Version 20 Changes and Updates

Order Entry

New fields were added to Order Entry.
- Packed By (this is the user that packed the order)
- Labels Printed by (this is the user that printed the packing labels)
- Labels Printed Date (this is the date the packing labels were printed

A change to Order Entry has been made to allow 2 different sound files to be heard. One for a good entry and one to indicate an error. A function key will need to be pressed to bypass the error instead of just pressing enter. The new system Flags to accomplish this are listed below:
- Order Entry - Bad Item Barcode - If this key is pressed or a barcode containing the key is scanned; close the bad item warning on the order entry screen.
- Order Entry Error Repetitions - Number of times to repeat the order entry error sound. Enter 0 to repeat until the error screen is closed.
- Order Entry Error Sound - Path\filename of the WAV file to play when there is an error during order entry.
- Order Entry Good Sound - Path\filename of the WAV file to play when there is a valid entry during order entry.

Notes can be added to the Notes Section of an Order in Order Entry without having to unpick the order.

Order Entry Field Order: You can now set the order the fields will appear on the Order Entry Screen. Set the entry order for fields in Order Entry by going to System, Order Entry Fields Order. By default, no order is set. Meaning pressing Enter will act the same as pressing Tab until you set the order on that screen. You can select the fields you want then FundTracker will proceed from one selected field to the next selected field in order from top to bottom. If you are on the last selected field in Order Entry and press Enter, FundTracker will automatically go to Product ID on Order Detail.

A blank homeroom field will no longer display an error if left blank when doing Order Entry. A new system flag was added called School ID as Homeroom. If properly set the Homeroom field will be auto-populated with the school ID.

Added the ability to Edit the Order Entry Tracking Tab so that a Tracking number can be manually added and then viewed.

The Text Number field has been moved from the Misc. tab to the Order Header tab in Order Entry.

Packing

On the *Packing Screen* the Scan Type now has a new Security Level called Packing Scan Type that can be selected for a Packing user. This locks down the ability for the packer to change the Scan Type from UPC number to Product Number.

Added system flag= **Packing Label Printer Prompt** on the Order Entry tab: If this is set to 1, then the user is prompted for the name of the printer to print labels to in Packing.
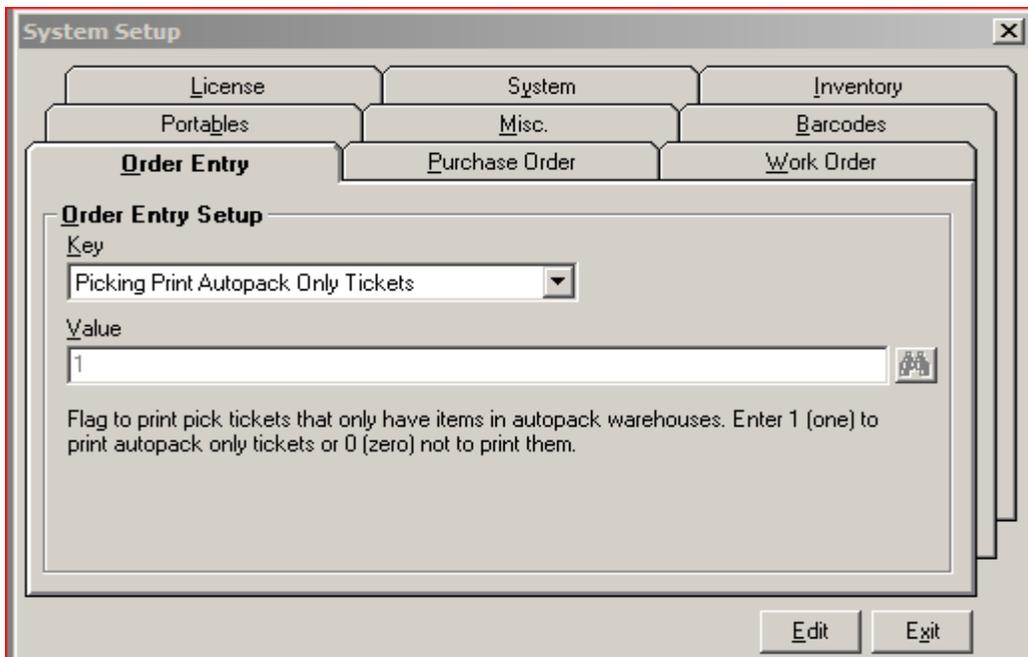
Picking

There have been changes made to picking process to accommodate company's using Terminal Services. If the flags are set correctly, then only one user can access the picking screen at a time. The following System Flags added to allow this are:
- Picking Lock User - User id and computer name who has locked picking for single user mode.
- Picking Single User Mode - Flag to enable picking single mode. Enter 1 (one) to only allow one user in picking or 0 (zero) to allow unlimited users.

A new pick ticket was created; that prints by the number of items on the order, from largest to smallest, but does not change the student number.

If an order has only Auto-Pack items on the order, there is a new option to not print the pick ticket. The order will be picked but the pick ticket will not be printed. The following system flag controls this feature.

Invoice Screen

The Invoice Date field on invoices can now be changed without having to delete the Invoice.

There is also a new dropdown field at the bottom of the Invoice screen that will allow you to select different invoice reports to print for the same invoice. This is setup like the picking screen report dropdown. You can add the invoice reports you wish to have in the dropdown by going to Orders\Invoice Files.

Remote Order Entry

Remote order entry will now allow you run a pick a prize program. It will look at the internet school sales as well to determine the prize level. You will need to create the ROE file after all of the internet school sales are completed. (See new ROE documentation on our website.)

Miscellaneous Changes

A new Backup Feature has been added. You will need to set up the System Setup\System\Backup Database Path. This is where the database will be backed up. Then select File, Back Up Database.
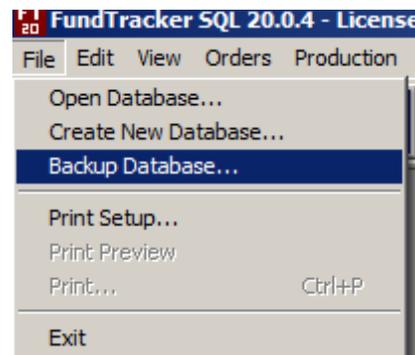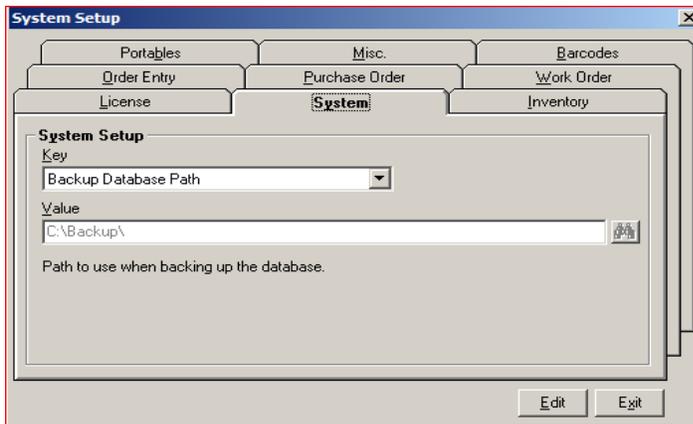
On the *Merge Ship To School Orders screen* a check box has been added called Global Update Internet School by Order Code. If checked the Global Update will run prior to the Merge Ship To School procedure. This Global Update seems to be most missed step in the merge process.
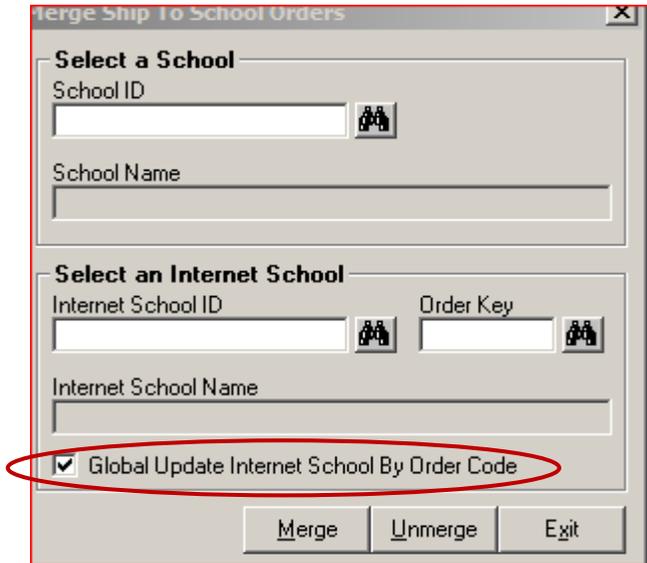
When Importing Schools with the Excel import the contract dates that are entered in the spread sheet for the brochure school now populate in the Internet school's Contract Tab when an Internet school is auto-created from the system settings. (For more information on how this is setup please contact support.)

The drop down of the Pick Ticket Report selections now comes over from one season's database to another.

Updated the PICS Internet Import File's "H" record to add a field for Web Tax Amount. The Sales Tax calculated for the Online order can be recorded here and the Sales Tax will be recorded in Order Entry when the file is imported.
*****There is now a new Internet Import File, Please download from our site the new Web Interface with FundTracker SQL Version 20 document. *****

Created a new report called Ready to Merge by School ID.

Ready To Merge

School ID	School Name	Merge Qty	Departure Date
170748	MACON CENTRAL HIGH SCHOOL	26	03/10/2016

This report will only show schools that have not been merged. Only the brochure school ID & Name are displayed.

Created a new report called Total Sales by Student Ranking by Dollars Sold.

The report description for the report Unmatched Ship To School Orders was changed to Unmatched Ship to School Orders by Order Code.

Two new reports were created called Prize Drawing Tickets Internet Combined, and Prize Drawing Tickets Internet Combined by Dollars. These reports combine the units/dollars from the brochure and Internet schools to determine the number of Prize Drawing tickets to awarded to each student.

Increased the report field size of the School ID on the following reports: School Information with Historical Totals, Reservations in by Kick Off Date, Company Profit All, Profit Summary, Salesperson by School & Brochure, Internet Sales, Process Report.

The report field size of the Delivery Date fields on Sales Analysis report and Profit Totals By School ID with Internet were increased to show the complete date.

The Partially Packed report in Remote packing has been updated to include the Student Number.

Added system flag = **Add Multiple Transactions Get Defaults** on the Inventory tab: If this is set to 1, then the default warehouse and bin will be displayed when a new product id is entered while Add Multiple Transactions is checked

Customer Service Ticket has been modified. Below is a screen shot of the new screen. (Documentation can be found on our website.)

The Customer Service Ticket was changed to make it easier to use, less data to have to be entered, and to allow all issues related to an order to be handled on one Customer Service Ticket. To streamline the process, the 2 message boxes at the top of the screen have been removed. The Priority field, the Issue Description, Research Steps Taken, Actions Taken, Return phone call check box, Refund Amount, Refund Check #, and Refund Date have been removed. All of the Support Issue reports have been changed to reflect the Customer Service Ticket changes.

The Help Desk Ticket # is an internal ticket number that can be manually entered. FT will continue to auto generate the ticket number when a new customer service ticket is created.

When the Add button is pressed and a new Customer Ticket Number is created the signed in User ID and the Creation Date will be populated.

A new checkbox for "Allow QTY to Ship" has been added to the Issue Code Screen. If the Issue Code's Allow QTY to Ship check box is checked, a QTY to ship can be entered on the Customer Service Ticket.

The School ID will be entered first if known, then a student can be selected from that school ID. If the school ID is not known all students from all schools can be searched. This feature will work similar to how Order Entry works. Once the order is found the Homeroom field, Ship To Address, City, State, Zip, Caller Name, Caller Phone#, Caller Email, Web Invoice #, and Reference Number will be populated if these fields are found in the Order Entry record. If the Caller Name, Caller Phone#, and Caller Email - are changed from what is displayed, FT will be updated.

The Order Detail screen will have a browse button next to the item number so any of the items on the order can be selected. Once the item number is selected, the Description and quantity ordered will be displayed. A dropdown will appear so the Issue Code can be selected and the Quantity to ship can be entered, if allowed. Once entered the item information will appear in the grid similar to how it works in Order Entry.
If the Tracking number exists, it will be populated and the view Tracking Detail button will display the tracking information as it does currently. If a Resolve Order has been created, the resolve Order Key will be populated. If the original order was packed the pack date is populated. If the View Resolve Order button is selected, the order entry screen is displayed with the Resolve Order selected. If the Create Resolve Order button is pressed, the order entry screen is displayed and all items entered on the Customer Service Ticket with a Quantity to Ship of 1 or more will be automatically entered on the Order Entry screen. The Prev, Next, Add, Delete, Edit, Print, and Exit Buttons will work like they did before.