



# DDMSPLUS™: Delayed Delivery Orders & Dated Shipment Orders

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## Introduction

The office products industry was created to provide next business day deliveries, and your DDMSPLUS™ software is adept at processing orders through purchasing, picking, staging, delivery, and billing with minimal effort. Historically, these processes have started as soon as the order is submitted.

The Delayed Delivery Orders and Dated Shipment Orders feature lets you effectively slow down this process so you can schedule your deliveries. This useful tool helps you avoid the financial burden of purchasing products too far in advance of the scheduled delivery. It also helps avoid utilizing valuable warehouse space by staging more products than is necessary. If mistakes occur, orders could be prepared and even delivered, thus creating customer dissatisfaction. This can help you avoid potentially costly multiple deliveries and efficiently manage special orders and requests from your customers.

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**Note:** You can also place delayed delivery and dated shipment orders in ECinteractivePLUS®. For more information, see the [Dated Orders](#) handout.

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## Delayed Delivery vs. Dated Shipment Orders

The differences between delayed and dated orders are described below.

### Delayed Delivery Orders

In addition to office products, you may sell other items, including Jansan, food and beverage supplies, breakroom supplies, and so on. Instead of next day delivery, customers may request the order be delivered on a specific day. This is a traditional order which requires staging. The product must be picked and purchased the business day prior to your customer's requested delivery date.

Delayed delivery orders are traditional orders which do not have a delivery date scheduled for the next business day. These orders:

- Update the Backorder box in Inventory (I-AUX file) so purchasing can make accommodations for this product when replenishing stock, if this is a stocking item.
- Allocate inventory when the system automatically releases the order the business day prior to the delivery date.
- Follow the general business flow when the order is released.

### Dated Shipment Orders

If you fill large school district orders, these orders are placed in the spring, and the product is delivered before school starts, usually in August. This special order can be scheduled for delivery weeks or months in advance. By placing a dated shipment order, you can avoid immediately allocating product inventory, having product flow to the short-buy process, and exclude this product from impacting low stock calculations. You can also control product picking and staging, as well as choose when to bill the order.

These special orders are typically handled as follows:

1. Special purchase orders are created to arrive just prior to delivery.
2. Purchase orders can be manually created in Purchase Order Entry or by using a special function available in the Purchase Order Entry Short-Buy Setup dialog box.
3. Inventory is allocated at a time selected by the user for specific products or for all products not associated to the purchase order.

4. Selected products can be released to short-buy purchasing.
5. Products are picked based on delivery dates.

Dated shipment orders are special orders or large quantity orders. These orders:

- Do not update the Backorder box in Inventory (I-AUX file). Since the items are being purchased for a specific order, this helps prevent impacting the standard replenishment process.
- Allocate inventory when an order is manually released in the Order Entry Change window, or inventory can be allocated by item using the Initial Verify function.
- Must be invoiced individually.
- By default are excluded from the picking manifest. A setting has been added to the (TM) Picking Manifest screen to include these orders with existing products. You can also place only these orders on a picking manifest. (Due to order size, this can help prevent overwhelming your warehouse staff.)

## Dated Shipment Order Restrictions

In addition to the differences listed above, dated shipment orders are considered special orders by the system and are prevented from performing the following functions:

- Traditional methods do not move the order to a billing status. This includes the (TR)[V] and (TR)[G] functions. Only final-verifying moves the order past a status 6 or 7.
- Since this order is not processed as a traditional order, submitting the order does not print the order, including when the order is ended in the Order Entry window. These orders are printed in the (TR)[G] flush process, which prints the FUTURE DEL (future delivery) message on the order. The order remains at a status 6/7.
- Since the order is initially held at a status 4, the Backorder field in the Item Usage record is not updated.
- It is also automatically excluded from the automated short-buy function until the order is released when performing an order change using the (F6) settings.
- You can manually create a purchase order while the dated order is at a status 4 or 6. At which point, the order is updated to a status 6 and the item is placed on the purchase order, which moves it to a status 7.
- The system updates the Backorder field in Inventory (I-AUX file) when the P/O is created, inventory is allocated, or when released to a short-buy.
- The (TR)[G] normal exact match function allows an exact match only.
- The (TR)[G] flush from on-hand, future shipping function is never allowed.
- The (TR)[G] flush from non-exact RECEIPTS file function is never allowed.
- The (TR)[V] function is never allowed.

## Commonalities of Delayed Delivery & Dated Shipment Orders

The list of commonalities between delayed delivery and dated shipment orders include:

- The ability to set a valid delivery date. (Invalid dates display in grey in the Company Calendar.)
- In-stock inventory is not allocated when the order is placed.
- Products do not automatically flow to purchasing.

- Delivery/shipment dates can be changed using the Order Entry Change mode.
- If an order is changed, the system updates the cost, but the selling price is not updated.
- The system logs an exception when a delivery or dated order is created or changed so Exception reports can be printed and reviewed.
- Three fields have been added to the PO-GLOBAL file: PO\_DELDATE, PO\_DELTYPE, and PO\_DELPROC. These fields display the delivery date, delivery type, and the delivery release status. You can use these fields when limiting and when printing reports.
- If an order moves to a dash ticket, -1, for example, any delivery settings for delayed delivery or dated shipment orders are cleared.
- Both order types can be placed using the DDMSPLUS Order Entry window.

## Using Delayed Delivery & Dated Shipment Orders

Using this feature involves the following:

- Setting Up Order Entry Calendar Parameters
- Placing Delayed Delivery and Dated Shipment Orders
- Changing Delayed Delivery and Dated Shipment Orders
- Allocating Inventory and Releasing Dated Orders to the Short-Buy
- Releasing Delayed Delivery Orders
- Releasing Dated Shipment Orders
- Picking Manifest Options for Dated Orders
- Using Order Analysis
- Viewing Delayed Delivery and Dated Shipment Orders in O/E History
- Using Report Writer

See the appropriate headings below.

### Setting Up Order Entry Calendar Parameters

You can set parameters to specify the days you do not make deliveries. This could include Saturdays and Sundays, for example. You can also specify the holidays when deliveries are not available, such as Thanksgiving, Christmas, and New Year's Day.

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**Note:** We recommend you review your calendar non-delivery dates each year.

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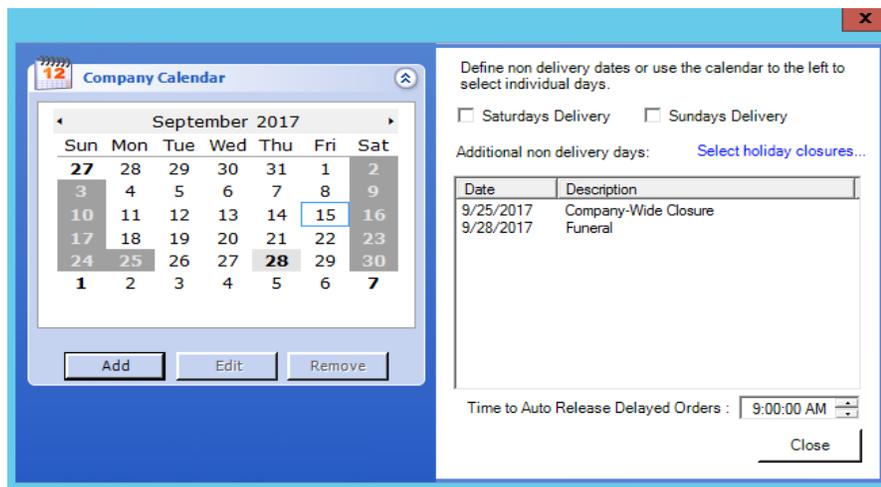
Keyop Menu



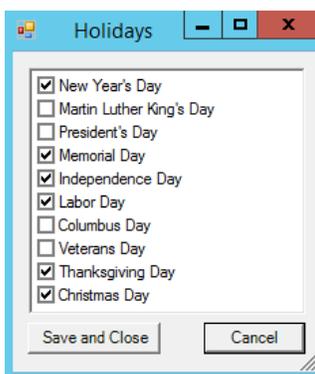
Parameters

1. From the Master Menu, double-click  , and then, double-click  . The Parameter Editor window opens.
2. Double-click Order Entry, and then, double-click Dated Shipments Calendar. The Company Calendar opens, displaying the current month and day with non-delivery dates shown in grey.

3. To set non-delivery dates for different months, click the Forward and Back arrows located to the left and right of the month's name.
4. Saturdays and Sundays are marked as non-delivery dates by default.
  - If you make deliveries on Saturdays, check the Saturdays Delivery box.
  - If you make deliveries on Sundays, check the Sundays Delivery box.
5. You can easily add, edit, and remove non-delivery dates.
  - To add a non-delivery date, click the day on the Company Calendar and click Add. In the New NonDelivery Date dialog box, click the Description box and enter a reason for this entry, Company-Wide Closure or Funeral, for example. The Date and Description columns display the information you specified, as shown below.



- To edit a non-delivery date, click the date on the Company Calendar and click Edit. The Edit Non-Delivery Date dialog box opens. Enter the new text over the existing text. When finished, click Edit. You can also click Remove to immediately remove this entry.
  - To delete a non-delivery date, click the date on the Company Calendar and click Remove. At the Are You Sure prompt, click Yes.
6. To select holiday non-delivery dates, click the Select Holiday Closures link. The Holidays dialog box opens.
  7. Check each box to select as non-delivery dates.



8. When finished, click Save and Close. The holiday non-delivery dates display in the Date and Description columns on the right. Non-delivery holidays are automatically retained by the system for subsequent years. We recommend you review your calendar settings each year.
9. For delayed orders, use the Time to Auto Release Delayed Orders box to specify the exact time when the system should release your delayed orders the prior business day. Once released, the orders are processed as a normal order. For example, you could select a time that is after you have processed your previous day's deliveries but before you run your short-buy or automated short-buy function for today.  
  
To select the time, click the hour, minute, and second numerals, or click the AM or PM text. Then, click the up and down arrows to change the time. Valid times include 8:00 AM to 5:00 PM. (Orders for next day delivery are usually processed before 5:00 PM).
10. When finished setting dates and times in the Company Calendar, click Close to exit the dialog box.
11. In the Parameter Editor window, click  to save your changes.

## Placing Delayed Delivery & Dated Shipment Orders

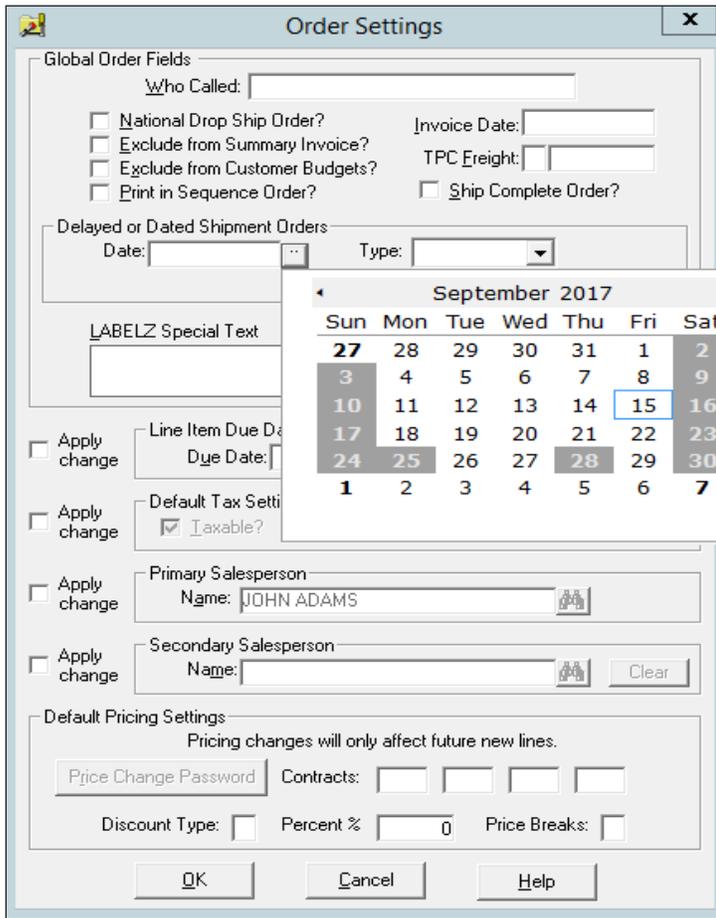


1. From the Master Menu, double-click **Order Entry**. The Order Entry window opens.
2. Click the Action Code drop-down menu and select Order.
3. Select the customer for this delayed delivery or dated shipment order.
4. Continue placing the order as you normally would until you click the Item Detail tab.
5. Type **F6** to open the Order Settings dialog box. You can open the Order Settings dialog box at any time to specify the delayed delivery or dated shipment order settings.

**Note:** If you use the Locations By Route feature, make sure you specify the settings in the Order Settings dialog box before placing *any* items on the order. If you have already added items to the order and later set the order to delayed or dated, we recommend you delete all the items. Once items have been added to the order, the inventory location is defined by the Route Locations parameter by item. This inventory location may not be the best location for the items on the order.

6. At the Changes to Global Order Settings message, click Yes to apply the changes to the entire order. The Order Settings dialog box opens, displaying the Delayed or Dated Shipment Orders boxes.
7. Click  beside the Delayed or Dated Shipment Orders Date box and select a delivery date for this order. Non-delivery dates appear in grey. Note that in the figure shown on the following page, the system retained the Company-Wide and Funeral non-delivery dates specified in the Company Calendar. See the figure on the following page.

**Note:** If you attempt to select a non-delivery date, Saturday, for example, the Selected Date is Not a Valid Delivery Date; Do You Wish to Continue and Set this Date for Delivery prompt displays. To select this non-delivery date, click Yes. This lets you arrange special delivery dates, if needed.



- Click the Type drop-down menu to specify whether this is a Delayed or Dated order.

Click Delayed to specify that this order be delivered at a later date. The order follows the basic purchasing flow, but is delayed.

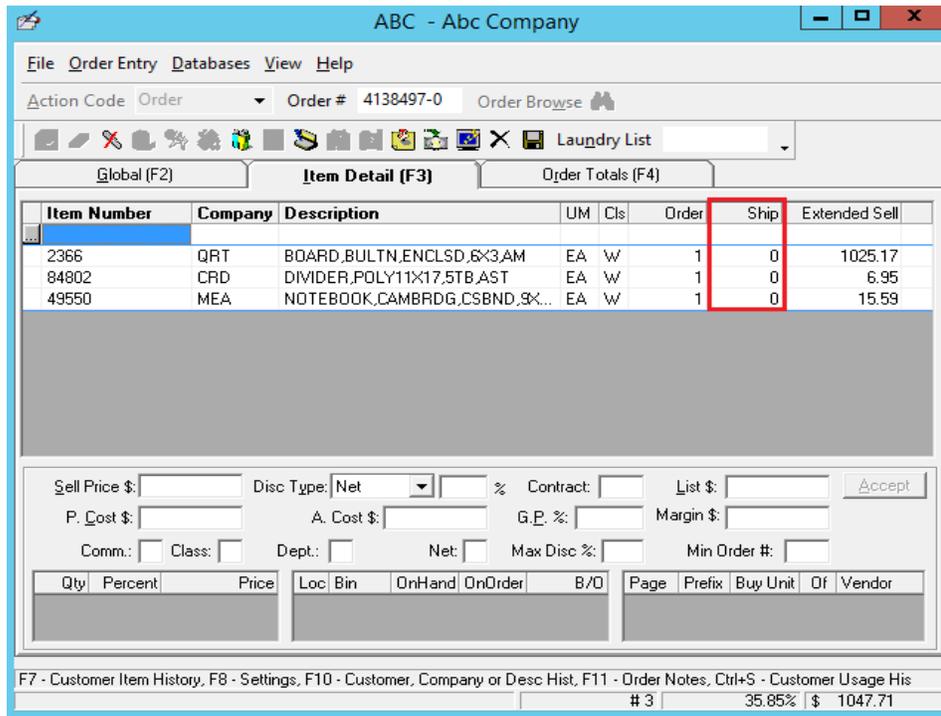
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**Note:** Once the order is released to the general flow, the item prices remain from when the order was placed. If item pricing has changed since the order was created and the time when it was released, the system does not update the price. This is important to remember if you are placing orders for the distant future.

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Click Dated to specify that this order type is usually scheduled for more than two weeks in advance. It could possibly be scheduled for months or weeks in advance, such as a school district order.

- When finished, click OK. The cursor returns to the Item Detail tab. Begin placing items on the order as you normally would. For each item added, the Ship box displays 0, indicating that this item is not yet being allocated from your in-stock inventory.



**Note:** To remove the delayed or dated order settings, type **F6** and clear the delivery date set in the Date box. Click OK. The Item Detail tab opens, and the Ship box displays the order quantity.

10. Complete the order as you normally would. The system handles the delayed or dated order as follows:

- Since the order is not being immediately filled, it does not print.
- If you placed a delayed order, the system holds the order at a status 6 and the Backorder field in Inventory is updated. Delayed order items appear on a Low-Stock report. If this is a dated order, the system holds the order at a status 4, so the Backorder field in Inventory is not updated and the items do not appear on the Low-Stock report. You also cannot force dated orders to a different status using a system function, such as the (TR)[A] process.
- The items do not appear on short-buy reports nor when running the automated short-buy function.

## Creating Dated Shipment Purchase Orders

In addition to manually creating a P/O, the Only Dated Orders box has been added to the Purchase Order Short-Buy Setup dialog box. You can use this box to limit the short-buy to include only dated shipment items.



1. From the Master Menu, double-click **Purchase Order Entry**. The Purchase Order Entry window opens.
2. Click the Action Code drop-down menu and select Short-buy. The Select Custom Short-buy Settings box opens.

- In the Profile drop-down list select a custom short-buy setting. Click Select. The Short-Buy Setup dialog box opens.
- Select limits as you normally would. Then, check the Only Dated Orders box.

The screenshot shows the 'Short-Buy Setup' dialog box. The 'Data Source' section has 'Build Short-Buy' selected. The 'File' field contains 'SHORT-BUY'. The 'Vendor Options' section has 'Set PO Vendor To' set to 'Purchasing Vendor ID', 'Check Vendor Alias' unchecked, 'Check Uncatalog Mfg.' checked, and 'Match On' set to 'Purchasing Vendor ID'. The 'Order Types To Exclude' section has 'Commerical', 'Point of Sale', 'Furniture', 'Serialized', and 'Gateway' all unchecked. The 'Limits' section has various fields for Customer #, Dept., Order #, Stock Class, Item Dept., Routes, Slsn, and Inv. Loc. The 'Include Auto SB Items' section has 'All items' selected. The 'Include Ship Direct Items' section has 'All items' selected. The 'Include National Drop Ship Orders' section has 'All items' selected. The 'Display Items' button is highlighted.

- Click Display Items. The Short-Buy Items dialog box opens, displaying the delivery date in the Deliver column.

The screenshot shows the 'Short-Buy Items' dialog box. The table below lists items with their respective delivery dates. The 'Deliver' column is highlighted with a red box.

S	Vendor	Item #	Co.	Description	Cost	Prefix	C	Item Dept.	Deliver	Unit	Weight
	<i>(Unassigned)</i>	MULTIBIN	DDMS	MULTIBIN ITEM	0.000		W	1	09/08/17	EA	0.000
<b>Total (Unassigned)</b>									<b>Total Cost = \$0.000</b>	<b>Total V</b>	
	SPARCO	00000	DIX	CRAYONS,WAX,8CT	0.540	DIX	W	1	09/04/17	BX	0.200
	SPARCO	00002	FEL	BOX,STORAGE,CHECK,9X23X4	101.300	FEL	W	1	09/04/17	CT	11.200
	SPARCO	4466	CKC	LETTERS/NUMBERS,FOAM,LACING	8.640	CKC	W	1	08/21/17	ST	0.600
	SPARCO	55642	LLR	BOARD,GLASS,PHOTO	10.450	LLR	W	1	09/01/17	EA	2.210
	SPARCO	55643	LLR	MARKER,FLUOR,WHI	1.650	LLR	W	1	09/01/17	EA	0.040
	SPARCO	55461	GJO	MAT,4X6,GOLDEN,CCL	70.520	GJO	Z	1	09/08/17	EA	20.000
	SPARCO	04650	BSN	ENVELOPE,SLFSEAL,DBLWNDW,#8	57.040	BSN	W	1	09/04/17	BX	5.600
	SPARCO	55461	GJO	MAT,4X6,GOLDEN,CCL	70.520	GJO	Z	1	09/08/17	EA	20.000
	SPARCO	654YW	MMM	NOTES,POST-IT,3X3,12PK,CA	11.950	MMM	W	1	09/08/17	PK	1.160
	SPARCO	00002	FEL	BOX,STORAGE,CHECK,9X23X4	101.300	FEL	W	1	09/08/17	CT	11.200
	SPARCO	55461	GJO	MAT,4X6,GOLDEN,CCL	70.520	GJO	Z	1	09/08/17	EA	20.000
	SPARCO	654YW	MMM	NOTES,POST-IT,3X3,12PK,CA	11.950	MMM	W	1	09/07/17	PK	1.160
	SPARCO	55642	LLR	BOARD,GLASS,PHOTO	10.450	LLR	W	1	09/07/17	EA	2.210
	SPARCO	39550	BSN	BOOK,ALLPURPS,NMBRD,2PT,4X7	2.430	BSN	W	1	10/26/17	EA	0.310
	SPARCO	48391	DTM	ORGANIZER,MICROFIBER,BCA,BK	32.260	DTM	W	1	10/26/17	EA	2.500
	SPARCO	58385	TAB	PROTECTOR,LABEL/FLDR,SLFADH	3.840	TAB	W	1	10/26/17	PK	0.170
<b>Total SPARCO</b>									<b>Lead Days: Mins: No order min. No freight min.</b>	<b>Total Cost = \$61.160</b>	<b>Total V</b>
	UNITED	55214	ICE	TABLE,30X60,FOLDING,MAH	162.570	ICE	W	1	08/21/17	EA	59.000
	UNITED	2645	TCR	SOFTWARE,READNG GAMES,GR3	16.720	TCR	W	1	08/21/17	EA	0.250
	UNITED	00470	CDB		10.090	CDB	W	1	09/01/17	BX	2.000
	* UNITED	00164	AVE	GLUE,STIC,3PK, REG,WH	1.840	AVE	W	1	09/04/17	PK	0.140
	UNITED	00470	CDB	FOOD,OREQ,28,8Z,SS,TR,6CT	10.090	CDB	W	1	09/07/17	BX	2.000
	UNITED	00470	CDB	FOOD,OREQ,28,8Z,SS,TR,6CT	10.090	CDB	W	1	09/08/17	BX	2.000
	UNITED	00164	AVE	GLUE,STIC,3PK, REG,WH	1.840	AVE	W	1	09/12/17	PK	0.140

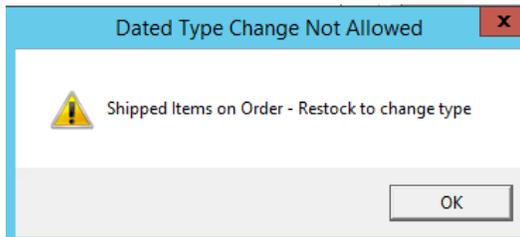
6. In the figure shown above, the Deliver column has been moved to display after the Item Dept column. You can easily customize this window to display only information for dated shipment orders. To do so, click . Select the columns to view. Your selections are saved for future short-buy dated orders. The grid selections you specify only apply when viewing delayed delivery or dated orders. When viewing other short-buy items, the regular columns display.
7. Complete the purchase order as you normally would. The purchase order is created and the dated order is automatically updated from a status 4 to a status 6.

## Changing Delayed Delivery & Dated Shipment Orders

You can change the delivery date for delayed delivery and dated shipment orders. This is useful if a customer contacts you and alters the delivery date. You can also change a delayed delivery order to a dated shipment order. When your shoppers place orders using ECinteractivePLUS, submitted orders with a delivery date that is less than two weeks are automatically set to a delayed delivery order. Orders with a delivery date greater than two weeks are automatically set to dated shipment orders. You can use the Order Entry window to monitor a shopper's dated shipment order to determine if the order date and type should be to a delayed order.

If you attempt to change a dated shipment order to a delayed delivery order, the following applies:

- Items on the dated order cannot display as shipped or the error message below displays. This indicates the picking process may have already begun. Before changing the order type, you must backorder the item. This helps ensure that the product is re-stocked or allows the warehouse to be notified.



- Items also cannot already be placed on a purchase order. This indicates the product is already arriving and could interfere in the delayed delivery process. You must remove the sales order from the purchase order before changing the order type.

**Note:** If you use the Advanced Manifest feature and change a delayed delivery order to a dated shipment order, you should delete the items from the order and add them again. We recommend doing so if your items have already been shipped and now need to be set to backordered. This helps ensure the order is properly processed.



1. From the Master Menu, double-click **Order Entry**.
2. Click the down arrow in the Action Code list box and click Change.
3. Click the Order # box and enter the order number. Press Enter. You can also click Order Browse to search for the number.
4. Click  or type **F6**.

5. At the Changes to Global Order Settings message, click Yes. The Order Settings dialog box opens.
6. Click  beside the Delayed or Dated Shipment Orders Date box to change the delivery date for this order. Non-delivery dates appear in grey.

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**Note:** When changing delayed delivery orders, you cannot change the date to the next available delivery date. Clear the date and setting in the Order Settings dialog box.

7. Click the Type drop-down menu to specify whether this is a Delayed or Dated order.
8. When finished, click OK.
9. Complete the order as you normally would.

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**Note:** When changing orders, the system does not update the selling price when the order is released. However, it does update the cost.

### Allocating Inventory and Releasing Dated Shipment Orders to the Short-Buy

If you are changing a dated order, you have two additional options. You can use the Change function to specify that the items be allocated from on-hand if the items are not allocated to a purchase order. This is useful when you are nearing the delivery date and need to fill specific products from on-hand inventory. You can also send the remaining items through the short-buy process. This lets you select the option early, while also preventing the items from being processed through the short-buy until you the order has moved to a status 6.

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**Note:** Using Order Entry Change mode, you can also allocate items from your inventory by updating the Ship box to ship the product and deduct the items from on-hand.



1. From the Master Menu, double-click  Order Entry.
2. Click the Action Code drop-down menu and select Change.
3. Click the Order # box and enter the order number. Press Enter. You can also click Order Browse to search for the number.
4. Click  or type **F6**.
5. At the Changes to Global Order Settings message, click Yes. The Order Settings dialog box opens. You have two additional options when changing dated orders, as shown on the following page.

The screenshot shows the 'Order Settings' dialog box. The 'Delayed or Dated Shipment Orders' section is highlighted with a red box. It contains the following fields and options:

- Allocate Items from On Hand
- Allow normal Short-Buy processing

Other visible fields include: Global Order Fields (Who Called, Invoice Date, TPC Freight, Ship Complete Order?), National Drop Ship Order?, Exclude from Summary Invoice?, Exclude from Customer Budgets?, Print in Sequence Order?, Date (10/26/2017), Type (Dated), LABELZ Special Text, Line Item Due Date, Default Tax Settings (Taxable?, District, Reset Entire Order?), Primary Salesperson (JOHN ADAMS), Secondary Salesperson, and Default Pricing Settings (Price Change Password, Contracts, Discount Type, Percent %, Price Breaks).

Check the Allocate Items from On Hand box to allocate the items from on-hand. This is useful when you are nearing the delivery date. (This option does not override the setting in the Ship box in the Item Detail tab.)

Check the Allow Normal Short-Buy Processing box to send the items through the short-buy process. If you check this box and the order is a status 4, the items do not go through the short-buy process until the order moves to a status 6. This lets you select the option early but prevents the items from being processed through the short-buy until you move the order to a status 6, such as when initial-verifying the order, for example.

- When finished, click OK. Complete the order as you normally would.

## Releasing Delayed Delivery Orders

The system checks for non-released delivery orders whose delivery date is less than or equal to the next business day. It uses the prior valid delivery date set in the Company Calendar. For example, if it is Friday, orders with delivery dates through Monday are released. If Monday is marked as a holiday on the Company Calendar, orders through Tuesday are released.

When the orders are found, the system automatically releases them using the time you specified in the Time to Auto Release Delayed Orders box in the Order Entry Company Calendar parameters. At this point, the order is processed through the system using the normal order flow. (Inventory is allocated when the order is released through the automated process one business day prior to delivery.) The order is also marked as auto-released with the PG\_DELPROC file set to A. If your terminal is set for online printing, the orders print.

## Picking Manifest Options for Dated Orders

The text-based (TM) Picking Manifest screen has been updated to let you include dated shipment orders with existing products when building a picking manifest. You can specify to build a manifest and include dated shipment orders with regular orders, build a manifest and include only dated shipment orders, or exclude dated shipment orders. Dated orders are large, special orders, so by default, the picking manifest does not include dated orders.



1. From the Master Menu, double-click Warehouse. The Warehouse menu opens.

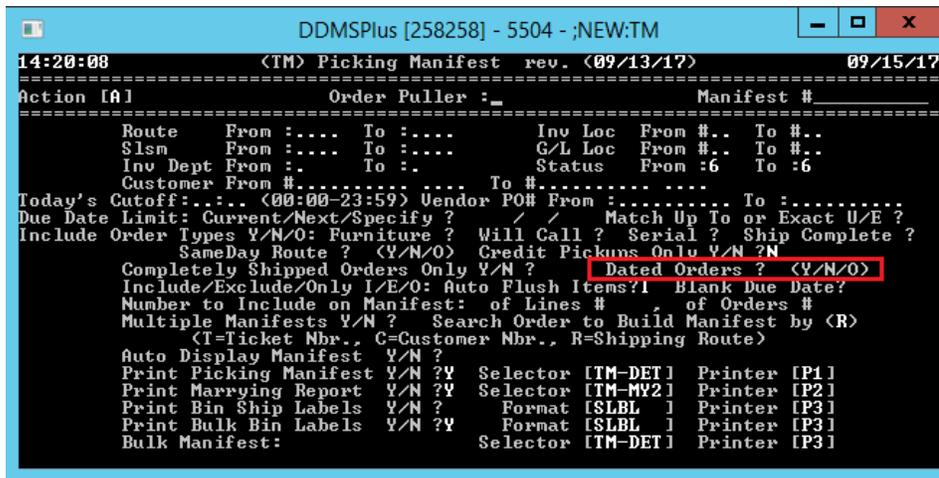


2. In the Warehouse menu, double-click Picking Manifest. The text-based (TM) screen opens.
3. Select the [A] Build New Manifest action code.
4. Begin placing the manifest as you normally would.
5. In the Dated Orders field, enter your response according to the following:

Type **Y** to include dated shipment orders with regular orders when building the picking manifest.

Type **O** to include only dated shipment orders when building the picking manifest.

Type **N** or leave this field blank to not include dated shipment orders when building the picking manifest.



6. Complete building the picking manifest as you normally would.

## Viewing Delayed Delivery & Dated Shipment Orders in O/E History and Order Analysis

You can view delayed delivery and dated shipment orders in O/E History. A line displays above the item list, displaying the delivery date. It also displays the text Not Released, indicating the order has not been released to the regular short-buy purchasing process. The date and not released text does not print. It is for display only.

**Note:** If necessary, you can manually final-verify the order to allow it to send it through your normal purchasing flow.

The Order Analysis window has also been updated to display delayed delivery or dated shipment order detail.

1. To view Delayed Delivery & Dated Shipment Orders in O/E History:



- 1.1 From the Master menu, double-click .
- 1.2 Click the Order Number box and specify the number of the delayed delivery or dated shipment order to view. The order opens, displaying the ship date.

Item Number	Company	Description	UM	Order	Ship	Sell	Extended
<b>Delayed Shipment Order: 09/27/2017 - Not Released</b>							
2366	QRT	BOARD, BULTN, ENCLSD, 6 EA	EA	1		1025.170	1025.17
84802	CRD	DIVIDER, POLY11X17, 5T EA	EA	1		6.950	6.95
49550	MEA	NOTEBOOK, CAMBRDG, CSB EA	EA	1		15.590	15.59

- 1.3 When finished viewing, close the window.

2. To view Delayed Delivery & Dated Shipment Orders in Order Analysis:



- 2.1 From the Master Menu, double-click . The Sales Order History and Analysis window opens, defaulting to the Quick Order Lookup option.

2.2 Retrieve the sales order to view. You can retrieve by order number, customer account number, or customer purchase order number. You can also query for the customer's order to view.

The order displays with the order delivery date and order status, as shown below.

**Sales Order Display**  
Input an Order #, Customer #, or Customer Short or Long PJO to view the sales order.

Order Number:  Customer P/O #

Order Date: 9/8/2017 08:28:03 Invoice Date:

G/L Location: 1 Inv. Location: 1

Order Type: Commercial  
Pay Code: 2 - Charge  
Status: 4 - Printed  
Order Taker: 901 - DANNY KUHLMAN  
SalesPerson: 137 - GREG HASTINGS  
Route: 16 Order Code:

Who Called:   
Attention:

**Dated Shipment Order: 10/1/2017 - Not Released**

**Order Totals:**

Subtotal \$	857.14
Discount \$	83.18
Tax \$	68.69
Total \$	842.65
Lines #	5
Gross Profit %	24.99
Margin Total \$	193.45
Cost Total \$	580.51

Tracking #s...  
[Hide Specials](#)  
[Show Exceptions](#)  
[Customize grid...](#)

**Additional Global Order Information**

Sequence	Item #	Company	Description	Unit	Bin	Class	Dept	Ordered	Backordered	Shipped	Price	Ext.Price	List
100	11	MED	FOOD.POPCORNERS.KETTLE	CT	W	1	2	2	0	2	38.070	76.14	42.300
105	220	IVR	POST.HASLER,WJ220,RD	EA	W	1	3	3	0	190.800	572.40	212.000	
110	1	ESS	FILE.STOR.STND.LTR	EA	A1	W	1	1	0	1	25.320	25.32	30.590
115	3	WLJ	SORTER.FILE.DESK.LTR,A,Z	EA	DD	3	1	4	4	0	12.672	50.69	14.080
120	2	SSN	CLEANER.STST.1GT	EA	N	Z	5	5	0	9.882	49.41	10.980	

## Analyzing Delayed Delivery & Dated Shipment Orders in Order Analysis

When analyzing orders, you now have additional limits.

**Sales Order Limits**  
Limit the sales orders to Display

Available Limits

- Cust Long PO Number
- GL Location
- Order Route
- Pay Code
- Order Type
- Third Party Billing Orders
- Third Party Billing Customer I
- Order Code
- Promotion Order
- Delayed Shipments Orders
- Dated Shipment Orders
- Released Delayed Orders
- Released Dated Orders
- Delayed/Dated Shipment Date
- Sales Order Contacts and Addr
- Attention
- Who Called
- Shipto Name
- Shipto Address 1
- Shipto Address 2
- Shipto City
- Shipto State
- Shipto Zip

**Set Criteria for Selected Limit**

[Sales Order] Delayed/Dated Shipment Date

Compare: = 09/14/2017

Range: 09/14/2017 To 09/14/2017

Relative: Sun Mon Tue Wed Thu Fri Sat By(s)

27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Entered Limit:

Today: 9/14/2017

You can view the date type, date released, and delivery date.

**Order History Tasks**

- [Quick Order Lookup](#)
- [Find Orders](#)
- [Analyze Orders](#)
- [Analyze Order Groups](#)
- [Analyze Line Items](#)
- [Analyze Item Groups](#)
- [Analyze Exceptions](#)
- [Execute a Template](#)
- [Setup Templates](#)
- [Setup User Groups](#)

**Current Options**

- [Print/Email/Fax Order](#)
- [Print Grid](#)
- [Export Grid](#)
- [Save Template](#)

### Sales Order Analysis

Select up to 4 levels to group and total the orders. Press the Apply Button to update the display. Double click on an order to view the order detail. Any limits on the totals are at the Order level.

Data Grouping and Subtotaling

Level 1: <none> Level 2: <none> Level 3: <none> Level 4: <none> Apply

Lines Total	Margin	G.P.%	Lines	Order Type	Order Date	Year	Month	Invoice Date	O.T. Name	Status	Pay Code	Dated Type	Dated Released	Dated Date
1,655.60	430.82	26.0	30											
85.94	22.47	26.1	4	Commercial	9/7/2017	2017	09		DANNY KUHLMAN	7	2-Charge	2	M	10/1/2017
773.96	193.45	25.0	5	Commercial	9/8/2017	2017	09		DANNY KUHLMAN	4	2-Charge	2		10/1/2017
264.07	64.68	24.5	4	Commercial	9/8/2017	2017	09		DANNY KUHLMAN	4	2-Charge	2		10/1/2017
324.61	82.01	25.3	7	Commercial	9/8/2017	2017	09		DANNY KUHLMAN	7	2-Charge	2		10/1/2017
83.10	23.53	28.3	3	Commercial	9/11/2017	2017	09		DANNY KUHLMAN	7	2-Charge	2	M	10/10/2017
12.67	4.81	38.0	1	Commercial	9/13/2017	2017	09		DANNY KUHLMAN	7	2-Charge	2		10/12/2017
12.67	4.81	38.0	1	Commercial	9/13/2017	2017	09		DANNY KUHLMAN	4	2-Charge	2		10/2/2017
25.34	9.62	38.0	1	Commercial	9/13/2017	2017	09		DANNY KUHLMAN	6	2-Charge	2		10/2/2017
38.02	14.44	38.0	1	Commercial	9/13/2017	2017	09		DANNY KUHLMAN	4	2-Charge	2		10/2/2017
12.67	4.81	38.0	1	Commercial	9/13/2017	2017	09		DANNY KUHLMAN	4	2-Charge	2		10/2/2017
22.55	6.19	27.5	2	Commercial	9/13/2017	2017	09	9/13/2017	DANNY KUHLMAN	B	2-Charge	2	M	10/2/2017

**Note:** Not all columns display by default. To add and delete columns, click the Customize Grid link. To add a column, double-click it. To remove a displayed column, highlight it and right-click. Click Hide Column.

You can also view delayed and dated order exceptions, as shown below.

**Order History Tasks**

- [Quick Order Lookup](#)
- [Find Orders](#)
- [Analyze Orders](#)
- [Analyze Order Groups](#)
- [Analyze Line Items](#)
- [Analyze Item Groups](#)
- [Analyze Exceptions](#)
- [Execute a Template](#)
- [Setup Templates](#)
- [Setup User Groups](#)

**Current Options**

- [Print/Email/Fax Order](#)
- [Save Template](#)

### Sales Order Display

Input an Order #, Customer #, or Customer Short or Long P/O to view the sales order.

Order Number:  Customer P/O #:

Order Date: 9/13/2017 11:38:18 Invoice Date:

G/L Location: 1 Inv. Location: 1

Order Type: Commercial

Pay Code: 2 - Charge

Status: 4 - Printed

Order Taker: 901 - DANNY KUHLMAN

SalesPerson: 137 - GREG HASTINGS

Route: 16 Order Code:

Who Called:

Attention:

Dated Shipment Order: 10/2/2017 - Not Released

Order Totals:

Subtotal \$ 42.24

Discount \$ 4.22

Tax \$ 3.37

Total \$ 41.39

Lines # 1

Gross Profit % 37.98

Margin Total \$ 14.44

Cost Total \$ 23.58

Tracking #s...  
[Hide Specials](#)  
[Show Exceptions](#)  
[Customize grid...](#)

**Additional Global Order Information**

---- Global Order Specials

---- Global Order Exceptions

419 Changed Delayed/Dated Date O.T.: 901 -0 09/13/17 11:38:14

Sequen...	Item #	Company	Description	Unit	Bin	Class	Dept	Ordered	Backordered	Shipped	Price	Ext.Price	List	P/O	Vendor	Ack.#
	100	3	WLJ	SORTER,FILE,DESK,LTR,A-Z	EA	DD	3	1	3	3	0	12.672	38.02	14.080		

**Note:** Under the Order History Tasks and Current Options sections, you can set up and save templates and user groups, as well as print data. For more information, see the [Order Analysis](#) handout.

## Using Report Writer

Additional fields have also been added to the P-GLOBAL file in Report Writer so you can limit on delayed delivery and dated shipment orders.

- **Dated Orders:** This field displays the delayed delivery date or the dated shipment date.
- **Type:** This field can be set to 1 or 2. If set to 1 it is a delayed order. If set to 2, it is a dated order.
- **Processed:** This field displays A for automatically processing delayed delivery orders, or M for manually processing dated shipment orders.

```

DDMSPlus [111111] - 4608 - ;SPC:Y
FROM SELECTION *INCLUSIVE*                               ;SELECTOR NAME -[PICK-1 ON SR ] [!SEL]
***** P-GLOBAL SECTION *****                          ;SELECT TITLE -
Pick #?????????-?   Print Time :?:?:?:?               ;ITE - SORTS: PICK #, ITEM #      ]
Summary #????????? Paid ?                               ;NEXT SELECTOR-[          ON SR??] LOC-[ ]
Billing Period From ??/??/?? To ??/??/??              ;REPORT FORMAT-[PICK-1 ON SR ]
EDI :????????????????????????????????????????????? ;PRINTER [P1] PGM [SORT ] PROTECTED-[Y]
:?????????????????????????????????????????????    ;REPORT TITLE -                   COPIES-[ ]
EDI Order :??/??/?? IP :????????????? ????          ;LOPEN PICK REPORT                ]
Auto Release 850 Y/N ??   Load Factor :?             ;SORT REPORT CONCURRENTLY Y/M/BLANK? [ ]
Ship Complete :?   Line DropShip :?
Freight:?? Method:????? Bill Only Order:?
Shipto - Dept :???? ID :?????????????
Geocode :???????????? Taxable :?   Zip4 :?
A/R Orig. Invoice #?????????????
Order Code :?????
[3rd Party] Acct #????????????? Dept:?????          ;FILE TO SELECT FROM [36] *99 FOR SORTS
Pricing Percent ??????? Use Sell Price??
User Set Price $?????????????
Dated Order: ??/??/?? Type:? Processed:?

```

FILL THE FIELD WITH CHARACTERS TO SELECT