Codes	
EDTFINH	Finance Charges Batch Information	N/A
- EDTFINH1	Finance Charge Transactions Detail	N/A
EDTFRMT	Freight Methods	
EDTGLCD	G/L Booking Codes	N/A
EDTGLPD	G/L Accounting Periods	
EDTHLER	Haulers	
EDTHLPV	Cartage/Plant Zone Information	
EDTICAT	Item Categories	
- EDTICAT1	UOM Tab	
- EDTICAT2	Concrete Mix Defaults	

Form Name	Screen Name	Configuration
- EDTICAT3	Aggregate Mix Defaults	
- EDTICAT4	Sales Tax Override Tab	
EDTIMST	Items	
- EDTIMST1	Main Information Tab	
- EDTIMST2	Units of Measure Tab	
- EDTIMST3	UOM Conversions Tab	
- EDTIMST4	Sales Information Tab	
- EDTIMST5	Sales Tax Override Tab	
- EDTIMST6	Concrete Mix Tab	
- EDTIMST7	Asphalt Mix Tab	
- EDTIMST8	User-Defined Fields Tab	
- EDTIMST9	Locations Tab	
- EDTIMSTA	Location Costs Tab	
- EDTIMSTB	Location Pricing Tab	
- EDTIMSTC	Location Inventory Tab	
- EDTIMSTD	Location Batching Tab	
- EDTIMSTE	Location Constituents Tab	
- EDTIMSTF	Location Batch Codes Tab	
- EDTIMSTG	Location Copy Tab	N/A
EDTISUB	Item Substitution	N/A
EDTIVPD	Inventory Accounting Periods	
EDTJBSC	Job Sources	
EDTJBTY	Job Types	
EDTJCJB	Job Cost Jobs/Phases	N/A
EDTJOBS	Jobs	
- EDTJOBS1	Main Tab	
- EDTJOBS2	Sales Information Tab	
- EDTJOBS3	Contacts Information Tab	
- EDTJOBS4	Action Information Tab	
- EDTJOBS5	Status Information Tab	
- EDTJOBS6	Products Information Tab	
- EDTJOBS7	Quotes Tab	N/A
EDTLCIN	Item Inquiries	N/A
- EDTLCIN1	Location	N/A
- EDTLCIN4	Serial Numbers On Hand	N/A
- EDTLCIN5	Lot Numbers On Hand	N/A
- EDTLCIN7	Item Inquiries	N/A
EDTLICN	Licenses	
- EDTLICNA	Concrete License Limits	
- EDTLICNB	Aggregate License Limits	
- EDTLICNC	Asphalt License Limits	

Form Name	Screen Name	Configuration
- EDTLICNE	Tracking License Limit	
- EDTLICNF	Scheduling License Limits	
- EDTLICNG	Pricing & Prep License Limits	
- EDTLICNH	Invoicing License Limits	
- EDTLICNI	Batch Console License Limits	
- EDTLICNJ	Signaling Unit License Limits	
- EDTLICNK	Flat Scale License Limits	
- EDTLICNL	Overhead Loadout License Limits	
- EDTLICNZ	Options	
- EDTLICN1	Temporary License Options	N/A
EDTLNCO	Lien Contractors	N/A
EDTLNHD	Lien Locations	N/A
- EDTLNHD1	Lien Dates	N/A
- EDTLNHD3	Notice Returns Receipts	N/A
- EDTLNHD4	Lien Addresses	N/A
- EDTLNHD5	Filed Lien Information	N/A
EDTLNLE	Lien Lenders	N/A
EDTLNOW	Lien Owners	N/A
EDTLNQH	Lien Queries	N/A
- EDTLNQH1	Lien Query Flags	N/A
- EDTLNQH2	Lien Query Dates	N/A
EDTLNTR	Lien Trusts	N/A
EDTLOCN	Locations	
EDTMAPP	Map Page Time Periods	
EDTMAPS	Map Pages	N/A
- EDTMAPS1	Map Page Travel Times	
- EDTMAPS2	Map Page Zones	N/A
- EDTMAPS3	Map Page Coordinates	
EDTMCHG	Minimum Load Charges	
EDTMDSN	Mix Design	N/A
EDTMODM	Modem Codes	
EDTMTMG	Material Manager	
EDTMTXT	Message Text	
EDTNEXT	Next Numbers	
EDTORDR	Orders	
- EDTORDR0	Customer-Project-Order Lookup	
- EDTORDR1	Order Haul Information	
- EDTORDR2	Order Pricing Information	
- EDTORDR3	Other Order Information	
- EDTORDR4	Order Line Schedule Information	
- EDTORDR5	Other Order Line Information	

Form Name	Screen Name	Configuration
- EDTORDR6	Order Line Associated Products	
- EDTORDR7	Order Line Cartage Charge Info.	
- EDTORDR8	Order Line Scheduled Loads	
- EDTORDR9	Associated Product Other Information	
- EDTORDRA	Product Description	
- EDTORDRB	Order COD Calculation	N/A
- EDTORDRC	Remove Order Reason Code	
- EDTORDRD	Scheduling Screen	
- EDTORDRE	Test Order Print	
- EDTORDRF	Suspend Order Reason Information	
- EDTORDRG	Standing File Order Lookup	N/A
- EDTORDRH	Order Truck Rostering	
- EDTORDRI	Order Sales Tax Distribution	N/A
- EDTORDRJ	UOM / Quantity Extensions	
- EDTORDRK	Order Audit Log Information	
- EDTORDRL	Order Audit Log History	
- EDTORDRN	Common Order Functions	N/A
- EDTORDRO	Sundry Charge Distribution	
- EDTORDRP	Order Line Mix Design	
- EDTORDRQ	Suggested Shipping Plants	N/A
- EDTORDRR	Lot Numbers	
- EDTORDRS	Associated Products Information	N/A
- EDTORDRU	Round Trip Trucks	
- EDTORDRV	Clear Round Trip Trucks	
- EDTORDRX	Order Payment Information	N/A
EDTPCHG	Sundry Charges	
EDTPHSE	Job Cost Phases	N/A
EDTPLNT	Plants	
- EDTPLNT1	Main Tab	
- EDTPLNT2	Communication Tab	
- EDTPLNT3	Batching Tab	
- EDTPLNT4	Scheduling Tab	
- EDTPLNT5	Costing Tab	
- EDTPLNT6	Scales Tab	
- EDTPLNT7	Batching Bins Tab	
- EDTPLNT8	Constituent Order Tab	
- EDTPLNT9	User-Defined Fields Tab	
- EDTPLNTA	Plant Communication Setup	
- EDTPLNTB	Check Plant License	N/A
- EDTPLNTC	Scale Communication Information	
- EDTPLNTD	Communication Port Setup	

Form Name	Screen Name	Configuration
- EDTPLNTE	Plant Scale Bins	
- EDTPLNTF	Plant Flags Tab	
EDTPLTV	Plant Unavailability	
EDTPMET	Pouring Methods	
EDTPMTH	Payment Method (Batch Information)	N/A
- EDTPMTH1	Payment Transactions Detail	N/A
- EDTPMTH2	Invoice Details	N/A
- EDTPMTH3	Open Payments	N/A
- EDTPMTH4	Find Duplicate Check Information	N/A
- EDTPMTH5	Find Duplicate Invoice Information	N/A
- EDTPMTH6	Invoice and Tax	N/A
- EDTPMTH7	Miscellaneous Payments	N/A
- EDTPMTH8	Payment Discount Information	N/A
- EDTPMTH9	Filter Options	N/A
- EDTPMTHA	Possible Tickets	N/A
- EDTPMTHB	Check/Credit Card Information	N/A
EDTPOHD	Purchase Order Information	
EDTPORC	Purchase Order Receipts	
EDTPRCC	Price Categories	
EDTPREP	Edit Orders & Tickets	
- EDTPREP1	Order Haul Information	
- EDTPREP2	Order Pricing Information	
- EDTPREP3	Other Order Information	
- EDTPREP4	Other Order Line Information	
- EDTPREP5	Order Line Associated Products	
- EDTPREP7	Edit Ticket Information	
- EDTPREP8	Edit Aggregate Ticket Information	
- EDTPREPA	Product Descriptions	
- EDTPREPB	Reason Code	
- EDTPREPC	Edit Ticket Times	
- EDTPREPD	Other Associated Product Information	
- EDTPREPE	Ticket Extra Products	
- EDTPREPF	Ticket Time Information	
- EDTPREPG	Other Ticket Information	
- EDTPREPH	Ticket Associated Products	
- EDTPREPI	Possible Products	N/A
- EDTPREPJ	Ticket Charges	
- EDTPREPK	Order Sales Tax Information	N/A
- EDTPREPL	Remove Order/Ticket Remove	N/A
- EDTPREPN	Other Lookups	N/A
- EDTPREPO	Suspend Product	

Form Name	Screen Name	Configuration
- EDTPREPP	Ticket Status	
- EDTPREPQ	Order Line Cartage Charge Info.	
- EDTPREPR	Product Cartage Charges	N/A
- EDTPREPS	Order Haul Charges	N/A
- EDTPREPT	UOM/Quantity Extensions	
- EDTPREPU	Order Credit/Debit Memo Information	
- EDTPREPV	Order Line Credit/Debit Information	
- EDTPREPZ	Edit Suspended Tickets	N/A
EDTPRJX	Edit Project Expiration Information	N/A
EDTPROJ	Projects	
- EDTPROJ1	Product Pricing Information	
- EDTPROJ2	Product Ready Mix Information	
- EDTPROJ3	Associated Products	
- EDTPROJ4	Product Description Information	
- EDTPROJ5	Sundry Charge Information	
- EDTPROJ6	UOM/Quantity Extensions	
- EDTPR OJ7	Product Cartage Information	
- EDTPR OJ8	Item Unit of Measure Information	N/A
- EDTPR OJ9	Taxing Details	N/A
- EDTPROJA	Main Tab	
- EDTPROJB	Addresses Tab	
- EDTPROJC	Sales Information Tab	
- EDTPROJD	Sales Schedule Information Tab	
- EDTPROJE	Taxing Information Tab	
- EDTPROJF	Pricing Tab	
- EDTPROJG	Charge Information Tab	
- EDTPROJH	Accounting Tab	
- EDTPROJI	Invoicing Tab	
- EDTPROJJ	Distribution Tab	
- EDTPROJK	User Field Tab	
- EDTPROJL	Plant Distances Tab	
- EDTPROJM	Ready-Mix Information Tab	
- EDTPROJO	Aggregate Products Information Tab	
EDTQUOT	Quotes	N/A
- EDTQUOT1	Address/Contact Information	N/A
- EDTQUOT2	Sales Information	N/A
- EDTQUOT3	Taxing Information	N/A
- EDTQUOT4	Pricing Information	N/A
- EDTQUOT5	Distribution Information	N/A
- EDTQUOT6	Products Information	N/A
- EDTQUOT7	Action Items Information	N/A

Form Name	Screen Name	Configuration
- EDTQUOT8	Status	N/A
- EDTQUOTB	Sales Schedule Information	N/A
- EDTQUOTC	Charges Information	N/A
- EDTQUOTD	Product Pricing	N/A
- EDTQUOTE	Product Description	N/A
- EDTQUOTF	UOM/Quantities Extensions	N/A
- EDTQUOTG	Accepted Quote Update	N/A
- EDTQUOTH	Quote Copy	N/A
- EDTQUOTI	Print Option	N/A
- EDTQUOTK	Quotes Taxing Details	N/A
EDTQUTK	Batch Interface Queued Tickets	N/A
EDTRCPC	Receipts / Cost Updates	
EDTRCPT	Raw Material Receipts	
EDTRELN	Release Notes	N/A
EDTREPL	Replication Servers	
EDTREPR	Reprint Tickets	N/A
EDTROST	Truck Rostering	N/A
EDTRSNC	Reason Codes	
EDTSANL	Sales Analysis Codes	
EDTSCHD	Schedule Standing Orders	
EDTSCHG	Seasonal Charges	
EDTSCTY	Scale Types	
EDTSIGU	Signaling Units	
- EDTSIGU1	Options Tab	
- EDTSIGU2	Incoming Tab	
- EDTSIGU3	Outgoing Tab	
- EDTSIGU4	Statuses Tab	
EDTSLSC	Sales Data Configuration	
EDTSLSH	Sales Batch Information	N/A
- EDTSLSH1	Sales Transactions Detail	N/A
- EDTSLSH2	Sales Transactions Misc. Information	N/A
- EDTSLSH3	Sales Transactions Terms Information	N/A
EDTSLSP	Sales Data Periods	
EDTSORD	Simplified Orders	
EDTSRCD	Source Codes	
EDTTAXA	Tax Authorities	
- EDTTAXC	Tax Codes	
- EDTTAXL	Tax Authorities / Locations	
EDTTCND	Condition Codes	N/A
EDTTEXT	Language Text	N/A
EDTTMGR	Time & Task Manager	N/A

Form Name	Screen Name	Configuration
- EDTTMGRA	Ticket Times Tab	N/A
- EDTTMGRB	Truck Times Tab	N/A
- EDTTMGRC	Driver Times Tab	N/A
EDTTRFS	Transfers	
EDTTRKV	Truck Unavailability	
EDTTRLR	Trailers	
- EDTTRLR1	Trailer Hauler Information	
- EDTTRLR2	Trailer Scheduling Information	
- EDTTRLR3	Trailer Tare Information	
EDTTRMS	Terms Codes	
EDTTRUC	Trucks	
- EDTTRUC1	Main Tab	
- EDTTRUC2	Scheduling Tab	
- EDTTRUC3	Tracking Tab	
- EDTTRUC4	User-Defined Fields Tab	
- EDTTRUC5	Truck Unavailable Tab	
- EDTTRUC6	Truck Optimizer Tab	
EDTTSHD	Tracking & Scheduling Setup	N/A
- EDTTSHD1	Tracking Setup	N/A
- EDTTSHD2	Scheduling Setup	N/A
- EDTTSHD3	Rostering Setup	N/A
- EDTTSHDA	Plant Setup	N/A
- EDTTSHDB	Truck Type Setup	N/A
- EDTTSHDC	Product Line Setup	N/A
EDTTTYP	Truck Types	
EDTUCHG	Unloading Charges	
EDTUFIL	Files Listing	N/A
EDTUFLD	Fields Function	N/A
EDTUOMS	Standard Units of Measure	
- EDTUOMS1	Unit of Measure Options	
- EDTUOMS2	Unit of Measure Conversions	
EDTUPRT	Print Models	
EDTUSAG	Usages	
EDTUSGE	Usage Codes	
EDTUSNM	User Names	
- EDTUSNM1	Preferences Tab	
- EDTUSNM2	Licenses Tab	
- EDTUSNM3	Privileges Tab	
- EDTUSNM4	Cost Centers Tab	
- EDTUSNM5	Order Printers Tab	
- EDTUSNM6	Options Tab	

Form Name	Screen Name	Configuration
- EDTUSNM7	Plants Tab	N/A
- EDTUSNM8	GIM Manager Tab	N/A
- EDTUSNMA	User Privilege Field List	N/A
- EDTUSNMB	User Order Printer Setup	N/A
- EDTUSNMC	User Confirm	N/A
- EDTUSNMD	Communications Port Setup	N/A
EDTVDPH	Void Payments Batch Information	N/A
- EDTVDPH1	Void Payment Transactions Detail	N/A
EDTVNDR	Vendors	
EDTVNTY	Vendor Types	
EDTZONE	Zones	N/A

Find or Lookup Forms (FND)

Form Name	Screen Name
FNDBPRC	Bid Price Calculator
- FNDBPRC1	Calculator Tab
- FNDBPRC2	Material Costs Tab
- FNDBPRC3	Overhead Costs Tab
- FNDBPRC4	Delivery Costs Tab
FNDDATE	Calendar
FNDLNCO	Lien Contractors
FNDLNHD	Lien Header (Location Manager)
FNDLNLE	Lien Lender Manager
FNDLNLG	Lien Event Log
FNDLNOW	Lien Owner Manager
FNDLNQH	Lien Query Header (Manager)
FNDLNTR	Lien Trusts Manager
FNDOTRE	Order Tree
FNDVOLM	Volume Calculator
- FNDVOLM1	Columns
- FNDVOLM2	Slabs, Footing, Walls
- FNDVOLM3	Steps on a Level Grade
- FNDVOLM4	Integral Footings
- FNDVOLM5	Stairs
- FNDVOLMA	Calculator UOM

Selection Forms (SEL)

Form Name	Screen Name
SELADJW	Adjustment Recap Report
SELARIN	A/R Invoices
SELATBR	Aged Trial Balance Report
SELAUDT	Audit Report
SELBATC	Batch Code Generator
SELBATT	Batch Totals Report
SELBCMP	Batching Comparison
SELCCST	Calculate Cost
SELCNOT	Customer Notes
SELCONT	Contribution Report
SELCRCH	Credit Status Change Report
SELCRGL	Create G/L Entries
SELCRIN	Customer Inquiry Report
SELCRLM	Credit Limit Report
SELCRPC	Period End Processing
SELCRPT	Purge Transactions
SELCRSI	Creating Orders for Separate Invoices
SELCSTU	Cost Update Registers
SELCTAJ	Deduction Report
SELCUHS	Credit History Report
SELDPTR	Deposit Register
SELDRVC	Driver Call Out Report
SELDSPS	Dispatch Sheet Report
SELEXCP	Exception Reports Selection
SELFNCH	Finance Charge Trial Balance
SELFOUT	Master File Data Out
SELGLDS	G/L Distribution Report
SELGRSM	Gross Margin Report
SELHREV	Hauler Revenue Report
SELHSET	Hauler Settlement Sheet
SELIGLD	Inventory G/L Distribution
SELINVC	Invoice Print
SELINVF	Final Invoice Register
SELINVP	Preliminary Invoice Register
SELIOUT	Invoice Data Out
SELIVBL	Inventory Balance Report
SELIVCF	Update COMMANDfinancials
SELIVPS	Post Inventory Transactions

Form Name	Screen Name
SELIVPT	Purge Inventory Transactions
SELIVTR	Inventory Analysis Report
SELJOBS	Jobs Listing
SELLNCM	Certified Mail Report Selection
SELLNEV	Lien Event
- SELLNEV1	Lien Event Handler
SELLNRP	Lien Report
SELMATR	Raw Material Requirements Report
SELMFIN	Master File Data In
SELMIST	Missing Time Report
SELONTM	On Time Delivery Report
SELOOUT	Order Data Out
SELORDR	Concrete Order Report
SELOSCH	Order Schedule Report
SELOSNP	Order Snapshot Report
SELOTIN	Order and Ticket Data In
SELOVTM	Overtime Report
SELPCHG	Calculate Price Change (Sundry Charges)
- SELPCHG1	- for Specific Products
- SELPCHG2	- for Specific Product Categories
- SELPCHG3	- for Specific Product Types
SELPCOS	Percentage Outstanding Report
SELPCUP	Update Orders / Tickets with Cost
SELPLTL	Plant Loading Report
SELPLTP	Plant Production (Scales Bin / Product)
SELPORG	Purchase Order Register
SELPSLS	Product Sales Usage Report
SELQTPR	Quote Print
SELQUOT	Quote Listing
SELRCAP	Order Recap Report
SELRCTC	Receipts / Cost Updates
SELRECP	Receipts Print
SELROST	Truck Roster Report
SELSLBK	Quote Sales Backlog Report
SELSLSS	Sales Analysis Summary Report
- SELSLSS1	Summary by Data Range
SELSTMT	Statements
SELSTXD	Sales Tax Distribution
SELTICK	Ticket Report
SELTIMA	Time Analysis Report
SELTIME	Time Analysis Report (Executive)

Form Name	Screen Name
SELTOUT	Ticket Data Out
SELTRCP	Transactions Recap Report
SELTRKG	Truck Demand Graph
SELTRNI	Inventory Transaction Registers
SELTRNR	Receivables Transactions Registers
SELTROR	Transfer Orders Register
SELTRPT	Transactions Reports
SELUCHG	Calculating Unloading Charges
SELUSEX	Item Usage Exception Report
SELVERS	Database Updates
SELVOUT	Inventory Data Out

System Forms (SYS)

Form Name	Screen Name	Configuration
SYSFORM	Run Form	N/A
SYSMSGS	Message Display	N/A
SYSPREF	Preferences	N/A
- SYSPREF1	General Tab	
- SYSPREF2	User Tab	
- SYSPREF3	Sounds Tab	
- SYSPREF4	Colors Tab	
- SYSPREF5	Tracking Tab	
- SYSPREF6	Fonts Tab	
- SYSPREF7	Keys Tab	
- SYSPREF8	Toolbar Tab	
- SYSPREF9	Forms Tab	
- SYSPREFA	Confirm	N/A
SYSPRNT	Print Screen	N/A
SYSSVCC	Service Control	N/A
SYSTAIL	Tailor Screen	N/A
SYSTASK	Task List	N/A

Item Units of Measure Examples

The following screen captures are examples of how item units of measure can be set up and billed in your system. Please note that these are simply the most common examples and may vary according to your operation's needs.

Concrete Per Cubic Yard (US)

	Mix UC	OM (EDTIMST2)		
Description 4000 Item Category 🗾 🛛	0#,3/4 CONC (U)		Short Des	or 4000#,3/4
Main UOM Conversion	ns Sales Tax Override	Mix User Fields	Locations Costs	Prices Inventory
Ordered Quantity 40003 cu yds	Ordered Quantity Extension Per Unit	on Code		
Delivered Quantity 40003 cu yds	Ticket Quantity Extension Delivered Quantity	n Code		
Price Quantity 40003 cu yds	Price Quantity Extension Delivered Quantity	Code		
Batch 40003 cu yds	Inventory/Cost			Reporting 40003 cu yds

Mixes have a simple UOM configuration, because they are almost always measured in cubic yards or cubic meters. It is in constituents that you see variation.

Expansion Joint (Extra Product)

	Extra Product UOM	
Description Expa	ansion Joint 1/2'' x 10'	Short Descr 1/2" exp joint
Item Category 🗾 100		
Main UOM Conversion	ns Sales Tax Override User Fields Locatio	ns Costs Prices Inventory Batchin
Ordered Quantity	Ordered Quantity Extension Code Per Unit	
Delivered Quantity 80001 each	Ticket Quantity Extension Code Delivered Quantity	
Price Quantity S [80001] each	Price Quantity Extension Code Delivered Quantity	Ţ
Batch	Inventory/Cost Inventory/Cost each	Reporting S0001 each

Extra products such as expansion joints and gloves also generally have a straightforward UOM configuration, primarily because the amounts are not affected by the amount of primary product being purchased.

Cement

			Ceme	nt UOM (EE	DT)				
Description Item Category	Cem 6	ent, Type I Adm	Lbs) ix			Sh	ort Descr	Cement,	T I(Lbs)
Main UOM	Conversion	s Sales	Tax Override	User Fields	Locations	Costs	Prices	Inventory	Batchin_4
Ordered Quanti	ty US tons	Ordered Q Per Unit	uantity Extensio	n Code					
Delivered Quan	tity US tons	Ticket Qu Delivered	antity Extension Quantity	Code		Accumul	ate		
Price Quantity	US tons	Price Qua Delivered	ntity Extension (Quantity	Code					
Batch	pounds	Invento	ory/Cost 002 pounds	Pur	chase 60003	US tons	F	eporting	US tons

Cement is usually measured in tons (or tonnes) for all cases except batching. In this example, the cement is measured in pounds for Inventory/Cost, but that is not always the case.

Calcium

			Ad	dmix UOM					
Description Item Category	Calc E	ium Adm	iix			Sł	nort Desc	r Calcium	
Main UOM	Conversio	ns Sales	Tax Override	User Fields	Locations	Costs	Prices	Inventory	Batchin_4
Ordered Quan	tity Dosage	Ordered Q Per Weigh	luantity Extension at of Cementitiou	n Code Is Materials		100		efault Dosag 10.00	ge Quantity
Delivered Qua	ntity ounces	Ticket Qu Delivered	antity Extension Quantity Per Mix	Code Cubic Quan	tity 🗖	Accumu	late		
Price Quantity 90001	Dosage	Price Qua Mix Delive	ntity Extension (red Quantity	Code					
Batch	ounces	Invento	ory/Cost 001 ounces	Pu	chase 50004	gallons	F	eporting	Dosage

Admixtures generally have the most complicated UOM settings, because the amounts needed are dependent on the amount of mix ordered. The primary values for this example will be calculated as follows:

Note: These settings only take effect if the admix is ordered as an associated product. If the admixture is part of the mix design, then values will be calculated based on the information in the mix item file.

Ordered Quantity -- The Dosage setting allows you to better control the proportions of an admixture to a mix. In the above example, the defined dosage is ten ounces per hundredweight of cementitious materials. Entering a dosage prevents having to manually calculate the amount of admixture needed.

Delivered Quantity -- When the system prepares to send target ticket weights for a specific load, it will calculate the target amount as follows:

- 1. Get the per yard weight of cementitious materials (cement and flyash) in the mix design.
- 2. Multiply that amount by the load amount to get the total amount of cementitious materials in the load.
- 3. Divide that amount by 100 (the dosage is per 100-weight).
- 4. Multiply the result by ten ounces to get the target Ticket Quantity.

Water (gallons)

			Wate	er UOM Tab					
Description Item Category	₩a ▼ 7	ter (gal) Wat	er			Sł	iort Desci	Water	
Main UOI	1 Conversio	ns Sales	Tax Override	User Fields	Locations	Costs	Prices	Inventory	Batchin_4
Ordered Qua	antity gallons	Ordered Q Per Unit	uantity Extensio	n Code					
Delivered Qu 50004	uantity gallons	Ticket Qu Delivered	antity Extension Quantity	Code		Accumu	late		
Price Quanti	ty gallons	Price Qua	ntity Extension (Quantity	Code					
Batch	gallons	Invento	rry/Cost 004 gallons	Pur	chase 50004	gallons	F	eporting	gallons

If you also need to handle water by weight, you may need to set up a separate item, Water (lbs).

Fiber

	Fiber UOM	
Description Fibe Item Category 320	r Mesh - Bag Other Ad	Short Descr Fiber Mesh - Bag
Main UOM Conversion	ns Sales Tax Override User Fields Locations	Costs Prices Inventory Batchin
Ordered Quantity S0001 each	Ordered Quantity Extension Code Per Mix Cubic Quantity	
Delivered Quantity 20001 each	Ticket Quantity Extension Code Delivered Quantity	Accumulate
Price Quantity [80001] each	Price Quantity Extension Code Delivered Quantity	
Batch Batch each	Inventory/Cost Purchase	each 🚽 80001 each

Fiber can be set up in different ways. In this case, it has a UOM setting similar to an admixture. It can also be set up like an extra product, so that you could order it by the bag.

Following are some samples of GL booking code configurations for different AR activity. These samples are provided as reference samples only.

Topics in this section:

COMMANDinvoicing COMMANDreceivables

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COMMANDinventory GL Entries

COMMANDinvoicing

Charge Invoice, Debit Memo and Credit Memo

(Credit amounts reversed)

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the sale of each product shipped from each plant	Charge Sales	Plant	Prod Cat		5000.00
If taxable, to record the Sales Tax Payable	Sales Tax Payable	Company	Tax A/L		500.00
To record the total entry to accounts receivable	Accounts Receivable	Company	Company	5500.00	
To record the quantities of the Product Line main product	Charge Sales Quantities	Plant	Prod Cat	100.00	

Invoice	
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Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the sale of each product shipped from each plant	COD Sales	Plant	Prod Cat		5000.00
If taxable, to record the Sales Tax Payable	Sales Tax Payable	Company	Tax A/L		500.00
To record the total entry to accounts receivable	COD Offset	Company	Company	5500.00	
To record the quantities of the Product Line main product	COD Sales Quantities	Plant	Prod Cat	100.00	
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Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the receipt of cash deposited to a bank	Cash Received	Company	Bank	5500.00	
To record the reduction to Accounts Receivable	Accounts Receivable	Company	Company		5500.00
To record a discount taken	Discounts Taken	Company	Company	100.00	
To record the effect of the Discount on Accounts Receivable	Accounts Receivable	Company	Company		100.00
If a payment is received and deposited by Company A for a Company B invoice					
To record the receipt of cash deposited by Company A	Cash Received	Company A	Bank	10000.00	
To record the reduction in Company A's A/R	Accounts Receivable	Company A	Company A		8000.00
To record the reduction in Company B's A/R	Accounts Receivable	Company B	Company B		2000.00
To record an Intercompany A/P for Co A to Co B	Intercompany A/P	Company A	Company B		2000.00
To record an Intercomany A/R for Co B from Co A	Intercompany A/R	Company B	Company A	2000.00	

Void Payments

Reverse the entries made for the original payment.

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Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record a negative Invoice Adjustment to an invoice	AR Adjustments	Plant	Adj Code	100.00	
To record a negative Sales Tax Adjustment to an invoice	Sales Tax Payable	Company	Tax A/L	10.00	
To record the effect to Accounts Receivable	Accounts Receivable	Company	Company		110.00
To record a positive Invoice Adjustment to an invoice	AR Adjustments	Plant	Adj Code		100.00
To record a positive Sales Tax Adjustment to an invoice	Sales Tax Payable	Company	Tax A/L		10.00
To record the effect to Accounts Receivable	Accounts Receivable	Company	Company	110.00	

Assignments

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the assignment of a Co A negative balance to Co B	Accounts Receivable	Company A	Company A	100.00	
To record the assignment of a Co A negative balance to Co B	Accounts Receivable	Company B	Company B		100.00

Finance Charges

	GLBC Tuno Entru	Cost	Account/ Sub-	Debit	Credit
			מררטתוור	AIIIUUIL	
To record a finance charge	Finance Charges	Company	Company		100.00
To record the effect on Accounts Receivable	Accounts Receivable	Company	Company	100.00	

COMMANDinventory GL Entries

(Based on the Standard Cost Inventory Valuation Method)

Receipts Example:

Received 10 @10.00; standard cost 7.50

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the increase to inventory at Standard Cost	Inventory Raw Materials	Plant	Prod Cat	75.00	
To record the offset to the inventory transaction at Received Cost (Material + Haul)	Inventory Offset	Company	Company		100.00
Using Standard Cost IVM:To record any difference in the total received cost and the standard cost	Material Price Variance	Plant	Prod Cat	25.00	

Receipts Example:

Received 10 @5.00 material and @1.00 haul; standard cost 7.50

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the increase to inventory at Standard Cost	Inventory Raw Materials	Plant	Prod Cat	75.00	
To record the offset to the inventory transaction at Received Cost (Material + Haul)	Inventory Offset	Company	Company		60.00
Using Standard Cost IVM:To record any difference in the total received cost and the standard cost	Material Price Variance	Plant	Prod Cat		15.00

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Sold 10 units; standard cost 7.50

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the decrease to inventory	Inventory Raw Materials	Plant	Prod Cat		75.00
To record the cost of inventory sold	Inventory Usages – Sales	Plant	Prod Cat	75.00	

Usages Example:

Used as a constituent 10 units; standard cost 7.50

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the decrease to inventory	Inventory Raw Materials	Plant	Prod Cat		75.00
To record the cost of inventory used	Inventory Usages – Constituents	Plant	Prod Cat	75.00	

Transfers Example:

Transfer 10 units from Loc 1; 10% Markup; Standard Cost 7.50, Haul 1.00 per unit To Loc 3; Standard Cost 8.50

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
Transfer From Entries:					
To record the decrease to inventory for the `transfer from' plant:	Inventory Raw Materials	Plant	Prod Cat		75.00
Standard Cost (at 'transfer from' Plant)					
To record the markup for the `transfer from plant'	Inventory Markup	Plant	Prod Cat		7.50
To record the transfer haul cost for the `transfer from' plant	Inventory Transfer Haul Cost	Plant	Prod Cat		10.00
To record the Inventory Transfer offset for the `transfer from' plant (Inventory Transfer	Company	Prod Cat	92.50	
Transfer To Entries:					
To record the increase to inventory for the `transfer to' plant:	Inventory Raw Materials	Plant	Prod Cat	85.00	
Standard Cost (at 'transfer to' Plant)					
To record the Inventory Transfer offset for the `transfer to' plant	Inventory Usages - Constituent	Company	Prod Cat		92.50
To record the difference in the total transfer cost and the standard cost at the 'transfer to' plant	Inventory Material Price Variance	Plant	Prod Cat	7.50	

Conversions Example: Convert from:

Product 1 – 10 units; Standard Cost 7.50 Product 2 – 10 units; Standard Cost 5.00 Labor - \$25.00

Convert to: Product 3 – 100 units; Standard Cost 1.00

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the decrease to inventory for Product 1 at Standard Cost	Inventory Raw Materials	Plant	Prod Cat		75.00
To record the decrease to inventory for Product 2 at Standard Cost	Inventory Raw Materials	Plant	Prod Cat		50.00
To record the Conversion Labor	Inventory Conversion Labor	Plant	Prod Cat		30.00
To record the increase to inventory for Product 3 at Standard Cost	Inventory Raw Materials	Plant	Prod Cat	100.00	
To record the difference in the total 'conversion from' cost and the standard cost for the 'conversion to' product	Inventory Material Price Variance	Plant	Prod Cat	55.00	

Adjustments Example:

Adjustment to Inventory -10 units; standard cost 7.50

Transaction	GLBC Type Entry	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the decrease to inventory for the adjustment quantity at Standard Cost	Inventory Raw Materials	Plant	Prod Cat		75.00
To record the Inventory Adjustment offset	Inventory Adjustments	Plant	Prod Cat	75.00	

Adjustments Example:

Adjustment to Inventory +20 units; standard cost 7.50

G Transaction	SLBC SLBC	Cost Center	Account/ Sub- account	Debit Amount	Credit Amount
To record the increase to inventory for the In adjustment quantity at Standard Cost M	nventory Raw 4aterials	Plant	Prod Cat	150.00	
To record the Inventory Adjustment offset In Ac	nventory Adjustments	Plant	Prod Cat		150.00

Content pricing (sometimes called "five sack pricing") uses a base price per unit which can be increased or decreased depending on the mix's cement content. In contrast, standard pricing uses a standard unit price which stays the same regardless of whether more or less units are used.

Sales involving a project or a customer with a quoted content item price do not include zone charges, discounts or admix charges. Quoted items for a customer or project use standard pricing.

- Zone charges are calculated the same way they are when using standard pricing. If zone charges are enabled in the system but are not to be charged, they must be manually disabled in the customer's and project's file.
- Discounts will apply if the customer or project is set up and the product is eligible. Discounts do not apply to quoted prices on customers or projects.
- Admix charges are the total price of the admixes in the mix.

The formula for non-quoted orders is:

Base Price +/- Up/Down Factor + Admix Charges +/- Zone Charge - Discount

Setting Up Content Pricing

The initial setup for content pricing has several steps. Because of certain database triggers that must be set, you must move back and forth between the Configuration and Item editors to complete the configuration:

- Set Configuration flag
- Create Base mix item
- Specify Base mix in Configuration
- Set up/down modifiers in Base mix
- Configure other mixes

To set the Configuration flag:

1. Open the Configuration - System screen The Configuration screen displays. {Files > General Information >Configuration}

Receivables Aging Sta System Defaults Dis	ements Financials Project: tribution Dispatch Aggr	:/Quotes Lien egate Signaling	User Fields Optimization	n ,		
System Name	CRT Industries					
Auditing Control Auditing Method No a Perform During Posting Order Audit Log	Auditing Control Archiving Control Auditing Method No audits Image: Archive Paid Invoice Transactions Perform During Posting Image: Archive Sales Tax Distributions for Paid Transactions Image: Order Audit Log Image: Fields Image: Archive General Ledger Distributions for Paid Transactions					
Currency Control Currency Code USA	United States [Measurer Tracking Use	nent System [U Plant Quantities [D Multiple Customer Code	I.S. Customary I.S. Customary I.S. Customar			
Pricing Method Customary Content Item Code Metric Content Item Code	Use Content Pricing					

- In the Pricing Method field, select Use Content Pricing. Two additional fields will display: Customary Content Item Code and Metric Content Item Code. You will come back to these fields later.
- 3. Save the configuration screen.

To create the base item:

- 4. Open the Items editor {Files > Item Information > Items}
- 5. Enter an Item Code
- 6. Enter the rest of the mix information (including price).
- 7. On the Mix tab, enter the base cement content in the **Pricing Cement Content** field.

	(/	
Main UOM	Conversions Sales Tax Override	e Mix User Fields	Locations Costs Prices
Strength Slump Water/Cement Ratio	2500.00 psi 4 .44	Aggregate Size Cement Type Days to Strength	3/4
Pricing Information	Pricing Cement Content		_

Item Mix (EDTIMST6)

8. Save the new mix.

If you do work on two measurement systems, you will need to create two separate mixes.

Note: The checkbox under Pricing Information is a Version 4 artifact and should be ignored.

To specify the base mix in Configuration:

- 9. Return to the Configuration-System screen.
- 10. Enter the base mixes in the appropriate **Content Item Code** field.
 - **Caution:** The system will return an error if you attempt to enter an item that does not exist, is not a mix, or that does not have a Pricing Cement Content value.
- 11. Accept the screen.

To set the up/down modifiers in the Base mix:

- 12. Open the base item in the Items editor.
- 13. Go to the Mix tab. Two additional fields will display:

Main UOM	Conversions Sales Tax Override	e Mix User Fields	Locations Costs Prices
Strength Slump Water/Cement Ratio		Aggregate Size Cement Type Days to Strength	
Pricing Information	Pricing Cement Content	Price Up	Price Down 6.000 4.000

Content Pricing-Base Mix

- 14. Enter Price Up & Price Down modifiers.
- 15. Accept the screen.

To set content for subsequent mixes:

Enter the Pricing Cement Content for the mix. COMMANDseries will use that value to calculate the price of the mix.

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Caution: Do not enter a standard mix price for any mix that is to be subject to content pricing. An entered price will be added to content pricing.

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\$65
\$6
\$4

If you have a mix with a cement content of 6, the price will be 65 + (1*6) = 71.

If you have a mix with a cement content of 4.5, the price will be 65 - (.5*\$4) = 63.

Admixtures & Content Pricing

To insure correct pricing for admixtures, create the admixtures with batching UOMs as dosages based on the amount of cement, and price based on the batched quantity.

A second option for admixtures is to give each mix a price that reflects the standard cost of the admixtures in that design. If you have a mix for which you want to charge an additional \$8/unit due to the admixture content, enter \$8 as the unit price for the mix. If the mix has a cement content of 6, its price will be calculated as \$65 + (1*\$6) + \$8 = \$79.

Projects

You can establish project-level content pricing simply by adding the base item to the Project-Product screen. When you do, you can set project pricing for all mixes:

To create project-level content pricing:

- 1. Add your system's base item to the project.
- 2. Press the Pricing button to display the Project Product Pricing Information screen for the base item.

Project Product Pri	cing Information (BASE Base for content	:)	×
Estimated Quantity Default Load Quantity Price		Price Up 6.000	Price Down 4.000
Price Extension Effective	Per unit 14-Feb-2005	14-Feb-2005	14-Feb-2005
Previous Price Price Extension	0.00 cy Perunit		UOM Extensions
Allow Automatic Price	e Adjustments		

Project Pricing-Content Pricing

- 3. Enter a Price. If the field is left blank, the system will use the price from the item master.
- 4. Enter Price Up/Down modifiers.
- 5. Accept the screen and the project.

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