

VERSION 1.0  
NOVEMBER 23, 2017

# Apps for Greentree

## ADVANCED FREIGHT MODULE

APP NUMBER: 010025

Powered by:

**MYOB** Greentree

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## FEATURES

### ADVANCED FREIGHT MODULE

- a) Configure complex rules for freight charging that are automatically applied  
This App helps you create complex rules for how and when customers are charged freight. E.g. orders under \$400 only, unless it is urgent, or includes a product from category X, never on backorders, unless order is placed through the website.  
  
Define your complex rules once, and then 'walk away'. Your users don't have to remember the rules themselves, as this app will enforce freight charging at packing slip despatch.
- b) Free-Freight Analysis  
Use the App's in-built reports to analyze your freight costs and to understand how and where you're giving away margin when Freight is not on-charged to a customer but could or should be.
- c) Delivery Manifest Automation  
The App allows you to print delivery labels and default each completed order to a scheduled delivery pick up.
- d) Adding Freight on Transfers and Job Invoicing  
The App can apply rules and enforce the charging of freight on location transfers and job invoices.
- e) KPI Reporting on Warehouse Personnel  
The App can record details of who picked and packed orders for KPI reporting. No standard report comes with the app but this can be written using the Greentree Report Writer and counting the number of packing slips Picked and packed per person.
- f) Creation of interface files for NZ Couriers "Despatch IT" system  
When a Packing Slip is Completed, the App can automatically generate an interface file for import to the "Despatch IT" system used by NZ Couriers, Castle Couriers and Castle Parcels. Optionally the satchel type and volume can be sent to Despatch IT which ensures the user doesn't need to enter that information into Despatch IT

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### IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

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### OTHER REQUIREMENTS

**Greentree Modules:** Sales Orders, Inventory, Accounts Receivable

**Associated Apps:** 010006 Transaction User Defined Fields (required for freight analysis)

010029 SO Despatch (required for delivery labels and carton checking)

## USER INSTRUCTIONS

### INSTRUCTIONS

#### ENTERING A SALES ORDER

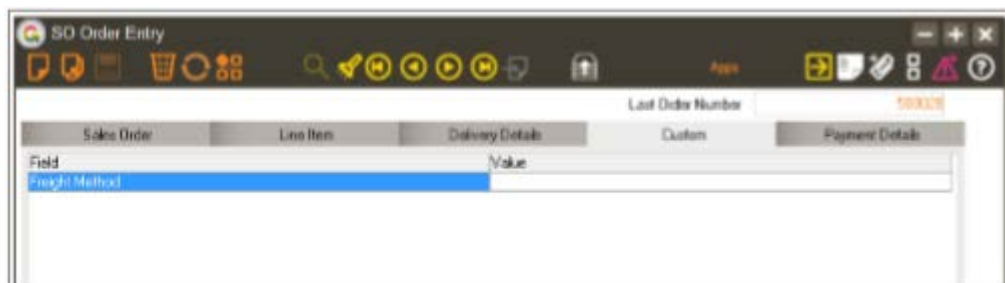
The App adds a new field to the Sales Order Entry screen called **Freight Type**. When you select a customer on the Sales Order Entry screen, the customer's default Freight Type will appear.



The screenshot shows the 'SO Order Entry' application window. The 'Customer Detail' tab is active, displaying fields for Code (1012), Name (Boulder Secondary), Currency (New Zealand Dollars), Rate (1.00000000), Discount (0.00%), Payment Terms (30 Days from Invoice Date), and Order Number. The 'Freight Type' field is highlighted with a red box and contains the value 'Freight 1'. Other tabs visible include Sales Order, Line Item, Delivery Details, Custom, and Payment Details.

The Freight Type determines what rules to apply to the Packing Slip and therefore whether Freight is to be charged and if so, what the charge will be. Users can be set up to manually override the customer's Default Freight Type setting. See the [Implementation Guide](#) below for details.

If applicable, the user can enter data against one or more User Defined Fields on the Custom tab where those UDFs have been configured as criteria governing when a Freight Charging Rule applies. e.g. if the **Freight Method** is "Urgent Courier" or the Sales Order contains **Dangerous Goods**.



The screenshot shows the 'SO Order Entry' application window with the 'Custom' tab selected. A table is displayed with two columns: 'Field' and 'Value'. The 'Field' column contains the text 'Freight Method'.

Field	Value
Freight Method	

#### PACKING SLIP MAINTENANCE

The App adds a **Complete** button to the Packing Slip Maintenance form. When the button is clicked a new Packing Slip **Complete Form** appears. The new form displays the fields that were selected to appear when the App was configured (see App Configuration below).

**Complete Form**

Packing slip: 500241.01

Customer code: 1005

Customer name: Wagin Secondary

**Complete Action**

Print packing slip     Email packing slip

Print consignment

Finalise

Invoice

Picked by: Angela Reilly

Packed by: Craig Clark

**Courier Info**

Courier Name: FedEx

Ticket no: A0003

Despatch Date: 24 / 1 / 2013

Number of boxes: 1

Volume (cubic meters): 0.2

Weight: 1.5

Charge freight

Freight	Description	Qty	Select
MF	Major freight	1	<input checked="" type="checkbox"/>

OK    Cancel

The Complete Actions will default from the App Control. You can adjust the default settings as required.

Select the picker, packer, checker and confirmer as required.

If a default freight supplier has been defined in the App control, the freight company will default into the Complete box.

If the freight supplier has defined delivery schedules, the next delivery schedule will default e.g. if there are deliveries at 1pm and 3pm and it is currently 2.30pm the system will default to 3pm. If no schedule is defined the user can scan a ticket number or type in their own delivery reference.

The despatch date defaults to today unless for scheduled suppliers, the current time is after the last delivery. E.g. if the last delivery is 3pm and it is currently 4.15pm then the despatch date will default to tomorrow.

If Advanced Checking is turned on, then the number of cartons, weigh and volume will default from the checking. If this is not used the user needs to type in the number of cartons.

If Freight Rules have been setup then the Charge Freight box will be ticked, and the system will display the freight code that matches the rule applied. The user must tick the Select box of the appropriate freight item – this will be mandatory.

If the customer qualifies for Freight Free, then the 'Freight Free' box will be ticked (for information purposes for the user only) and the selected item/(s) will be added with a 100% discount.

The system will check the Freight Maintenance code on the sales order (populated from the freight code on the customer but may have been overwritten at the time the order was placed) and based on the rules for that Freight code, will determine if that level qualifies for freight free. It will also check if any items qualify as exceptions that will need to be charged freight. Note: backorders won't be charged freight if 'First Print Only?' is ticked.

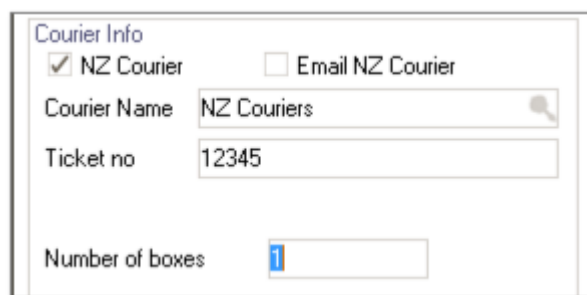
The line narration against the freight code/(s) will be populated with the ticket number from the Complete screen and with the narration from the first applicable rule based on the sequence.

The calculation as to whether there are any exception items will be based on the Packing Slip rather than the Sales Order.

The IN Transaction types specified on the Freight Code will be used to analyze how the freight was charged or not and the reasons for why it was freight free.

### CREATING A "DESPATCH IT" INTERFACE FILE

If you have configured the system to generate an interface file for "Despatch IT", you will see the following section on the Packing Slip [Complete Form](#):



Courier Info

NZ Courier       Email NZ Courier

Courier Name: NZ Couriers

Ticket no: 12345

Number of boxes: 1

If you tick the **NZ Courier** checkbox, the system will generate the interface file when the OK button is clicked to close the form.

Note: The App will not print delivery labels as they will be printed from Despatch IT.

If you tick the **Email NZ Courier** checkbox, the system will include the email address shown on the **Packing Slip Delivery Address** tab, in the interface file. This email address will be used by the Courier Company to send the recipient an email confirmation of the shipment.

### IN TRANSACTION ENTRY – LOCATION TRANSFER

If the control setting is activated on the GApp Manager Control Location Transfer group box for 'Add Freight' then freight can be added to a Location Transfer through IN Transaction Entry.

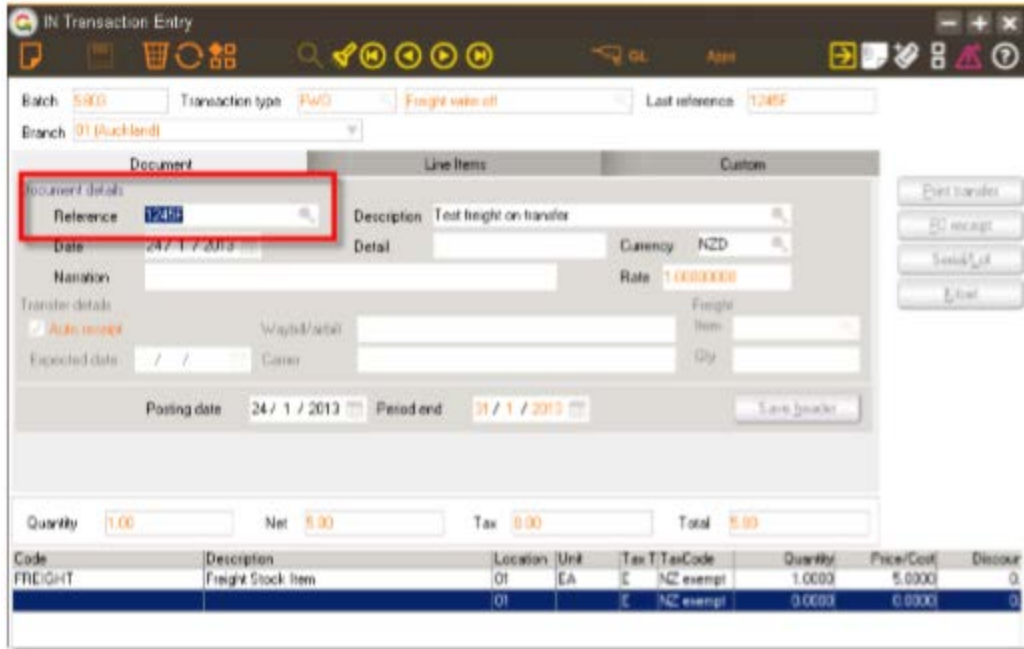
Changes have been made to the IN Transaction Entry screen when a Location Transfer (transaction type code of Transfer) is processed to enable this freight item to be added.

A Freight group box has been added below with a new drop down box for selecting the stock item that is the freight item used on the transfer and another box for the quantity to be entered.

The screenshot shows the 'IN Transaction Entry' window. At the top, there are fields for 'Batch' (5003), 'Transaction type' (Transfer), 'Location Transfer', and 'Last reference' (1245F). Below this is a 'Branch' dropdown menu set to '01 (Auckland)'. The main area is divided into 'Document details', 'Line Items', and 'Custom' tabs. Under 'Document details', there are fields for 'Reference' (1245), 'Date' (24/1/2013), 'Description' (Test freight on transfer), 'Detail', 'Currency' (NZD), and 'Rate' (1.00000000). Under 'Transfer details', there is a checked 'Auto receipt' box, 'Waybill/stabil', 'Expected date', and 'Carrier'. A 'Freight' group box is highlighted with a red rectangle, containing 'Item' (FREIGHT) and 'Qty' (1.0000). At the bottom, there are summary fields: 'Quantity' (10.00), 'Net' (2,750.00), 'Tax' (0.00), and 'Total' (2,750.00). Below the summary is a table with columns: Code, Description, Location, Location To, Unit, Tax T, Tax Code, Quantity, Price/D.

Code	Description	Location	Location To	Unit	Tax T	Tax Code	Quantity	Price/D
ALTEC220WSPEAKERS	Altec 220 Watt Speakers	01	02	EA	E	NZ exempt	10.0000	275.00
		01			E	NZ exempt	0.0000	0.00

Once the form is saved, a second IN Transaction will be created using the Transaction Type specified when the App was configured (see the App Configuration, Location Transfer section of this document), and the Freight item will be populated with the quantity keyed on the Location Transfer and the average cost taken from the item maintenance. The reference will be the same as the Location Transfer with an F added as a suffix.



If the 'Freight Mandatory' option is ticked on GApp Manager Control then the user will not be able to save the Location Transfer until the Freight item is entered. A message will be displayed informing the user that the field is mandatory.

Note that an IN Transaction type of – FRT with the GL going to the appropriate expense account will need to be setup.

If the freight code is not known at the time, then a 'dummy' freight code can be entered (if mandatory) and then the correct freight code entered when the location transfer is recalled at a later date. The Freight transaction will then be updated with the correct code provided all relevant posting periods are open.

### ENTERING A JOB COST INVOICE

The App adds a new **Complete** button to the JC Job AR Invoice Entry screen.



Batch: 5005 Branch: 02 (Wellington) Last Invoice Number: 154

Invoice: Get Claim Items Narration Dates Delivery Details

Job Detail  
Job: 5002 Internet connection in each class rm

Customer Detail  
Code: 1007NEw Alpha: 1007  
Name: Bright Primary  
Currency: New Rate: 1.00000000  
Terms: 30 Days from Invoice Date  
Salesperson: Sandia Sandston  
Contact: Sandia Plight Delivery Address:

Invoice Detail  
Proforma No:   
Invoice No: 154  
Date: 24 / 1 / 2013  
Hold Code: None Pre-paid:   
Order No:  Reprint:   
Format: Invoice Line Format

Payment Date: 23 / 2 / 2013 Posting Date: 24 / 1 / 2013 Period End: 31 / 1 / 2013

Invoice Amount  
Discount: 0.00 Net: 3562.61 Tax: 537.39 Total: 4120.00

Tax	Code	Description	IN Code	IN Description	Quantity	Rate	Discount%	Discount Tax C
*	J	ACCMD	Accommodation		24.0000	45.0000	0.00	0.00 NZ GS

When you click on this button, the JC Invoice Complete form will appear.

Complete Form

Invoice No: 155  
Job code: 5002  
Job name: Internet connection in each class rm

Courier Info  
Courier Name: FedEx  
Ticket no: A0003  
Number of boxes: 1  
Volume (cubic meters): 0.5  
Weight: 1.2

Charge freight

Freight	Description	Qty	Select
FREIGHT	Freight Stock Item	1	<input checked="" type="checkbox"/>

OK Cancel

The user must select the appropriate Freight charge – this is mandatory.

When the invoice save (or print) button is clicked a transfer to job transaction dated the same date as the invoice will be created with an IN line and the stock code being the freight code, the activity code will be the JC Activity code specified on the stock item. The sales code from that activity code will then be added to the JC AR Invoice and the IN transaction will be selected as Invoiced on the Get Costs tab. The ticket number and freight code narration will be populated into the line narration of the sales code.

## REPORTING

### Freight Analysis Report

The App adds a new report to the | [Other Reports](#) menu called IN Freight Analysis Report, which lists the invoices that have freight applied to them.

#### Selection Criteria:

<a href="#">From Date &amp; To Date</a>	Select the period on which to report
<a href="#">From Code &amp; To Code</a>	Select the range of Transaction Types to report on.
<a href="#">Summary Only</a>	If ticked the report shows the number of invoices and the lost sales value against each selected Transaction Type. The lost sales value will be the amount that should have been charged for freight (excluding GST) i.e. the discount amount.

Freight Analysis Report			
From Date: 1/4/2012		To Date: 30/4/2012	
Freight Code	Freight Name	Quantity	Lost Sales Value
F400+	Orders over \$400	192	1,369.25
F400+EMC	Orders over \$400 with Exclusions	12	0.00
F400-	Orders Under \$400	561	3.19
FBACK	Backorder	26	190.10
FCORP	Corporate Accounts	100	891.52
FCORP+EMC	Corp with Exclusions	7	0.00
FFREE	Freight Free Always	278	1,906.04
FGOVT	Government Depts	13	133.20
FGOVT+EMC	Government Accounts + Exclusions	1	0.00
FISLANDS	Island Orders	0	0.00
FHPO	Manual Price Override	64	289.88
FURG	Order sent with Urgent Courier	0	0.00
FWEB	WebStore Freight	0	0.00
FWEB+EMC	Webstore Freight with Excl	1	0.00
<b>Total</b>		<b>1,288</b>	<b>4,854.10</b>

If not ticked the report shows individual invoices and the lost sales value by each Transaction Type. The lost sales value will be the amount that should have been charged for freight (excluding GST) i.e. the discount amount.

Freight Analysis Report			
From Date: 1/4/2012		To Date: 30/4/2012	
Freight Code	Freight Name		
Customer Code	Customer Name	Reference	
<b>F400+</b>	<b>Orders over \$400</b>		
1403	J Chong Dental Ltd	517063	11.30
2429	Dr G Kinton BDS	517990	5.70
1184	Drs De Berry & Pawley	517999	7.10
2987	Gus Quin BDS	517926	10.00
1127	Philip Street Dental Limited	518090	3.60
1924	Cooper Lowe Ltd	518017	5.70
1361	Taylor Cameron DENT Centre	518154	5.70
2202	Scott Helensville Dental	518155	3.60
1305	Queen & Hunt Dental Care Ltd	518192	3.60

## IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

### APP INSTALLATION

1. Log into Greentree as the **Super** user
2. Select the menu item | System | Apps For Greentree | Apps Module Control | 3.  
Enter the New Registration Codes supplied and click Install App

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	<input checked="" type="checkbox"/>	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	<input checked="" type="checkbox"/>	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	<input checked="" type="checkbox"/>	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the **Advanced Freight Module** App.

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	<input checked="" type="checkbox"/>	01 November 2017	100-Edit User	Change	

5. Click on the **Edit Users** button and select the users who will be configured to use Active Directory Integration, for which companies.

User Count Limit:

User	e-Computers - Australia (0)	e-Computers - Canada (0)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
<b>All Users</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amanda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ashlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
7. **Save** and **Close** the form.

## CONFIGURATION

### IN TRANSACTION TYPES SETUP

Several new IN Transaction types must be set up for use with this App. Please consult the Greentree Help menu for detailed information about maintaining Transaction Types.

1. Select the menu item | [System](#) | [Inventory](#) | [Transaction Type Maintenance](#) |
2. Create a Freight [IN Transaction Type](#) to be used on Location Transfers.
3. Create one or more Freight [IN Transaction Types](#) to be used to analyze why an order has gone out as Freight Free or why it has been charged freight. These will match to different lines on your Freight Rule.
4. Create a Freight [IN Transaction Type](#) for use when the price of freight is manually overridden.

The screenshot shows the 'IN Transaction Type Maintenance' application window. The left pane displays a tree view with categories AP, AR, IN, JC, and MF. Under 'IN', there are sub-items: +ADJ, +S/Take, -ADJ, -S/Take, Cost Adj, FGReceipt, PDVarCostAdj, RM Issue, RMRReturns, Total Adj, and Transfer. The right pane shows configuration for a transaction type with Code 'Under200', Module 'IN', Name 'Order Under \$200', Effect on inventory 'Decrease Inventory Level', GL account '30 . 10 . 1020', Tax code 'NZ GST', and Location '03.201'. There is an unchecked checkbox for 'Transfer options'. At the bottom, there is a section 'Inventory update options' with three radio buttons: 'Update inventory item sales history' (selected), 'Update inventory item purchase history', and 'Update transfer or adjustment'.

5. [Save](#) and [Close](#) the form.

### SALES ORDER UDF SETUP

This section assumes that the App [010006 Transaction User Defined Fields](#) has been purchased and installed successfully.

User Defined Fields (UDFs) may be used to add further customer defined criteria to determine how Freight should be charged. Examples of UDFs you may wish to use in this way include: Freight Method, Order Method (e.g. Online, Phone, Standing Order etc.)

1. Select the menu item | [System](#) | [System Setup](#) | [Transaction UDF Maint](#) |
2. Complete the Following fields for each User Defined Field you require. UDFs will appear on the [Custom](#) tab of [Sales Order Maintenance](#) and [Freight Type Maintenance](#) screens.

**Field Name**

Enter a name for the new field.

**Line/Header**

NB: at the time of writing the App allows for creation of UDFs at the Header level for a Masterfile and not at the Line level. This field will therefore default to Header.

**Masterfile**

Select the Masterfile Customer.

**Transaction Type**

Select the Transaction Type SO Sales Order.

**Line Type**

NB: at the time of writing the App allows for creation of UDFs at the Header level for a Masterfile and not at the Line level. This field is not editable.

**M**

Tick to make this a mandatory field.

**Field Type**

Choose from:

**String** (and set the maximum field length),

**Boolean** (true/false),

**Date** (and set the display format),

**Integer** (and set the number of digits)

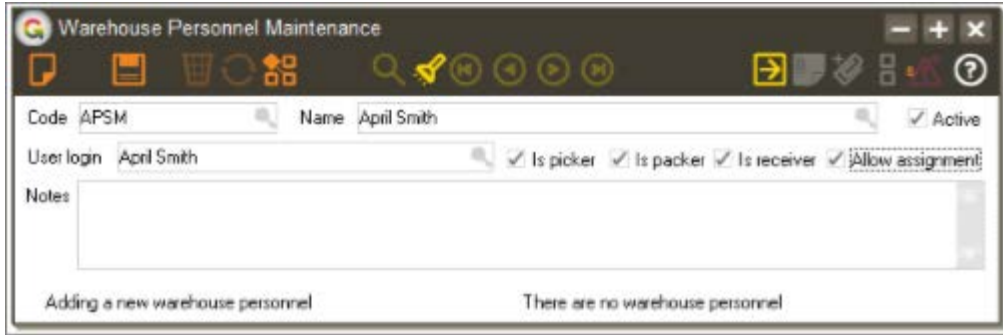
**Decimal** (and set the number of decimal places).

3. **Save** and **Close** the form.

## WAREHOUSE PERSONNEL MAINTENANCE

The App uses **Warehouse Personnel Maintenance** to create Warehouse Personnel records for existing Greentree users who have the roles of Picker, Checker, Packer and/or Confirmer, for the purpose of recording this information on the **Sales Order Complete** screen. This configuration is in addition to setting up the users in User Maintenance.

1. Select the menu item | **System** | **Sales Order** | **Warehouse Personnel Maintenance** |
2. Complete the form:

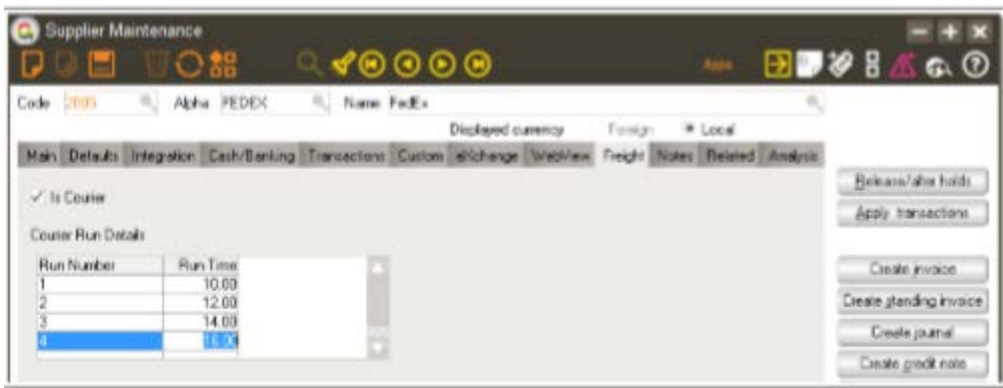


- Code** Enter a unique code for the Warehouse Person.
- Name** Enter the user's Name.
- User login** Choose the Greentree Username associated with this person from the drop-down list.
- Is Picker** If ticked, this person will be able to Pick and Check orders.
- Is Packer** If ticked, this person will be able to Pack and Confirm orders.
- Is Receiver** [please check Greentree Help for information on this setting]
- Allow Assignment** Must be ticked if this person is allowed to assign Pickers, Packers, Checkers and Confirmers on the packing slip. If not ticked, the user may only be added to a packing slip in one of those roles.

## COURIER SETUP

The App adds a new tab to the Supplier Maintenance form to allow a supplier to be configured as a Courier.

1. Select the menu item | **Data Entry** | **Accounts Payable** | **Supplier Maintenance** |
2. Select a supplier who you use for Freight.
3. Click on the **Freight** tab.





### Is Courier

The supplier will show in the Default Courier drop down box of the Freight Control screen (see above).

### Courier Run Details

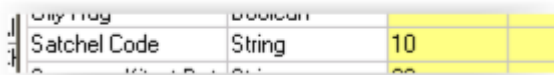
Add a new line for each scheduled Run (collection) time for that courier. When an order is completed, the system will default to the next available Run.

4. Save and Close the form.

## INVENTORY ITEM SETUP

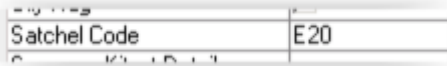
Note this section is only required if "Include Auto Print Info" is True in the Module Control settings.

1. Create a new Inventory User Field called "Satchel Code". It will be a string, 10 characters long.



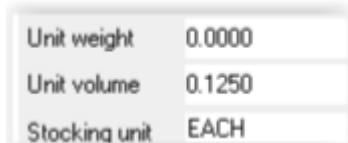
User Field	DataType	Length	Decimal
Satchel Code	String	10	

For all the inventory items that are Satchels, populate this user field with the satchel code from the courier company. E.g. E20. Do this from the "Custom" tab of [Inventory Item Maintenance](#).



Satchel Code	E20
--------------	-----

2. For all Inventory items that are boxes, the box volume needs to be set against the Inventory Item [Unit Volume](#) as below.



Unit weight	0.0000
Unit volume	0.1250
Stocking unit	EACH

## OTHER GREENTREE SETUP

The system must be configured with the following before the App may be configured.

- A tree to indicate how many cartons are required to supply a stock item. Stock items must have been allocated to a branch. E.g. 0 – can go in a carton of another product, 1 comes in a single carton, 2 required 2 separate cartons to supply the item.
- A Barcode printer for delivery labels

## APP CONFIGURATION

In the AppsForGreentree Module Control screen, click on the [Change](#) button in the [Settings](#) column to open the [Freight Control](#) screen.

## SO PACKING SLIP COMPLETED ACTION

Configure the **SO Packing Slip Completed** Action settings to determine what happens at the time of completing a packing slip. i.e.

- what actions are taken automatically
- which fields are displayed on the **Sales Order Complete** screen

The screenshot shows the 'SO Packing Slip Complete Action' configuration window. Key settings include:

- Print packing slip**: BES SO Packing S
- Email Packing Slip**
- Print Consignment**
- Number of copies**: 1
- Finalise**
- Invoice**
- Print invoice**
- Email invoice**
- Export Invoice**
- Use Auto Complete**
- Hide Save Unconfirmed**
- Hide Print Invoice**
- Hide Generate Invoice**
- Auto Add Freight on PS**
- Use SO Location Whouse**
- Picked by** (Mandatory)
- Checked by** (Mandatory)
- Packed by** (Mandatory)
- Confirmed by** (Mandatory)
- Update Narration**
- Validate Password**
- Display Courier Information**: Default Courier: NZ COURIERS
- File NZ Courier**: \\bghutsr\nz couriers
- Display Packaging Information**
- Display Despatch Date**
- Allow Zero Boxes on Complete**
- Print Actual Weight**
- Update Sales Order Narration**
- Is Courier Mandatory**
- Update Courier Info to Narration**
- Include Auto Print Info**
- Complete Form Width**: 400

### Print Packing Slip

Automatically print a packing slip to send with the goods. Choose the format to be printed from the drop-down list.

### Email Packing Slip

Automatically email a packing slip. Choose the format to be printed from the drop-down list.

### Print Consignment

Automatically print a consignment note to send with the goods. Choose the format to be printed from the drop-down list. Enter the **Number of Copies** of the consignment note to be printed.

### Finalise

Finalise the Sales Order on completion.

### Invoice

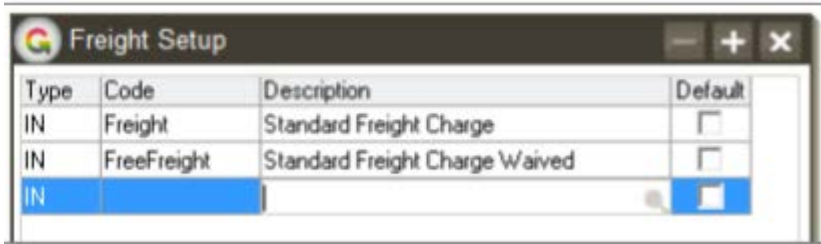
Invoice the Sales Order on completion.

Print Invoice	Automatically print the invoice on completion.
Picked by	Require information to be collected on who picked the order.
Mandatory	The user may not progress until this information is supplied
Update Narration	This information is automatically added to the Sales Order narration
Validate Password	The user must enter a valid password before progressing
Checked by	Require information to be collected on who checked the order. Options are as above.
Packed by	Require information to be collected on who packed the order. Options are as above.
Confirmed by	Require information to be collected on who confirmed the order. Options are as above.
Display Courier Information	Show courier information on the SO Complete screen
Default Courier	Select the default courier. See the section above entitled Courier Setup for details on configuring suppliers as Couriers.
File NZ Courier	Click the tick-box and select the network folder into which NZ Couriers Despatch IT files will be placed when generated by the system. NB: this folder must be accessible by the Greentree server not the local PC or Terminal Server. NB This location can be overridden by a User setting, see below
Display Packaging Information	Show packaging information on the SO Complete screen
Is Courier Mandatory	Require a courier to be selected
Display Despatch Date	Show the despatch date on the SO Complete screen
Update Courier Info to Narration	Add the courier name to the Sales Order narration
Include Auto Print Info	Creates a Despatch IT file that includes the volume or satchel type. If set to False, the user will need to log into Despatch IT to provide the details of the goods being despatched
Print Actual Weight	Print the actual weight of goods on the Packing Slip

**Update Sales Order Narration** Adds notes to the Sales Order narration from the fields on the Packing Slip Complete screen

### FREIGHT SETUP

Click on the **Freight Setup** button to configure the Inventory items that may be used for charging Freight. Items must be set up as a non-diminishing stock item.



Type	Code	Description	Default
IN	Freight	Standard Freight Charge	<input type="checkbox"/>
IN	FreeFreight	Standard Freight Charge Waived	<input type="checkbox"/>
IN			<input checked="" type="checkbox"/>

### LOCATION TRANSFER

Configure the **Location Transfer** settings to Add a new section to the IN Transaction Entry screen when the transaction type 'Transfer' is selected. The section contains an 'Item Code' drop-down box and a 'Quantity' numeric field.



Location Transfer

Add Freight

Mandatory

**Add Freight**

Allow Freight to be added to the Location Transfer transaction. Choose an IN Transaction Type from the drop-down that will be used by the App to create a transaction for the Freight charged,

**Mandatory**

Require that Freight is always entered when a Location Transfer transaction is processed.

### JC AR INVOICE



JC AR Invoice

Use Freight

**Use Freight**

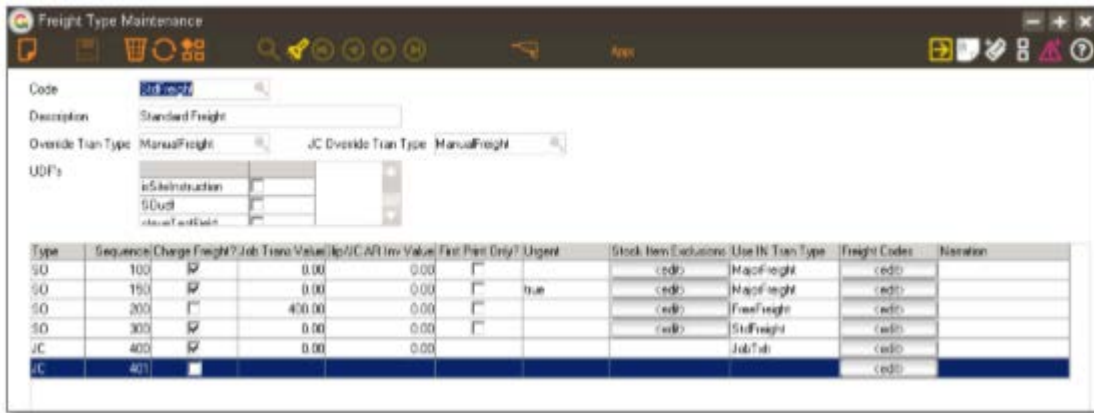
If ticked the **Freight Maintenance** menu item is added to the | **System** | **Job Cost** | menu, and a **Complete** button is added to the JC Job AR Invoice Entry screen allowing Freight to be added to the invoice.

Note: if the Greentree system also has the Sales Orders module enabled the Freight Maintenance menu item will appear on the | System | Sales Orders | menu.

## FREIGHT TYPE MAINTENANCE

The App adds a new screen to allow for the configuration of Freight Types that define whether freight should be charged on a Sales Order and if so, what charge should apply.

1. Select the menu item | System | Sales Orders | Freight Type Maintenance |
2. Complete the Header section of the screen then Save and Re-load the record before moving on to the next step:



**Code**

Enter a code by which the Freight Type will be known.

**Description**

Enter a meaningful description for the Freight Type.

**Override Tran Type**

Select the IN Transaction Type to be used for analysing Freight costs where the price on a freight line on a Packing Slip has been manually overridden to 0.00.

**JC Override Tran Type**

Select the IN Transaction Type to be used for analysing Freight costs where the price on a freight line on a JC Job AR Invoice has been manually overridden to 0.00.

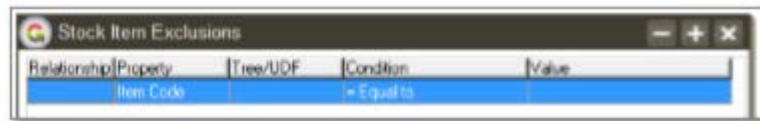
**UDF's**

Select the User Defined Fields that have been set up on the Sales Order for use in determining what should be charged. (See Sales Order UDF Setup below for further details).

3. Complete the Table section of the screen, adding a row for each Rule that defines when the Freight Type is applied to a Sales Order:

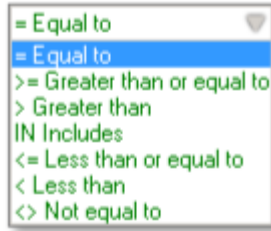
Type	Sequence	Charge Freight?	Order/Job Trans Value	Packing Stock	JC AR Inv Value	First Print Only?	Urgent	Stock Item Exclusions	Use IN Tran Type	Freight Codes	Narration
SO	1	<input type="checkbox"/>				<input type="checkbox"/>		cedb		cedb	

Type	Choose whether the Rule applies to a Sales Order (SO) or Job Cost transaction (JC).
Sequence	The order in which the rules should be applied
Charge Freight?	Tick where Freight is to be charged
Order/Job Trans Value	Set the total value for the Order or JC Job over which the Rule applies (excl. GST)
Packing Slip/JC AR Inv Value	Set the total value of the Packing Slip or JC Job AR Invoice over which the Rule applies (excl. GST)
First Print Only?	Tick if the rule should only apply to the first print of a packing slip (i.e. will not apply to back-orders). Note: this field is disabled for the Type JC.
Stock Item Exclusions	Click on the Edit button. A pop-up screen will appear into which you may add multiple lines defining a set of specific conditions based on which this Rule should or should not apply:



Note: this field is disabled for the Type JC.

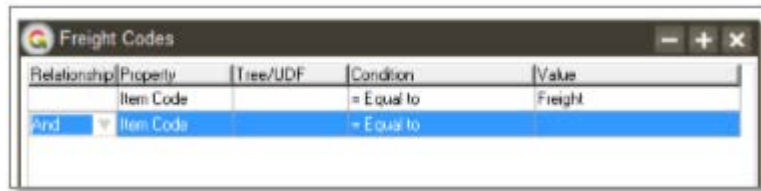
Relationship	Used for the operators “And” and “Or” which determine whether a combination of items constitutes the exclusion. e.g. “does not apply the rule if the customer orders Item 12457 and item 34112”. The first line does not require a Relationship, but all subsequent lines do.
Property	Select one of the following from the drop-down box: <ul style="list-style-type: none"> <li>- Item Code (stock code)</li> <li>- Analysis Code</li> <li>- Stock Tree</li> <li>- Stock UDF</li> </ul>
Tree/UDF	If the Property chosen is Stock Tree or Stock UDF, select the required Tree/UDF from the drop-down box.
Condition	Select the condition that should apply for this line. The options available are:



**Value** Enter the Value to which this condition should be applied. This will be a specific Item Code, Analysis Code, Stock Tree or UDF Value.

**Use IN Tran Type** Select the IN Transaction Type to be used for analysing why Freight was or was not charged.

**Freight Codes** Click on the Edit button. A pop-up screen will appear into which you may add multiple lines defining which Freight Codes are available on the Packing Slip Complete form or JC Job Invoice Complete form, for this Rule:

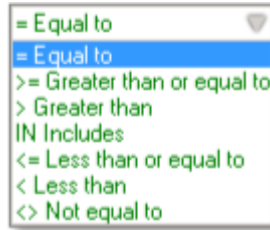


**Relationship** Used for the operators “And” and “Or” which determine whether a combination of items constitutes the exclusion. e.g. “do not apply the rule if the customer orders Item 12457 and item 34112”. The first line does not require a Relationship, but all subsequent lines do.

**Property** Select one of the following from the drop-down box:  
 - Item Code (stock code)  
 - Analysis Code  
 - Stock Tree (applies to all items under this tree)  
 - Stock UDF

**Tree/UDF** If the Property chosen is Stock Tree or Stock UDF, select the required Tree/UDF from the drop-down box.

**Condition** Select the condition that should apply for this line. The options available are:



Value

Enter the Value to which this condition should be applied. This will be a specific Item Code, Analysis Code, Stock Tree or UDF Value.

Narration

Enter the Narration that will be added to the Sales Order or JC Job line along with the Ticket number (if entered).

4. Save and Close the form.

### Examples:

Rules are applied in sequence, so you must specify the most specific first.

- A. To charge a higher freight for a specific item you would;
  - i. Tick charge freight, leave the two values at 0, don't tick First print Only, ignore UDF's, click the <edit> for Stock Item Exclusion,
  - ii. Select Item Code, condition of <> Not Equal to, then select the stock item to charge freight on,
  - iii. Choose the IN Tran Type – these are used to analysis the freight charged and not charged, click <edit> on Freight Codes
  - iv. Select as many stock items as are applicable for this rule line – would normally only be one or one per geographical area, click OK
- B. To charge a higher freight for urgent delivery (or anything setup as a transaction udf);
  - i. Tick charge freight, leave the two values at 0, don't tick First print Only, type in the relevant value for the udf (if the udf is a Boolean this must be true or false in lower case), ignore the <edit> for Stock Item Exclusion, choose the IN Tran Type – these are used to analysis the freight charged and not charged, click <edit> on Freight Codes
  - ii. Select as many stock items as are applicable for this rule line – would normally only be one or one per geographical area, click OK
- C. To not charge freight for orders over a specified value;
  - i. Do not tick charge freight, type the total order value over which freight is free, don't tick First print Only, ignore UDF's, ignore the <edit> for Stock Item Exclusion, choose the IN Tran Type – these are used to analysis the freight charged and not charged, click <edit> on Freight Codes
  - ii. Select as many stock items as are applicable for this rule line – would normally only be one or one per geographical area, click OK

Notes:



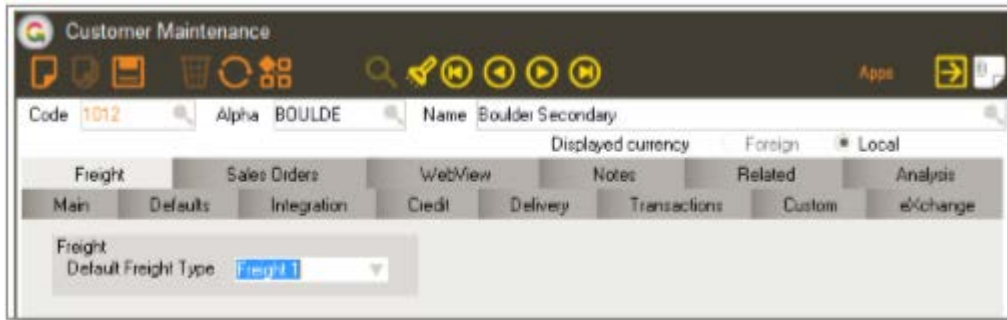
- every rule you need a final line which is a catchall – normally charge freight, with no value, no udf's, no exclusion then a Transaction type and Freight Code.
- To charge freight on Job Invoices, you must have a JC line – for these you cannot have UDF's of stock item exclusions.

## CUSTOMER MAINTENANCE

The App adds a new **Freight** tab to the Customer Maintenance screen to allow a default freight type to be set for each customer.

### MANUAL SETUP

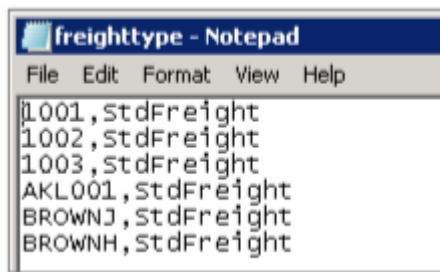
1. Select the menu item | **Data Entry** | **Accounts Receivable** | **Customer Maintenance** |
2. Choose a customer.
3. Choose a **Default Freight Type** for the customer, from the drop-down list.
4. **Save** and **Close** the form.



### FREIGHT TYPE IMPORT

The App adds a new import script to allow Freight codes to be imported in bulk.

- 1) Create a text file with the following fields separated by a comma:
  - a) Customer Code
  - b) Default Freight Type Code



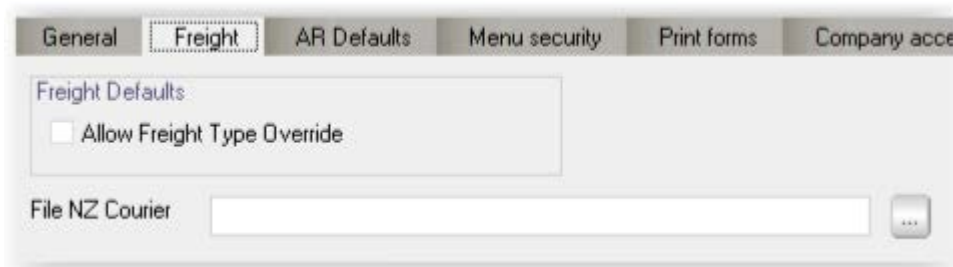
- 2) Save the file in CSV or TXT format
- 3) Select the menu item | **System** | **Utilities** | **System Scripts** |
- 4) Expand the list entry for **Apps4GT Freight**
- 5) Select **Import Customer Freight Types**
- 6) Tick the **Output to screen** tick box
- 7) Click on the **Run script** button

- 8) Browse to find the text file created at step 1 above, and click **Open**
- 9) The script will run to import the default freight codes and will show the results of the import on-screen.

## USER SETUP

The App adds a new tab to the User Preferences Maintenance form to allow a user to be configured to over-ride the Freight Type on a Sales Order, and also change the location of the Despatch IT files this app creates. This could be useful if there are multiple physical locations Despatch IT couriers to pick up from.

1. Select the menu item | **System** | **System Setup** | **User Maintenance** |
2. Select the user from the **Name** drop-down list and click on the **More Preferences** button.
3. Click on the **Freight** tab.
4. Tick **Allow Freight Type Override**.
5. IF the user outputs the Despatch IT file to a different location please enter the directory where this user's Despatch IT files should be placed.
6. **Save** and **Close** the form.



The screenshot shows a software interface with a tabbed menu at the top. The tabs are: General, Freight (selected), AR Defaults, Menu security, Print forms, and Company access. Below the tabs, there is a section titled "Freight Defaults" containing a checkbox labeled "Allow Freight Type Override" which is currently unchecked. Below this section is a text input field labeled "File NZ Courier" with a browse button (three dots) to its right.