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MADE2MANAGE SFDC

USER MANUAL

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Overview

This document provides the overview for the Made2Manage Manufacturing SFDC (Shop Floor Data Collection) Basic and Premier System. It includes both explanatory and technical details documenting the solution. Full description of compatible hardware is listed along with the variations among these devices. The Made2Manage SFDC Basic and Premier System is offering to customers the capability to collect shop floor data via RF (radio frequency) devices (Premier only), as well as hardwired terminals supporting protocols such as RS-232, RS-422, RS-485 and Ethernet (Basic and Premier). In certain instances, a customer will want to have a hybrid environment that includes both RF and hardwired terminals.

The solution is a middleware service written to communicate with a variety of hardware devices via RF and hardwired and to also employ a flexible scripting component allowing powerful transaction support for easy modification and additions. Detailed in the manual are the specific transactions supported by the end devices.

The product underlying the Made2Manage SFDC Basic and Premier System also supports printing; auto labeling solutions (such as label applicators), light trees, reader boards and PLC's. Please note: these "Non-RF" items listed in the previous sentence are not a standard part of the Made2Manage SFDC Basic and Premier System and therefore will be specified and provisions made for their inclusion during the functional specification phase of any custom project.

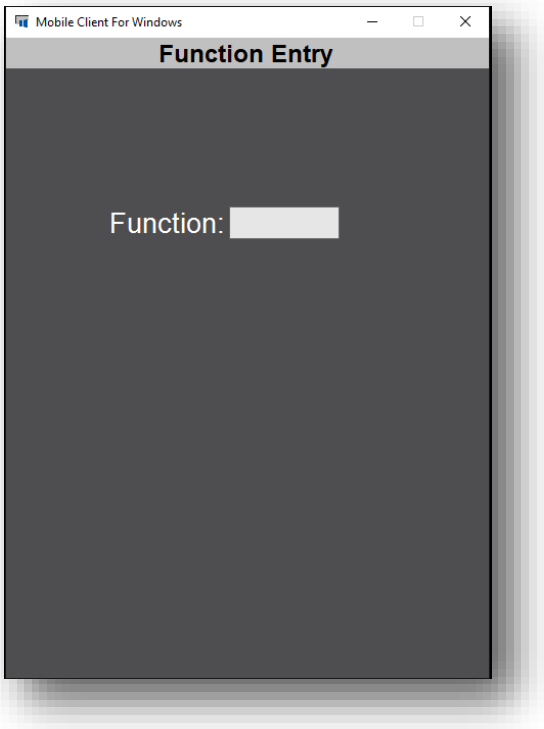
Please be aware that the transactions included in the documentation are the standard included items in the Made2Manage SFDC Basic and Premier System. As evidenced by the many types of devices supported above, other possibilities exist for interfacing to Made2Manage ERP and if requested, the product can be easily modified to support this.

The Made2Manage SFDC Basic and Premier System are, by design, very powerful, extremely flexible, and easy to use.

Interface Software

Function Entry

The system may be configured to use the function entry screen. This screen is designed to be used with the various reports generated from Made2Manage (including the Barcode Function Sheet). These reports contain barcodes which may be scanned into this prompt and the system will display the appropriate screen for the transaction requested.

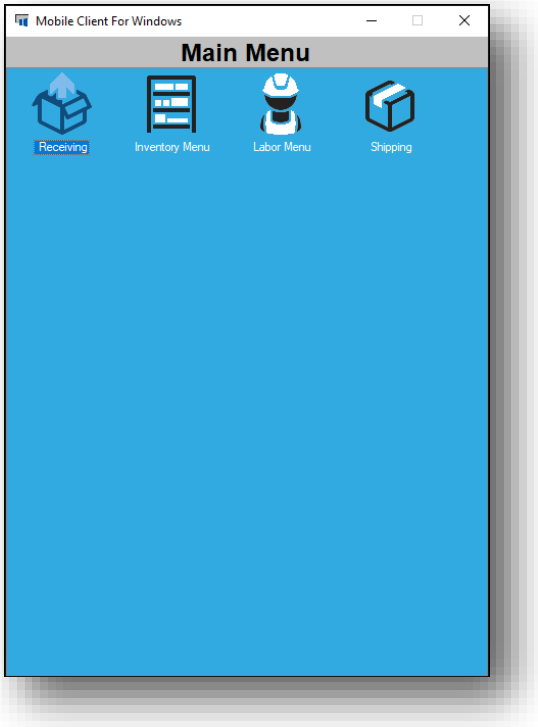


Once the transaction is completed, the device will return to this screen and wait for another barcode function to be scanned.

Main Menu

The system can also be configured to present a menu driven interface to the user. In this configuration, the data collection terminal software consists of menu and screen prompts all designed to be easy to use on a small or large screen display. Each Device used within Made2Manage SFDC has its own script instance that runs the application.

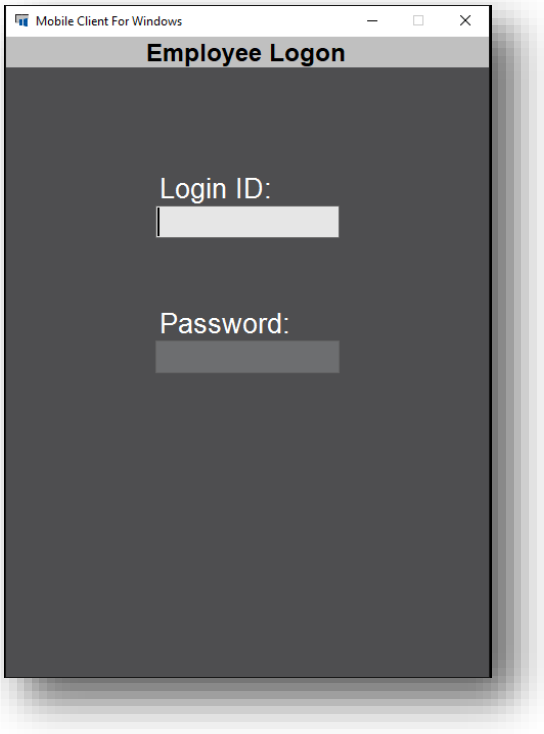
The Main Menu appears as follows:



Many menu options contains sub-menus. A sub-menu is a subsequent menu with more options. In the following pages we will detail all the menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

A Note Concerning Employee Number

The following screenshots all display a prompt for Employee Number where appropriate. However, if you are using a configuration of the Made2Manage SFDC System that prompts the user for a Login ID and Password upon connecting to the system (a decision made during system evaluation), then upon boot up the user will see a screen that looks like this:



When a user connects with the Login and Password, the user identified by the login will travel with every transaction. The password for this is configured in the Employee Maintenance form in the SFDC configuration, or in the SFDC Security application, which are discussed later in this document.

If you choose not to login upon booting up the system, the user will be prompted for an Employee Number with every transaction. The following screenshots display this Employee Number prompt.

A Note Concerning Location and Bin Fields

Post-Foxpro version, Made2Manage allows the use of more than 2-character location fields. This may require you to have separate prompts for location and bin.

The only difference is that instead of one field that handles location and bin, it has been broken into two separate fields. If you are entering by hand, you would key in the location, press Enter, then key in the bin and press Enter again. If you are scanning separate barcodes, you would first scan the location, and then follow with a scan for the bin.

However, you will note that Made2Manage documents will create a single barcode for the location – even if it is more than 2 characters – with the bin also contained in that barcode. If this is the case, simply scan that barcode when you are entering the Location field. The

system will recognize the location and bin and split the data out accordingly, populating both fields. You will then be able to move on to complete the transaction.

Screens displayed in this document will have both the Location field and the Bin field. The Made2Manage SFDC system can be configured without the bin field on screens if bin control is not required for inventory.

A Note Concerning Multi-Facility

Version 5.x+ of Made2Manage allow the use of multiple facilities. This functionality requires that SFDC use the Made2Manage standard of referencing identity column records for part numbers and locations, per their appropriate tables (INMASTX and BCLOCBIN). If multiple facilities are being used, manually keying part numbers or location and bin combinations will generate errors, because SFDC must use the identity column record number to associate the value being scanned with its proper facility!

A Note Concerning Label Printing

As you will see in the following transaction descriptions, printing of a standard label has been added to two transactions: Receiving and Shipping. The standard label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.

If you wish to attempt generating a new label format on your own, you need to use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The SMS Group to assist in the creation of the printer output files, this may be provided as a billable service.

Receiving

Selecting the Receiving option from the Main Menu will display the following screen:

Below is a brief description of each of the Receiving Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

1. ***By PO Line*** is used to receive items by PO line number (using the Receiving Copy of the M2M Purchase Order).

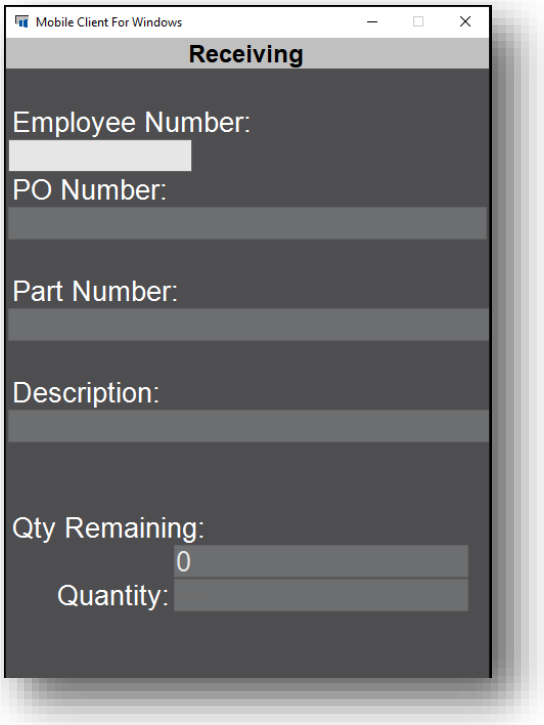
2. ***By Part*** is used to receive items by part number (without using any M2M documents, or used when scanning labels provided by a vendor)

3. ***Receiving Inspection*** is used inspect parts received and mark them as either passing or failing inspection

4. ***Receiving Images*** can be used in conjunction with the SMS Mobile client and a mobile computer that has a camera, to take pictures of items received, and attach the images to the receiver document in M2M.

By PO Line

Selecting By PO Line from the Receiving Menu (or scanning F5 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

PO Number – Scan the appropriate P0 line number from the Receiving Copy of the Purchase Order Document.

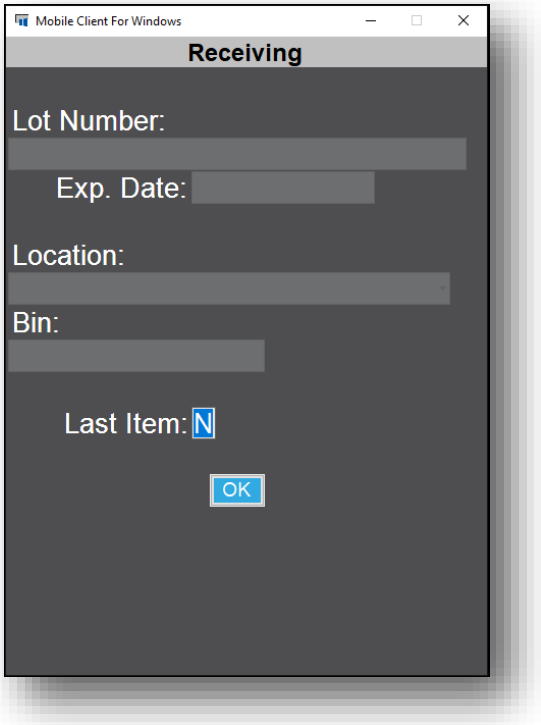
Part Number – Displays the part number of the PO line selected.

Description – Displays the description of the part for the PO line selected.

Qty Remaining – Displays the quantity remaining to be received for the PO line selected.

Quantity – Key the quantity of product being received. The system will allow the quantity indicated on the PO, +/- any tolerances indicated on the PO. Depending on the Receiving Tolerance Error setting in the configuration, the system will either generate a warning or an error if this acceptable quantity is exceeded.

Receiving by PO Line, Page 2



Lot Number – Key or scan the lot number for the product received, if applicable. This field will be active only for parts flagged for lot control.

Exp. Date - Key the expiration date for the product received, if applicable. This field will be active only for parts flagged for date control.

Location – Key or scan the location to place the items received. By default, system will display the default location for the indicated PO line item as indicated on the purchase order (field will be blank for lines flagged for Inspection, requiring the scan of the appropriate Inspection Location). In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Enter the bin to place the items received. By default, system will display the default bin for the indicated PO line item as indicated on the purchase order. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

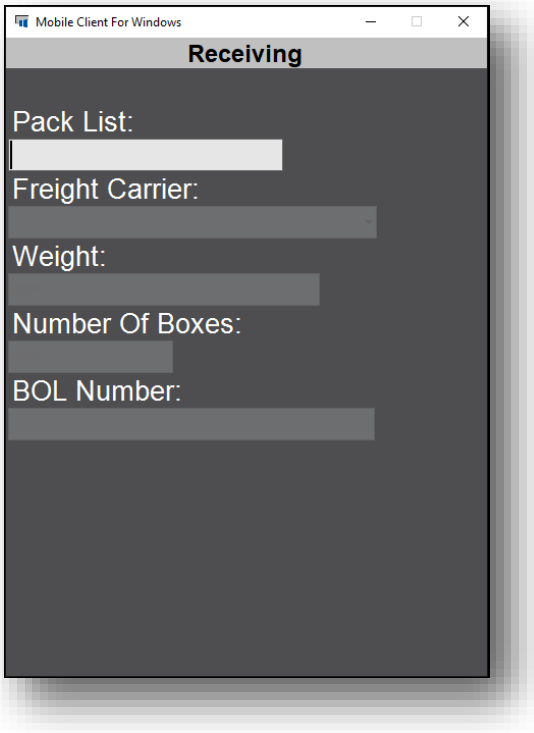
Last item – If this is the last item received, enter a 'Y". As transactions are entered, the system keeps all receiving transactions in table RECEIVED of the SFDC database. No

transactions for a PO will post as received until the user answers 'Y' in this field to any line item from that PO; when this happens, all transactions are flushed to BCSHARED for posting by the Made2Manage posting program.

OK – Press the OK button to complete this transaction.

Receiving by PO Line, Page 3

A third page has been added to allow for additional Receiver header information collection for M2M v6.x+, as follows (**note: this screen will only display when Last Item = Yes**):



Pack List – Key or scan the receipt's Packing List number.

Ship Via – Press F2 to display list of Ship Via options from M2M ERP.

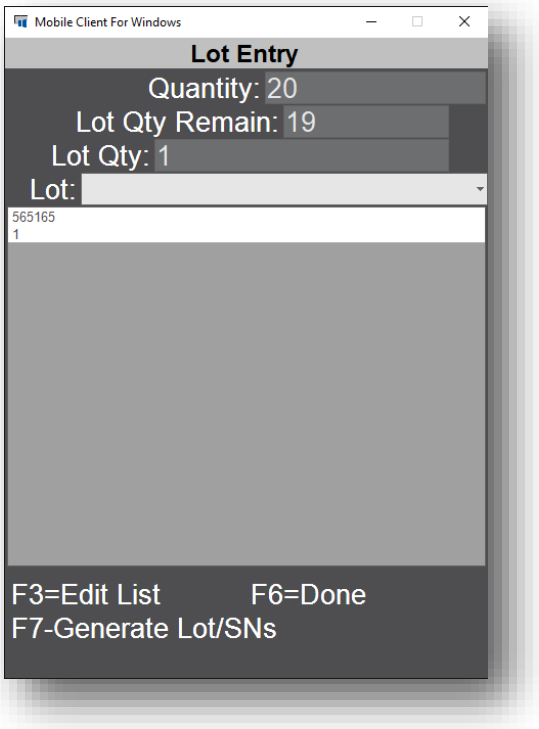
Weight – Key or scan the Weight of the receipt.

Number of Boxes – Key or scan the Number of Boxes of the receipt.

BOL Number – Key or scan the receipt's Bill of Lading number.

Receiving, Lot Entry

If M2M version 7.51 or higher and rules are setup for lot numbers, user will be taken to new lot entry form to enter new lot numbers



Quantity – Display only value of the quantity entered in the receiving transaction

Lot Qty Remain –Display only value of lot numbers remaining to be entered.

Lot Qty – Key or scan the quantity for the lot to be entered.

Lot – Key or scan the lot number. Depending upon how the rules are defined in M2M for the lot, user may not be able to key in a value, and must hit the F7 key to get the next lot number from M2M.

FKey1 & FKey2 – These values will change in what they display and if they are displayed based on lot number entry. The possible values are

F6=Done - User can press the F6 key to say they are done entering lot numbers. If the user is in the list, the F6 key will take them from the list back to the lot number prompt for more lot number entry.

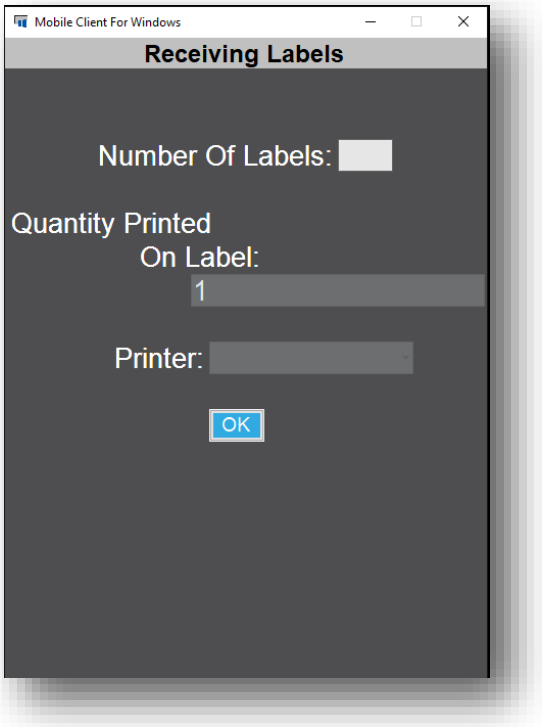
F3=Edit List - After at least one lot number has been entered, the user can press the F3 key to move the focus to the list, and they can scroll the list to review lot numbers entered.

F8=Delete - if the user is in the list, they can press the F8 key on a lot number highlighted and remove it from the list

F7- Generate Lot/SNs – will generate lot number based on Made2Manage rules.

Receiving Labels

If the value from *Receiving Label*= setting of configuration contains a value, then upon completion of receiving transaction the Receiving Labels screen will be displayed, as follows:

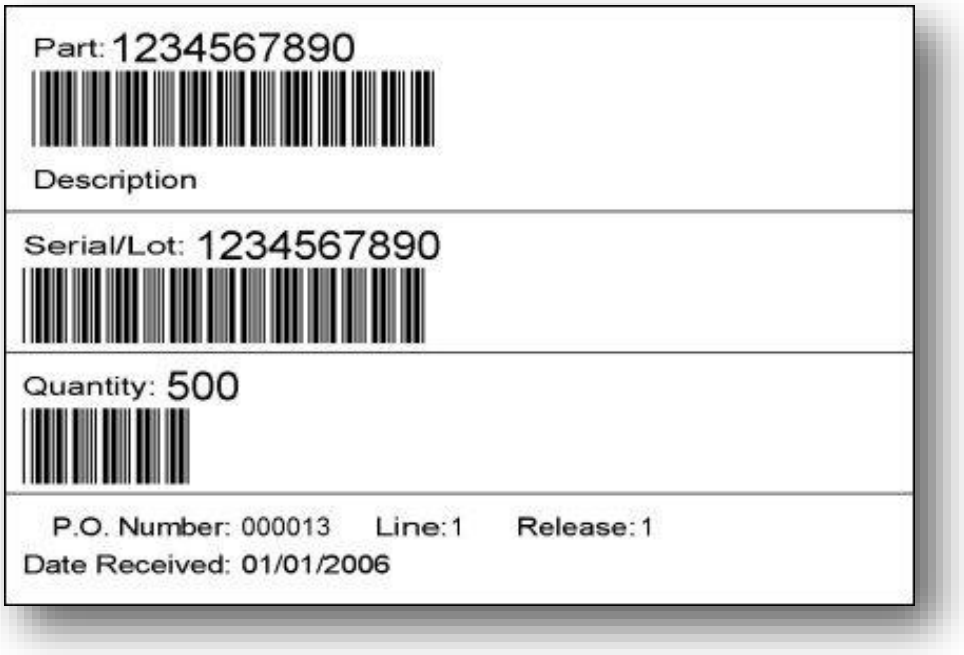


Number of Labels – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed on Label – Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the Printers of the SFDC configuration.

OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label which appears as follows:

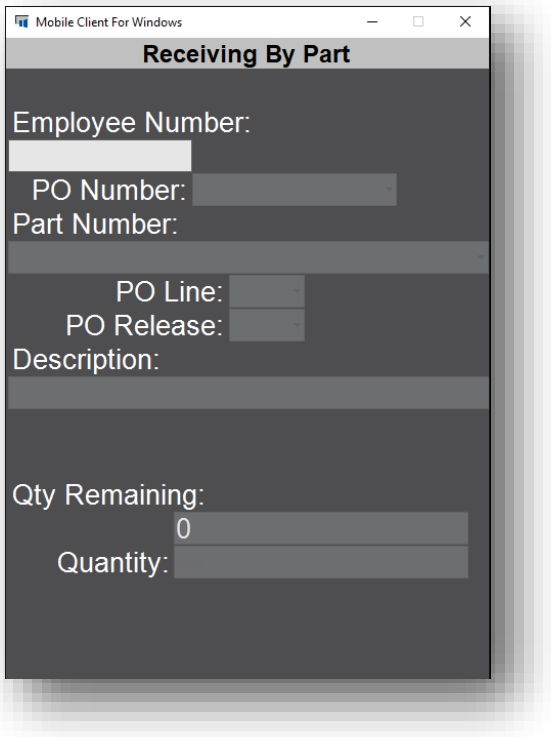


A Note Concerning Label Printing

- The standard receiving label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.
- If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

By Part

Selecting By Part from the Receiving Menu (or scanning F5B from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

PO Number – Key or scan the 6-digit purchase order number, or press F2 to display a choice list of PO numbers in OPEN status.

Part Number –Press F2 to display a choice list of part numbers for the selected PO number; scroll the list to select the part to be received.

PO Line – If value selected in the Part Number prompt occurs on only one line, this value will be defaulted. If the part occurs on multiple lines, user may press F2 to display a choice list of lines for the indicated part.

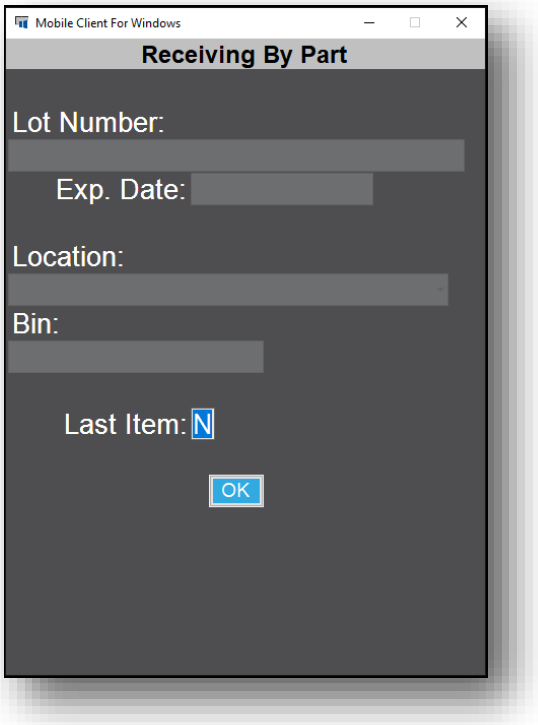
PO Release – If value selected in the Part Number prompt occurs as only one release, this value will be defaulted. If the part occurs on multiple releases, user may press F2 to display a choice list of releases for the indicated part.

Description – Displays the description of the part for the PO line selected.

Qty Remaining – Displays the quantity remaining to be received for the PO line selected.

Quantity – Key the quantity of product being received. The system will allow the quantity indicated on the PO, +/- and tolerances indicated on the PO. Depending on the Receiving Tolerance Error setting of the configuration, the system will either generate a warning or an error if this acceptable quantity is exceeded.

Receiving by Part, Page 2



Lot Number – Key or scan the lot number for the product received, if applicable. This field will be active only for parts flagged for lot control.

Exp. Date - Key the expiration date for the product received, if applicable. This field will be active only for parts flagged for date control.

Location – Key or scan the location to place the items received. By default, system will display the default location for the indicated PO line item as indicated on the purchase order (field will be blank for lines flagged for Inspection, requiring the scan of the appropriate Inspection Location). In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Enter the bin to place the items received. By default, system will display the default bin for the indicated PO line item as indicated on the purchase order. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

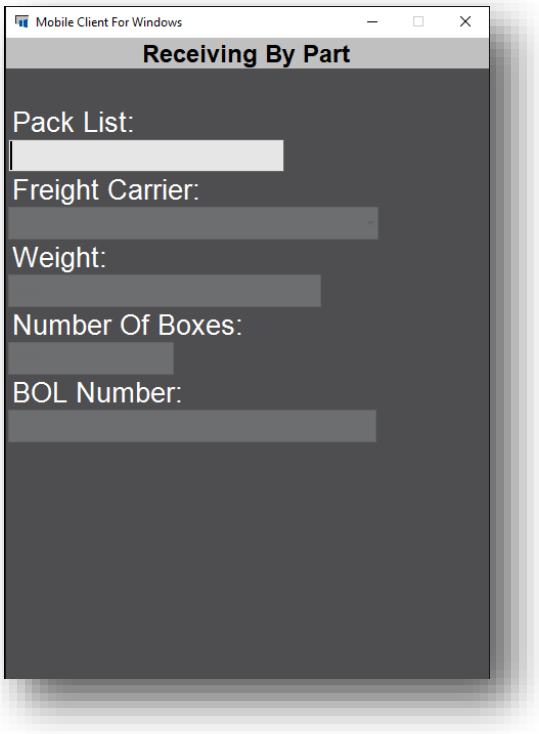
Last item – If this is the last item received, enter a 'Y". As transactions are entered, the system keeps all receiving transactions in table RECEIVED of the SFDC database. No transactions for a PO will post as received until the user answers 'Y' in this field to any line

item from that PO; when this happens, all transactions are flushed to BCSHARED for posting by the Made2Manage posting program.

OK – Press the OK button to complete this transaction.

Receiving by Part, Page 3

A third page has been added to allow for additional Receiver header information collection for M2M v6.x+, as follows (**note: this screen will only display when Last Item = Yes**):



Pack List – Key or scan the receipt's Packing List number.

Ship Via – Press F2 to display list of Ship Via options from M2M ERP.

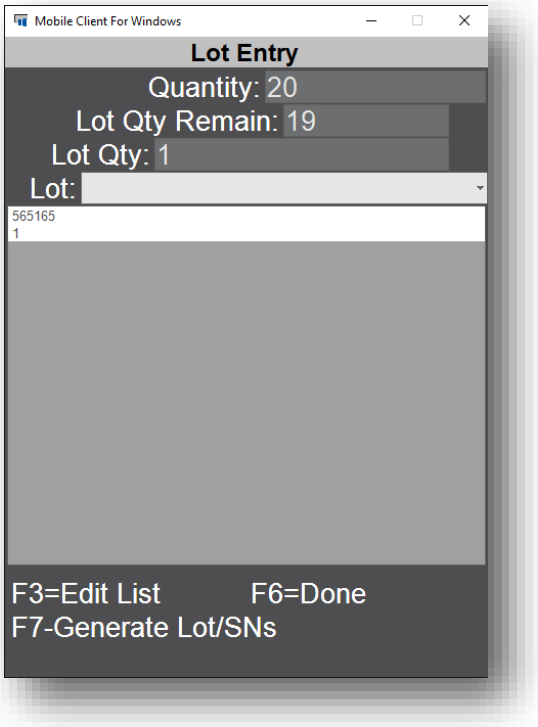
Weight – Key or scan the Weight of the receipt.

Number of Boxes – Key or scan the Number of Boxes of the receipt.

BOL Number – Key or scan the receipt's Bill of Lading number.

Receiving By Part, Lot Entry

If M2M version 7.51 or higher and rules are setup for lot numbers, user will be taken to new lot entry form to enter new lot numbers



Quantity – Display only value of the quantity entered in the receiving transaction

Lot Qty Remain –Display only value of lot numbers remaining to be entered.

Lot Qty – Key or scan the quantity for the lot to be entered.

Lot – Key or scan the lot number. Depending upon how the rules are defined in M2M for the lot, user may not be able to key in a value, and must hit the F7 key to get the next lot number from M2M.

FKey1 & FKey2 – These values will change in what they display and if they are displayed based on lot number entry. The possible values are

F6=Done - User can press the F6 key to say they are done entering lot numbers. If the user is in the list, the F6 key will take them from the list back to the lot number prompt for more lot number entry.

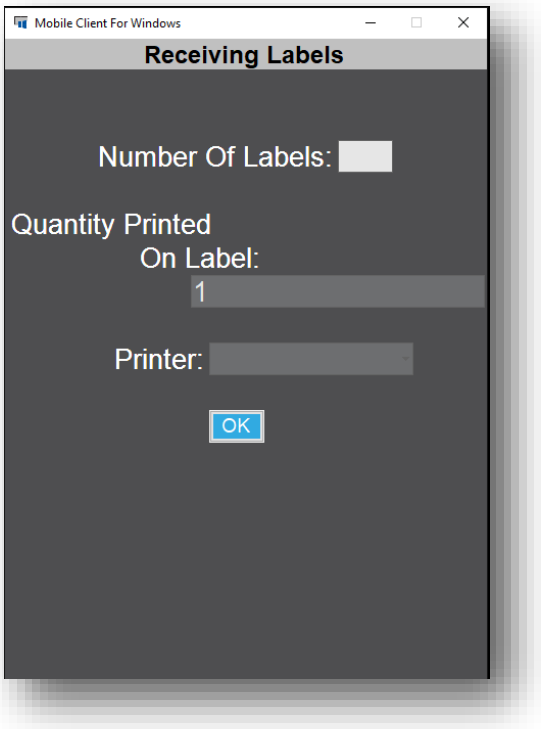
F3=Edit List - After at least one lot number has been entered, the user can press the F3 key to move the focus to the list, and they can scroll the list to review lot numbers entered.

F8=Delete - if the user is in the list, they can press the F8 key on a lot number highlighted and remove it from the list

F7- Generate Lot/SNs – will generate lot number based on Made2Manage rules.

Receiving Labels

If the value from *Receiving Label*=* line of SFDC configuration contains a value, then upon completion of receiving transaction the Receiving Labels screen will be displayed, as follows:



Number of Labels – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed on Label – Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the Made2Manage SFDC configuration.

OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label which appears as follows:
Number of Labels – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed On Label - Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the SFDC configuration.

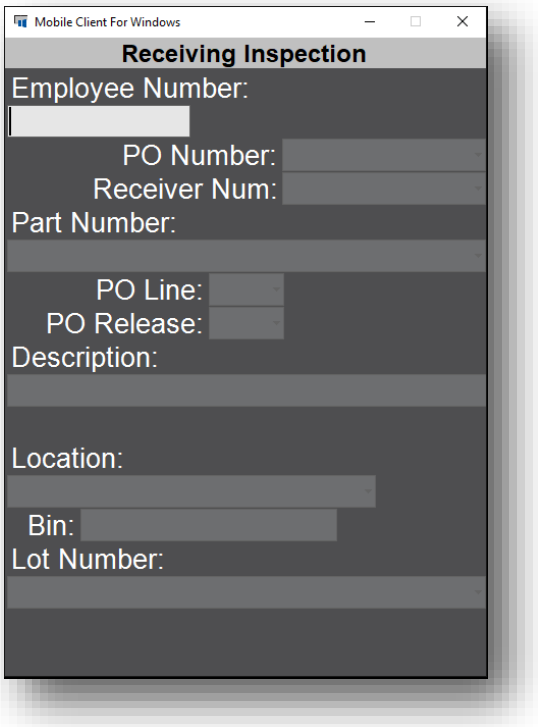
OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label that appears as follows:

A Note Concerning Label Printing

- The standard receiving label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.
- If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

Rec. Inspection

Receiving Inspection allows user to inspect and locate parts received into the inspection location. Selecting Rec. Inspection from the Receiving Menu will display the following screen:



Employee Number – Key or scan the Employee Number.

PO Number – Key or scan 6-digit PO number or press F2 to display list POs to inspect. User may scroll list using arrow keys and press Enter to select. User may also skip this field if PO is not known.

ReceiverNum – Key or scan 6-digit receiver number or press F2 to display list receivers to inspect. User may scroll list using arrow keys and press Enter to select. Field may also be defaulted based on selection of PO Number, if applicable.

Part Number – Press F2 to see list of parts for the indicated PO requiring inspection; user may scroll list using arrow keys and press Enter to select.

PO Line – Defaulted from PO associated with selected Receiver number.

PO Release – Defaulted from PO associated with selected Receiver number.

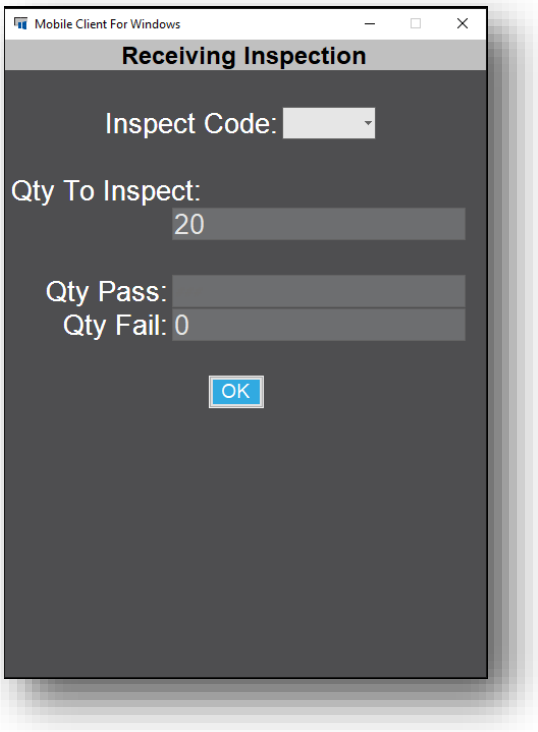
Description – Description of part number being inspected.

Loc – Key or scan the location the inspected part is being moved to. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Key or scan the bin number the inspected part is being moved to. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

Lot Number – Key or scan the lot number of the part being inspected.

Rec. Inspection (page 2)



Inspect Code – Press F2 to see list of inspection codes from M2M ERP; user may scroll list using arrow keys and press Enter to select.

Qty To Inspect – Default value showing quantity if parts waiting to be inspected per the receiver/part number selected for inspection.

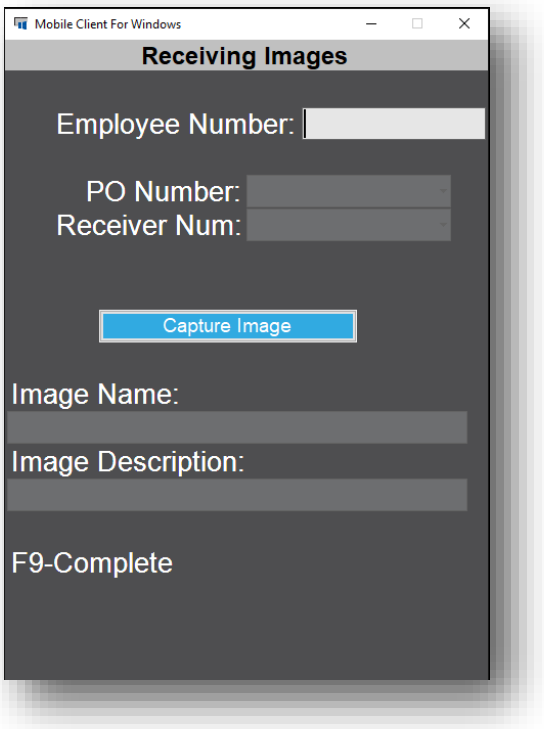
Qty Pass – Key or scan the quantity of parts passing inspection.

Qty Fail – Key or scan the quantity of parts failing inspection.

OK – Press Enter to complete transaction. System will not allow a total quantity inspected to exceed quantity requiring inspection.

Receiving Images

Receiving Images allows user to take pictures of items received and attach those images to the receiver in M2M. Use of this transaction requires use of the SMS Mobile client on a phone or mobile computer that has a camera. This also requires a premier license for SFDC. Selecting Receiving Images from the Receiving Menu will display the following screen:



Employee Number – Key or scan the Employee Number.

PO Number – Key or scan PO number or press F2 to display list POs to take images for. User may scroll list using arrow keys and press Enter to select. User may also skip this field if PO is not known.

Receiver Num – Key or scan receiver number or press F2 to display list receivers to take picture for. User may scroll list using arrow keys and press Enter to select. Field may also be defaulted based on selection of PO Number, if applicable.

Capture Image – click the button to be prompted to take a picture. Once accepted, the camera of the mobile computer will be active and allow the user to take a picture and accept the taken picture.

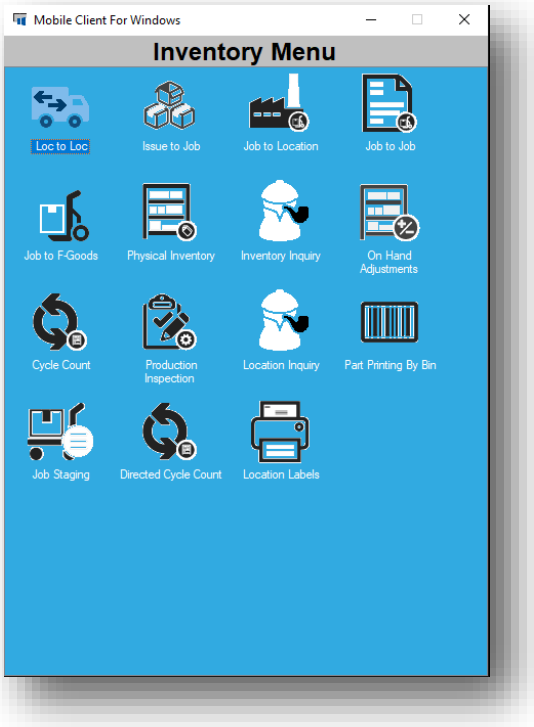
Image Name – key in a name for the image taken.

Image Description – optionally enter a description for the image taken. Once this field is entered, user will be returned to the Capture image button to capture additional images, if needed. After entry, form will reset to the capture image button to take additional images, if needed.

F9-Complete – when done capturing images, press F9 to be returned to the clear the form for taking pictures for another receiver

Inventory Menu

Selecting Inventory Menu from the Main Menu will display the following screen: :



Below is a brief description of each of the Inventory Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

1. ***Loc to Loc*** is used to move parts from one location to another location.
2. ***Issue to Job*** is used to issue inventory to a job.

3. ***Job to Location*** is used to move component material that was previously issued to the job back to inventory.

4. ***Job to Job*** is used to move component material from one job to another

5. ***Job to F-Goods*** is used to move finished goods from the job to finished goods inventory.

6. ***Physical Inventory*** is used to count how many parts the company has in inventory.

7. ***Inventory Inquiry*** is used to view on hand quantities for a selected part.

8. ***On Hand Adjust*** is used to adjust the quantity on hand of a specific part in a specific location.

9. ***Cycle Count*** is used to record how many parts in inventory of a specific part in a specific location.

A. ***Prod. Inspection*** is used to perform inspections of parts manufactured as part of the production/labor process.

B. ***Location Inquiry*** is used to view on hand quantities for a location and bin.

C. ***Part Printing By Bin*** is used to print part labels for item(s) that are in an entered location and bin.

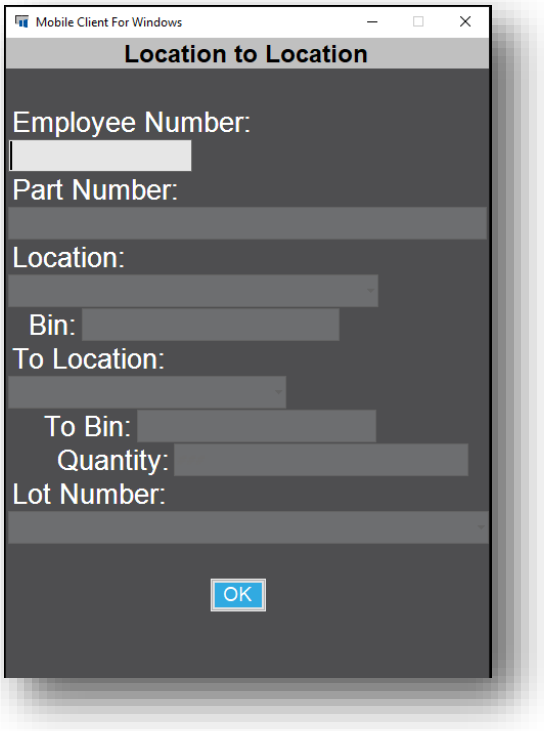
D. ***Job Staging*** is menu used to pick items for a job and then issue items picks.

E. ***Directed Cycle Count*** is used to do a cycle count directed by bin

F. ***Location Labels*** is used to create location bin labels

Loc to Loc

The Location to Location transaction is used to transfer inventory from one location to another location. Selecting Loc to Loc from the Inventory Menu (or scanning M from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

Part Number – Key or scan the part number.

Location – Key or scan the location the part is being transferred from. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Key or scan the bin number the part is being transferred from. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

To Location – Key or scan the location the part is being transferred to. The To location must be the same type as the From location; for example, a transfer from an inventory location to an inspection location will not be allowed. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

To Bin – Key or scan the bin number the part is being transferred to. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under To Location, this field will automatically be populated.

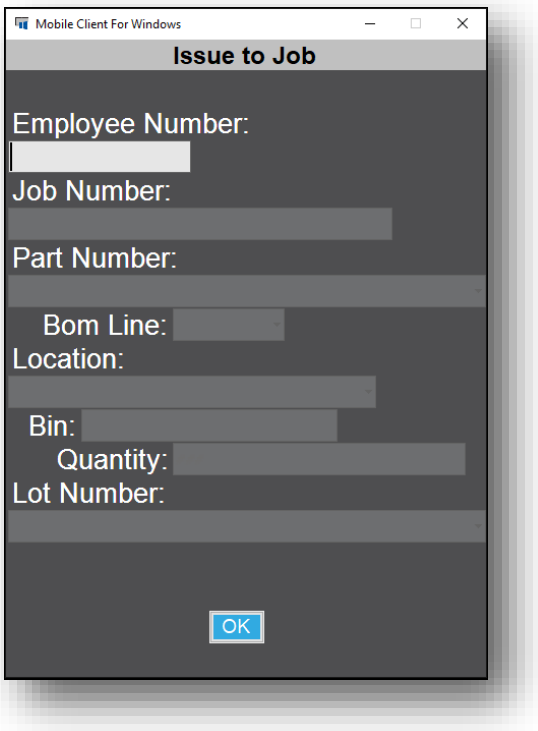
Quantity – Key the quantity of product being transferred. The system will not allow the user to move more than is currently on hand in the specified From location.

Lot Number – Key or scan the lot number for the product transferred, if applicable. This field will be active only for parts flagged for lot control.

OK – Press the OK button to complete this transaction.

Issue to Job

The Issue to Job transaction will issue inventory to a job. Selecting Issue to Job from the Inventory Menu (or scanning F8 from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

Job Number – Scan the Job Number barcode from the Job Order Pick List or the Production Floor Traveler document.

Part Number – Scan the Part Number barcode from the Job Order Pick List document. In addition, user may press F2 to view choice list of all parts on the indicated job's BOM. User may scroll the list and select the part to be issued. (per M2M v6.x+, the barcode on the Job Order Pick List will no longer be a barcode for the part number. Instead, it will be the identity column for the BOM record number for the part being issued from JODBOM. This will enable

the posting program to update the specific part number record being issued to in the event the same part appears on the job BOM multiple times.

Bom Line – If part appears on multiple lines of the job BOM, press F2 to select which line you are issuing against. If part appears only once, value will be defaulted (this functionality works only with M2M v6.1 or greater!)

Location – Key or scan the location the part is being issued from. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from the list will populate the location and bin fields accordingly.

Bin – Key or scan the bin number the part is being issued from. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

Quantity – Key the quantity of product being issued. The system will not allow the user to issue more than is currently on hand in the specified location.

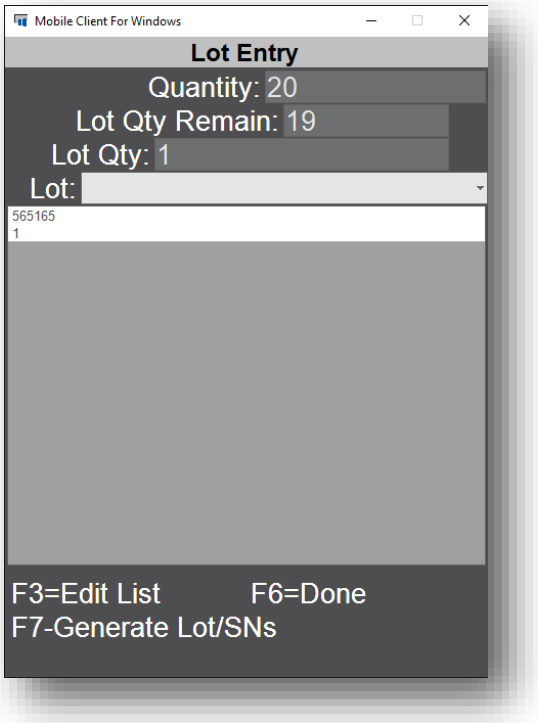
Lot Number – Key or scan the lot number for the product issued, if applicable. This field will be active only for parts flagged for lot control.

Last item – If the user wishes to issue additional parts to the job number entered, they enter N for this field, if this is the last item they are issuing to the job, enter a Y. If N is entered the Employee field(if prompted) and the job number field value will be retained and the user will be returned to the Part Number part for the next part to issue. If Y is entered the job number will also be cleared for entry of a new job number. As transactions are entered, they are written to BCSHARED for posting by the Made2Manage posting program.
NOTE: the Last Item prompt is only available if the user sets the Issue To Job Last Item Prompt is set to true in the Application configuration.

OK – Press the OK button to complete this transaction.

Issue To Job, Lot Entry

If M2M version 7.51 or higher and both the component and parent part are lot controlled, user will be taken to new lot entry form to enter lot numbers of the parent item that the components are being issued to.



Quantity – Display only value of the quantity entered in the receiving transaction

Lot Qty Remain –Display only value of lot numbers remaining to be entered.

Lot Qty – Key or scan the quantity for the lot to be entered.

Lot – Key or scan the lot number. Depending upon how the rules are defined in M2M for the lot, user may not be able to key in a value, and must hit the F7 key to get the next lot number from M2M.

FKey1 & FKey2 – These values will change in what they display and if they are displayed based on lot number entry. The possible values are

F6=Done - User can press the F6 key to say they are done entering lot numbers. If the user is in the list, the F6 key will take them from the list back to the lot number prompt for more lot number entry.

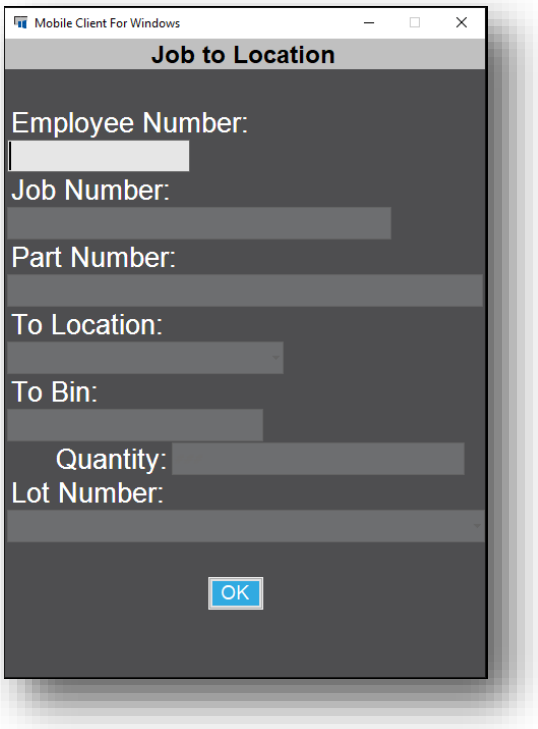
F3=Edit List - After at least one lot number has been entered, the user can press the F3 key to move the focus to the list, and they can scroll the list to review lot numbers entered.

F8=Delete - if the user is in the list, they can press the F8 key on a lot number highlighted and remove it from the list

F7- Generate Lot/SNs – This field will not be available for the transaction

Job to Location

The Job to Location transaction will move material/components that were previously issued to a job back to inventory. Selecting Job to Location from the Inventory Menu (or scanning L from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

Job Number – Scan the Job Number barcode from the Job Order Pick List or the Production Floor Traveler document.

Part Number – Scan the Part Number barcode from the Job Order Pick List document.

To Location – Key or scan the location the part is being transferred to. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

To Bin – Key or scan the bin number the part is being transferred to. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under To Location, this field will automatically be populated.

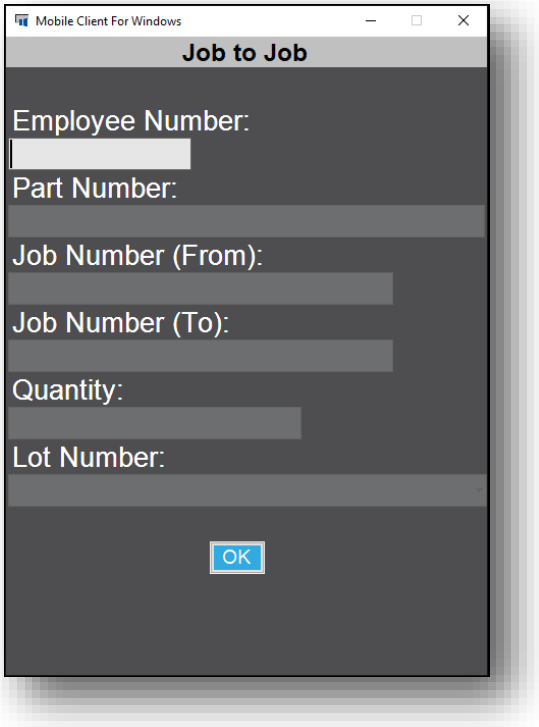
Quantity – Key the quantity of product being transferred. The system will not allow more quantity to be transferred off a job than was originally issued to it.

Lot Number – Key or scan the lot number for the product transferred, if applicable. This field will be active only for parts flagged for lot control.

OK – Press the OK button to complete this transaction.

Job to Job

The Job to Job transaction will transfer material from one job to another. Selecting Job to Job from the Inventory Menu (or scanning O from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

Part Number – Scan the Part Number barcode from the Job Order Pick List document.

Job Number From – Scan the Job Number barcode from the Job Order Pick List or the Production Floor Traveler document from which the part is being transferred.

Job Number To – Scan the Job Number barcode from the Job Order Pick List or the Production Floor Traveler document to which the part is being transferred.

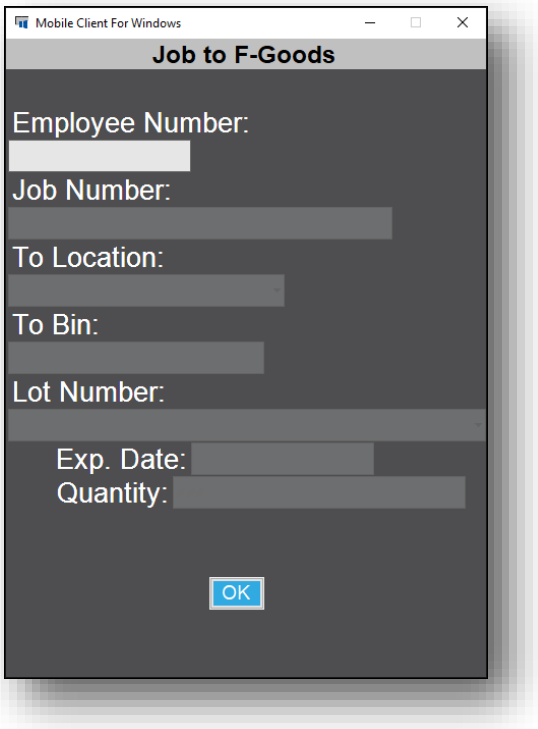
Quantity – Key the quantity of product being transferred. The system will not allow more quantity to be transferred off a job than was originally issued to it.

Lot Number – Key or scan the lot number for the product transferred, if applicable. This field will be active only for parts flagged for lot control.

OK – Press the OK button to complete this transaction.

Job to F-Goods

The Job to F-Goods option will move finished goods from an internal for stock job to inventory. Selecting Job to F-Goods from the Inventory Menu (or scanning F9 from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

Job Number – Scan the Job Number barcode from the Job Order Pick List or the Production Floor Traveler document.

Quantity – Key the quantity of product being moved.

To Location – Key or scan the location the JO part is being moved to. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated JO's part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

To Bin – Key or scan the bin number the JO part is being moved to. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column

value from M2M), or selected a location/bin combination from the choice list under To Location, this field will automatically be populated.

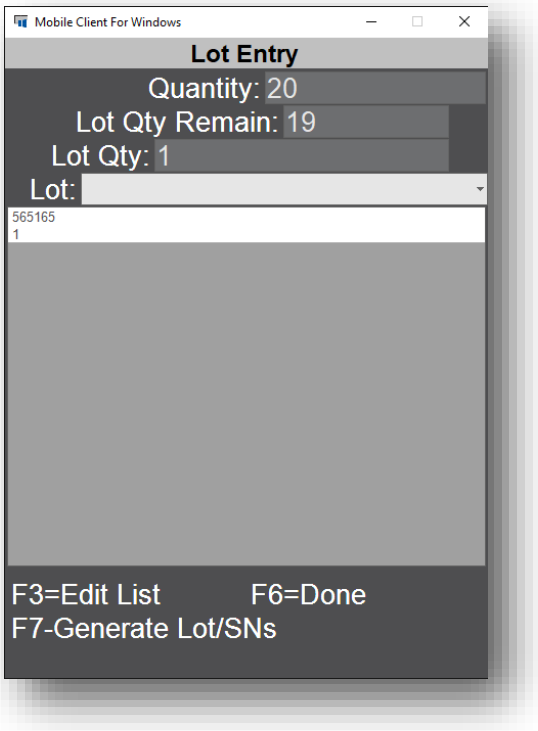
Lot Number – Key or scan the lot number for the product moved, if applicable. This field will be active only for parts flagged for lot control (note: prior to M2M v6.0, job order lots were required to be created ahead of time in M2M ASSIGN screen. However, with v6.x+, it is possible to create job order lot numbers on the fly, depending on Validate Job To Finished Goods Lot Number Setting and the bar code posting program).

Exp. Date - Key the expiration date for the product moved, if applicable. This field will be active only for parts flagged for date control.

OK – Press the OK button to complete this transaction.

Issue To Job, Lot Entry

If M2M version 7.51 or higher and both the component and parent part are lot controlled, user will be taken to new lot entry form to enter lot numbers of the parent item that the components are being issued to.



Quantity – Will prompt for quantity of lots to be entered.

Lot Qty Remain –Display only value of lot numbers remaining to be entered.

Lot Qty – Key or scan the quantity for the lot to be entered.

Lot – Key or scan the lot number. Depending upon how the rules are defined in M2M for the lot, user may not be able to key in a value, and must hit the F7 key to get the next lot number from M2M.

FKey1 & FKey2 – These values will change in what they display and if they are displayed based on lot number entry. The possible values are

F6=Done - User can press the F6 key to say they are done entering lot numbers. If the user is in the list, the F6 key will take them from the list back to the lot number prompt for more lot number entry.

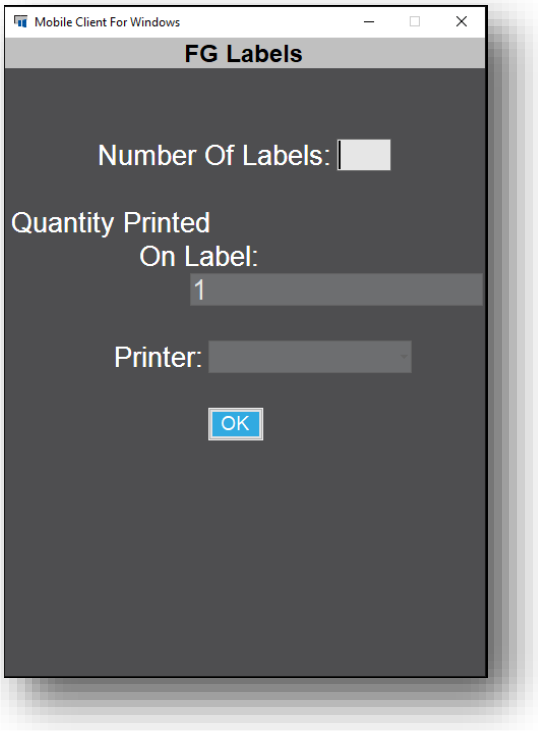
F3=Edit List - After at least one lot number has been entered, the user can press the F3 key to move the focus to the list, and they can scroll the list to review lot numbers entered.

F8=Delete - if the user is in the list, they can press the F8 key on a lot number highlighted and remove it from the list

F7- Generate Lot/SNs – will generate lot number based on Made2Manage rules.

Job To Finished Goods Labels

If the value from *Job To FG Label*= setting of configuration contains a value, then upon completion of Job to Finished Goods transaction the FG Labels screen will be displayed, as follows:



Number of Labels – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed on Label – Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the Printers of the SFDC configuration.

OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label which appears as follows:

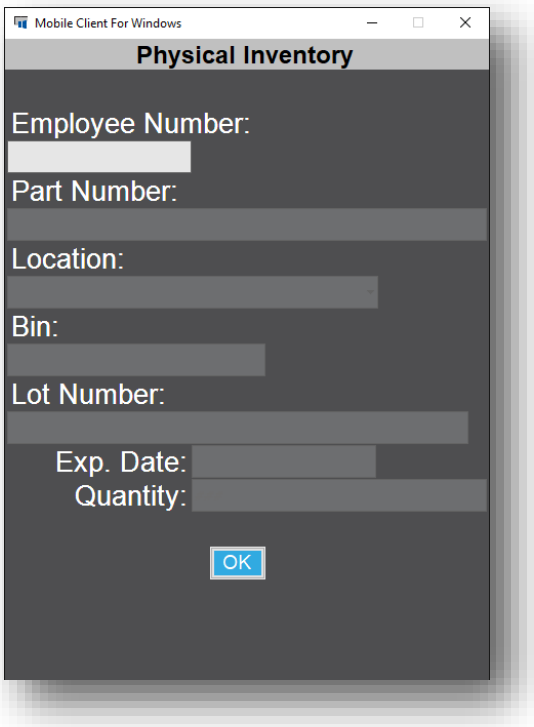
A Note Concerning Label Printing

- The standard finished goods label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.
- If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The

SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

Physical Inventory

The Physical Inventory option is used to count how many parts the company has in stock during a physical inventory, per Made2Manage's established rules. Selecting Physical Inventory from the Inventory Menu (or scanning F6 from the Function prompt) will display the following screen:



Important Note: While the process of recording inventory quantities via the Made2Manage SFDC is the same for both cycle counting and full physical inventory, it is important that the rules for whichever process you are performing are properly set up in Made2Manage prior to gathering this data. Consult your Made2Manage documentation to be certain your setups are correct before using the barcode physical inventory functions!

Employee Number – Key or scan the Employee Number.

Part Number – Key or scan the Part Number.

Location – Key or scan the location being inventoried.

Bin – Key or scan the bin being inventoried, if applicable.

Lot Number – Key or scan the lot number for the product counted, if applicable. This field will be active only for parts flagged for lot control.

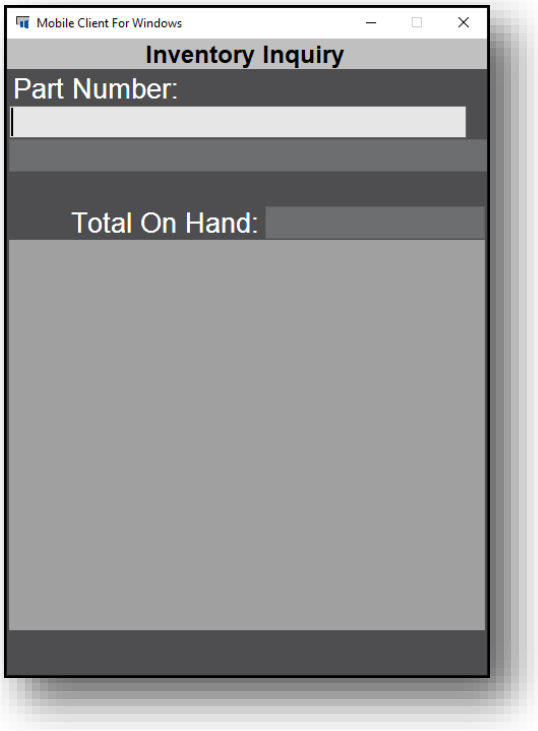
Exp. Date - Key the expiration date for the product counted, if applicable. This field will be active only for parts flagged for date control.

Quantity – Key the quantity of product at this location.

OK – Press the OK button to complete this transaction.

Inventory Inquiry

The Inventory Inquiry option is used to view on hand quantities for a selected part. This option is for inquiry purposes only, and does not post any data to Made2Manage. Selecting Inventory Inquiry from the Inventory Menu (or scanning IQ from the Function prompt) will display the following screen:



Part Number – Key or scan the Part Number. If there is inventory on hand, the screen will display each quantity by Facility, location, bin and revision. The user will have to use the scroll keys on the device to scroll up and down to view all records. Pressing Enter on a selected line will display further information. If a part label is defined in the SFDC configuration, the user will be taken to a screen displaying information about the

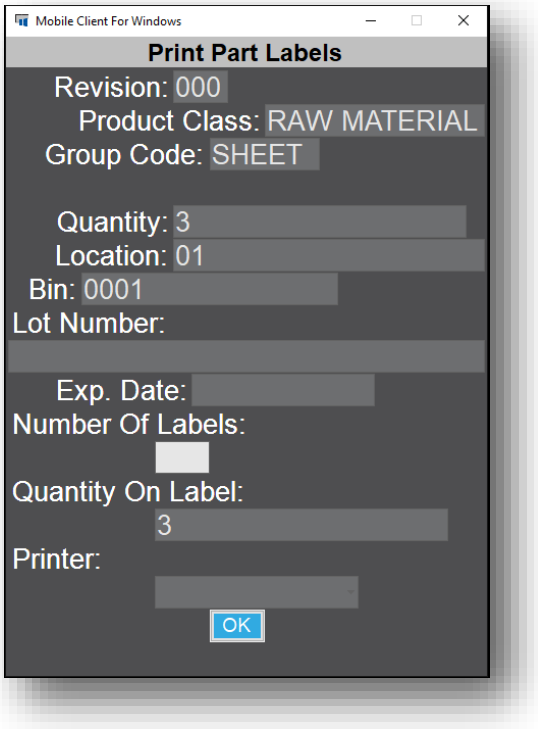
part/location/bin selected with the ability to print labels. Otherwise, only information about the selection made will be displayed. To exit, press Escape.

Description – The two lines below the part number will display the description of the part.

Total Inv. – This value will display the total quantity on hand for the part inquired upon.

Part Labels

If the value from *Part Label=** line of SFDC configuration contains a value, when selecting a part/location/bin from the list will take the user to the following screen:



Revision – display only field of the revision of the item selected in the part list

Product Class – display only field of the product class of the item selected in the part list

Group Code – display only field of the group code of the item selected in the part list

Quantity – display only field of the quantity of the item in the location and bin selected in the part list

Location – display only field of the location of the item selected in the part list

Bin – display only field of the bin of the item selected in the part list

Lot Number – if part is lot controlled, display only field of the lot number of the item selected in the part list

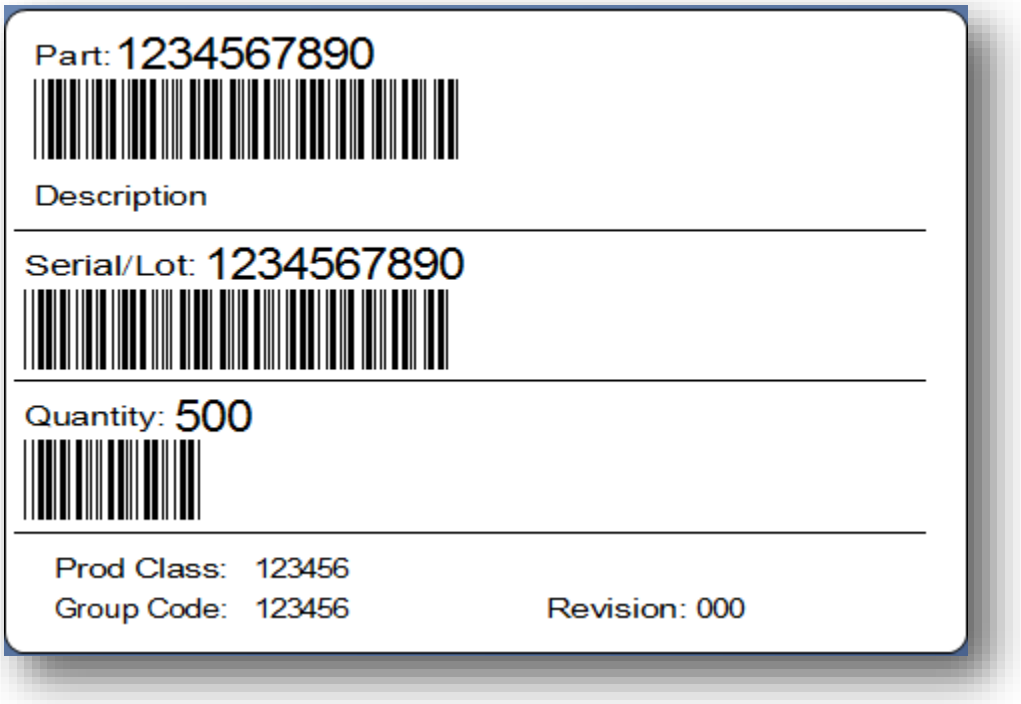
Exp. Date – if part is expiration controlled, display only field of the expiration date of the item selected in the part list

Number of Labels – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed on Label – Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the SFDC configuration.

OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label which appears as follows:



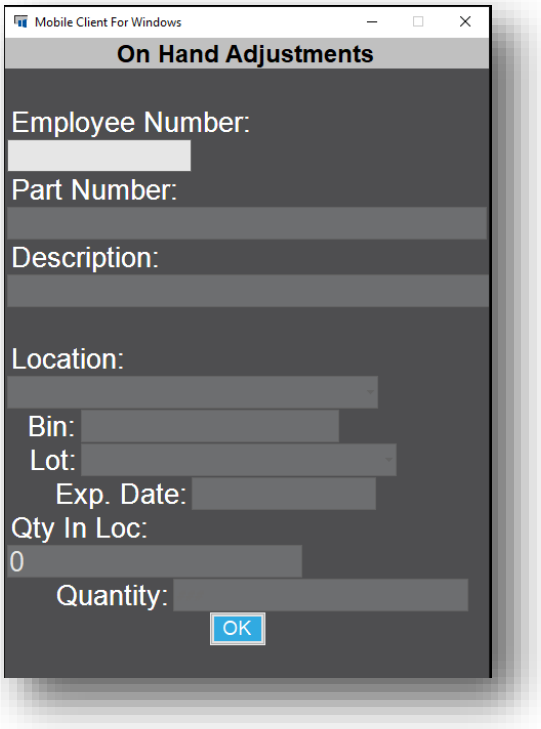
A Note Concerning Label Printing

- The standard part label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.

- If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

On Hand Adjust.

The On Hand Adjustment option will adjust the quantity on hand of a specific part in a specific location. This transaction is only available for M2M v6.x+. Selecting On Hand Adjust from the Inventory Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

Part Number – Scan the part number to be adjusted.

Description – Display only description of part number to be adjusted.

Location – Key or scan the location the part is being adjusted in. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently

resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Key or scan the bin number the part is being adjusted in. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

Lot – Key or scan the lot number for the product adjusted, if applicable. This field will be active only for parts flagged for lot control.

Exp. Date - Key the expiration date for the product adjusted, if applicable. This field will be active only for parts flagged for date control.

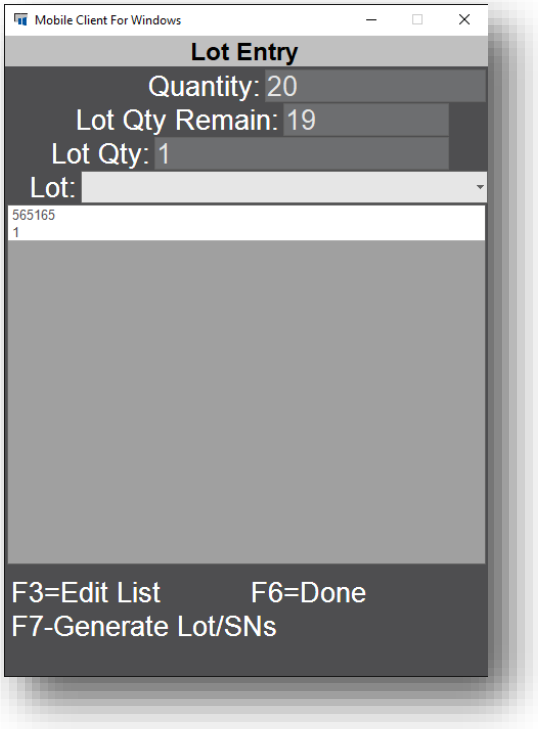
Qty in Loc - Display only quantity M2M currently shows as on hand for the indicated part/lot in the indicated location/bin.

Quantity - Key or scan the quantity to be adjusted by. Key in a positive number to add that quantity to the existing quantity or a negative number to subtract from the existing quantity.

OK – Press Enter to complete the transaction.

On Hand Adjustment, Lot Entry

If M2M version 7.51 or higher and rules are setup for lot numbers, user will be taken to new lot entry form to enter new lot numbers.



Quantity – Display only value of the quantity entered in the receiving transaction

Lot Qty Remain –Display only value of lot numbers remaining to be entered.

Lot Qty – Key or scan the quantity for the lot to be entered.

Lot – Key or scan the lot number. Depending upon how the rules are defined in M2M for the lot, user may not be able to key in a value, and must hit the F7 key to get the next lot number from M2M.

FKey1 & FKey2 – These values will change in what they display and if they are displayed based on lot number entry. The possible values are

F6=Done - User can press the F6 key to say they are done entering lot numbers. If the user is in the list, the F6 key will take them from the list back to the lot number prompt for more lot number entry.

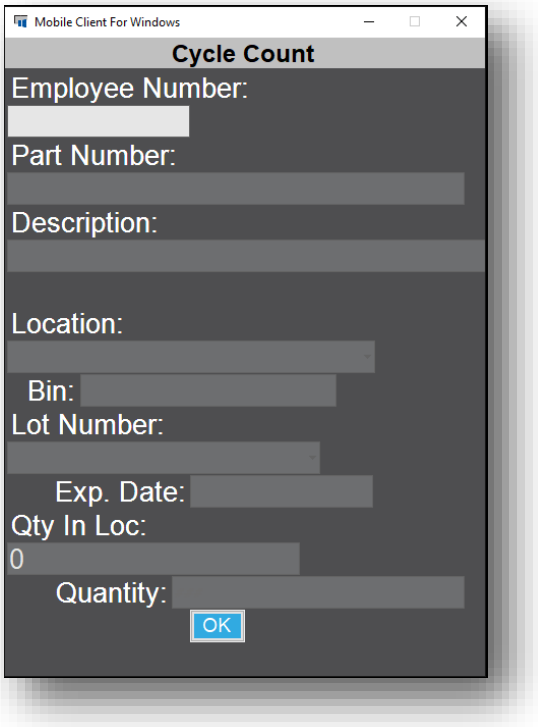
F3=Edit List - After at least one lot number has been entered, the user can press the F3 key to move the focus to the list, and they can scroll the list to review lot numbers entered.

F8=Delete - if the user is in the list, they can press the F8 key on a lot number highlighted and remove it from the list

F7- Generate Lot/SNs – will generate lot number based on Made2Manage rules.

Cycle Count

The Cycle Count option is used to record how many parts the in inventory of a specific part in a specific location. This transaction is only available for M2M v6.x+. Selecting Cycle Count from the Inventory Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

Part Number – Scan the part number to be counted.

Description – Display only description of part number to be adjusted.

Location – Key or scan the location the part is being counted in. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Key or scan the bin number the part is being counted in. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

Lot – Key or scan the lot number for the product counted, if applicable. This field will be active only for parts flagged for lot control.

Exp. Date - Key the expiration date for the product counted, if applicable. This field will be active only for parts flagged for date control.

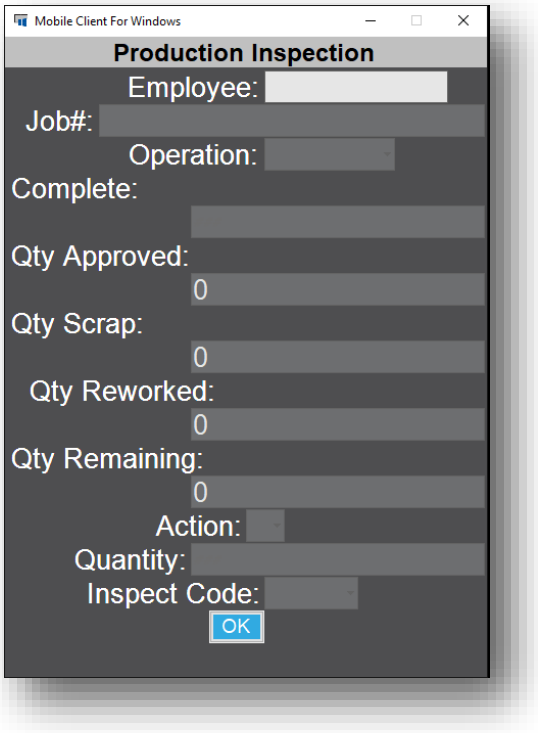
Qty in Loc - Display only quantity M2M currently shows as on hand for the indicated part/lot in the indicated location/bin.

Quantity - Key or scan the counted quantity for the indicated part/lot in the indicated location/bin.

OK – Press Enter to complete the transaction. While this transaction looks very similar to the Inventory Adjustment transaction, it is different. Where Inventory Adjustment automatically updates the on hand quantity for the indicated part/lot, the Cycle Count transaction creates a record in M2M screen BCPINV which must be reviewed and then posted as a secondary step inside Made2Manage ERP.

Prod. Inspection

The Production Inspection option is used to perform inspections of parts manufactured as part of the production/labor process. This transaction is only available for M2M v6.x+. Selecting Prod. Inspection from the Inventory Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

Job Number – Scan the Job Number barcode from the Job Order Pick List or the Production Floor Traveler document.

Operation – Key or scan the Operation barcode from the Job Order Pick List, or user may press the F2 key to view a choice list of all operations for the indicated JO.

Complete – Display only field that displays the total quantity complete for the indicated job/operaton.

Qty Apprvd – Display only field that displays the total quantity approved for the indicated job/operaton.

Qty Scrap – Display only field that displays the total quantity scrapped for the indicated job/operaton.

Qty Rewrkd – Display only field that displays the total quantity reworked for the indicated job/operaton.

Qty Remain – Display only field that displays the total quantity remaining to be inspected for the indicated job/operaton.

Action – Press F2 to see list of action options (Pass, Scrap, Rework); user may scroll list using arrow keys and press Enter to select.

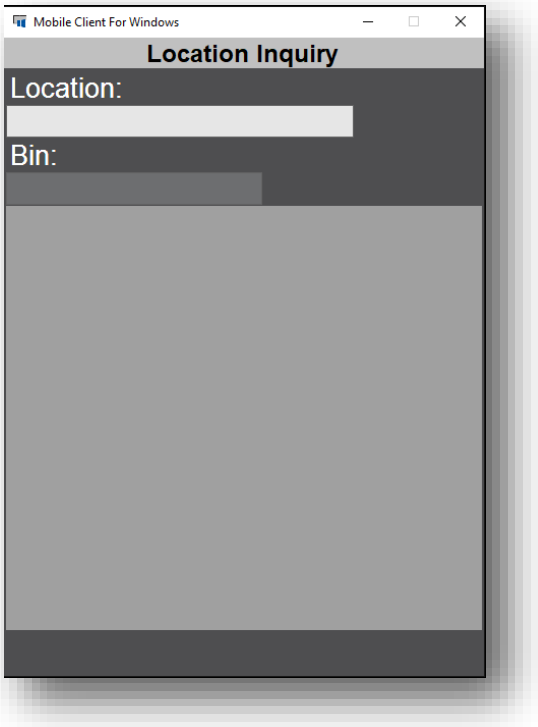
Quantity – Key the quantity of product being inpspected.

Inspect Code – Press F2 to see list of inspection codes from M2M ERP; user may scroll list using arrow keys and press Enter to select.

OK – Press the OK button to complete this transaction.

Location Inquiry

The Location Inquiry option is used to view on hand quantities for a location and/or bin. This option is for inquiry purposes only, and does not post any data to Made2Manage. Selecting Location Inquiry from the Inventory Menu will display the following screen:



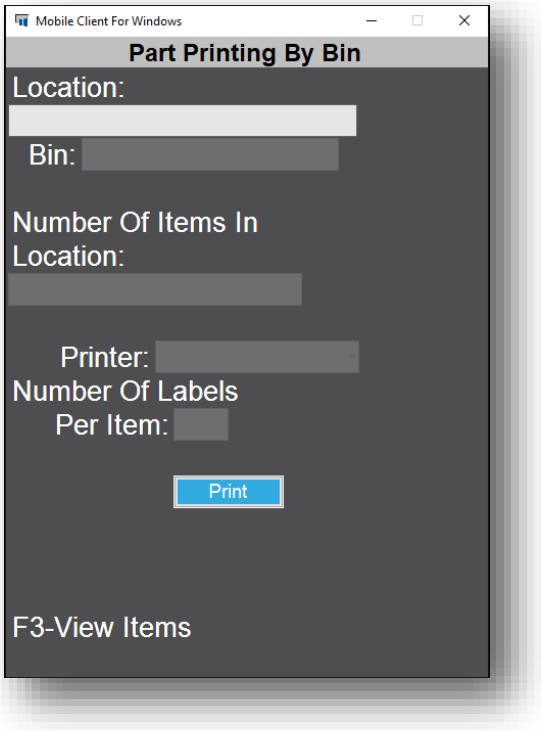
Location – Key or scan the location. System will validate that the value entered is a valid location.

Bin – Key or scan the bin. This field is not required, if the user wants to view all items in all bins of a specified location. If a value is entered, system will validate that the value entered is a valid bin.

After location/bin is entered, system will display the part, revision, lot number and quantity in the location/bin. If a bin is not specified, bin will also be displayed in the list.

Part Printing By Bin

The Part Printing By Bin option is used to print part labels for a location and bin. This option is for label printing purposes only, and does not post any data to Made2Manage. Transaction will only display if part label is specified in the SFDC configuration. Selecting Part Printing By Bin from the Inventory Menu will display the following screen:



Location – Key or scan the location. System will validate that the value entered is a valid location.

Bin – Key or scan the bin. System will validate that the value entered is a valid location. Once bin is validated system will check inventory on hand and see if there are any items in the indicated location/bin. If no inventory exists, and error will be displayed, and transaction will not continue.

Number Of Items In Location – Display only field of the number of different items in the entered location/bin.

Printer – Will default to previously used printer. User can press F2 function key to see list of defined printers and select printer to print labels to.

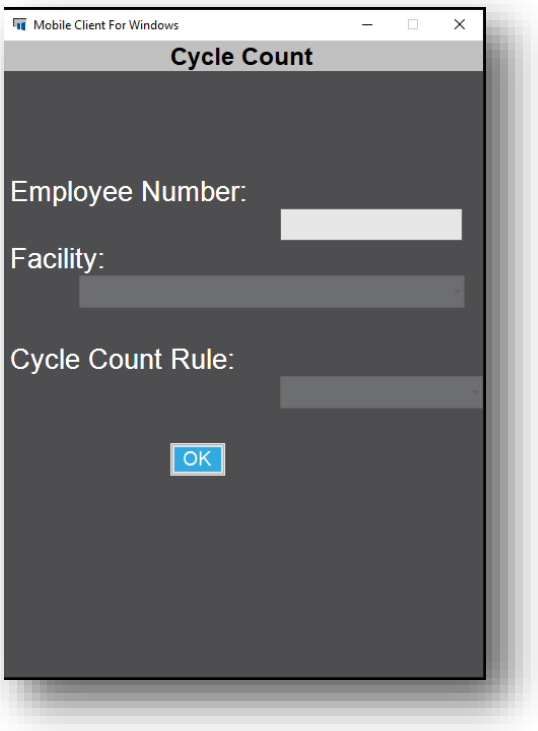
Number Of Labels Per Item – Enter the number of labels to print for each item/lot in the location/bin.

Print – Once all data has been entered, press enter on the Print button to print out labels indicated for the items in the location/bin. Part labels will be printed for each part and lot, if lots are specified for part in the location/bin. Once labels print, screen will clear for next entry.

F3 View Items – After a location and bin has been entered, user will be able to press the F3 function key to see a list of all the items in the entered location/bin. List will include part number, revision, lot, and quantity.

Directed Cycle Count

The Directed Cycle Count option is used to cycle count based on a rule defined in M2M, by bin. Selecting Directed Cycle Count from the Inventory Menu will display the following screen:



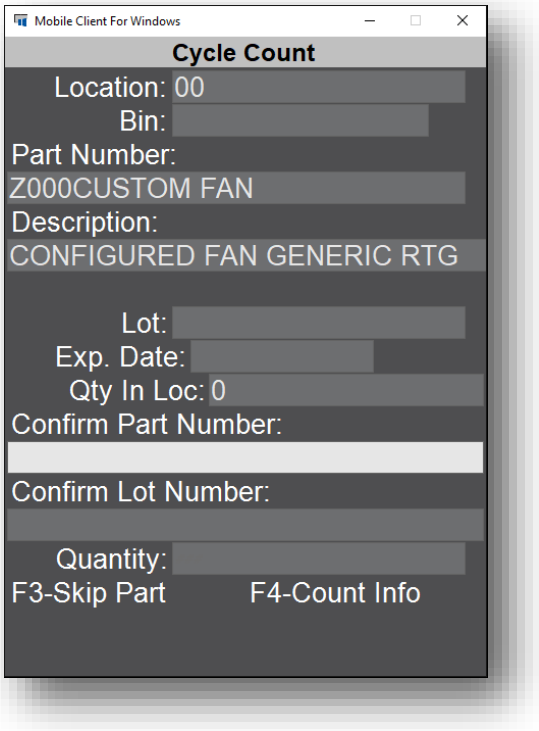
Employee Number - Key or scan the Employee Number.

Cycle Count Rule – Press F2 to display a list of M2M defined cycle count rules, and select the count rule from the list to populate list of count items.

OK – Press enter on the OK button go generate list of parts and proceed to second screen of transaction.

Directed Cycle Count, Page 2

The following screen is displayed after the user presses enter on the ok button on page 1



Location - display only field of the location the part to be counted is located in

Bin – display only field of the bin the part to be counted is located in

Part Number – display only field of the part number to be counted

Description – display only field of the description of part to be counted

Lot Number – display only field of the lot number of part to be counted, if part is lot controlled

Exp Date – display only field of the Expiration Date of part to be counted, if part is expiration controlled

Qty in Loc. – display only field of the quantity that the system thinks exists in the location and bin, for the part/lot displayed

Confirm Part Number – enter or scan the item to be counted, value must match displayed part.

Confirm Lot Number – enter or scan the lot to be counted, value must match displayed lot. Only if part is lot controlled will this field be active.

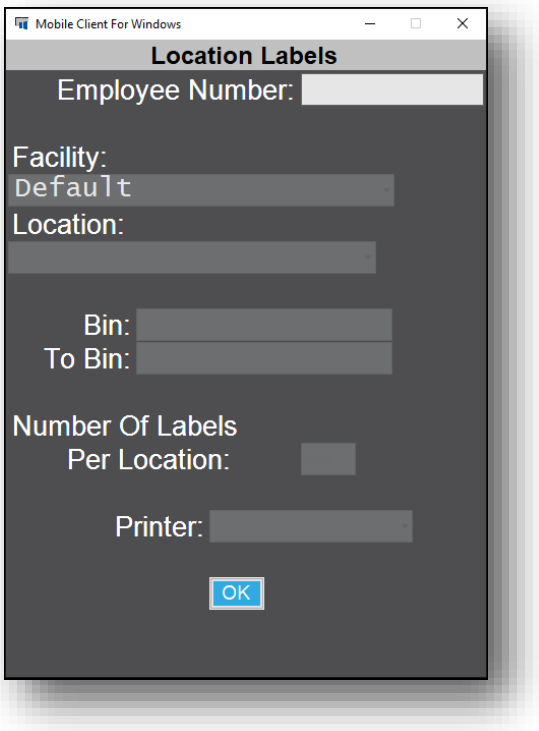
Quantity – enter the quantity of the part/lot in the displayed location/bin.

F3 Skip Part – pressing F3 will skip the current part and moves to the next one to be counted

F4 Count Info – pressing F4 will display a message to the user indicating the number of items counted for the current count out of a total number of items to be counted as part of the count.

Location Labels

Location Labels allows user to print labels for locations and bins that can be scanned during other inventory transactions with SFDC. Selecting Location Labels from the Inventory Menu will display the following screen:



Employee Number – Key or scan the Employee Number.

Facility – This will default to the facility setup in the SFDC Configuration in the Default Facility property. If the M2M Company that SFDC is connecting to is multi facility, this field can be changed by pressing F2 to see a list of facilities and selecting the alternate facility. If the M2M Company is not multi facility, this field will not be displayed.

Location – Enter or select the location the bins labels will be for. Must be a valid location in M2M and in the BCLocBin table.

Bin – Enter the first bin to begin printing from. Bin will need to be valid in M2M in the BCLocBin Table.

To Bin – If a range of labels are to be printed, enter the bin to print to. Bin will need to be valid in M2M in the BCLocBin Table. When printing, system will query the BCLocBin table for all bin between and including the bin and to bin values alphabetically.

Number of Labels Per Location – Enter the number of labels to printer per location/bin

Printer – Field will default to the users previously saved printer, but user can change printer by pressing F2 and selecting alternate printer.

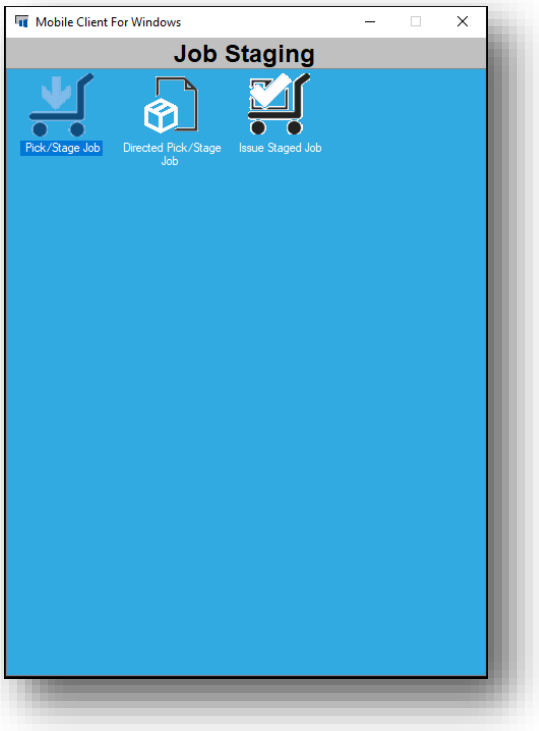
OK – Pressing enter will print the label(s) for the bin(s) entered.

A Note Concerning Label Printing

- The standard location label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.
- If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

Job Staging Menu

Selecting Job Staging from the Inventory Menu will display the following screen: :



Below is a brief description of each of the Job Staging Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

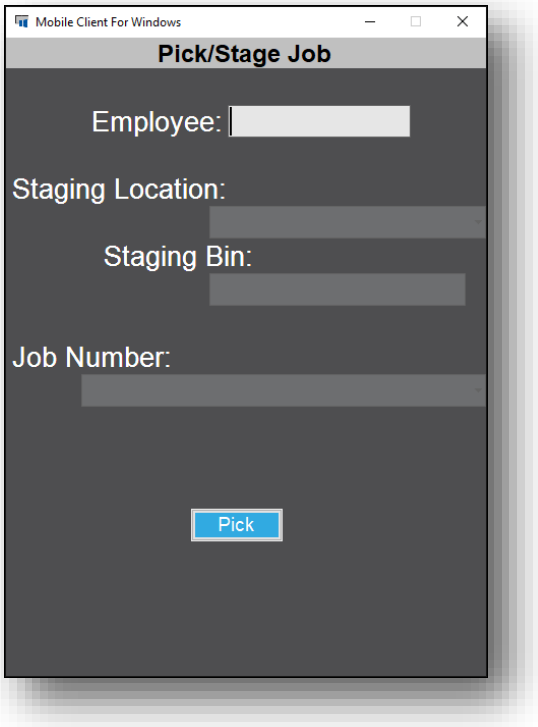
1. ***Pick/Stage Job*** is used to pick parts for a job to a staging location.

2. ***Directed Pick/Stage Job*** is used to pick parts for a job to a staging location, with system guiding picks by bin location.

3. ***Issue Staged Job*** is used to issue parts to a job that have been staged in the pick job transaction.

Pick Job

The Pick Job option is used to pick component items for a job to a staging location or cart. Selecting Pick Job from the Stage Job Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

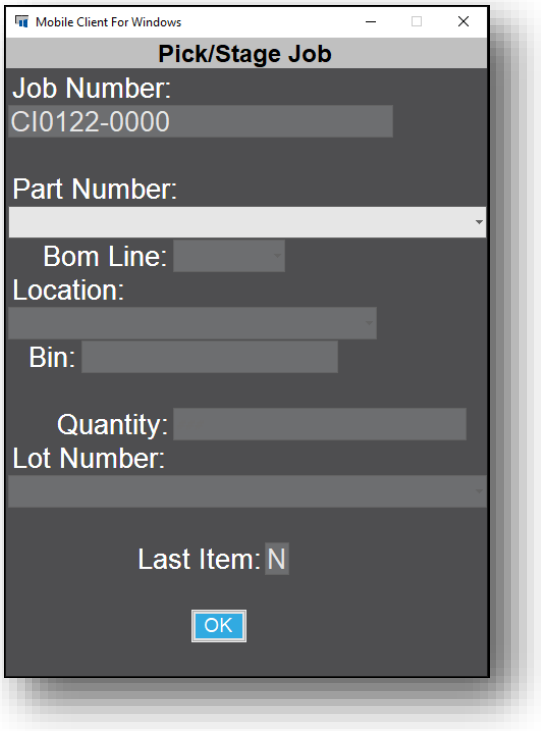
Staging Location – Key or scan the location items are being picked to. System will validate that the value entered is a valid location.

Bin – Key or scan the bin items are being picked to. System will validate that the value entered is a valid location.

Job Number – Key in, Scan or Press F2 to get a list of jobs to pick parts for. System will validate the job is in the correct status.

Pick Job, Page 2

The following screen is displayed after the user presses enter on the pick button on page 1



Job Number - display only field of the job number being picked

Part Number – Scan the Part Number barcode from the Job Order Pick List document. In addition, user may press F2 to view choice list of all parts on the indicated job's BOM. User may scroll the list and select the part to be issued. (per M2M v6.x+, the barcode on the Job Order Pick List will no longer be a barcode for the part number. Instead, it will be the identity column for the BOM record number for the part being issued from JODBOM. This will enable the posting program to update the specific part number record being issued to in the event the same part appears on the job BOM multiple times.

Bom Line – If part appears on multiple lines of the job BOM, press F2 to select which line you are issuing against. If part appears only once, value will be defaulted (this functionality works only with M2M v6.1 or greater!)

Location – Key or scan the location the part is being issued from. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from the list will populate the location and bin fields accordingly.

Bin – Key or scan the bin number the part is being issued from. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

Quantity – Key the quantity of product being issued. The system will not allow the user to issue more than is currently on hand in the specified location.

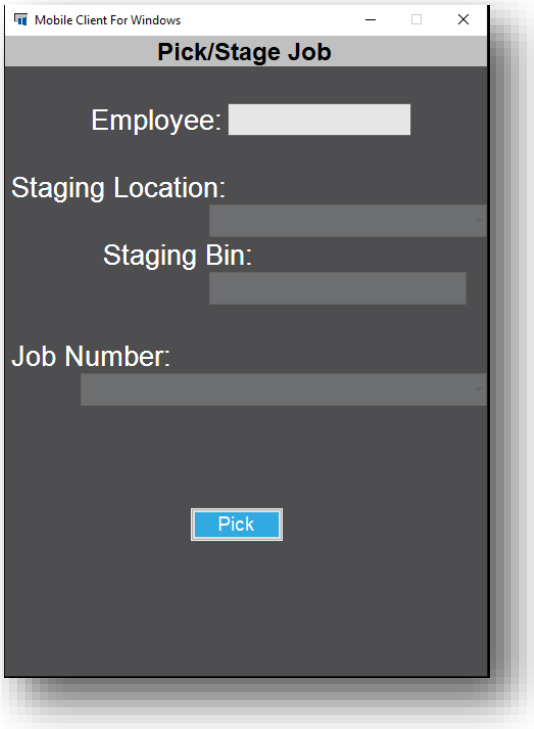
Lot Number – Key or scan the lot number for the product issued, if applicable. This field will be active only for parts flagged for lot control.

Last item – If the user wishes to pick additional parts to the job number entered, they enter N for this field, if this is the last item they are issuing to the job, enter a Y. If N is entered the user will be returned to the Part Number field for the next part to pick. If Y is entered the screen will be cleared.

OK – Press the OK button to complete this transaction. As transactions are entered, location to location transaction are posted to to BCSHARED for posting by the Made2Manage posting program. Data is also written to custom jobpicking table for use with issuing parts later.

Directed Pick/Stage Job

The Directed Pick/Stage Job option is used to pick component items for a job to a staging location or cart with the system guiding the user to bin locations. Selecting Directed Pick/Stage Job from the Stage Job Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

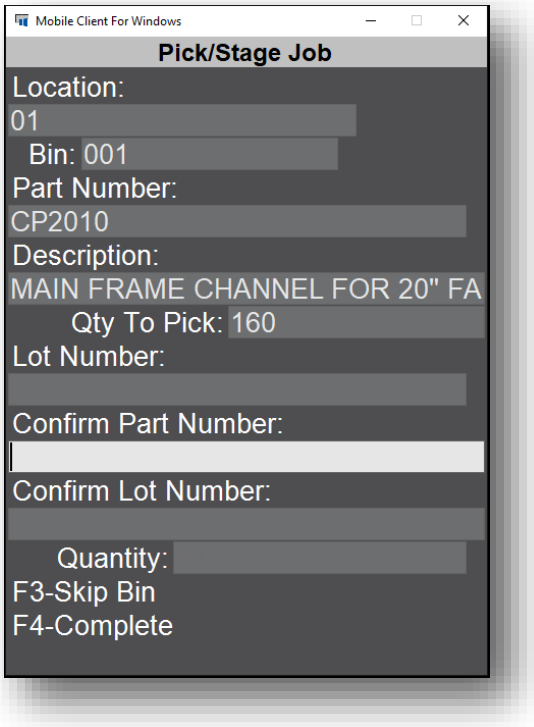
Staging Location – Key or scan the location items are being picked to. System will validate that the value entered is a valid location.

Bin – Key or scan the bin items are being picked to. System will validate that the value entered is a valid location.

Job Number – Key in, Scan or Press F2 to get a list of jobs to pick parts for. System will validate the job is in the correct status.

Directed Pick/Stage Job, Page 2

The following screen is displayed after the user presses enter on the pick button on page 1



Location – Display only value of the location the part is in that is to be picked for issue

Bin – Display only value of the bin the part is in that is to be picked for issue.

Part Number – Display only value of the part to be picked for issue.

Description – Displays the description of the part displayed.

Lot Number – Display only value of the lot to be picked for issue.

Qty To Pick – Displays the quantity to issue from this location and bin. Will display either the job issue quantity for the part, or the bin quantity if the bin quantity is less than the quantity to issue.

Confirm Part Number – Enter or scan the part number being picked from the location and bin displayed. Value must match value displayed in part number field.

Confirm Lot Number – If part is lot controlled, enter or scan the lot number being picked for the part from the location and bin displayed. Value must match value displayed in lot number field.

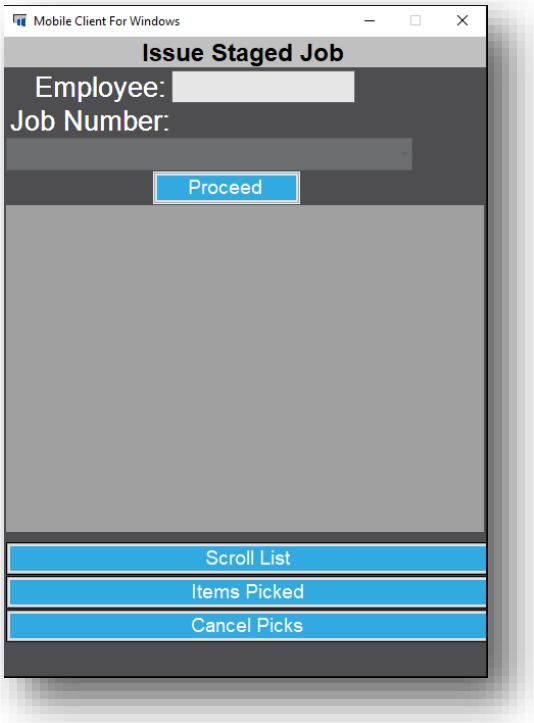
Quantity – enter the quantity picked for issuance to the job. System will not allow quantity to exceed quantity in the location and bin displayed.

F3-Skip Bin – the user can press F3 to display the next part/location/bin for the shipper items to be picked.

F4-Complete – the user can press F4 to complete issuing parts, keeping unpicked parts in an unpicked status, and clearing the transaction.

Issue Staged Job

The Issue Staged Job option is used issued parts that were picked for a job to the job. Selecting Issue Staged Job from the Stage Job Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

Job Number – Key, scan or press F2 to select a job number that was picked. Only jobs that have items picked against them will be valid. System will display list of all parts currently picked for the job in the list box.

Proceed – pressing enter on the proceed button will issue the parts picked to the job.

F3 Scroll List – After a job number has been entered, user can press the F3 key to be able to scroll the list box to view items. When scrolling the list, this field will change to F8-Delete Line.

F4 Header Info – After a job number has been entered and the listbox has items picked, user can press F4 to view items for the job that have not been picked. Pressing F4 again will toggle back to viewing items that have been picked for the job.

F6 Cancel Picks – After a job number has been entered, user can press the F6 key to cancel all picks made for the indicated job. This will delete records from the table, but user will need to do location to location transactions to get items from the staging location back to an inventory locations.

F8 Delete Line – When scrolling the list of picked items, users can delete an individual line that they do not wish to issue.

Labor Collection

Standard SFDC allows labor to be collected in two ways: either Clock Onto Jobs, or via Legacy.

Labor Menu, Clock Onto Jobs

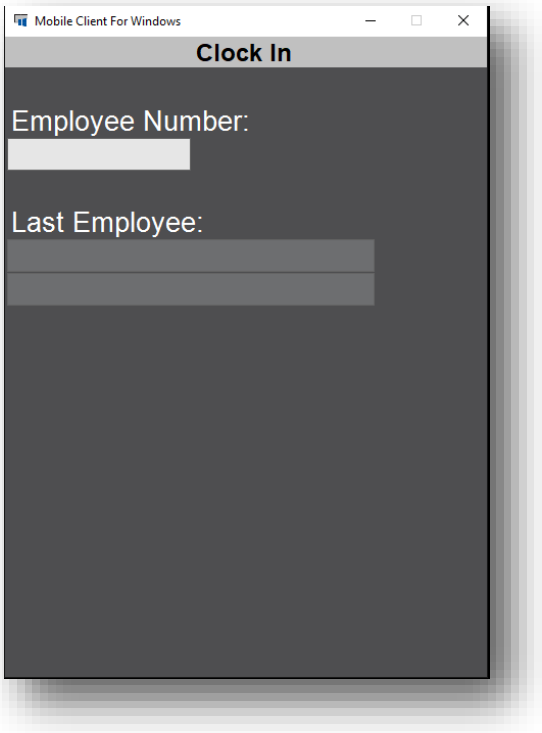
For best results concerning menu display, the following settings should be made in the SFDC Configuration section if users should be required to clock on to jobs:

- Clock On Required = True
- Clock On and Off Jobs Menu =True
- Idle Job = Valid Internal for Internal Use job (status = RELEASED)(not necessary if SFMInterface = True)
- Idle Operation =Valid operation for indicated idle job (not necessary if SFMInterface = True)
- SFMInterface=True/False depending on if SFM is used

Selecting the Labor Menu option from the Main Menu will display the following screen:

Clock In

The Clock In transaction is used to clock users into Made2Manage at the beginning of a shift. Selecting Clock In from the Labor Menu (or scanning F1 from the Function prompt) will display the following screen:



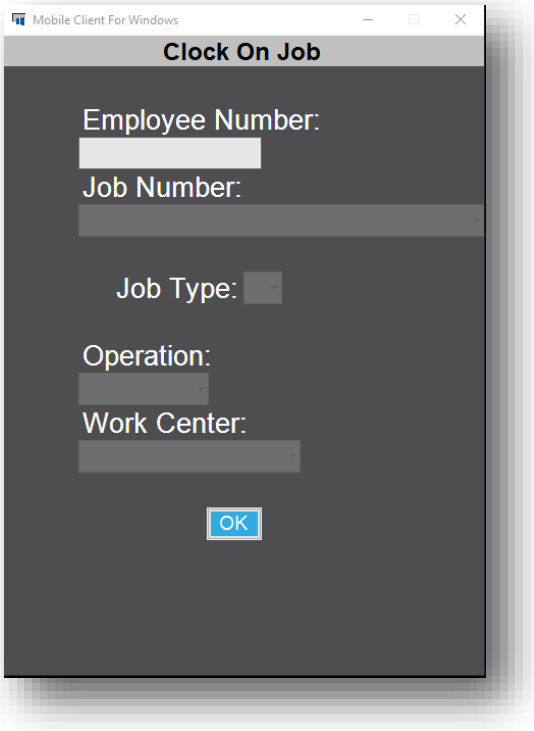
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F1 transaction will be written to BCSHARED for posting to Made2Manage. In addition, a record is created in SFDC table EMPCLCKIN showing the clock in, and another record is created in EMPCLCKIN showing the user clocked into the default idle job indicated in the Idle Job= setting of the SFDC configuration.

Clock On Job

The Clock On Job transaction is used to clock users into production jobs, and off their default idle job automatically. Selecting Clock In from the Labor Menu (or scanning CON from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Job Number – Scan the Job Number barcode from the Production Floor Traveler document. In addition, the user may also press F2 to display a choice list of all jobs in RELEASED status; user may then scroll the list to select the desired job.

Job Type – Upon clocking into the first production job, the default value will be D for Direct. User may also press the F2 key to display a choice list of available job types, which include (D)irect, (P)arallel, (S)Serial, or (A)dd Operation. If a user comes back to this screen subsequent times, if they have a current (D)irect job they are clocked into they may only select (P)arallel or (S)erial. If user is already clocked into (P)arallel or (S)erial labor, they may only clock into other jobs as (P)arallel or (S)erial unless they first clock off existing (P)arallel or (S)erial labor jobs.

Operation – Scan the Operation from the Production Floor Traveler document. In addition, user may press F2 to display a choice list of all operations associated with the indicated job.

Work Center – This prompt is only activated if Job Type = A. Key or scan the work center to record labor against, or press F2 to display a choice list of all work centers.

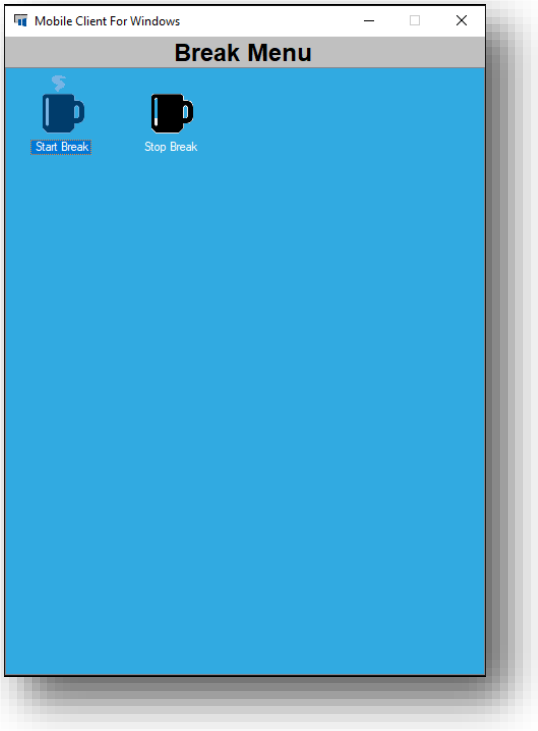
OK – Press the OK button to complete this transaction.

Upon completion of transaction, an F4 transaction will be written to BCSHARED for posting to Made2Manage if user had an existing record in the EMPCLCKIN table against the default

idle job. If Job Type = P, an F15 transaction will also be written to BCSHARED for posting to Made2Manage. Finally, a record is created in SFDC table EMPCLCKIN showing the the user clocked into the indicated job.

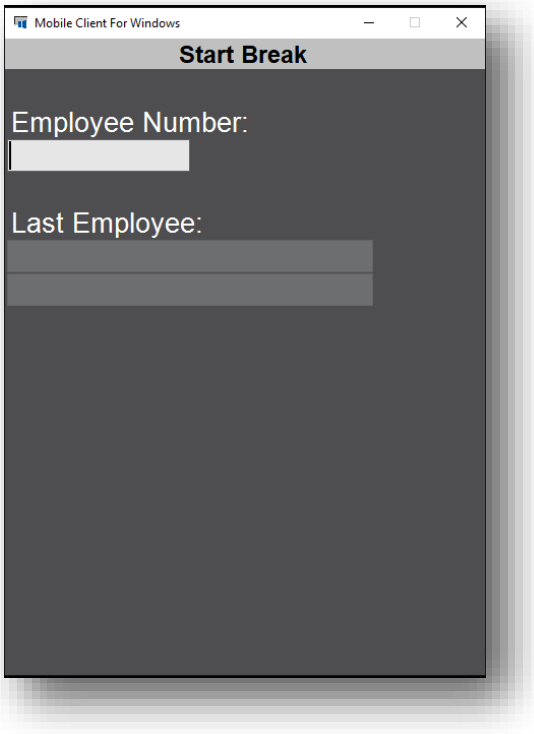
Breaks

Selecting Breaks from the Labor Menu will display the following screen:



Start Break

The Start Break transaction is used to clock users into Break. Selecting Start Break from the Breaks Menu (or scanning BON from the Function prompt) will display the following screen:



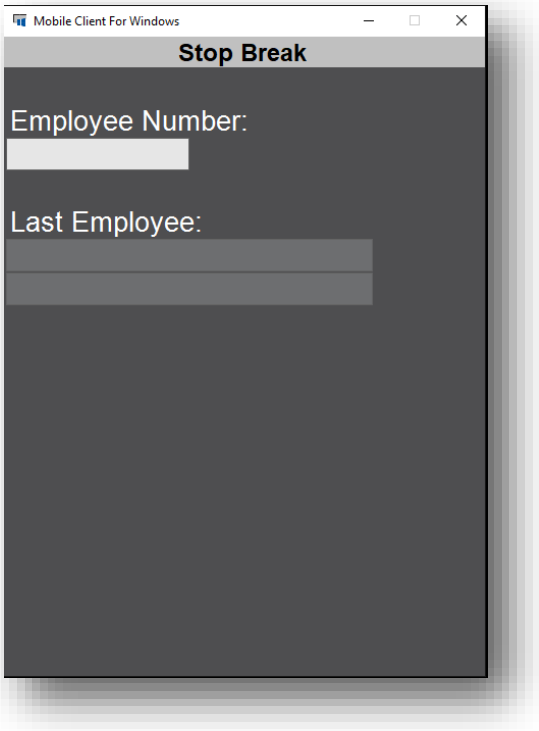
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Stop Break

The Stop Break transaction is used to clock users out of Break. Selecting Stop Break from the Breaks Menu (or scanning BOFF from the Function prompt) will display the following screen:



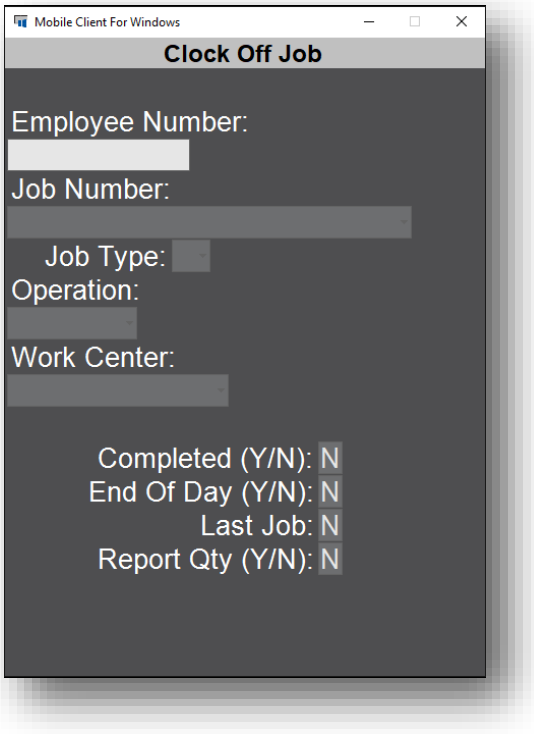
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Clock Off Job

The Clock Off Job transaction is used to clock users out of production jobs. Selecting the Clock Off Job transaction from the Labor Menu (or scanning COFF from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Job Number – If user is clocked into Direct labor (1 job), this field will be defaulted with the values from the EMPCLCKIN table. If the user is in multiple jobs (i.e. clocked into (P)arallel or (S)erial labor), they may press F2 to display a choice list of all jobs currently clocked into.

Job Type – This value will be defaulted from the EMPCLCKIN record for the selected job number.

Operation – This value will be defaulted from the EMPCLCKIN record for the selected job number.

Work Center – This value will be defaulted from the EMPCLCKIN record for the selected job number, if applicable.

Completed (Y/N) – By default, the Made2Manage posting program will automatically update an operation to Completed status (or the job order as a whole if the last operation is completed) if the full quantity required is met. However, user may manually update this status by entering Y for Yes in this prompt if the operation should be updated to Complete regardless of quantity actually completed.

End of Day (Y/N) – Enter Y for Yes if this is the last labor transaction of the day for the employee. If so, employee status will be changed to OUT. If employee will continue to

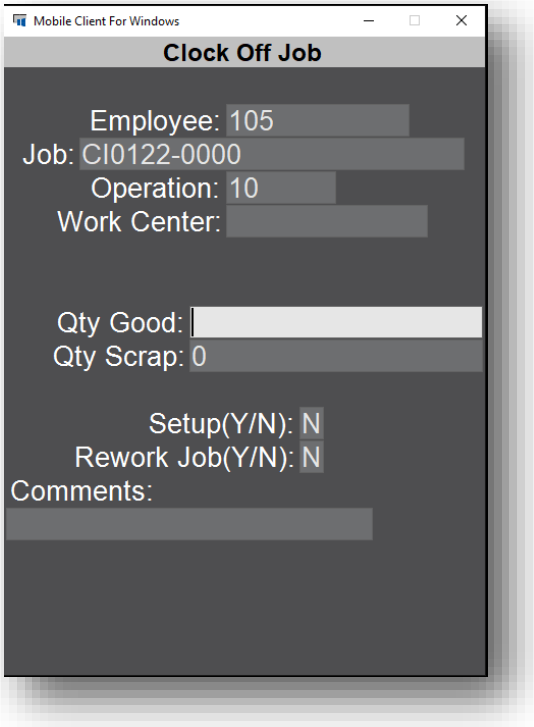
make additional labor transactions, enter N for No. If a user does enter Y for Yes, they will be required to Clock In again before they may record any additional labor transactions.

Last Job (Y/N) – This prompt is activated only when clocking off (S)erial labor. Enter Y if no additional jobs are to be clocked off at this time. System will require a minimum of 2 serial jobs to be clocked off of as a part of any sequence.

Report Qty (Y/N) - Enter N for No if user does not wish to record a quantity completed on the operation, otherwise take the default Y for Yes. Note that this field is named “Lead Person” in the legacy bar code collection system. You may use the Prompt Editor to change the caption for this field, if desired.

Clock Off Job, Page 2

The following screen is what is displayed if the user chooses Yes to Report Qty:



Employee – Display only value from previous screen.

Job Number - Display only value from previous screen.

Operation – Display only value from previous screen.

Work Center – Display only value from previous screen.

Qty Good – Key the quantity of good parts produced.

Qty Scrap – Key the quantity of scrap parts, if applicable.

Setup (Y/N) – Enter Y for Yes if the time should be logged as setup.

Rework Job (Y/N) – Enter Y for Yes if the job is a rework job.

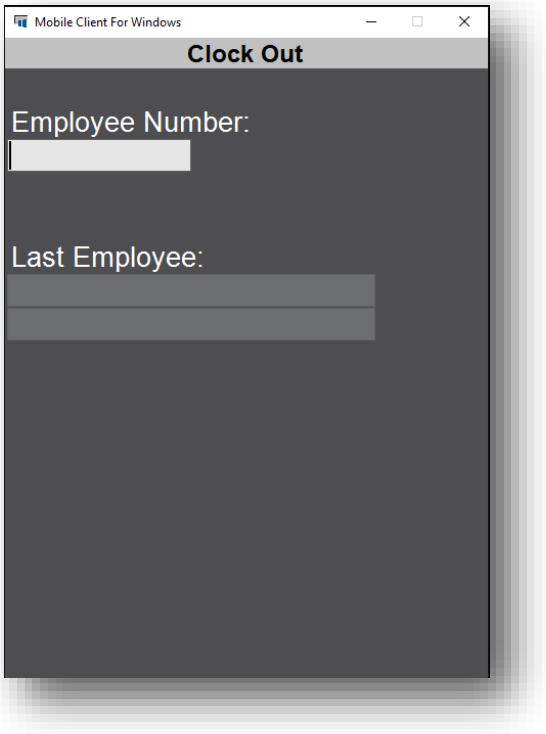
Comments – Key or scan any comments about this transaction. Comments are not posted to Made2Manage and are held in the COMMENTS table of the SFDC database.

Upon completion of transaction, the following transactions are created depending on the labor type involved:

- F2 transaction written to BCSHARED if labor type was (D)irect
- F3 transaction written to BCSHARED if labor type was (A)dd Operation
- F16 transaction written to BCSHARED if labor type was (P)arallel
- F14 transaction written to BCSHARED if labor type was 1st (S)erial
- J14 transaction written to BCSHARED if labor type was subsequent (S)erial
- If End of Day = Yes, user status will be updated to OUT and all job history records will be flushed from EMPCLCKIN to the EMPCLCKHS table
- If no production jobs remain in EMPCLCKIN table, a record will be created showing the user clocked into default idle job

Clock Out

The Clock Out transaction is used to clock users out of Made2Manage at the end of their shift. Selecting the Clock Out transaction from the Labor Menu (or scanning COUT from the Function prompt) will display the following screen:



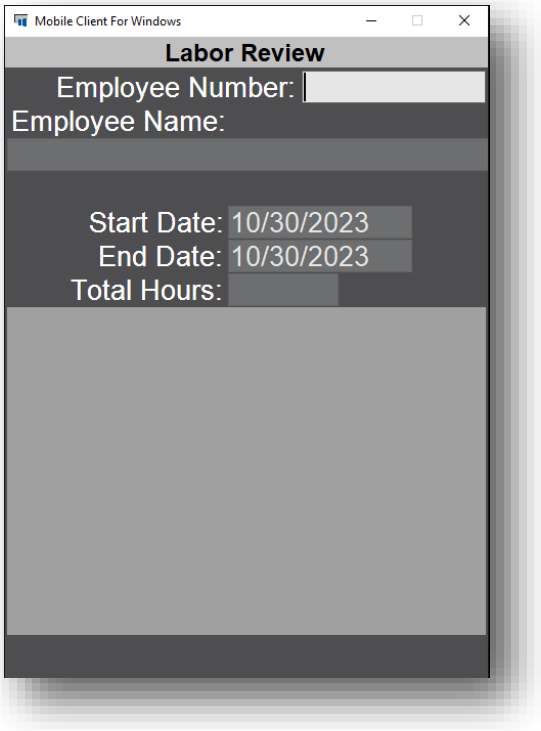
Employee Number – Key or scan the Employee Number. System will validate that the user is clocked into an idle/indirect job or an error will be displayed.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction an F4 transaction will be written to BCSHARED for posting to Made2Manage and the employee status will be updated to OUT. In addition, all job history records will be flushed from EMPCLCKIN to the EMPCLCKHS table.

Labor Review

The Labor Review transaction is used to review labor data for an employee for a range of dates. Selecting the Labor Review transaction from the Labor Menu will display the following screen:



Employee Number – Key or scan the Employee Number. System will validate that the user is a valid user in the system.

Employee Name – This display-only field will display the name of the employee for the employee number entered.

Start Date – Enter the start date that labor records are to be looked up by. Field will default to current date.

End Date – Enter the end date that labor records are to be looked up by. Field will default to date entered in the start date field. System will validate that the date range entered is not greater than 31 days.

Total Hours – This display-only field will display the total number of hours recorded for employee for the date range entered.

List Field – If the date range entered is for just one day(date is the same), this list will display list of jobs that the user recorded labor on, whether the labor was setup or production, the start and end time of the labor record and the elapsed time for the labor record. User will be able to scroll list to review all labor data.
If a date range greater than one day is entered in the date fields, this list will display a list of dates labor was recorded for the employee, along with the total elapsed time of the labor data. User will be scroll the list and select a row in the list to get details of the labor for that date. The details will display list of jobs that the user recorded labor on, whether the labor

was setup or production, the start and end time of the labor record and the elapsed time for the labor record. User will be able to scroll list to review all labor data.

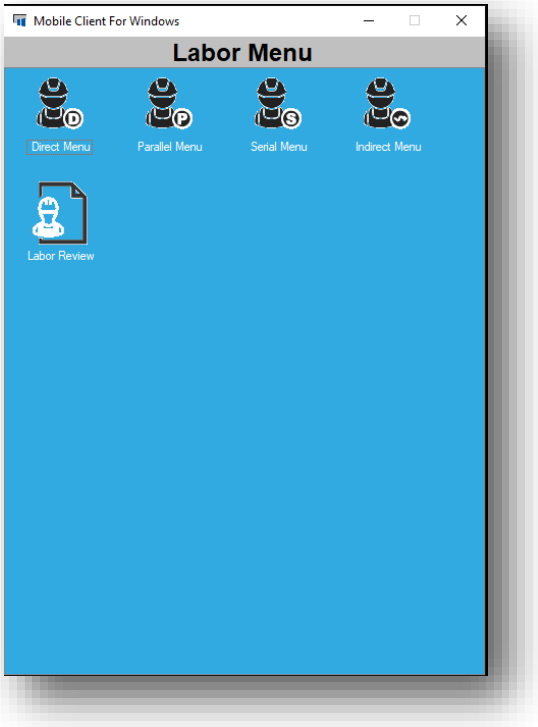
Labor Menu, Legacy

For best results concerning menu display, the following settings should be made in the SFDC Configuration section if users will use Legacy labor collection:

- Clock On Required = False
- Clock On and Off Jobs Menu = False
- Check Employee Status = False (generally when upgrading from BCC)
- Idle Job = Not necessary
- Idle Operation = Not necessary
- SFMInterface =True/False depending on if SFM is used

Labor Menu

Selecting the Labor Menu option from the Main Menu will display the following screen:

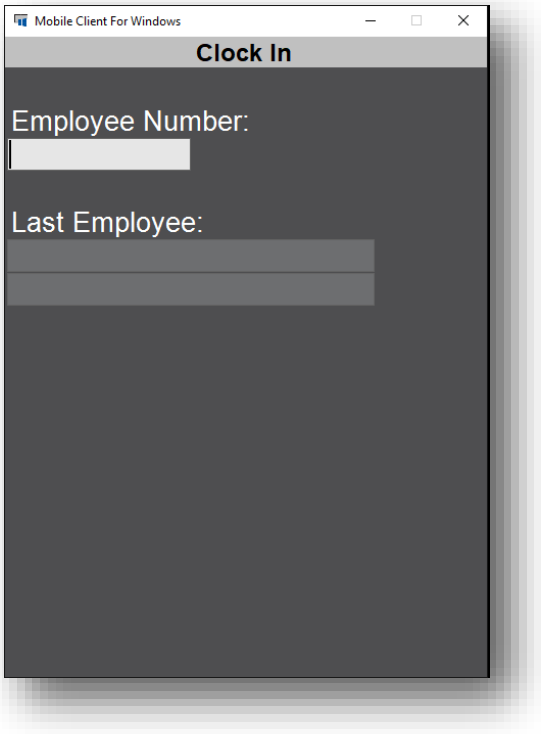


Direct Menu

Selecting the Direct Menu option from the Labor Menu will display the following screen:

Clock In

The Clock In transaction is used to clock users into Made2Manage at the beginning of a shift. Selecting Clock In from the Direct Menu (or scanning F1 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

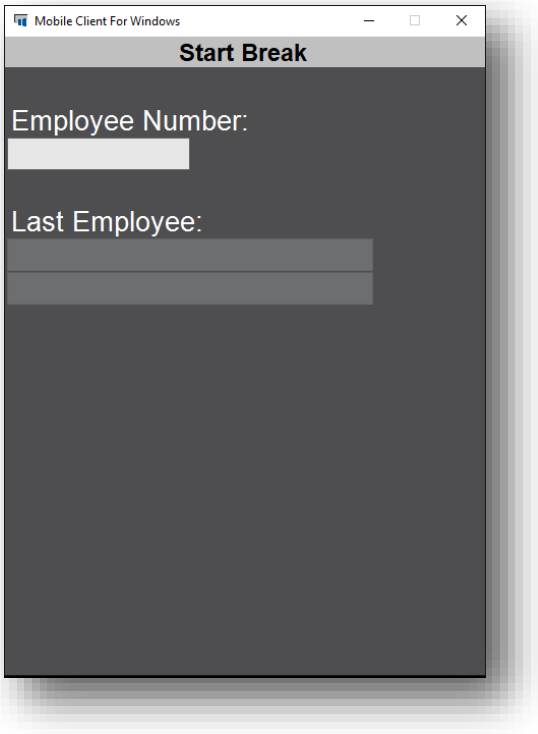
Upon completion of transaction, an F1 transaction will be written to BCSHARED for posting to Made2Manage.

Breaks

Selecting Breaks from the Direct Menu will display the following screen:

Start Break

The Start Break transaction is used to clock users into Break. Selecting Start Break from the Breaks Menu (or scanning BON from the Function prompt) will display the following screen:



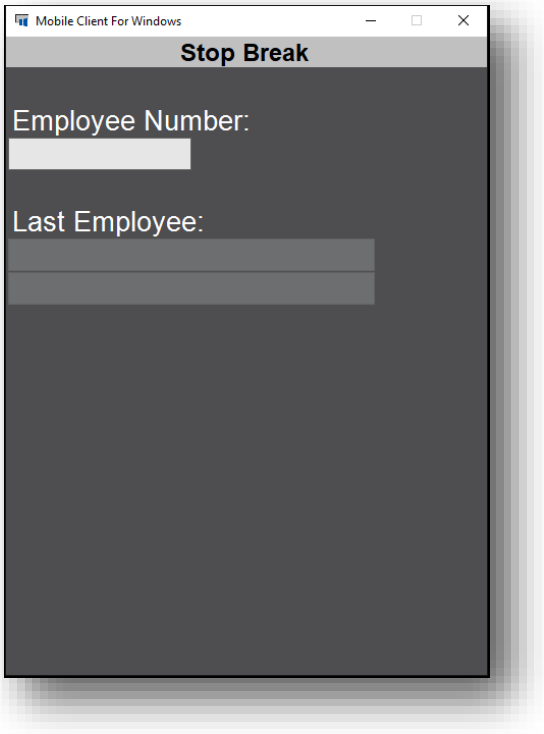
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Stop Break

The Stop Break transaction is used to clock users out of Break. Selecting Stop Break from the Breaks Menu (or scanning BOFF from the Function prompt) will display the following screen:



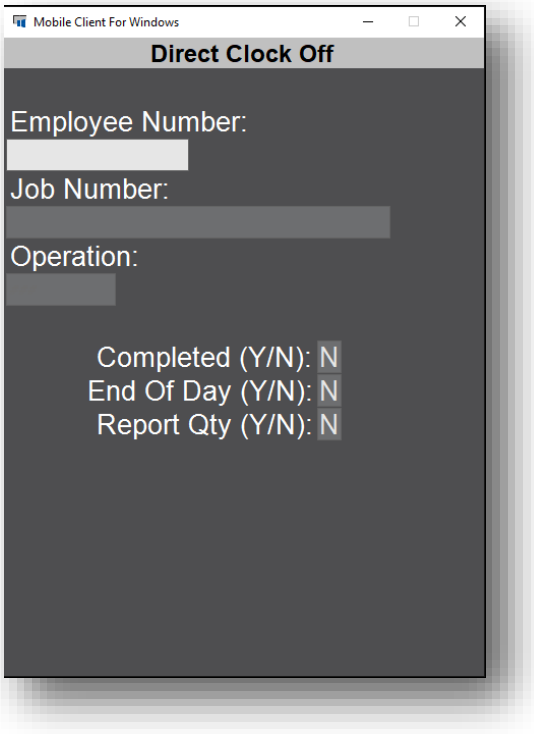
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Clock Off

The Clock Off transaction is used to clock users out of direct labor jobs. Selecting the Clock Off transaction from the Direct Menu (or scanning F2 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Job Number – Scan the job number barcode from the Made2Manage traveler document.

Operation – Scan the appropriate operation barcode from the Made2Manage traveler document.

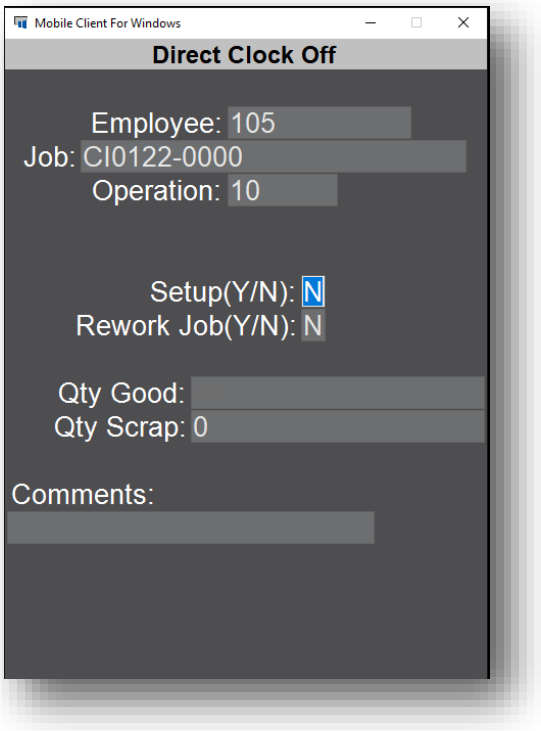
Completed (Y/N) – By default, the Made2Manage posting program will automatically update an operation to Completed status (or the job order as a whole if the last operation is completed) if the full quantity required is met. However, user may manually update this status by entering Y for Yes in this prompt if the operation should be updated to Complete regardless of quantity actually completed.

End of Day (Y/N) – Enter Y for Yes if this is the last labor transaction of the day for the employee. If so, employee status will be changed to OUT. If employee will continue to make additional labor transactions, enter N for No. If a user does enter Y for Yes, they will be required to Clock In again before they may record any additional labor transactions.

Report Qty (Y/N) - Enter N for No if user does not wish to record a quantity completed on the operation, otherwise take the default Y for Yes. Note that this field is named “Lead Person” in the legacy bar code collection system. You may use the Prompt Editor to change the caption for this field, if desired.

Clock Off, Page 2

The following screen is what is displayed if the user chooses Yes to Report Qty:



Employee – Display only value from previous screen.

Job Number - Display only value from previous screen.

Operation – Display only value from previous screen.

Setup (Y/N) – Enter Y for Yes if the time should be logged as setup.

Rework Job (Y/N) – Enter Y for Yes if the job is a rework job.

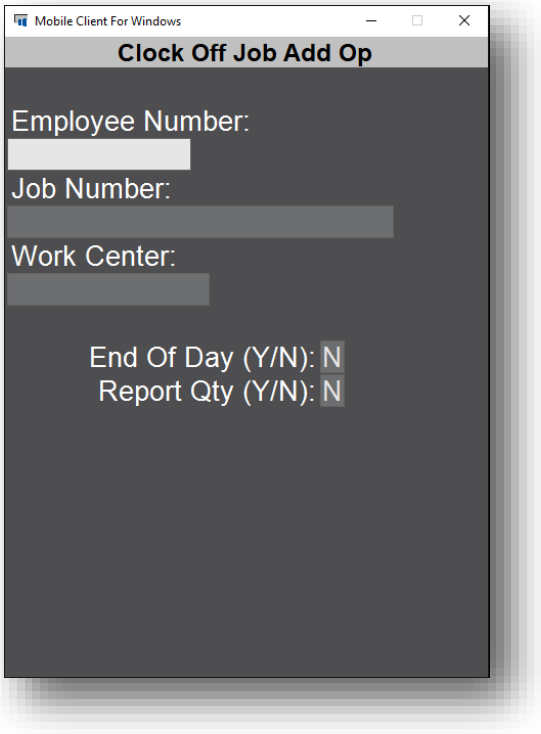
Qty Good – Key the quantity of good parts produced.

Qty Scrap – Key the quantity of scrap parts, if applicable.

Comments – Key or scan any comments about this transaction. Comments are not posted to Made2Manage and are held in the COMMENTS table of the SFDC database.

Clock Off Add Op

The Clock Off Add Op transaction is used to clock users out of direct labor against workcenters not assigned to the job router. Selecting the Clock Off Add Op transaction from the Direct Menu (or scanning F3 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Job Number – Scan the job number barcode from the Made2Manage traveler document.

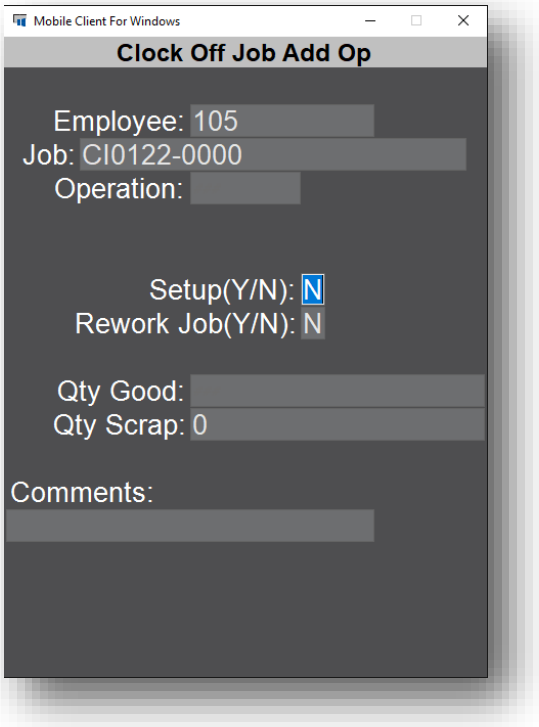
Work Center – Scan the appropriate work center barcode for the work center labor was collected at from M2M report RPBCWC.

End of Day (Y/N) – Enter Y for Yes if this is the last labor transaction of the day for the employee. If so, employee status will be changed to OUT. If employee will continue to make additional labor transactions, enter N for No. If a user does enter Y for Yes, they will be required to Clock In again before they may record any additional labor transactions.

Report Qty (Y/N) - Enter N for No if user does not wish to record a quantity completed on the work center, otherwise take the default Y for Yes. Note that this field is named “Lead Person” in the legacy bar code collection system. You may use the Prompt Editor to change the caption for this field, if desired.

Clock Off Add Op, Page 2

The following screen is what is displayed if the user chooses Yes to Report Qty:



Employee – Display only value from previous screen.

Job Number - Display only value from previous screen.

Operation – Display only value from previous screen.

Setup (Y/N) – Enter Y for Yes if the time should be logged as setup.

Rework Job (Y/N) – Enter Y for Yes if the job is a rework job.

Qty Good – Key the quantity of good parts produced.

Qty Scrap – Key the quantity of scrap parts, if applicable.

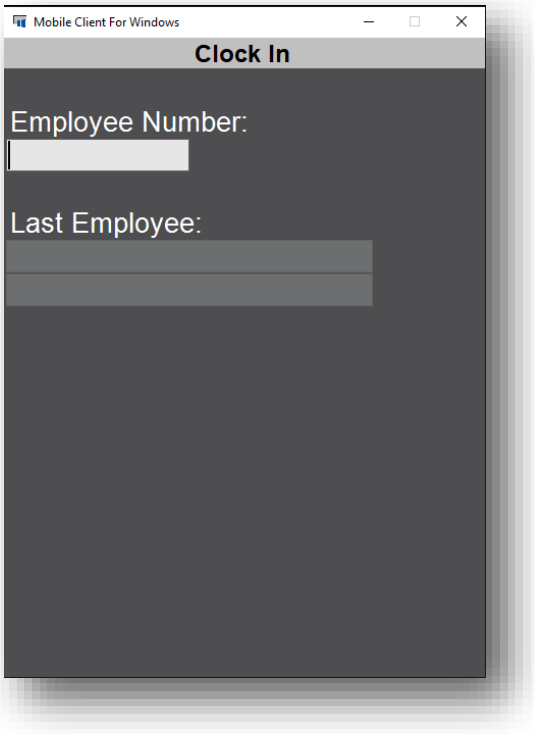
Comments – Key or scan any comments about this transaction. Comments are not posted to Made2Manage and are held in the COMMENTS table of the SFDC database.

Parallel Menu

Selecting the Parallel Menu option from the Labor Menu will display the following screen:

Clock In

The Clock In transaction is used to clock users into Made2Manage at the beginning of a shift. Selecting Clock In from the Parallel Menu (or scanning F1 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

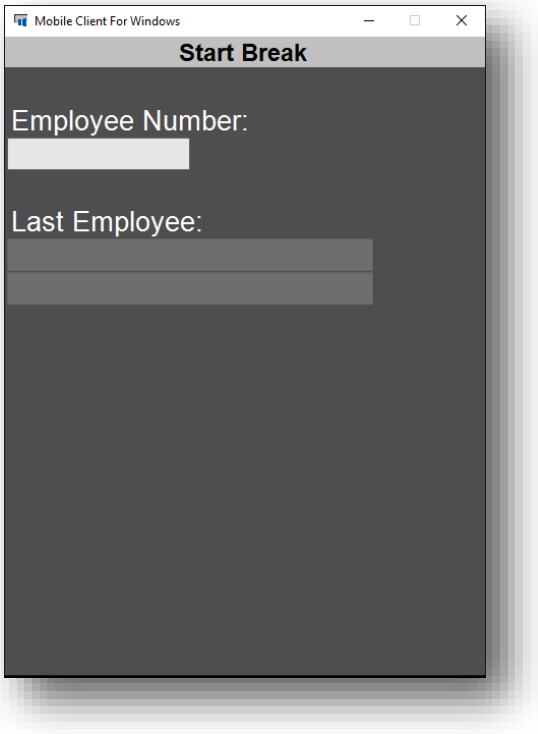
Upon completion of transaction, an F1 transaction will be written to BCSHARED for posting to Made2Manage.

Breaks

Selecting Breaks from the Parallel Menu will display the following screen:

Start Break

The Start Break transaction is used to clock users into Break. Selecting Start Break from the Breaks Menu (or scanning BON from the Function prompt) will display the following screen:



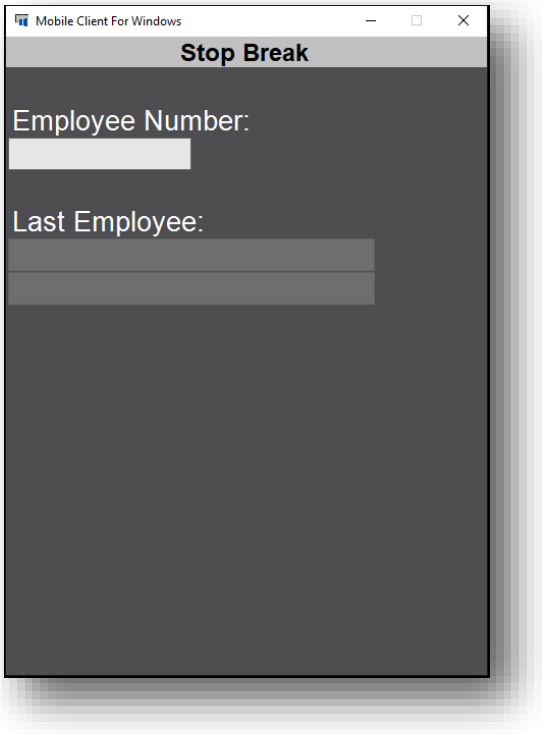
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Stop Break

The Stop Break transaction is used to clock users out of Break. Selecting Stop Break from the Breaks Menu (or scanning BOFF from the Function prompt) will display the following screen:



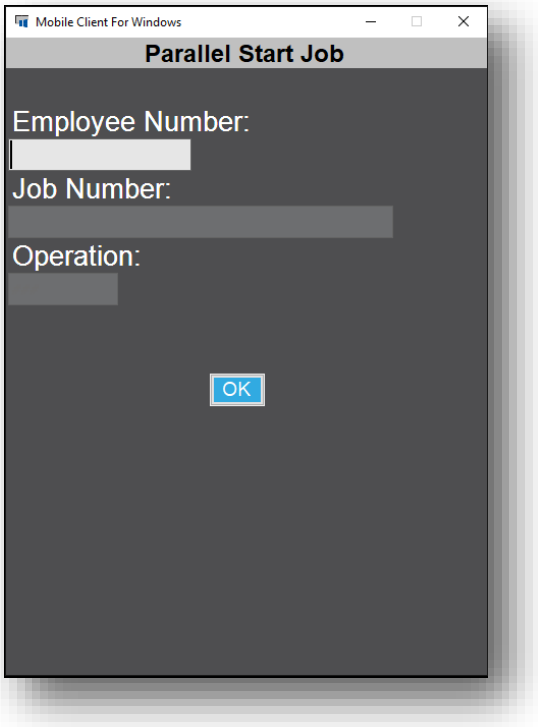
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Parallel Start

The Parallel Start transaction is used to clock users into parallel production jobs. Selecting Parallel Start from the Parallel Menu (or scanning T from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

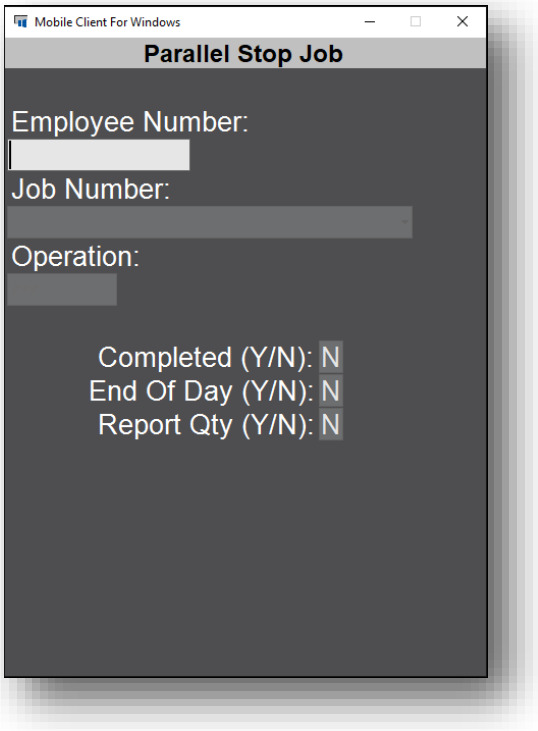
Job Number – Scan the Job Number barcode from the Production Floor Traveler document.

Operation – Scan the Operation from the Production Floor Traveler document.

OK – Press the OK button to complete this transaction.

Parallel Stop

The Parallel Stop transaction is used to clock users off parallel production jobs. Selecting Parallel Stop from the Parallel Menu (or scanning S from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Job Number – Scan the job number barcode from the Made2Manage traveler document. User may also press F2 to select from jobs clocked into.

Operation – Scan the appropriate operation barcode from the Made2Manage traveler document. System will validate that the job/operation scanned is a job/operation user previously clocked into via the Parallel Start Job transaction.

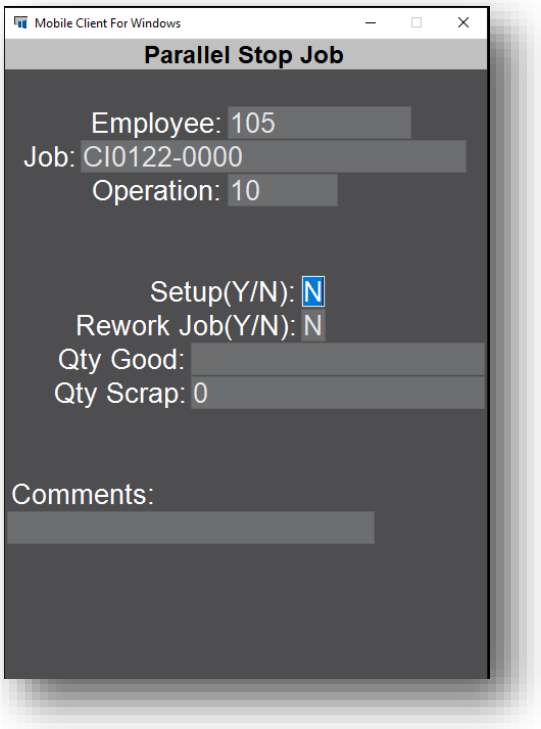
Completed (Y/N) – By default, the Made2Manage posting program will automatically update an operation to Completed status (or the job order as a whole if the last operation is completed) if the full quantity required is met. However, user may manually update this status by entering Y for Yes in this prompt if the operation should be updated to Complete regardless of quantity actually completed.

End of Day (Y/N) – Enter Y for Yes if this is the last labor transaction of the day for the employee. If so, employee status will be changed to OUT. If employee will continue to make additional labor transactions, enter N for No. If a user does enter Y for Yes, they will be required to Clock In again before they may record any additional labor transactions.

Report Qty (Y/N) - Enter N for No if user does not wish to record a quantity completed on the operation, otherwise take the default Y for Yes. Note that this field is named “Lead Person” in the legacy bar code collection system. You may use the Prompt Editor to change the caption for this field, if desired.

Parallel Stop, Page 2

The following screen is what is displayed if the user chooses Yes to Report Qty:



Employee – Display only value from previous screen.

Job Number - Display only value from previous screen.

Operation – Display only value from previous screen.

Setup (Y/N) – Enter Y for Yes if the time should be logged as setup.

Rework Job (Y/N) – Enter Y for Yes if the job is a rework job.

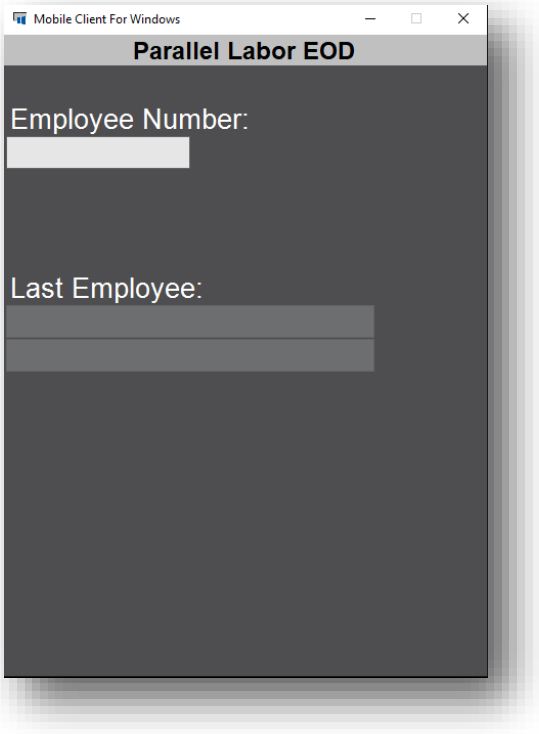
Qty Good – Key the quantity of good parts produced.

Qty Scrap – Key the quantity of scrap parts, if applicable.

Comments – Key or scan any comments about this transaction. Comments are not posted to Made2Manage and are held in the COMMENTS table of the SFDC database.

Parallel Labor EOD

The Parallel Labor EOD transaction is used to indicate End of Day processing for an employee. Selecting Parallel Labor EOD from the Parallel Menu (or scanning U from the Function prompt) will display the following screen:

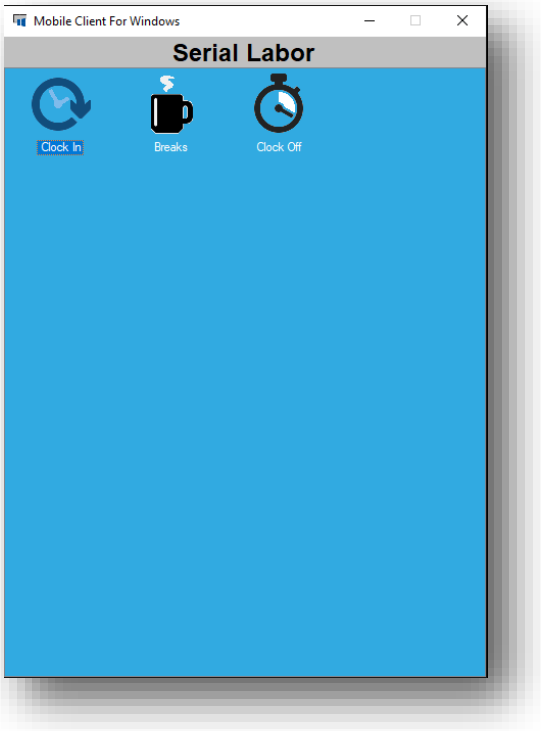


Employee Number – Key or scan the Employee Number. System will validate that no parallel jobs are currently clocked on, and if employee is in valid status. If validation succeeds, transaction will be posted.

Last Employee – Display only field of the last employee name to perform the transaction.

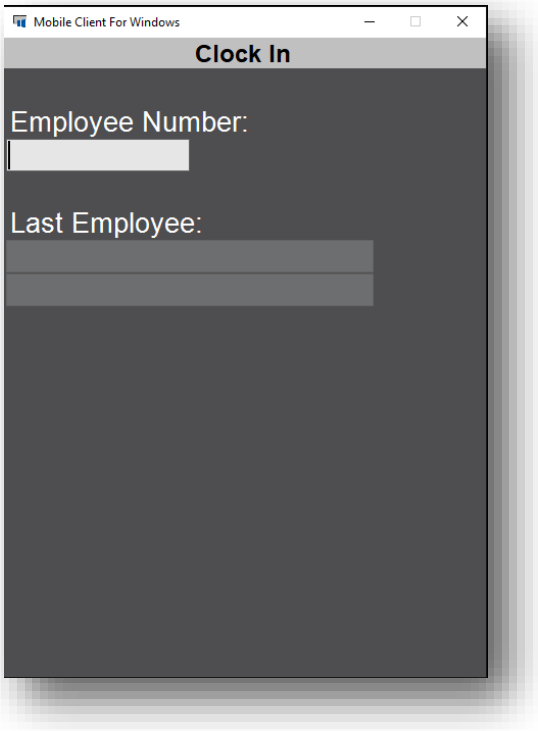
Serial Menu

Selecting the Serial Menu option from the Labor Menu will display the following screen:



Clock In

The Clock In transaction is used to clock users into Made2Manage at the beginning of a shift. Selecting Clock In from the Serial Menu (or scanning F1 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

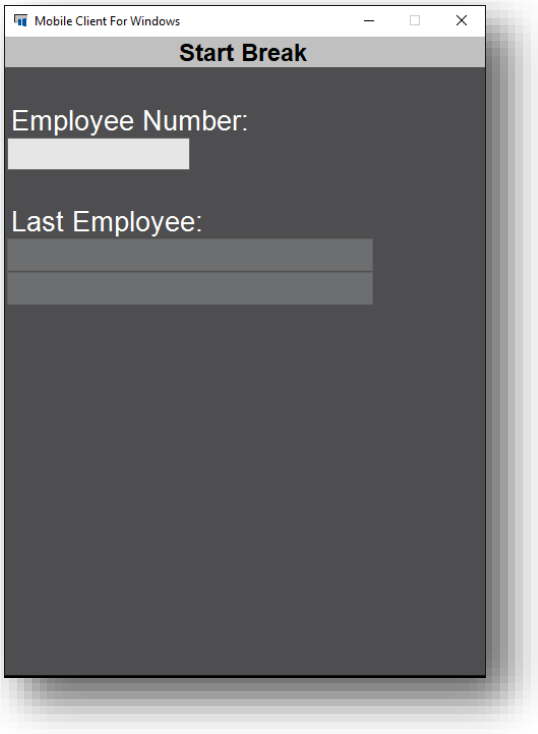
Upon completion of transaction, an F1 transaction will be written to BCSHARED for posting to Made2Manage.

Breaks

Selecting Breaks from the Serial Menu will display the following screen:

Start Break

The Start Break transaction is used to clock users into Break. Selecting Start Break from the Breaks Menu (or scanning BON from the Function prompt) will display the following screen:



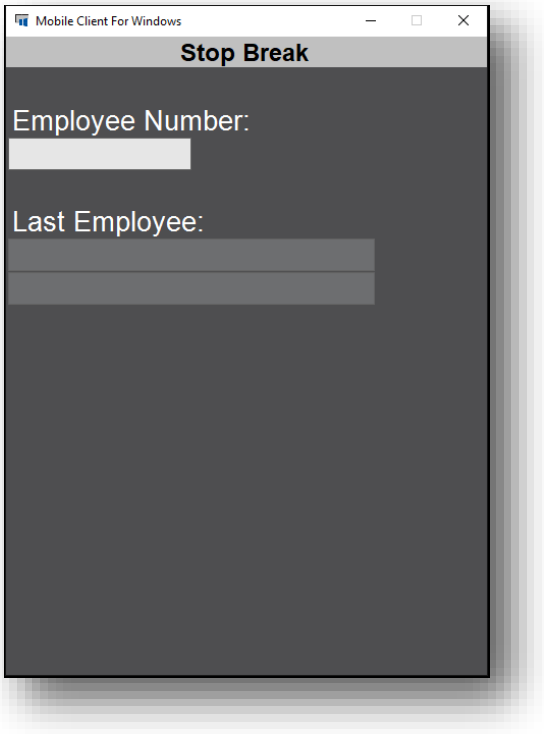
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Stop Break

The Stop Break transaction is used to clock users out of Break. Selecting Stop Break from the Breaks Menu (or scanning BOFF from the Function prompt) will display the following screen:



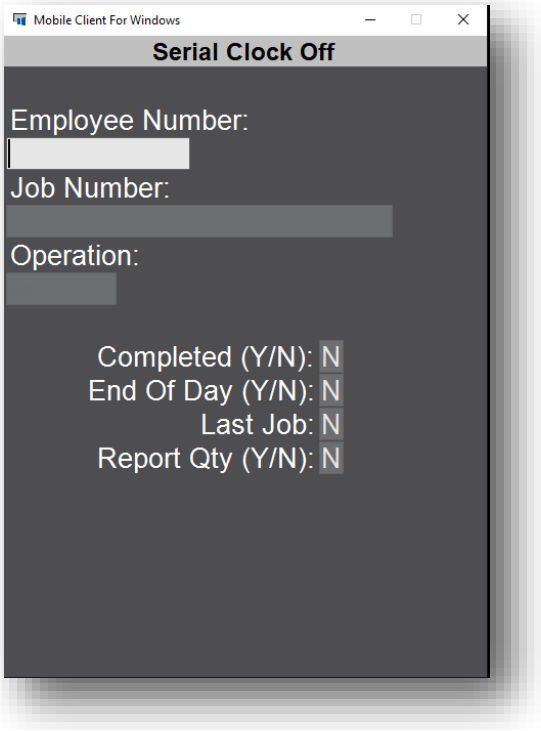
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Clock Off

The Clock Off transaction is used to clock users off serial production jobs. Selecting Clock Off from the Serial Menu (or scanning R from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Job Number – Scan the job number barcode from the Made2Manage traveler document.

Operation – Scan the appropriate operation barcode from the Made2Manage traveler document. If the operation scanned is subsequent to the first serial job, system will validate that the associated workcenter matches that of the first serial operation scanned.

Completed (Y/N) – By default, the Made2Manage posting program will automatically update an operation to Completed status (or the job order as a whole if the last operation is completed) if the full quantity required is met. However, user may manually update this status by entering Y for Yes in this prompt if the operation should be updated to Complete regardless of quantity actually completed.

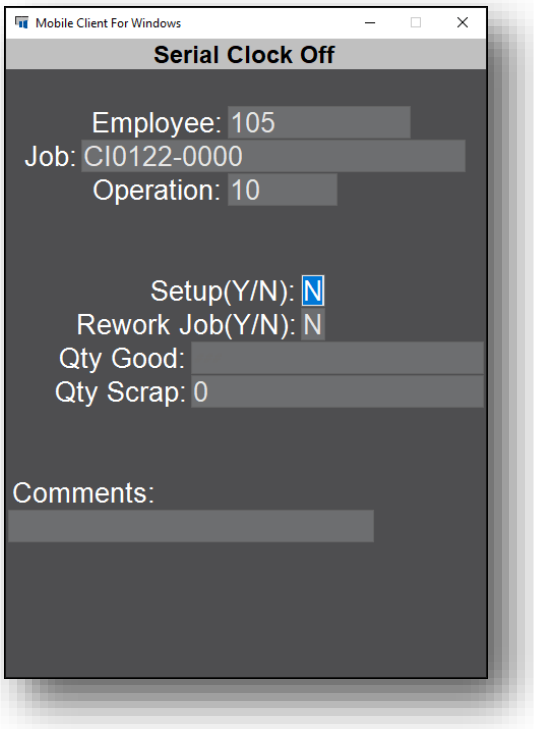
End of Day (Y/N) – Enter Y for Yes if this is the last labor transaction of the day for the employee. If so, employee status will be changed to OUT. If employee will continue to make additional labor transactions, enter N for No. If a user does enter Y for Yes, they will be required to Clock In again before they may record any additional labor transactions.

Last Job – Enter Y if this is the last job to be clocked off as serial labor in this series. System will require that a minimum of two serial jobs are clocked off per series before allowing using to answer N for No.

Report Qty (Y/N) - Enter N for No if user does not wish to record a quantity completed on the operation, otherwise take the default Y for Yes. Note that this field is named “Lead Person” in the legacy bar code collection system. You may use the Prompt Editor to change the caption for this field, if desired.

Clock Off, Page 2

The following screen is what is displayed if the user chooses Yes to Report Qty:



Employee – Display only value from previous screen.

Job Number - Display only value from previous screen.

Operation – Display only value from previous screen.

Setup (Y/N) – Enter Y for Yes if the time should be logged as setup.

Rework Job (Y/N) – Enter Y for Yes if the job is a rework job.

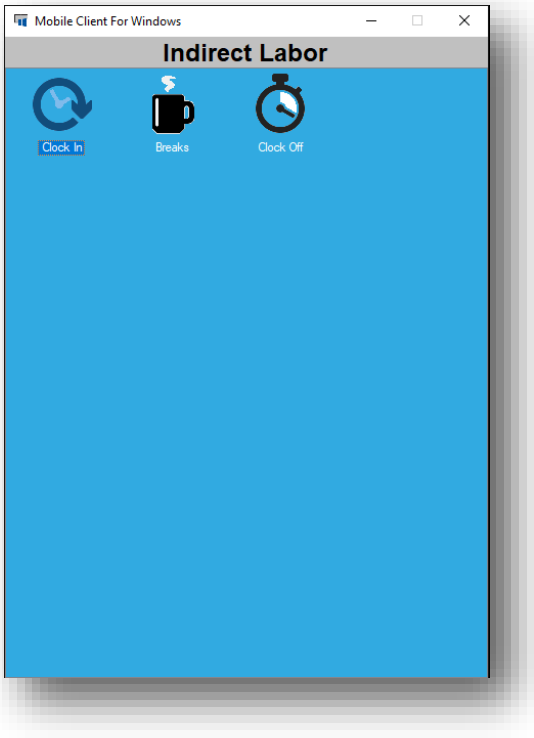
Qty Good – Key the quantity of good parts produced.

Qty Scrap – Key the quantity of scrap parts, if applicable.

Comments – Key or scan any comments about this transaction. Comments are not posted to Made2Manage and are held in the COMMENTS table of the SFDC database.

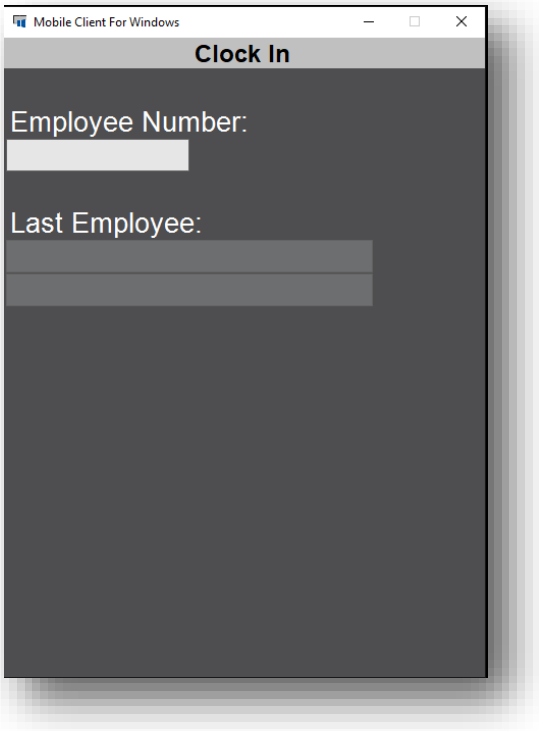
Indirect Menu

Selecting the Indirect Menu option from the Labor Menu will display the following screen:



Clock In

The Clock In transaction is used to clock users into Made2Manage at the beginning of a shift. Selecting Clock In from the Indirect Menu (or scanning F1 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

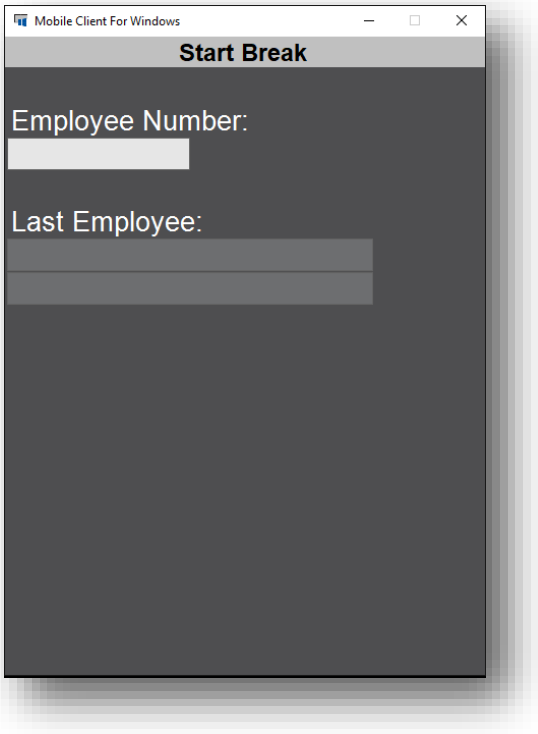
Upon completion of transaction, an F1 transaction will be written to BCSHARED for posting to Made2Manage.

Breaks

Selecting Breaks from the Indirect Menu will display the following screen:

Start Break

The Start Break transaction is used to clock users into Break. Selecting Start Break from the Breaks Menu (or scanning BON from the Function prompt) will display the following screen:



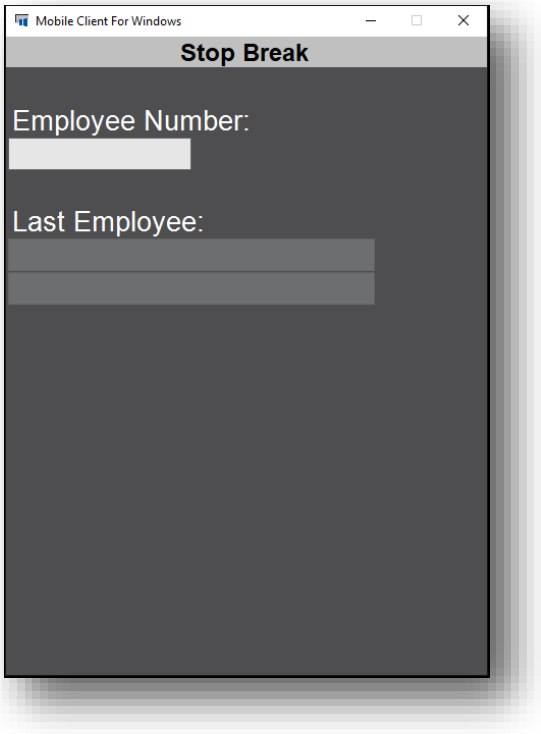
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Stop Break

The Stop Break transaction is used to clock users out of Break. Selecting Stop Break from the Breaks Menu (or scanning BOFF from the Function prompt) will display the following screen:



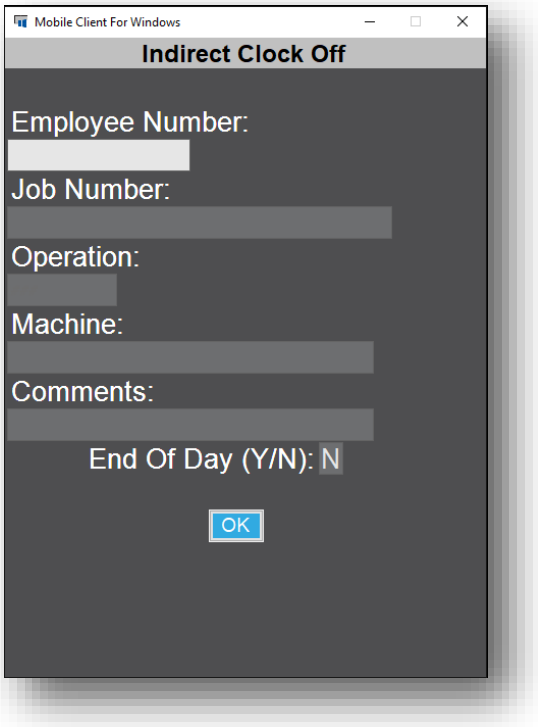
Employee Number – Key or scan the Employee Number.

Last Employee – This display-only field will display the last employee to have clocked into this screen.

Upon completion of transaction, an F13 transaction will be written to BCSHARED for posting to Made2Manage.

Clock Off

The Clock Off transaction is used to clock users off indirect jobs. Selecting Clock Off from the Indirect Menu (or scanning F4 from the Function prompt) will display the following screen:



Employee Number – Key or scan the Employee Number.

Job Number – Scan the job number barcode from the Made2Manage traveler document.

Operation – Scan the appropriate operation barcode from the Made2Manage traveler document.

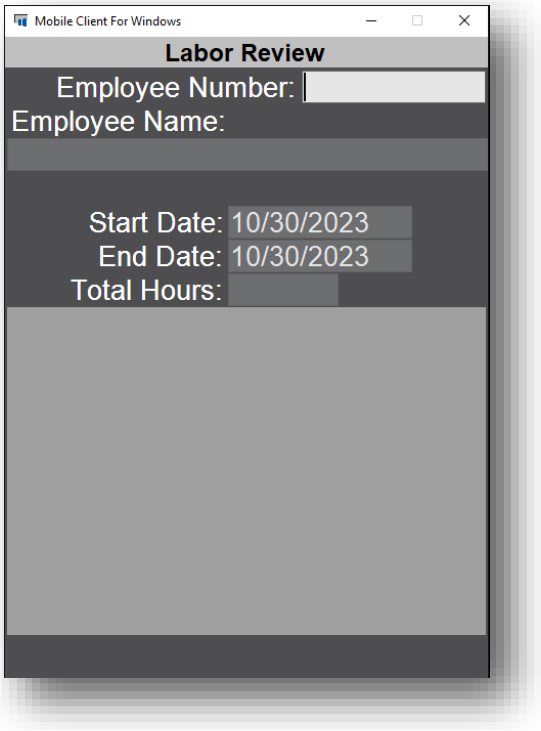
Machine – User may scan the Machine/Work Center the labor was performed against, if applicable.

Comments – Key or scan any comments about this transaction. Comments are not posted to Made2Manage and are held in the COMMENTS table of the SFDC database.

End of Day (Y/N) – Enter Y for Yes if this is the last labor transaction of the day for the employee. If so, employee status will be changed to OUT. If employee will continue to make additional labor transactions, enter N for No. If a user does enter Y for Yes, they will be required to Clock In again before they may record any additional labor transactions.

Labor Review

The Labor Review transaction is used to review labor data for an employee for a range of dates. Selecting the Labor Review transaction from the Labor Menu will display the following screen:



Employee Number – Key or scan the Employee Number. System will validate that the user is a valid user in the system.

Employee Name – This display-only field will display the name of the employee for the employee number entered.

Start Date – Enter the start date that labor records are to be looked up by. Field will default to current date.

End Date – Enter the end date that labor records are to be looked up by. Field will default to date entered in the start date field. System will validate that the date range entered is not greater than 31 days.

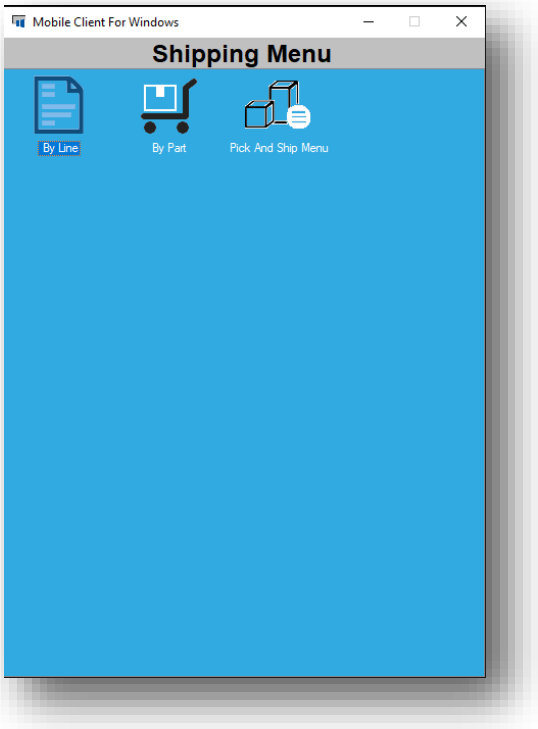
Total Hours – This display-only field will display the total number of hours recorded for employee for the date range entered.

List Field – If the date range entered is for just one day(date is the same), this list will display list of jobs that the user recorded labor on, whether the labor was setup or production, the start and end time of the labor record and the elapsed time for the labor record. User will be able to scroll list to review all labor data.
If a date range greater than one day is entered in the date fields, this list will display a list of dates labor was recorded for the employee, along with the total elapsed time of the labor data. User will be scroll the list and select a row in the list to get details of the labor for that date. The details will display list of jobs that the user recorded labor on, whether the labor

was setup or production, the start and end time of the labor record and the elapsed time for the labor record. User will be able to scroll list to review all labor data.

Shipping Menu

Shown below is the sub-menu entered if the user chooses the Shipping Menu.



Below is a brief description of each of the Shipping Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

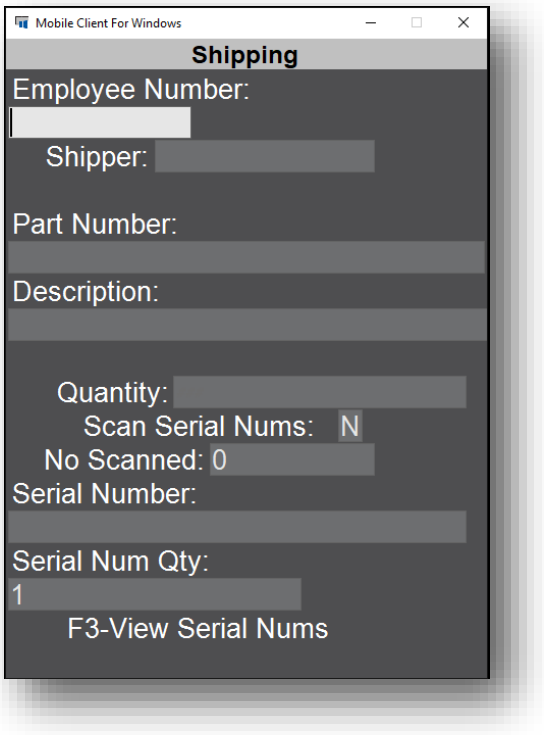
1. ***By Line*** is used to ship items by Shipper line number (using the Made2Manage Packing List document).

2. ***By Part*** is used to ship items by Shipper part number.

3. ***Pick And Ship Menu*** is used to ship items in a two part method, one to pick the items into a staging location and then a confirm to ship the items

By Line

The By Line option is used to ship items per the shipper line item barcode that appears on the Packing List document printed from Made2Manage. Selecting By Line from the Shipping Menu (or scanning F7 from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

Shipper – Scan the line number barcode from the Made2Manage Packing List document.

SO Release – If shipper is from a single SO release, value will be defaulted. It multiple release, user may press F2 to select the appropriate release.

Part Number – Displays the part number of the shipper line selected.

Desc – Displays the description of the part for the shipper line selected.

Qty – Key or scan the quantity of product being shipped. The system will only allow the quantity to be shipped as ordered, +/- any tolerances as indicated on the sales order. Depending on the Shipping Tolerance Error setting, the system will either generate a warning or an error if this acceptable quantity is exceeded.

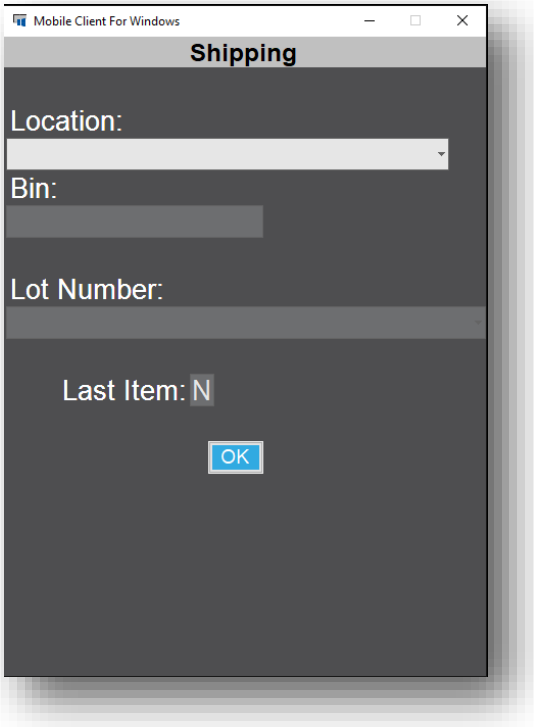
Scan Serial Nums – Key or scan Y for Yes or N for No if serial numbers are to be recorded for the indicated part. This prompt is only active if Shipping Serial Numbers setting in the SFDC configuration is set to True.

Serial Num – Key or scan the Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes.

Ser No Qty – Key or scan the Quantity of the indicated Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes. System will continue to prompt for serial numbers until quantity of serial numbers = value from Quantity prompt.

F3 – View Serial Nums – Press F3 key on device to view Serial Numbers scanned, and remove if necessary (see Shipping By Line, Page 4, below)

Shipping By Line, Page 2



Location – Key or scan the location the items will ship from. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Key the bin the items will ship from. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

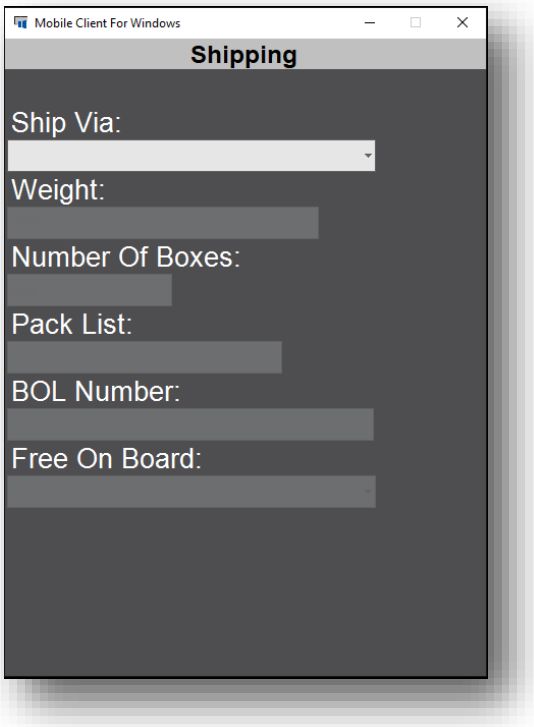
Lot Number – Key or scan the lot number for the product shipped, if applicable. This field will be active only for parts flagged for lot control.

Last item - If this is the last item to be shipped against the indicated shipper, enter a 'Y". As transactions are entered, the system keeps all shipping transactions in table SHIPPERS of the SFDC database. No transactions for a shipper will post as Shipped until the user answers 'Y' in this field to any line item from that shipper; when this happens, all transactions are flushed to BCSHARED for posting by the Made2Manage posting program and the shipper is confirmed.

OK – Press the OK button to complete this transaction.

Shipping By Line, Page 3

A third page has been added to allow for additional Shipper header information collection for M2M v6.x+, as follows (**note: this screen will only display when Last Item = Yes**):



Ship Via – Press F2 to display list of Ship Via options from M2M ERP.

Weight – Key or scan the Weight of the shipment.

Number of Boxes – Key or scan the Number of Boxes of the shipment.

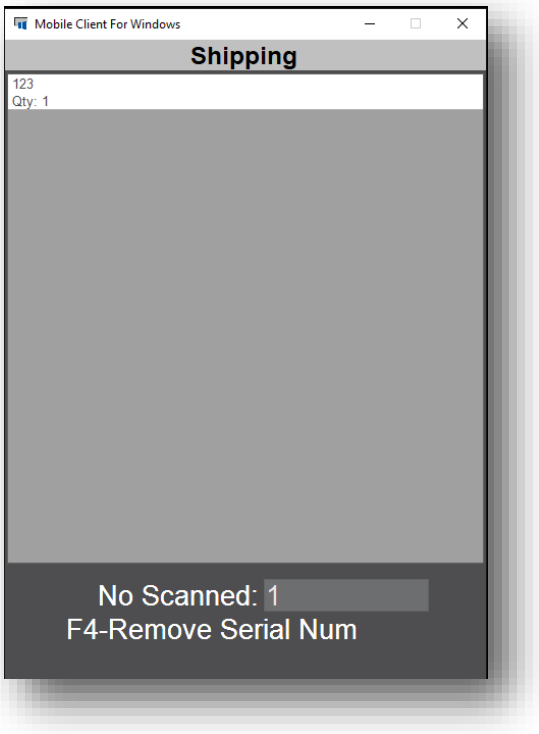
Pack List – Key or scan the shipment's Packing List number.

BOL Number – Key or scan the shipment's Bill of Lading number.

Free on Board – Press F2 to display list of FOB options from M2M ERP.

Shipping By Line, Page 4

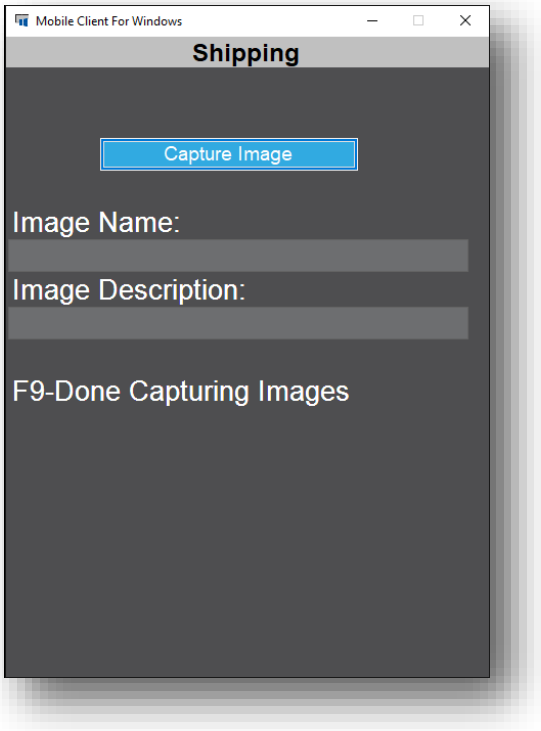
A fourth page has been added to allow for viewing Serial Numbers that have been scanned against a specific part/line (**note: this screen will only display when F3 is pressed from the page where Serial Numbers are entered**):



No Scanned – Indicates number of Serial Numbers that have been scanned for the indicated part number

F4 – Remove Serial Num – User may scroll list of Serial Numbers; pressing F4 while on a selected number will remove it from the list.

Pressing the F9 function key, any time after the shipping transaction has been started by entering a shipper, will allow the user to capture images for the shipment. These images will be saved as attachments to the shipper. Use of this transaction requires use of the SMS Mobile client on a phone or mobile computer that has a camera. This also requires a premier license for SFDC. The image capture screen will appear as follows:



Capture Image – click the button to be prompted to take a picture. Once accepted, the camera of the mobile computer will be active and allow the user to take a picture and accept the taken picture.

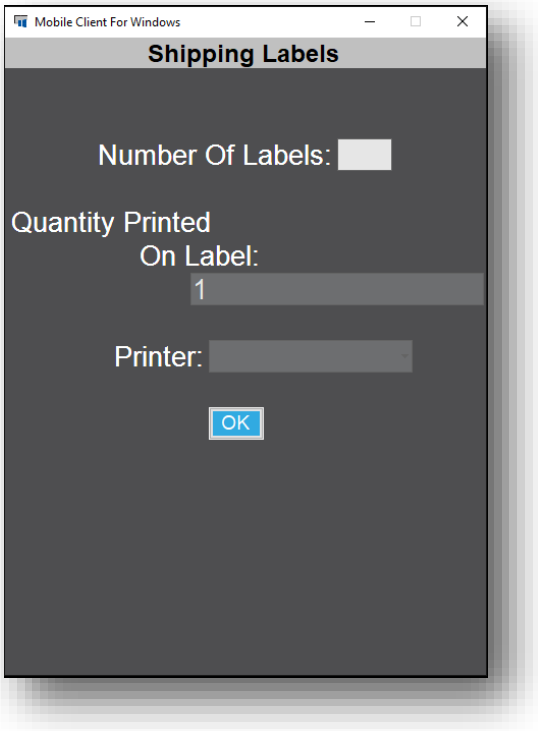
Image Name – key in a name for the image taken.

Image Description – optionally enter a description for the image taken. Once this field is entered, user will be returned to the Capture image button to capture additional images, if needed. After entry, form will reset to the capture image button to take additional images, if needed.

F9-Complete – when done capturing images, press F9 to be returned to return to the field user was last in before pressing F9 to start capturing images.

Shipping Labels

If the value from *Shipping Label*= setting of the SFDC configuration contains a value, then upon completion of shipping transaction the Shipping Labels screen will be displayed, as follows:



Number of Labels – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed On Label - Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the SFDC configuration.

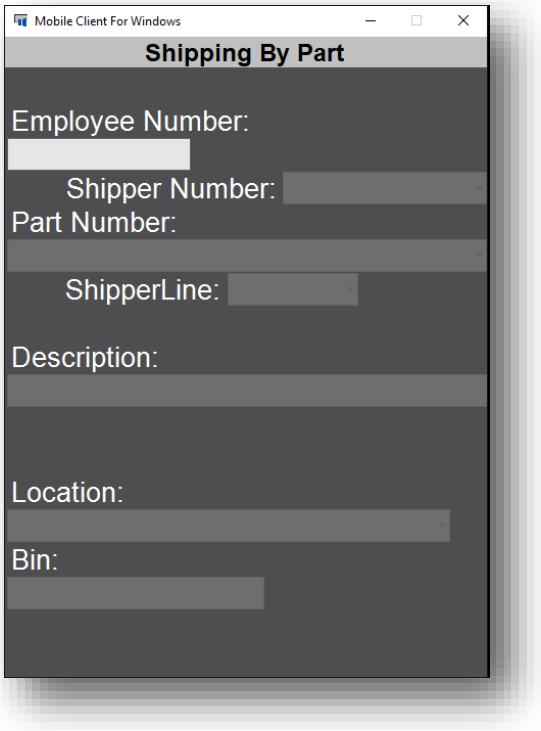
OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label that appears as follows:

A Note Concerning Label Printing

- The standard receiving label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.
- If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

By Part

The By Part option is used to ship items based on their part number. Selecting By Part from the Shipping Menu (or scanning F7B from the Function prompt) will display the following screen:



Employee Number - Key or scan the Employee Number.

Shipper No. – Key or scan the 6-digit Shipper number, or press F2 to display choice list of Shipper numbers in NOT SHIPPED status.

Part Number – Press F2 to display a choice list of part numbers for the selected shipper; scroll the list to select the part to be shipped.

ShipperLine – If value selected in the Part Number prompt occurs on only one line, this value will be defaulted. If the part occurs on multiple lines, user may press F2 to display a choice list of lines for the indicated part.

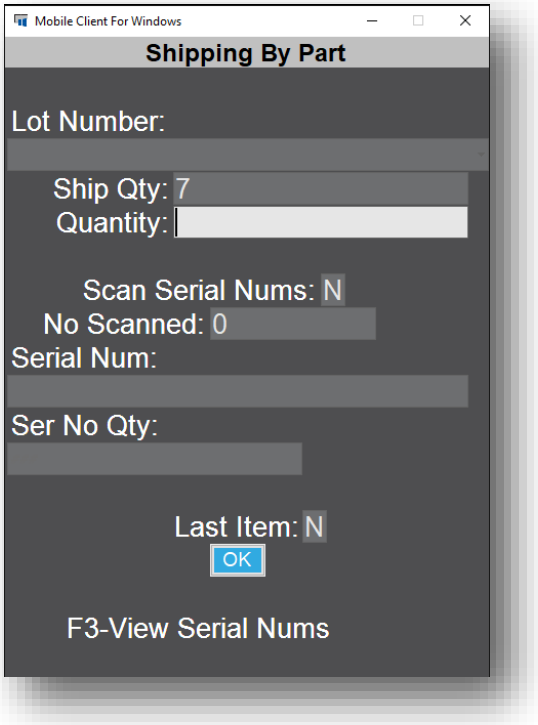
SO Release – If shipper is from a single SO release, value will be defaulted. It multiple release, user may press F2 to select the appropriate release.

Description – Displays the description of the part for the shipper line selected.

Location – Key or scan the location the items will ship from. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Key the bin the items will ship from. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

Shipping By Part, Page 2



Lot Number – Key or scan the lot number for the product shipped, if applicable. This field will be active only for parts flagged for lot control.

Ship Qty – Displays the quantity required to ship.

Quantity – Key or scan the quantity of product being shipped. The system will only allow the quantity to be shipped as ordered, +/- any tolerances as indicated on the sales order. Depending on the Shipping Tolerance Error setting in the SFDC configuration, the system will either generate a warning or an error if this acceptable quantity is exceeded.

Scan Serial Nums – Key or scan Y for Yes or N for No if serial numbers are to be recorded for the indicated part. This prompt is only active if Shipping Serial Numbers setting of the SFDC configuration is set to True

Serial Num – Key or scan the Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes.

Ser No Qty – Key or scan the Quantity of the indicated Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes. System will continue to prompt for serial numbers until quantity of serial numbers = value from Quantity prompt.

Last item - If this is the last item to be shipped against the indicated shipper, enter a 'Y". As transactions are entered, the system keeps all shipping transactions in table SHIPPERS of

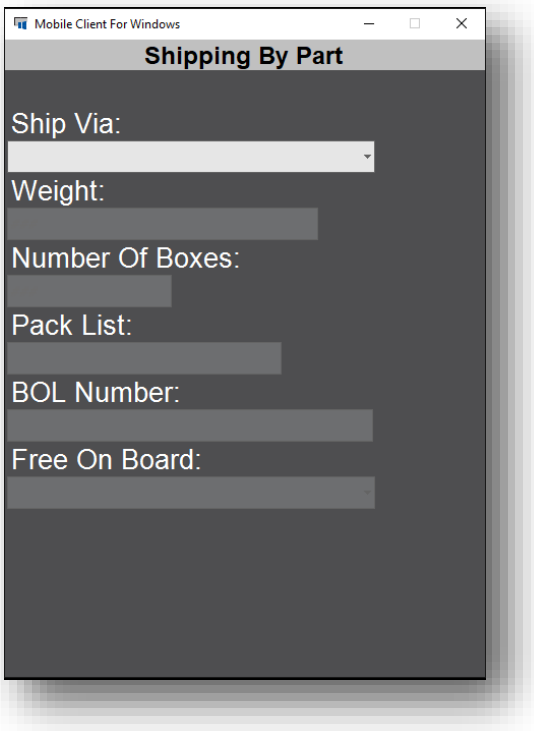
the SFDC database. No transactions for a shipper will post as Shipped until the user answers 'Y' in this field to any line item from that shipper; when this happens, all transactions are flushed to BCSHARED for posting by the Made2Manage posting program and the shipper is confirmed.

OK – Press the OK button to complete this transaction.

F3 – View Serial Nums – Press F3 key on device to view Serial Numbers scanned, and remove if necessary (see Shipping By Line, Page 4, below)

Shipping By Part, Page 3

A third page has been added to allow for additional Shipper header information collection for M2M v6.x+, as follows (**note: this screen will only display when Last Item = Yes**):



Ship Via – Press F2 to display list of Ship Via options from M2M ERP.

Weight – Key or scan the Weight of the shipment.

Number of Boxes – Key or scan the Number of Boxes of the shipment.

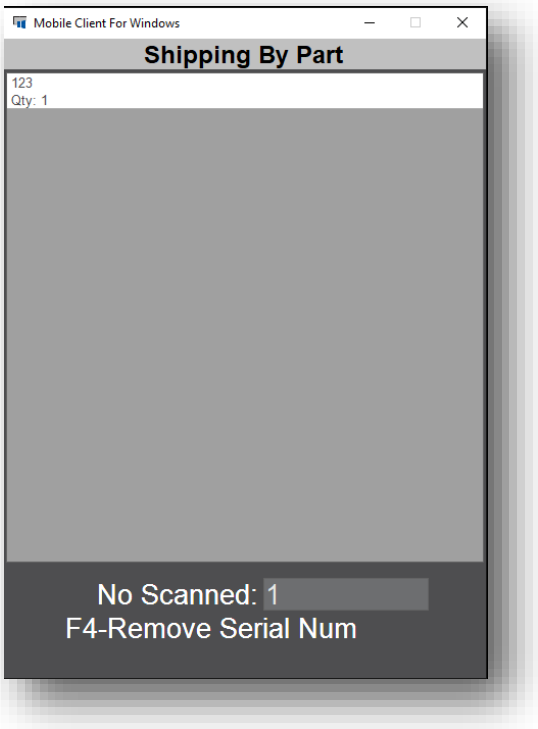
Pack List – Key or scan the shipment's Packing List number.

BOL Number – Key or scan the shipment's Bill of Lading number.

Free on Board – Press F2 to display list of FOB options from M2M ERP.

Shipping By Part, Page 4

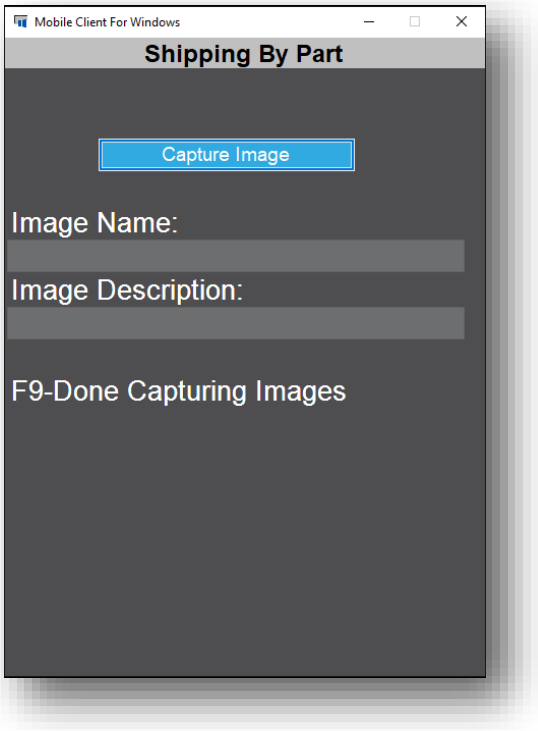
A fourth page has been added to allow for viewing Serial Numbers that have been scanned against a specific part/line (**note: this screen will only display when F3 is pressed from the page where Serial Numbers are entered**):



No Scanned – Indicates number of Serial Numbers that have been scanned for the indicated part number

F4 – Remove Serial Num – User may scroll list of Serial Numbers; pressing F4 while on a selected number will remove it from the list.

Pressing the F9 function key, any time after the shipping transaction has been started by entering a shipper, will allow the user to capture images for the shipment. These images will be saved as attachments to the shipper. Use of this transaction requires use of the SMS Mobile client on a phone or mobile computer that has a camera. This also requires a premier license for SFDC. The image capture screen will appear as follows:



Capture Image – click the button to be prompted to take a picture. Once accepted, the camera of the mobile computer will be active and allow the user to take a picture and accept the taken picture.

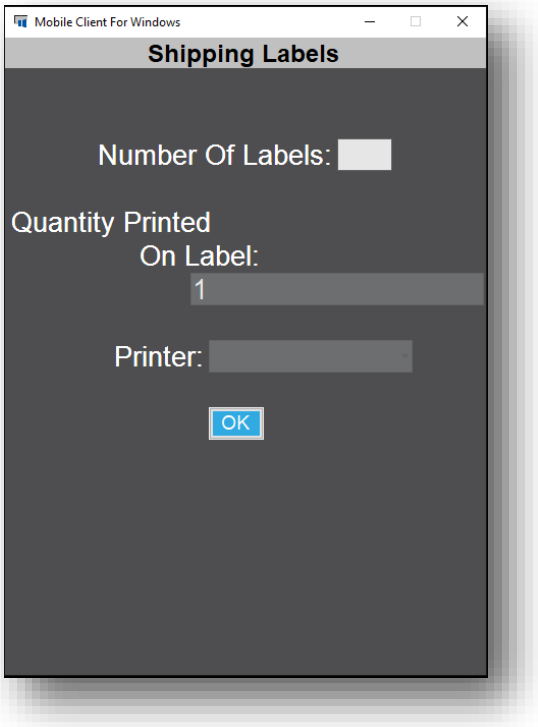
Image Name – key in a name for the image taken.

Image Description – optionally enter a description for the image taken. Once this field is entered, user will be returned to the Capture image button to capture additional images, if needed. After entry, form will reset to the capture image button to take additional images, if needed.

F9-Complete – when done capturing images, press F9 to be returned to return to the field user was last in before pressing F9 to start capturing images.

Shipping Labels

If the value from *Shipping Label* line of SFDC configuration contains a value, then upon completion of shipping transaction the Shipping Labels screen will be displayed, as follows:



Number of Labels – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed On Label - Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the SFDC Configuration.

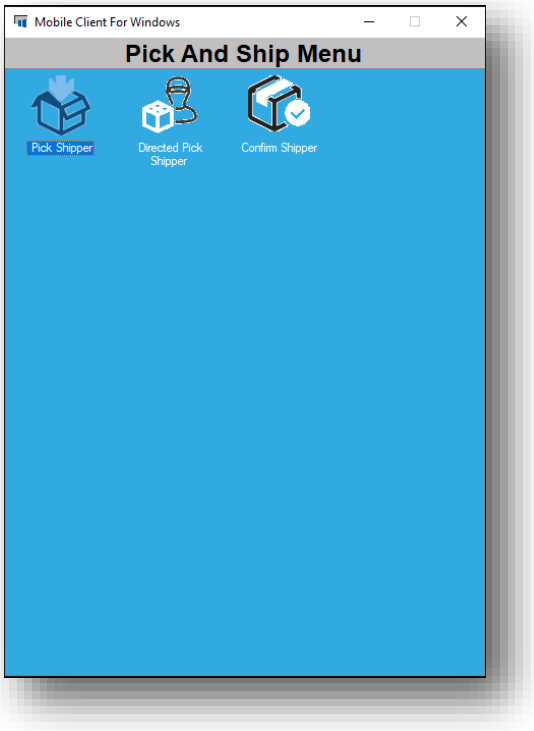
OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label that appears as follows:

A Note Concerning Label Printing

- The standard receiving label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.
- If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want Made2Manage/The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

Pick And Ship Menu

Shown below is the sub-menu entered if the user chooses the Pick and Ship Menu.



Below is a brief description of each of the Pick and Ship Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

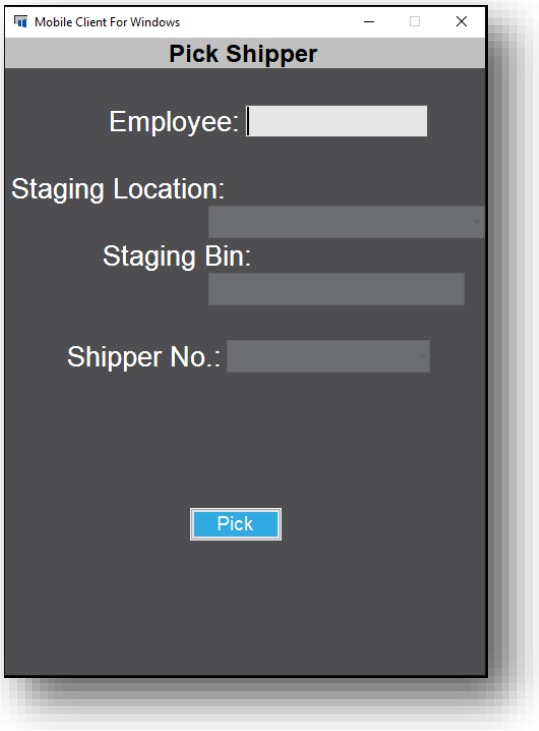
1. ***Pick Shipper*** is used to pick ship items to a staging location, where user can select which items to pick.

2. ***Directed Pick Shipper*** is used to pick ship items to a staging location, where system guides users to pick items by bin location

3. ***Confirm Shipper*** is used to ship items that were picked for shipping.

Pick Shipper

The Pick Shipper option is used to pick items for shipping into a staging location. Selecting Pick Shipper from the Pick and Ship Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

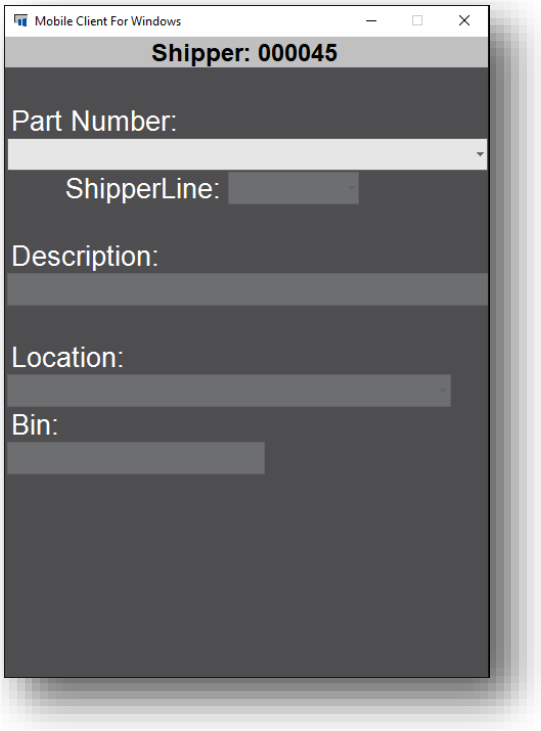
Staging Location – Scan or selected form the choice list, the location the items being picked will be staged to.

Staging Bin – Scan the bin the items being picked will be staged to.

Shipper No. – Key in or scan the shipper number being picked.

Pick – Press enter on this button to start picking items for the indicated shipper.

Pick Shipper, Page 2



Part Number – Press F2 to display a choice list of part numbers for the selected shipper; scroll the list to select the part to be shipped.

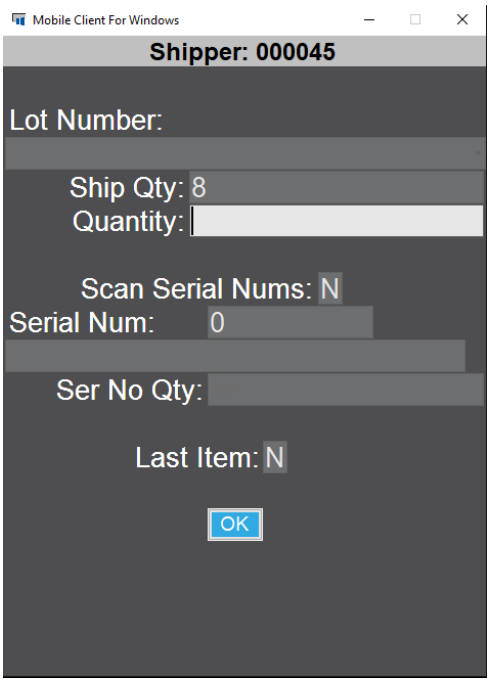
Shipper Line – If value selected in the Part Number prompt occurs on only one line, this value will be defaulted. If the part occurs on multiple lines, user may press F2 to display a choice list of lines for the indicated part.

Description – Displays the description of the part for the shipper line selected.

Location – Key or scan the location the items are being picked from. In addition, the user may press the F2 key to view a choice list of all locations in which the indicated part currently resides in M2M. Selecting an option from that list will populate the location and bin fields accordingly.

Bin – Key the bin the items are being picked from. In addition, if user scanned a barcode that contained both location and bin (for example, an identity column value from M2M), or selected a location/bin combination from the choice list under Location, this field will automatically be populated.

Pick Shipper, Page 3



Lot Number – Key or scan the lot number for the product shipped, if applicable. This field will be active only for parts flagged for lot control.

Ship Qty – Displays the quantity required to ship.

Quantity – Key or scan the quantity of product being shipped. The system will only allow the quantity to be shipped as ordered, +/- any tolerances as indicated on the sales order. Depending on the Shipping Tolerance Error setting in the SFDC configuration, the system will either generate a warning or an error if this acceptable quantity is exceeded.

Scan Serial Nums – Key or scan Y for Yes or N for No if serial numbers are to be recorded for the indicated part. This prompt is only active if Shipping Serial Numbers setting of the SFDC configuration is set to True

Serial Num – Key or scan the Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes.

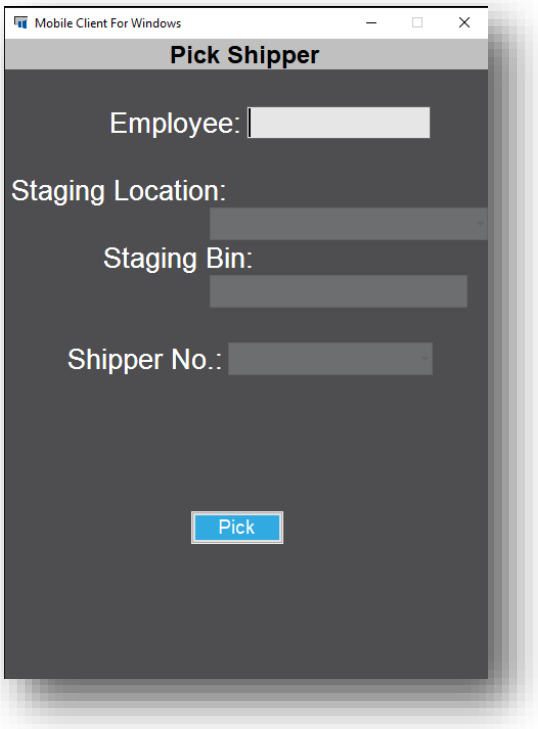
Ser No Qty – Key or scan the Quantity of the indicated Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes. System will continue to prompt for serial numbers until quantity of serial numbers = value from Quantity prompt.

Last item - If this is the last item to be picked for the indicated shipper, enter a 'Y". As transactions are entered, the system keeps all pick for shipping transactions in table ShipmentStaging of the SFDC database. No transactions for a shipper will post, the posting of the shipper is done in the Confirm Shipper transaction

OK – Press the OK button to complete this transaction, doing a location to location move of the part from the picked location/bin to the staging location/bin.

Directed Pick Shipper

The Directed Pick Shipper option is used to pick items for shipping into a staging location, where the system guides users to items based on bin location. Selecting Directed Pick Shipper from the Pick and Ship Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

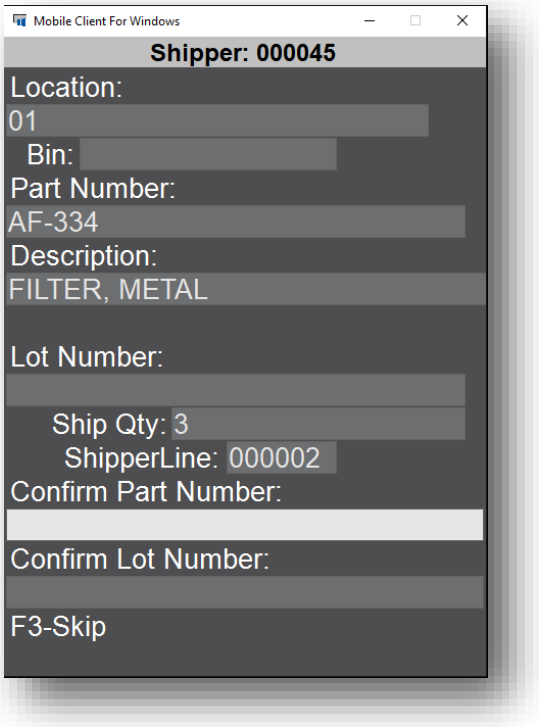
Staging Location – Scan or selected form the choice list, the location the items being picked will be staged to.

Staging Bin – Scan the bin the items being picked will be staged to.

Shipper No. – Key in or scan the shipper number being picked.

Pick – Press enter on this button to start picking items for the indicated shipper.

Directed Pick Shipper, Page 2



Location – Display only value of the location the part is in that is to be picked for shipping

Bin – Display only value of the bin the part is in that is to be picked for shipping.

Part Number – Display only value of the part to be picked for shipping.

Description – Displays the description of the part displayed.

Lot Number – Display only value of the lot to be picked for shipping.

Ship Qty – Displays the quantity to ship from this location and bin. Will display either the ship quantity for the part, or the bin quantity if the bin quantity is less than the quantity to ship.

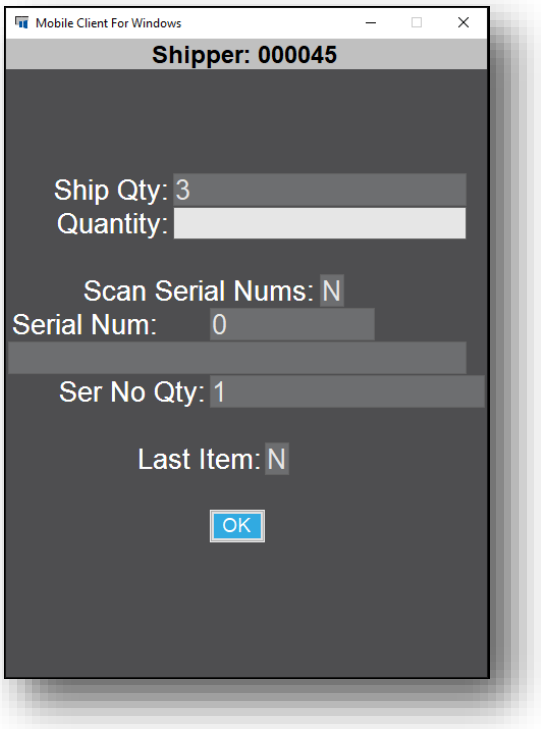
Shipper Line – Display only value of the shipper line the displayed information is for on the shipper.

Confirm Part Number – Enter or scan the part number being picked from the location and bin displayed. Value must match value displayed in part number field.

Confirm Lot Number – If part is lot controlled, enter or scan the lot number being picked for the part from the location and bin displayed. Value must match value displayed in lot number field.

F3-Skip – the user can press F3 to display the next part/location/bin for the shipper items to be picked.

Pick Shipper, Page 3



Ship Qty – Displays the quantity required to ship.

Quantity – Key or scan the quantity of product being shipped. The system will only allow the quantity to be shipped as ordered, +/- any tolerances as indicated on the sales order. Depending on the Shipping Tolerance Error setting in the SFDC configuration, the system will either generate a warning or an error if this acceptable quantity is exceeded.

Scan Serial Nums – Key or scan Y for Yes or N for No if serial numbers are to be recorded for the indicated part. This prompt is only active if Shipping Serial Numbers setting of the SFDC configuration is set to True

Serial Num – Key or scan the Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes.

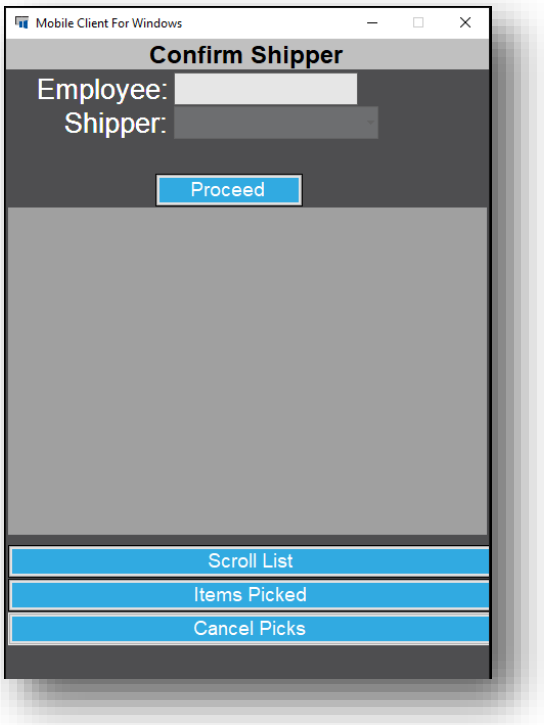
Ser No Qty – Key or scan the Quantity of the indicated Serial Number of the part being shipped. This prompt is only active if Scan Serial Nums prompt = Yes. System will continue to prompt for serial numbers until quantity of serial numbers = value from Quantity prompt.

Last item - If this is the last item to be picked for the indicated shipper, enter a 'Y". As transactions are entered, the system keeps all pick for shipping transactions in table ShipmentStaging of the SFDC database. No transactions for a shipper will post, the posting of the shipper is done in the Confirm Shipper transaction

OK – Press the OK button to complete this transaction, doing a location to location move of the part from the picked location/bin to the staging location/bin.

Confirm Shipper

The Confirm Shipper option is used to ship items that have been picked for shipping for a shipper. Selecting Confirm Shipper from the Pick and Ship Menu will display the following screen:



Employee Number - Key or scan the Employee Number.

Shipper – Key in or selected form the choice list, the shipper being confirmed. Once a shipper is entered a list of parts picked will be displayed

Proceed – Press enter here to proceed to the Shipper header fields on page 2 of the transaction.

F3 Scroll List – After a shipper has been entered, user can press the F3 key to be able to scroll the list box to view items. When scrolling the list, this field will change to F8-Delete Line.

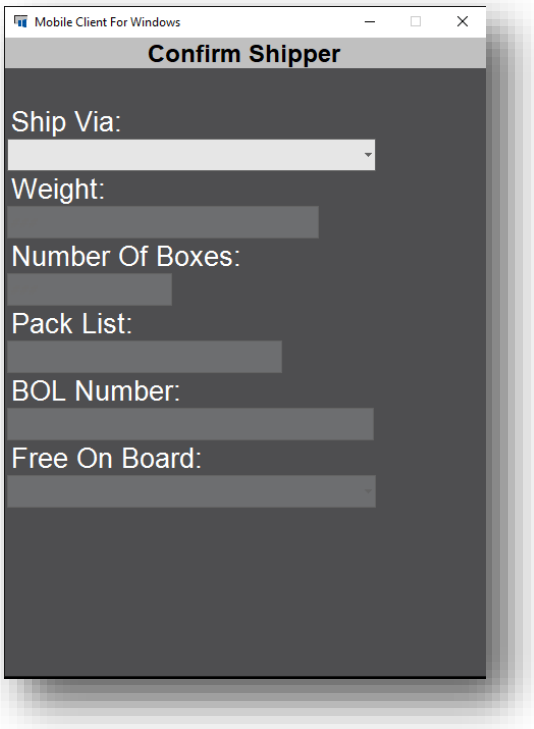
F4 Header Info – After a shipper has been entered and the listbox has items picked, user can press F4 to view items for the shipper that have not been picked. Pressing F4 again will toggle back to viewing items that have been picked for the shipper.

F6 Cancel Picks – After a shipper has been entered, user can press the F6 key to cancel all picks made for the indicated shipper. This will delete records from the table, but user will need to do location to locatoin transactions to get items from the staging location back to an inventory locations.

F8 Delete Line – When scrolling the list of picked items, users can delete an individual line that they do not wish to ship.

Confirm Shipper, Page 2

The second page allows for additional Shipper header information collection for M2M as follows



Ship Via – Press F2 to display list of Ship Via options from M2M ERP.

Weight – Key or scan the Weight of the shipment.

Number of Boxes – Key or scan the Number of Boxes of the shipment.

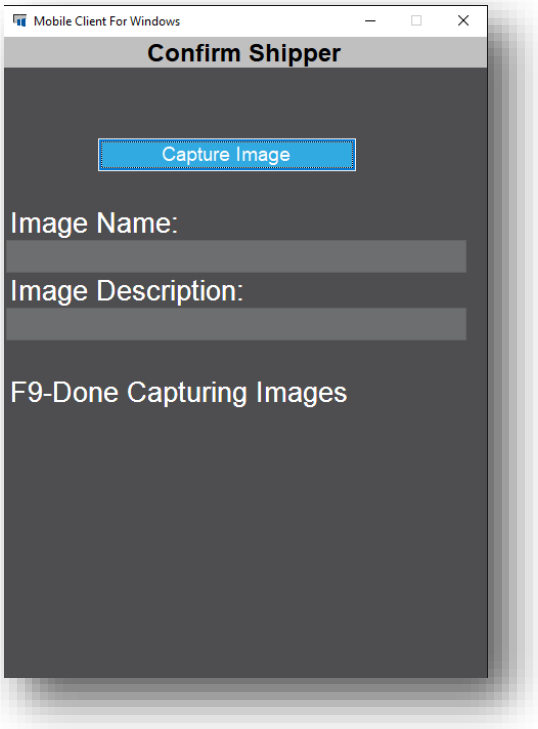
Pack List – Key or scan the shipment's Packing List number.

BOL Number – Key or scan the shipment's Bill of Lading number.

Free on Board – Press F2 to display list of FOB options from M2M ERP. Pressing enter on this field will past the items picked for the shipper to BCSHARED.

Pressing the F9 function key, any time after the confirm shipper transaction has been started by entering a shipper, will allow the user to capture images for the shipment. These

images will be saved as attachments to the shipper. Use of this transaction requires use of the SMS Mobile client on a phone or mobile computer that has a camera. This also requires a premier license for SFDC. The image capture screen will appear as follows:



Capture Image – click the button to be prompted to take a picture. Once accepted, the camera of the mobile computer will be active and allow the user to take a picture and accept the taken picture.

Image Name – key in a name for the image taken.

Image Description – optionally enter a description for the image taken. Once this field is entered, user will be returned to the Capture image button to capture additional images, if needed. After entry, form will reset to the capture image button to take additional images, if needed.

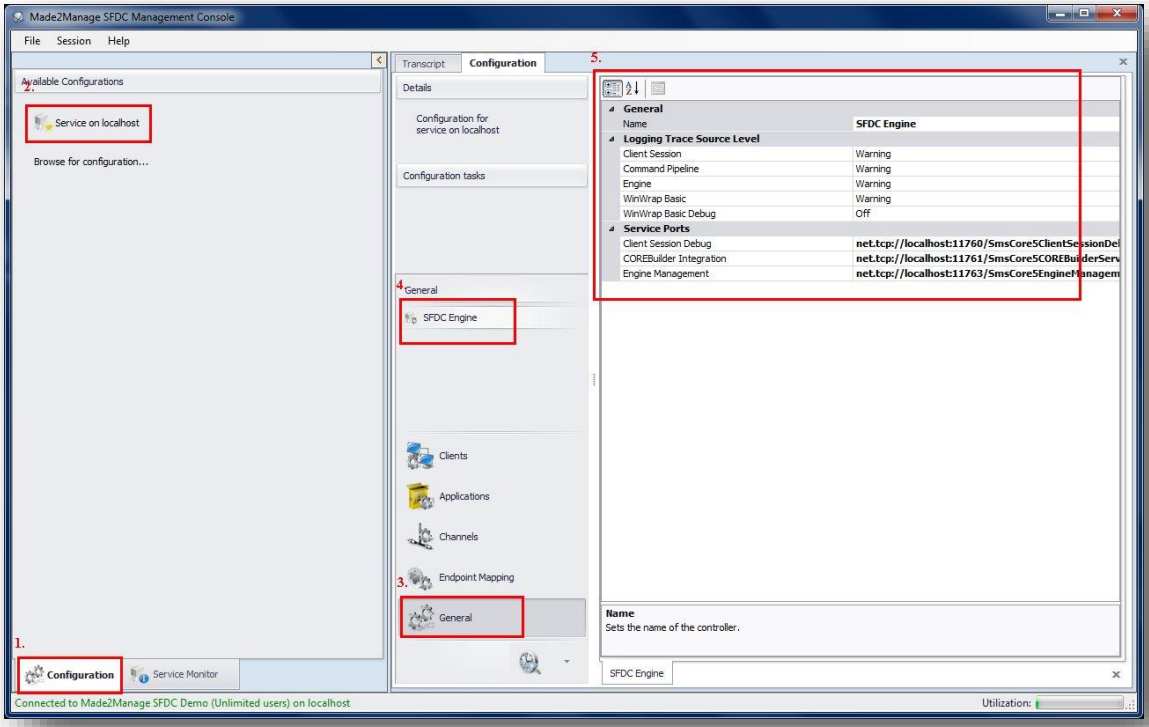
F9-Complete – when done capturing images, press F9 to be returned to return to the field user was last in before pressing F9 to start capturing images.

Made2Manage SFDC Management Console

This chapter details the various functions available within the Made2Manage SFDC Management Console for administration of SFDC functionality. A shortcut to the Management Console is installed on the desktop of the SFDC server, but the application may also be installed elsewhere.

General Settings

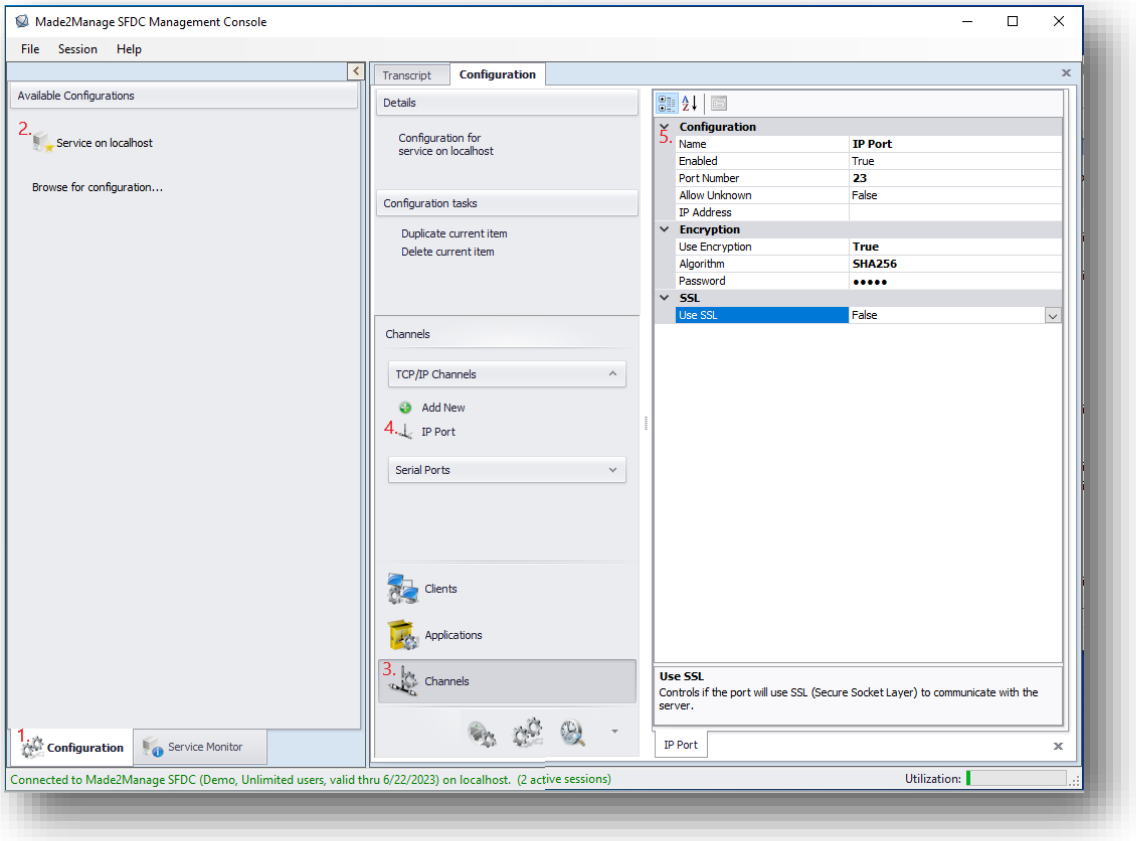
This program is used to maintain and manage system level attributes of SFDC. To manage and view these general settings, start the Made2Manage SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the General tab in the lower middle of the screen **(3.)**, then select SFDC Engine **(4.)**. Shown below is the screen that will appear with the General settings shown in the upper right side panel **(5.)**.



These settings typically should not be changed. It is displayed here in the event a support event may require a support person to request an admin make a change, or reference a path. Generally even administrators will never need to access these settings.

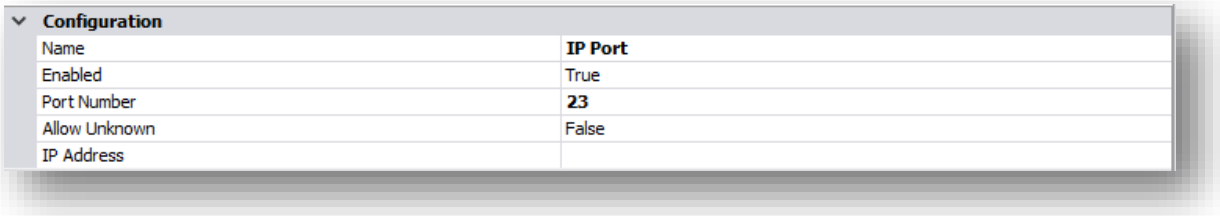
Channels Settings

This program is used to maintain and manage communication Channels that SFDC uses for communicating with client devices. From here an administrator may manage the required Channels depending on the devices to be used. To manage Channels, start the Made2Manage SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Channels tab in the lower middle of the screen **(3.)**, then select a channel **(4.)**. Shown below is the screen that will appear with the Channels settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates an IP Port channel. This channel is all that is necessary for most implementations. However, users using legacy serial equipment may need to create a Serial Port channel as needed.

Configuration Section



Name - Sets the name for the port/channel.

Enabled - Controls if the port/channel is enabled. Click the field for a dropdown menu for selection of True or False.

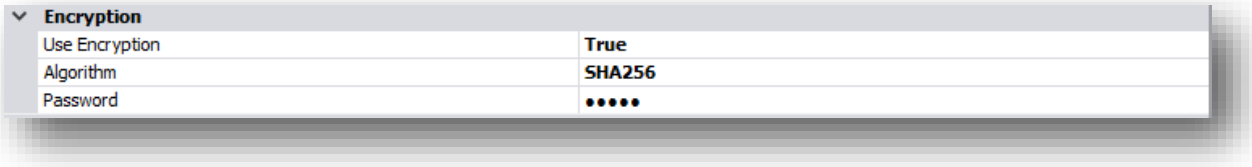
Port Number - Sets the port number for the port/channel.

Allow Unknown - Controls if the port/channel will allow devices with unknown IP Addressed to connect. Click the field for a dropdown menu for selection of True or False.

IP Address - Sets the IP Address for the port/channel, if applicable.

Encryption Section

If encryptions is to be used, to encrypt the data communicated between the scanner and the SFDC server, the Use Encryption option can be set to true and then the Algorithm can be selected(either SHA256, SHA386, or SHA512) and a password can be provided. These encryption settings must match what is configured in the SMS Mobile client configuration.



Use Encryption – controls whether encryption is enabled.

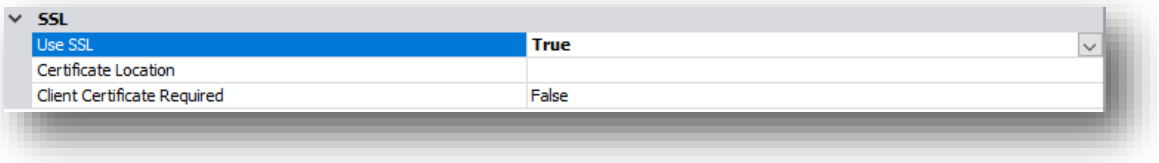
Algorithm – If encryption is used, select from the drop down the encryption algorithm to use.

Password – enter the encryption password to be used.

> **Note:** You will need version 1.12 of the Android or iOS SMS Mobile client or 1.8.x or higher of the Windows version of the SMS Mobile client.

Note: The SMS Telnet Client and other telnet clients do not support this encryption and will not work with the IP Channel if encryption is turned on.

SSL Section



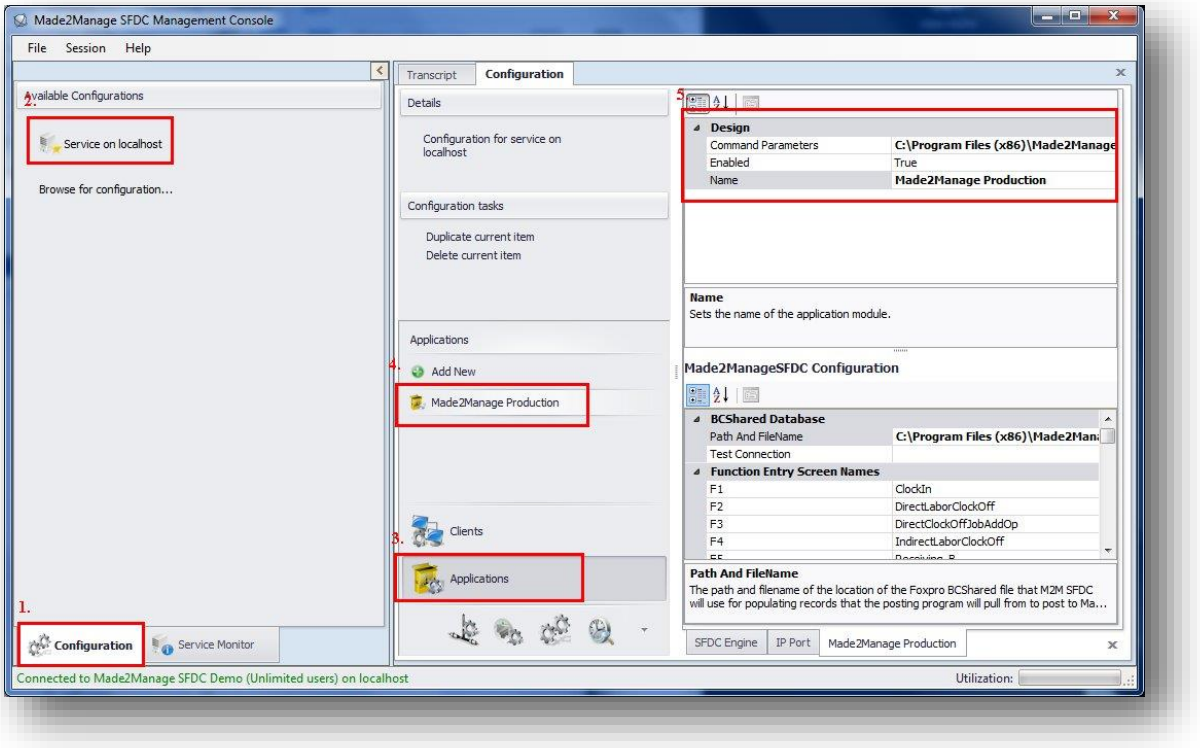
Use SSL – controls whether SSL is enabled to communicate between the server and the handhelds.

Certificate Location – The path to the SSL certificate file.

Client Certificate Required – controls where a client certificate is required.

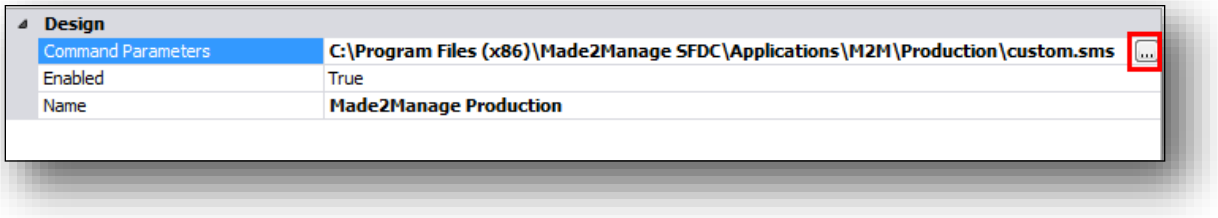
Applications Management: Design

This program is used to maintain and manage the Application Modules for SFDC. From here an administrator may manage the Design of the application modules as well as the configuration of the application modules. To manage the Design, start the Made2Manage SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Applications tab in the lower middle of the screen **(3.)**, then select an application **(4.)**. Shown below is the screen that will appear with the Design settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates one Application modules: Made2Manage Production, intended to be pointed at a production or "live" database. However, additional application modules may be created (via "Add New" option, see 4.) to handle specific device functionality, support of multiple Made2Manage database instances (including a Test environment), etc. This advanced functionality is best addressed on a case by case basis with Aptean professional services.

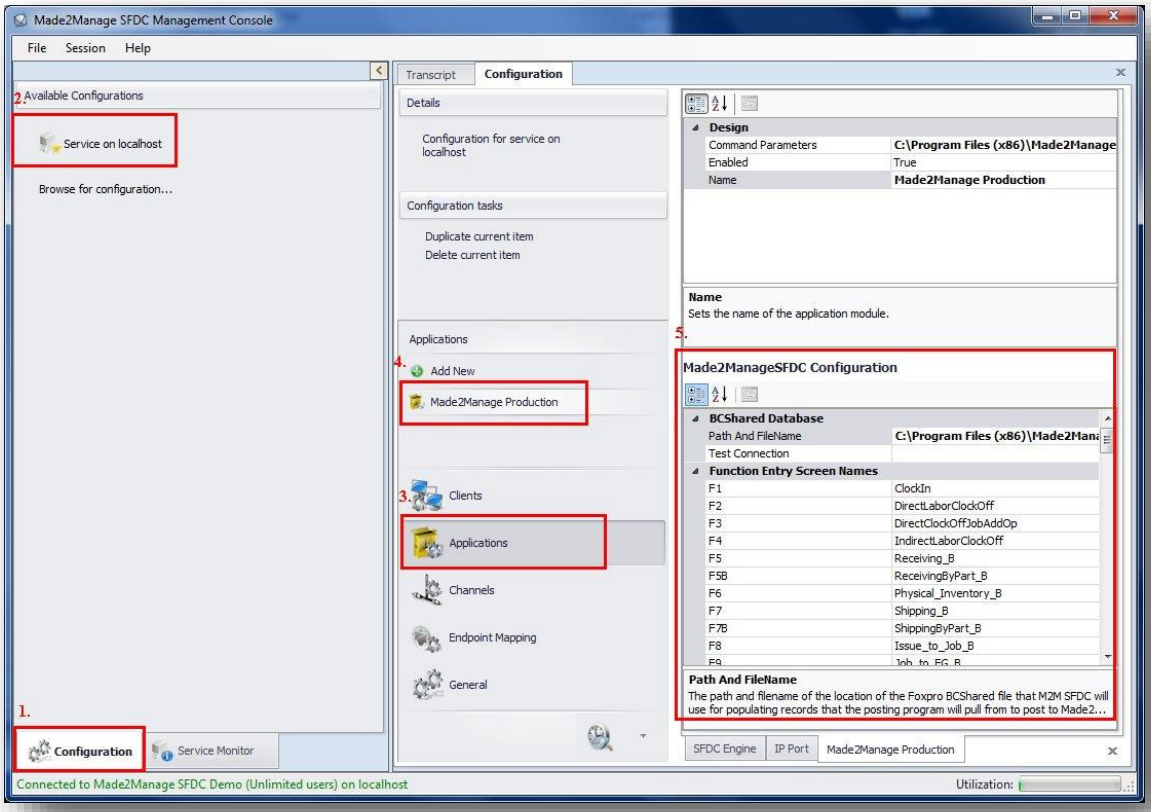
Design Settings



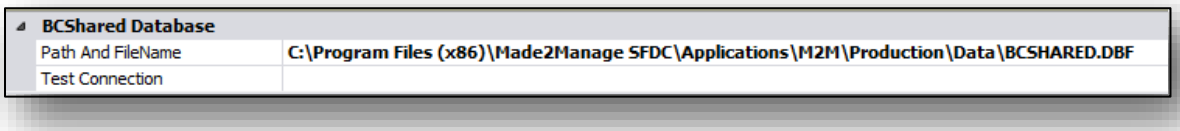
Command Parameters - Sets the command parameters for the application module. Press the button to browse to the project (.sms) file to be used with the indicated application module (usually custom.sms). The indicated path will be the folder containing all the files necessary for the application to function.
Enabled - True if application module should load upon starting of the Made2Manage SFDC Server service.
Name - Sets the name of the application module.

Applications Management: Made2Manage SFDC Configuration

This program is used to maintain and manage the configuration settings for SFDC. Start the Made2Manage SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Applications tab in the lower middle of the screen **(3.)**, then select an application **(4.)**. Shown below is the screen that will appear with the configuration settings shown in the lower half of the right side panel **(5.)**. You may scroll the window up and down to see all of the options.



BCShared Database



Path and FileName – The path and file name of the location of the Foxpro table BCSHARED that SFDC populates for posting by the M2M posting program. By default, on installation this file is located as displayed, though path must be manually set on installation.

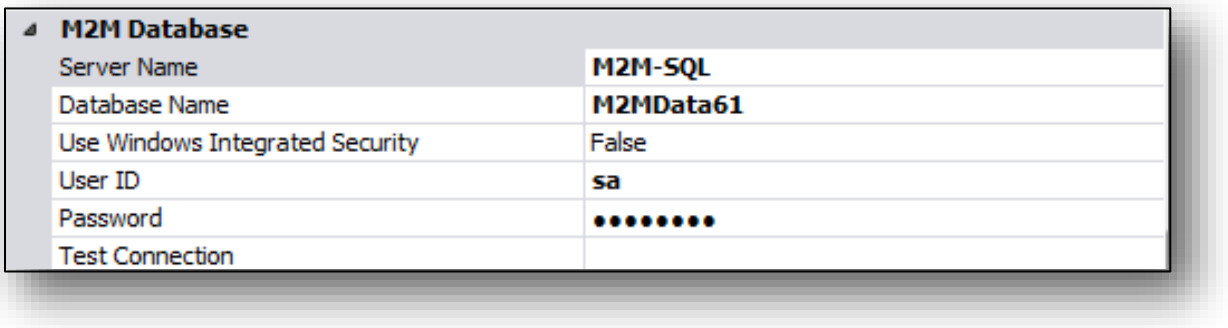
Test Connection – Test the connection to the BCShared database.

Database Sections

M2M Database

Depending upon version, this section can vary.

If a version of M2M less than 8 is set in the M2M Version property, the following fields will be displayed for configuration



Server Name - Enter the name of the SQL server where the Made2Manage database is located.

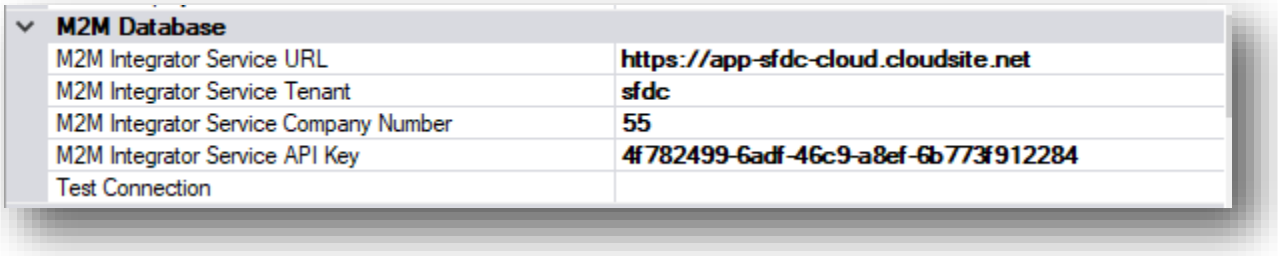
Database Name - Enter the name of the database (M2MDATAxx).

Use Windows Integrated Security – Default is False, set to True if SQL uses Windows security for validating user connections instead of SA login/password (if True, see below for configuration information)
User ID - Enter the SQL Server User ID.

Password - Enter the password for the User ID.

Test Connection – Test the connection to the M2M database.

If a version of M2M of 8 is set in the M2M Version property, the following fields will be displayed for configuration



M2M Integrator Service URL - this is the URL of the gRPC service running in the M2M cloud.

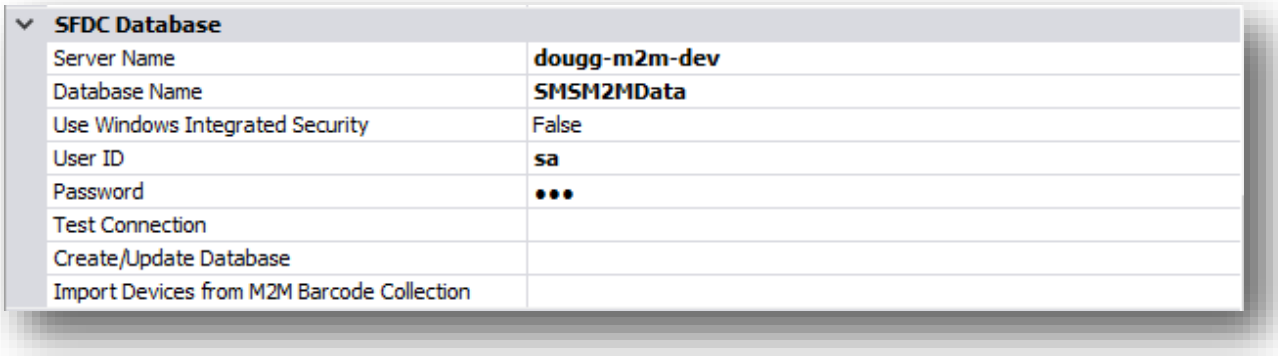
M2M Integrator Service Tenant this is the tenant number that corresponds to the cloud version of M2M being configured.

M2M Integrator Service Company Number– this is the M2M company number for the cloud version of M2M being configured.

M2M Integrator Service API Key - this is the key to allow connection, via the service URL to the M2M cloud. NOTE: M2M may require this to be changed from time to time and will provide the API key needed.

Test Connection – Test the connection to the M2M cloud service.

SFDC Database



Server Name - Enter the name of the SQL server where the Made2Manage database is located.

Database Name - Enter the name of the database (SMSM2MDATA).

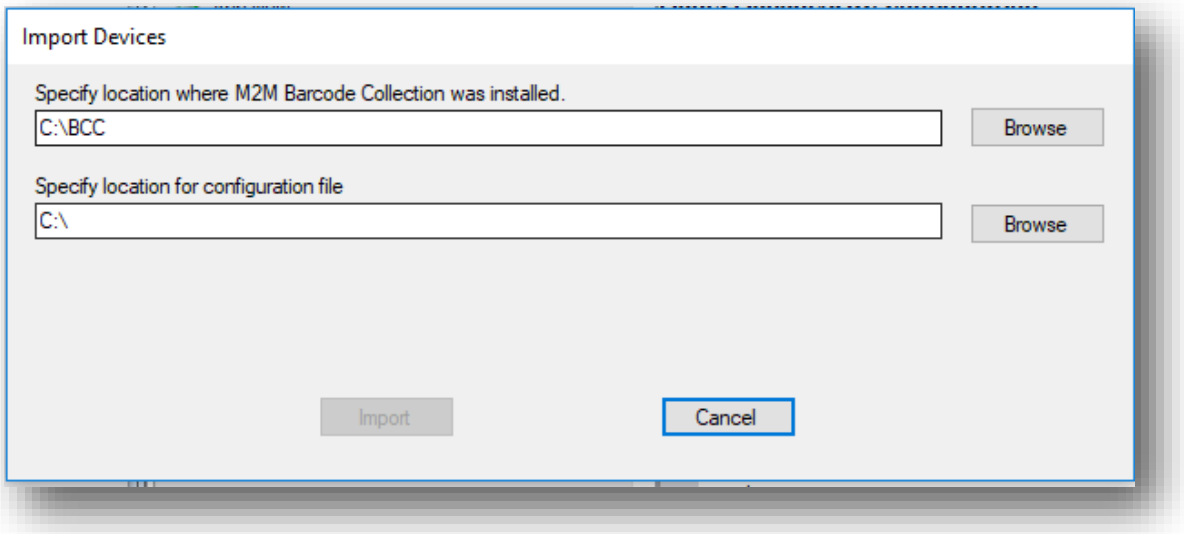
Use Windows Integrated Security – Default is False, set to True if SQL uses Windows security for validating user connections instead of SA login/password (if True, see below for configuration information)
User ID - Enter the SQL Server User ID.

Password - Enter the password for the User ID.

Test Connection – Test the connection to the M2M database.

Create/Update Database – If the SFDC database does not exist, click to create it. The option will also update the database with the latest changes. Make sure the SQL parameters (security, login, password) have been configured before pressing button.

Import Devices from M2M Barcode Collection – If SFDC is being installed as a replacement for M2M's Barcode Collection(BCC), click this button to import device configuration from BCC into SFDC, removing the need to manually add device configuration and endpoints. Clicking the button will display the following form



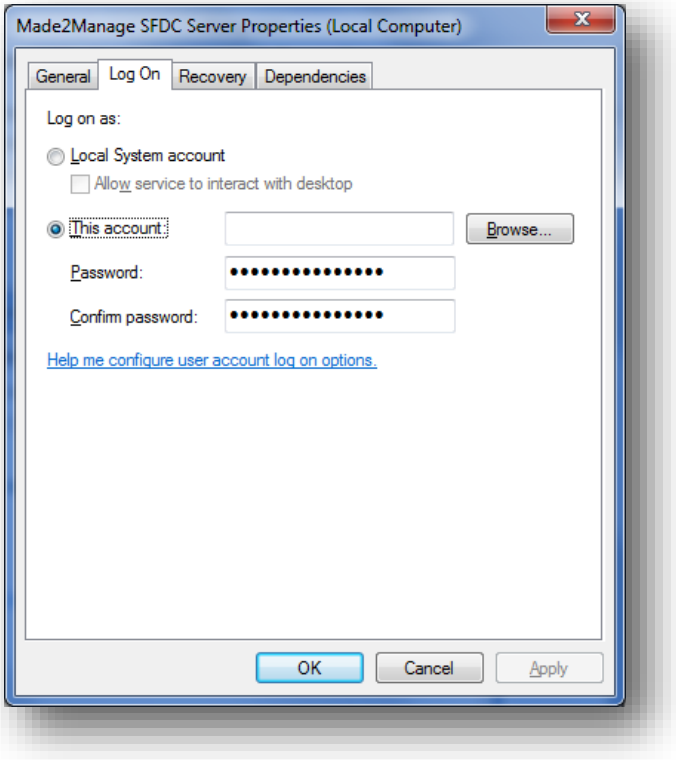
Specify location where M2M Barcode Collection was installed – This is the path that barcode collection was installed at, or where the barcode collection files were placed at for being imported. Click the browse button to select the folder. The folder selected should be the root barcode collection installation folder.

Specify location for the configuration file – This is the path for that contains the SMSCoreConfig.sdf file, by default C:\Program Files (x86)\Made2Manage SFDC. Click the browse button to select the folder.

Import – Clicking this button will perform the import process. This will delete all existing device and endpoint configuration, and the user will be prompted about this and will need to say yes before the import will occur. After saying yes, device information will be imported. After the import, the SFDC Management Console will need to be restarted to load the imported device configuration.

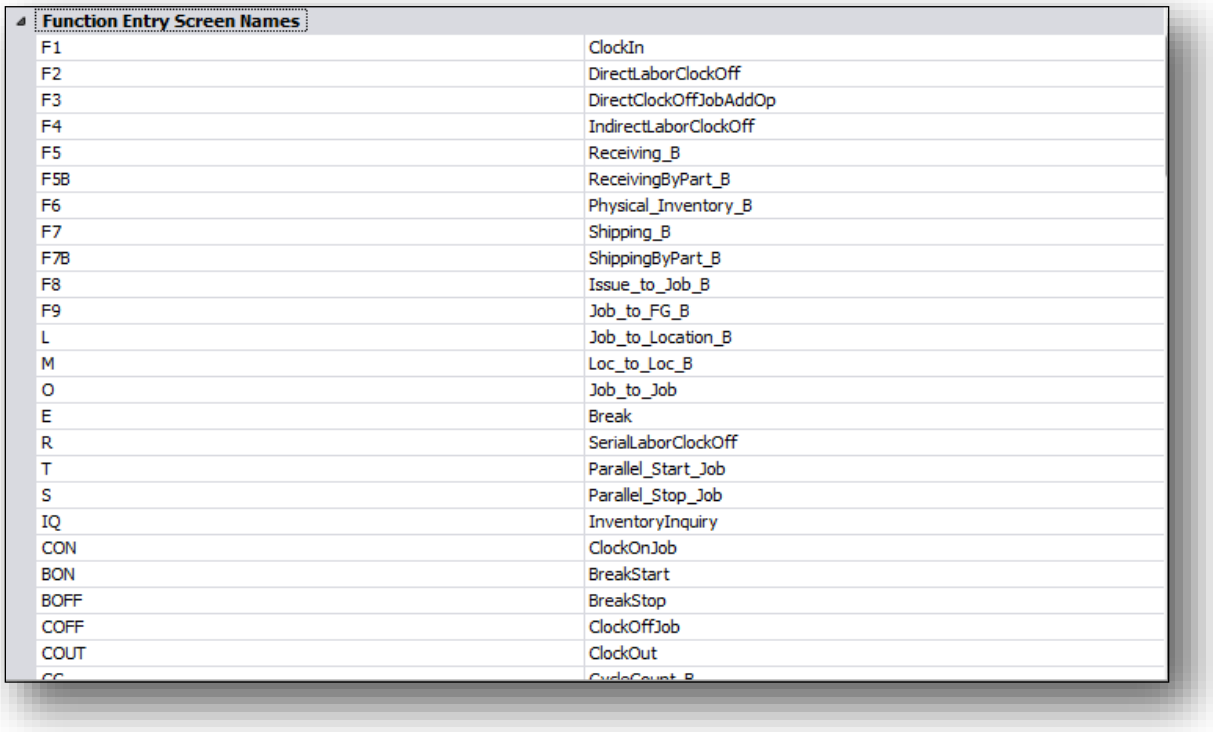
Using Windows Integrated Security

If Use Windows Integrated Security = True, to configure login in properly, go to Windows Services and find the Intuitive SFDC Server service. Right click and select properties, then Log On. Check **This account** radio button, and provide a user name and password with SQL rights, press OK then restart the service.



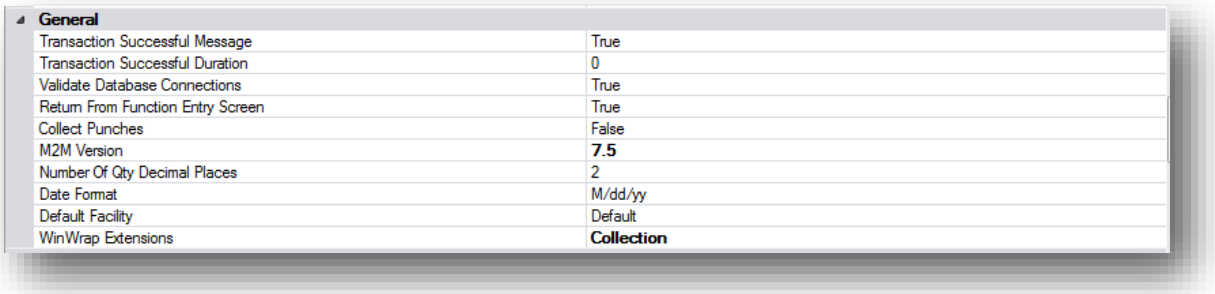
Function Entry Screen Names Section

This section is for setting what shortcut scan will launch individual screens from the Function Entry Screen. The two columns will be for the Function code and for the screen launched by the function. Generally it is not recommended to modify these settings.



Function Entry Screen Names	
F1	ClockIn
F2	DirectLaborClockOff
F3	DirectClockOffJobAddOp
F4	IndirectLaborClockOff
F5	Receiving_B
F5B	ReceivingByPart_B
F6	Physical_Inventory_B
F7	Shipping_B
F7B	ShippingByPart_B
F8	Issue_to_Job_B
F9	Job_to_FG_B
L	Job_to_Location_B
M	Loc_to_Loc_B
O	Job_to_Job
E	Break
R	SerialLaborClockOff
T	Parallel_Start_Job
S	Parallel_Stop_Job
IQ	InventoryInquiry
CON	ClockOnJob
BON	BreakStart
BOFF	BreakStop
COFF	ClockOffJob
COUT	ClockOut

General Section



General	
Transaction Successful Message	True
Transaction Successful Duration	0
Validate Database Connections	True
Return From Function Entry Screen	True
Collect Punches	False
M2M Version	**7.5**
Number Of Qty Decimal Places	2
Date Format	M/dd/yy
Default Facility	Default
WinWrap Extensions	**Collection**

Transaction Successful Message - True/False if system should display a message indicating the transaction just performed was successful upon transaction's completion.

Transaction Successful Duration – Number of seconds the Transaction Successful message should display for the user. If 0, user must press F1 to clear message.

Validate Database Connections - True/False if system should validate connections via ADO.

Return From Function Entry Screen - True/False if system should automatically return to the Function menu upon completion of transaction, if system is configured to use the Function menu for navigation.

Collect Punches – True/False if the system write to the punches table. This will record all transactions (legacy pre-M2M functionality)

M2M Version – Indicates which version of M2M is being used

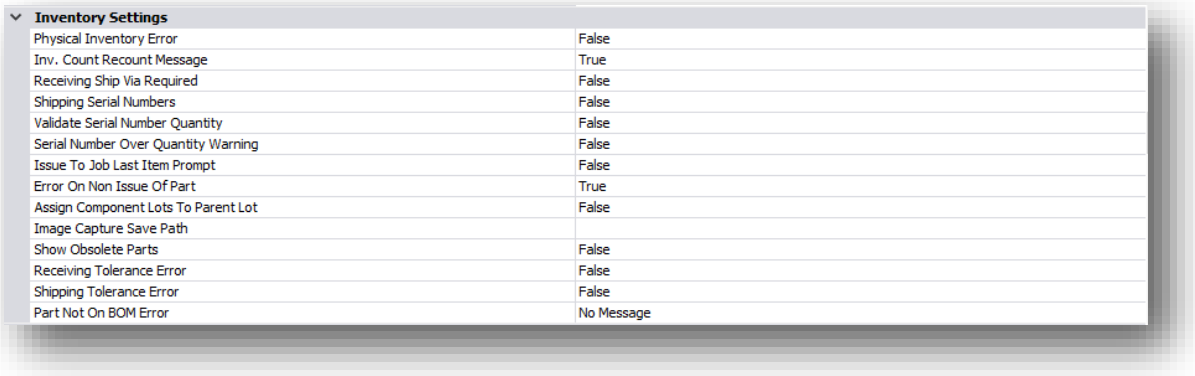
Number of Qty Decimal Places – indicates the number of decimal places SFDC will round quantities to, if decimal quantities are entered.

Date Format – Desired format for entry/display of dates in SFDC, wherever applicable.

Default Facility – Indicated Default facility of M2M database.

WinWrap Extensions - This should only be changed at the direction of SFDC support.

Inventory Settings Section



Inventory Settings	
Physical Inventory Error	False
Inv. Count Recount Message	True
Receiving Ship Via Required	False
Shipping Serial Numbers	False
Validate Serial Number Quantity	False
Serial Number Over Quantity Warning	False
Issue To Job Last Item Prompt	False
Error On Non Issue Of Part	True
Assign Component Lots To Parent Lot	False
Image Capture Save Path	
Show Obsolete Parts	False
Receiving Tolerance Error	False
Shipping Tolerance Error	False
Part Not On BOM Error	No Message

Physical Inventory Error - True/False if system should display a message indicating an inventory freeze is in place.

Inv. Count Recount Message - True/False if the system will display a message if the user recounts a part/location/bin that was already counted as part of a cycle count or physical inventory.

Receiving Ship Via Required – True/False if Ship Via prompt will be a required field in Shipping transaction

Validate Job to Finished Goods Lot Number - True/False if system will validate QALOTC table for pre-created lot numbers on job orders (M2M v6+ only!) Flag is removed if M2M Version flag is set to 7.5 or greater and them system checks flag in M2M BCPSetup form.

Shipping Serial Numbers - True/False if system will allow user to enter Serial Numbers as part of shipping transaction (M2M v6+ only!)

Validate Serial Number Quantity – True/False if system will allow more serial numbers to be entered than quantity being shipped

Serial Number Over Quantity Warning – True/False if system will display a hard error on serial number over quantity, False if only a warning is desired

Issue to Job Last Item Prompt – True/False if Issue to Job transaction should prompt for Last Item

Error On Non Issue of Part – True/False if system should generate an error if a part is transferred back off a job that was not previously issued

Image Capture Save Path – Enter the UNC network path that images captured on the mobile computers will be saved to. Path needs to end with a backslash.

Show Obsolete Parts - True/False if system will allow user to see Obsolete parts in inventory inquiry transaction

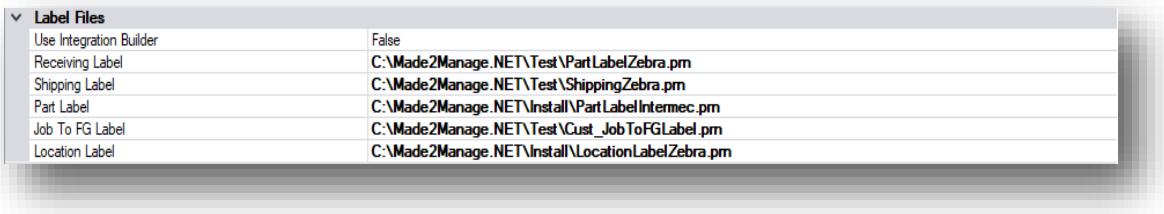
Receiving Tolerance Error – True/False if system will allow user to receive more parts that required on purchase order

Shipping Tolerance Error - True/False if system will allow user to ship more parts that required on shipper/pick list

Part Not On BOM Error – True/False if Issue to Job transaction will generate error if part being issued is not on job BOM

Label Files Section

This section is for setting the location of the labels and company address info. This tab is only used with Made2Manage SFDC configurations that have label printing functionality enabled.



Use Integration Builder - this flag, when set to false, indicates the traditional label printing will be used, where the prn label files are set for the four label files. If this flag is set to true, SFDC will use Seagull Scientific Bartender's Integration Builder to print label. **Please refer to Integration Builder Notes later in this document for additional details on using Integration Builder.**

Receiving Label - Valid path to the receiving label file used for SFDC. A button will appear on the right side. Click the button to select the label file.

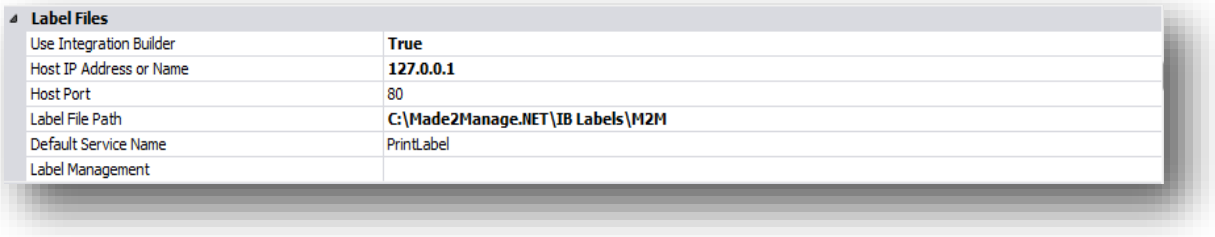
Shipping Label - Valid path to the shipping label file used for SFDC. A button will appear on the right side. Click the button to select the label file.

Part Label - Valid path to the part label file used for SFDC, printed from the inventory inquiry transaction. A button will appear on the right side. Click the button to select the label file.

Job To FG Label - Valid path to the job to finished goods label used for SFDC, printed from the Job to Finished Goods transaction. A button will appear on the right side. Click the button to select the label file.

Location Label - Valid path to the location label used for SFDC, printed from the Location Labels transaction. A button will appear on the right side. Click the button to select the label file.

When the Use Integration Builder flag is set to True, the label path fields are replaced with settings for Integration Builder



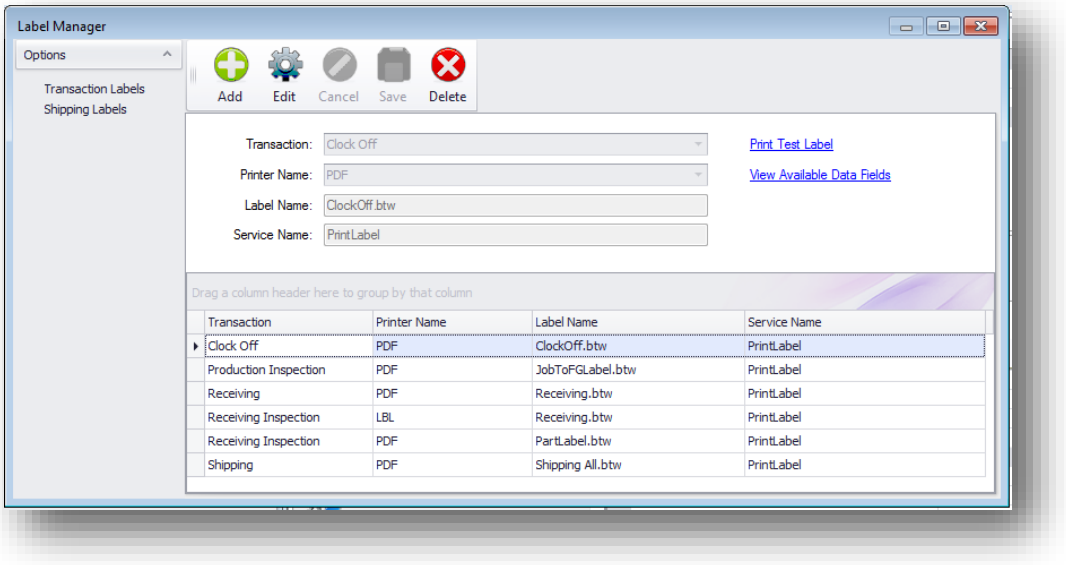
Host IP Address or Name – This is the IP address or server name of the computer running the Bartender Integration Builder.

Host Port – This is the port that Bartender Integration Builder is running on, default port is 80.

Label File Path – This is the path to the Bartender label file formats (BTW files) that will be used with Bartender Integration Builder. This path is the path of the files on the computer where Integration Builder is running.

Default Service Name – This is the Bartender Integration service name that is used to print the labels in Integration Builder. This name will be used when adding labels via the Label Management configuration form.

Label Management – Click the button in this property field to load the below form to configuration labels for transactions



The label management tool selects which transaction in SFDC will prompt for labels to be printed after each transaction, and which printer and label file will be used. To add transaction labels, Click the Transaction Labels link, in the top left of the form, under the Options section.

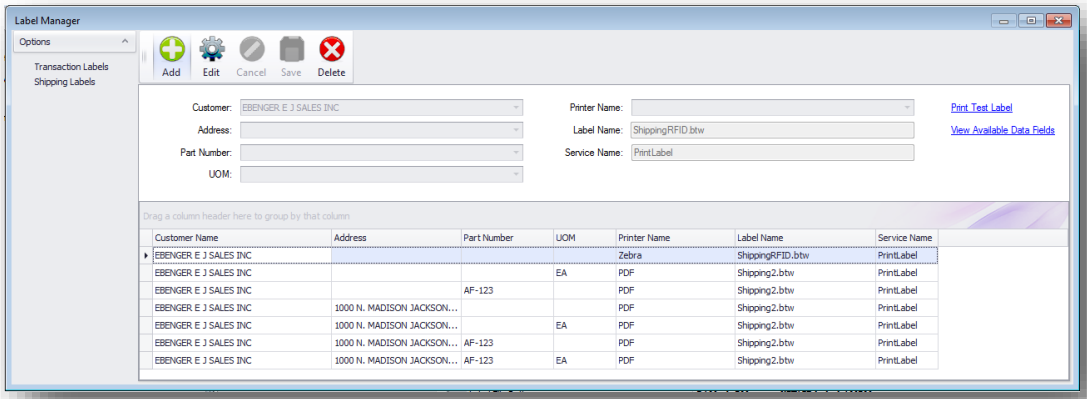
To add a new label, click the Green Add button. This will enabled the four fields in the top middle of the form. First select the transaction from the drop down. This dropdown will list all M2M SFDC screens. Next, select the printer that will print the label. This list of printers will come from the Printers section of the SFDC configuration. These printers will also need to physically be installed on the computer configured in the Integration Builder Host setting, and drivers for these installed printers will need to be from Seagull Scientific. Next enter the name of the label file to be used for this transaction and printer. Since integration builder supports the use of multiple printer models, be sure to select the label file configured for the selected printer model. The service name setting will default to what was configured in the Integration Builder Default Service Name setting, and should stay at that value. Click the Save Link to save the information.

To test that the label, click the Print Test Label link to the right of the settings fields. This will print the indicated label to the selected printer.

To view what variable data is available for use with each transaction, click the View Available Data Fields link to the right of the settings fields. This will display a list of all variable data fields that SFDC sets as part of the selected transaction, that can be used as fields in the label file as either printed fields, or as part of queries to get additional data for the label.

The grid at the bottom of the form show all configured transactions and their label and printer configuration. To edit or delete a configured transaction label, click on the row in the

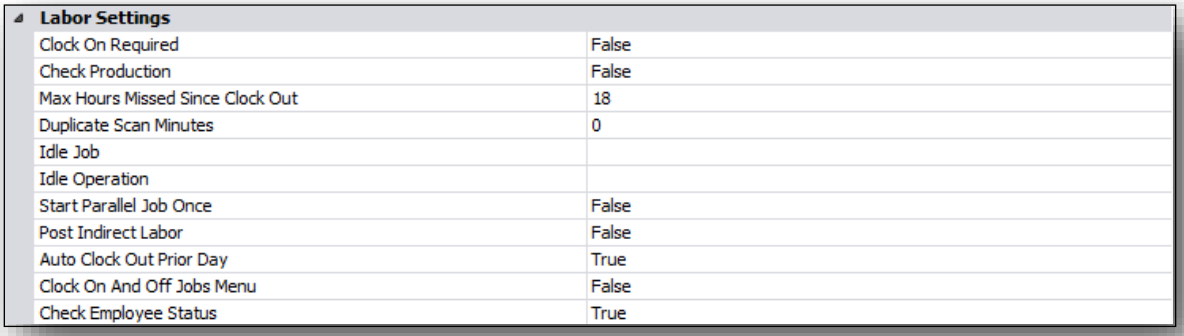
gird, and click the appropriate button. Clicking edit will enable the entry fields, populated with the data from the selected row for editing. Click the delete button will prompt for deletion of the row.



In addition to transaction labels, specific labels can be setup for Shipping, which adds some additional configuration features. Labels for shipping are added in the same manner as transaction labels, but there are additional fields for printing certain labels by customer/address/part number/unit of measure. This allows for specific labels to be printed based on any or all four of those details. This allows for RFID labels to be printed based on part and UOM. Note: RFID labels will have to be properly setup in the Bartender label file.

When printing labels, if a shipping label is not found, the label setup for the shipping transaction in the Transaction Labels configuration will be used for the shipping label.

Labor Settings Section



Labor Settings	
Clock On Required	False
Check Production	False
Max Hours Missed Since Clock Out	18
Duplicate Scan Minutes	0
Idle Job	
Idle Operation	
Start Parallel Job Once	False
Post Indirect Labor	False
Auto Clock Out Prior Day	True
Clock On And Off Jobs Menu	False
Check Employee Status	True

Clock On Required - True/False if employees must clock on to jobs in order to clock off of them, with or without SFM interface (setting is ignored if SFMInterface = True)

Check Production – True/False if system should verify if employees are production (legacy pre-M2M functionality)

Max Hours Missed Since Clock Out - Number of hours until it is assumed that a clock out has been missed and an auto clock out will be performed. (ignored if SFMInterface = True and will be controlled by configuration settings in SFM)

Duplicate Scan Minutes - When clocking in or out, the number of minutes that must pass before another scan of the same employee number will be considered a duplicate scan.

Idle Job – Job number (Internal for Internal Use) set up in M2M as an indirect labor job that labor is posted against when not on production jobs. (ignored if SFMInterface = True and will be controlled by configuration settings in SFM)

Idle Operation – Operation for the idle job that indirect labor will be posted against when not on a production job (ignored if SFMInterface = True and will be controlled by configuration settings in SFM)

Start Parallel Job Once – True/False to control if user may clock onto the same parallel job/operation more than once.

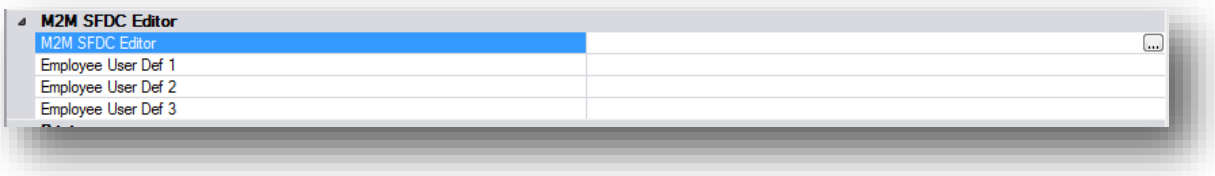
Post Indirect Labor – True/False to indicate if system should post indirect labor transactions to Made2Manage. If so, a job number and operation must be provided. If not, this data is written to the indirect table (legacy pre-M2M functionality).

Auto Clock Out Prior Day - True/False to determine if SFDC will clock employee out of jobs from the prior day that they failed to clock off of (ignored if SFMInterface = True and will be controlled by configuration settings in SFM)

Clock On and Off Jobs Menu – True/False to determine if system should display Legacy labor menu or Clock On Jobs labor menu.

Check Employee Status - True/False to control whether system validates user IN/OUT/BRK status when performing labor transactions

Made2Manage SFDC Editor Section



M2M SFDC Editor - If this option is selected, a button will appear on the right side of the second column (highlighted in red). Click that button to launch the M2M SFDC Editor to perform Employee Maintenance, view SMS Tables (i.e. tables from SQL database

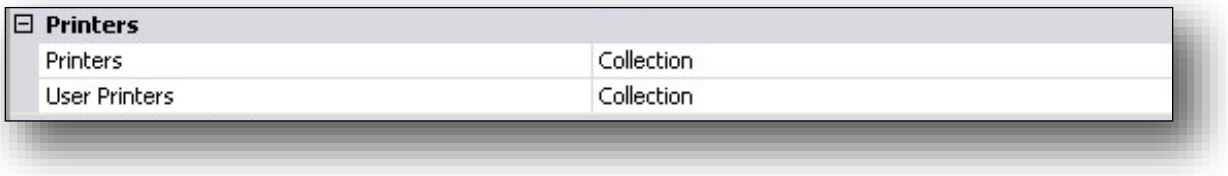
SMSM2MDATA), and edit prompts (via Prompt Editor). See section below for more information.

Employee User Def 1 – The value entered here will be the caption of the user defined field 1 in the employee editor. If no value is entered, the field will not display in the employee editor. Field is only used in conjunction with SFDC customizations.

Employee User Def 2 – The value entered here will be the caption of the user defined field 2 in the employee editor. If no value is entered, the field will not display in the employee editor. Field is only used in conjunction with SFDC customizations.

Employee User Def 3 – The value entered here will be the caption of the user defined field 3 in the employee editor. If no value is entered, the field will not display in the employee editor. Field is only used in conjunction with SFDC customizations.

Printers Section



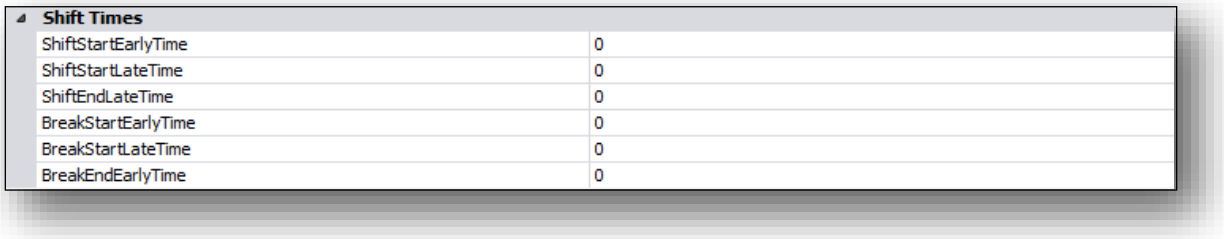
Printers - Select this line to define printers to be used when printing labels from SFDC. Once selected, a button will appear on the right side. Click the button to bring up the screen to define printers.

User Printers - Select this line to assign printers to users or devices when printing labels from SFDC. Once selected, a button will appear on the right side. Click the button to bring up the screen to define user printers.

Note: The only printers supported for standard label printing by the standard SFDC application (Receiving and Shipping transactions, as previously detailed) are Intermec, Zebra and Sato printers. Other printers may be used, but doing so will require a customization to support the printing of labels directly from SFDC.

Shift Times Section

Note: The following section refers to legacy, pre-M2M interface functionality. For standard SFDC, all grace period settings are handled in M2M ERP screen BCGRAC.



Shift Times	
ShiftStartEarlyTime	0
ShiftStartLateTime	0
ShiftEndLateTime	0
BreakStartEarlyTime	0
BreakStartLateTime	0
BreakEndEarlyTime	0

ShiftStartEarlyTime - Shift start early grace period.

ShiftStartLateTime – Shift start late grace period.

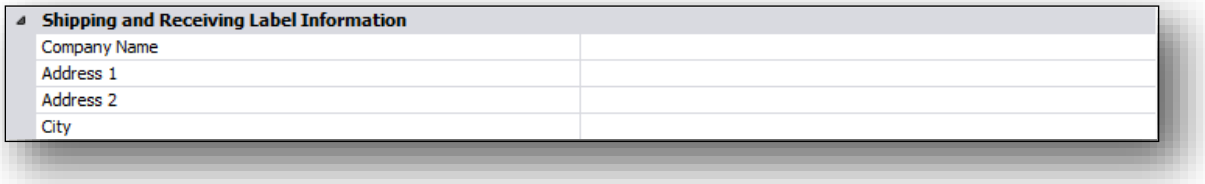
ShiftEndLateTime - Shift end late grace period.

BreakStartEarlyTime - Break start early grace period.

BreakStartLateTime – Break start late grace period.

BreakEndEarlyTime – Break end early grace period.

Shipping and Receiving Label Information Section



Shipping and Receiving Label Information	
Company Name	
Address 1	
Address 2	
City	

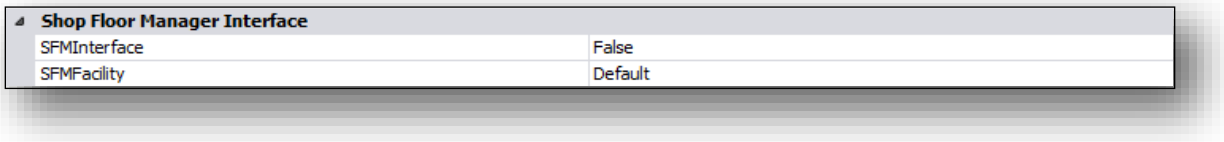
Company Name - Company name used to print on shipping labels

Address 1 - Address of company that is to print on shipping labels

Address 2 - Additional address for company to print on shipping labels

City - City state and zip code for company to print on shipping labels

Shop Floor Manager Interface Section

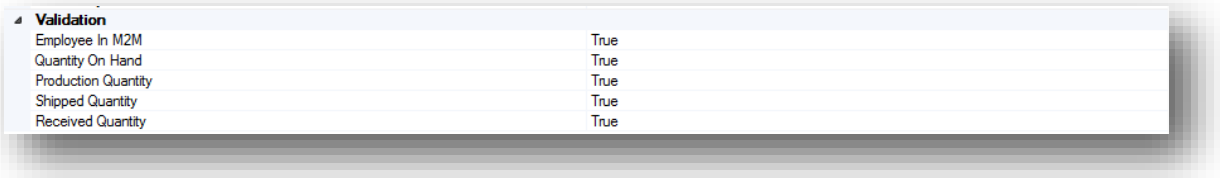


Shop Floor Manager Interface	
SFMInterface	False
SFMFacility	Default

SFMInterface - True/False if SFDC will interface with Made2Manage Shop Floor Manager and write labor information to custom tables and perform additional labor validation per SFM rules

SFMFacility - Default facility for Made2Manage Shop Floor Manager

Validation Section



Employee In M2M - True/False if SFDC will validate employee is in M2M

Quantity On Hand - True/False if SFDC will validate quantity on hand

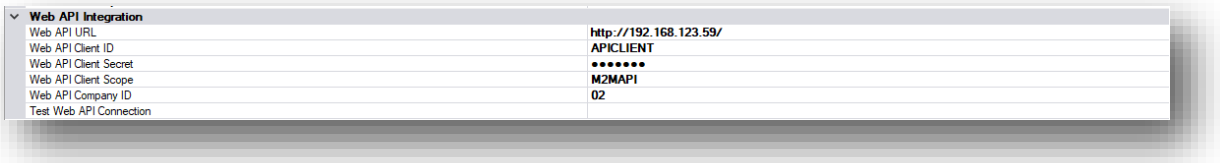
Production Quantity - True/False if SFDC will validate production quantity

Shipped Quantity - True/False if SFDC will validate quantity being shipped

Received Quantity - True/False if SFDC will validate quantity being received

Web API Integration Section

This section is only used when there are customizations done for SFDC that require use of Made2Manage Web API. Ignore this configuration for standard setups



Web API URL – URL for the M2M Web API server

Web API Client ID – Client ID for the Web API, most probably APICLIENT, unless changed in M2M.

Web API Client Secret – The M2M Web API password/secret setup in M2M.

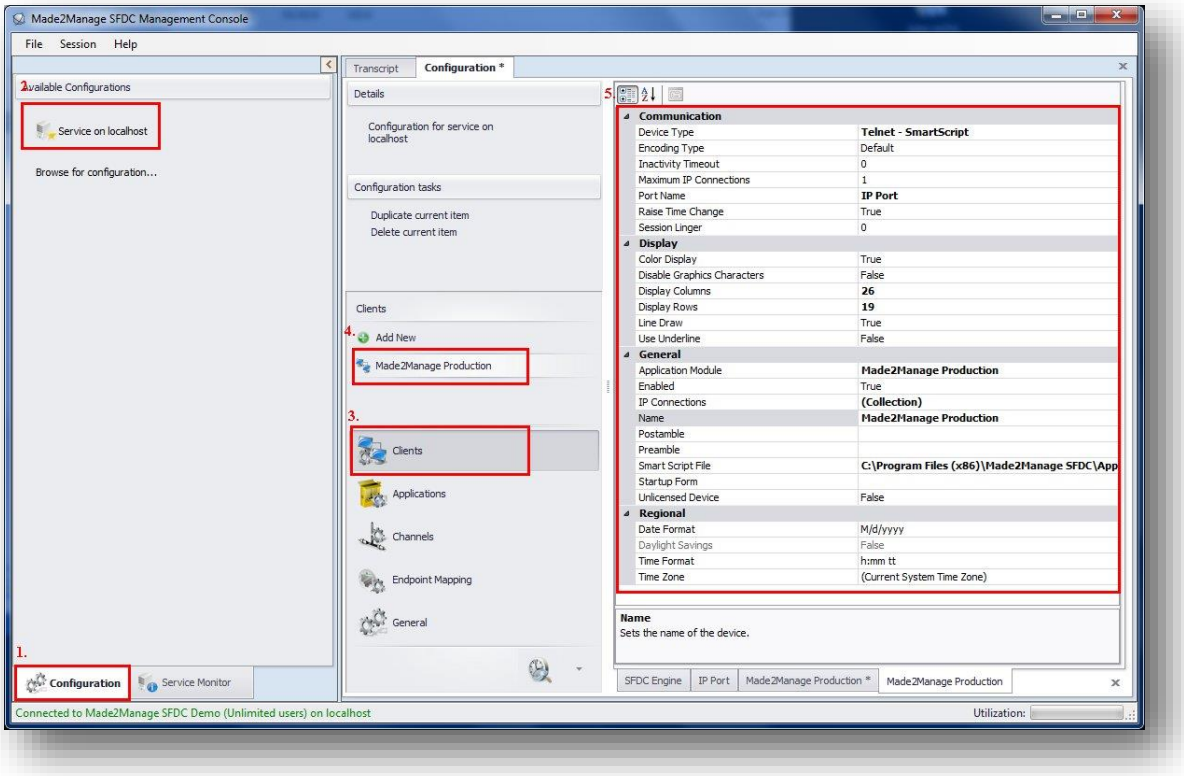
Web API Client Scope - Client Scope for the Web API, most probably M2MAPI, unless changed in M2M.

Web API Company ID – Company code of the M2M Company this application module is pointed to

Test Web API Connection – Click this button to test the connection to M2M Web API using details configured.

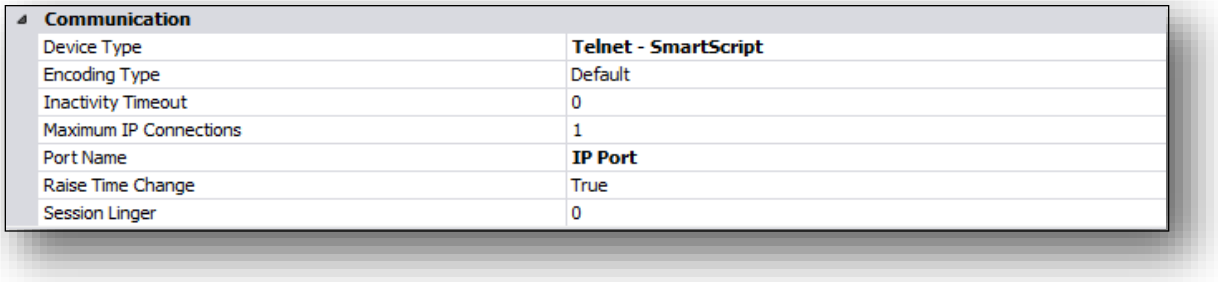
Clients Management

This program is used to maintain and manage the SFDC Clients. From here an administrator may manage the individual clients (aka "devices") and which application modules they use to collect data. To manage the Clients, start the Made2Manage SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Clients tab in the lower middle of the screen **(3.)**, then select a client **(4.)**. Shown below is the screen that will appear with the client settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates one Client: Made2Manage Production, a simple telnet client intended to be pointed at the application module for production or "live" data. However, additional Clients may be created (via "Add New" option, see 4.) to handle configuration of device types which do not operate as a telnet client, have different screen configurations, etc. A list of common devices and their configurations is included in the final chapter of this manual.

Communication Section



Communication	
Device Type	**Telnet - SmartScript**
Encoding Type	Default
Inactivity Timeout	0
Maximum IP Connections	1
Port Name	**IP Port**
Raise Time Change	True
Session Linger	0

Device Type - Sets the type of the client device. Click the field for a dropdown menu for selection of available device options.

Encoding Type - Sets the encoding type for the client device. Click the field for a dropdown menu for selection of available encoding options.

Inactivity Timeout - Sets the inactivity period for the device before automatic reset, in seconds.

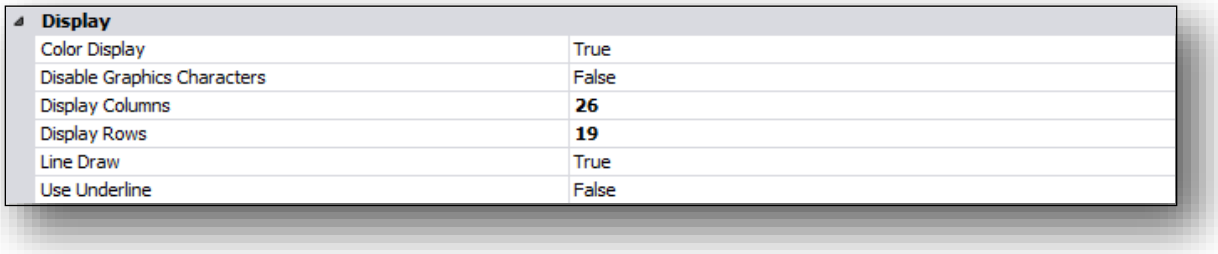
Maximum IP Connections - Controls the maximum number of concurrent connections from the client device (IP address). Typically used in Terminal Server environments.

Port Name - Sets the port name for the client device. Click the field for a dropdown menu for selection of available port options.

Raise Time Change - Controls if the raise time change event is set for the device. Click the field for a dropdown menu for selection of True or False.

Session Linger - Sets the time the session remains active for the device.

Display Section



Display	
Color Display	True
Disable Graphics Characters	False
Display Columns	**26**
Display Rows	**19**
Line Draw	True
Use Underline	False

Color Display - Controls if the client device supports color. Click the field for a dropdown menu for selection of True or False.

Disable Graphics Characters - Disables graphic characters for the client device. Click the field for a dropdown menu for selection of True or False.

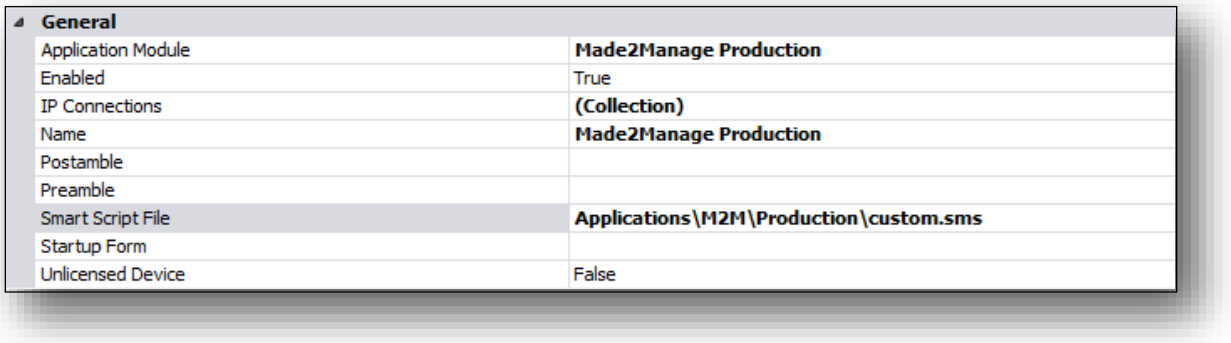
Display Columns - Sets the number of display columns (horizontal) for the client device.

Display Rows - Sets the number of display rows (vertical) for the client device.

Line Draw - Controls if the client device supports line draw characters. Click the field for a dropdown menu for selection of True or False.

Use Underline - Sets the client device to underline mode. Click the field for a dropdown menu for selection of True or False.

General Section



General	
Application Module	**Made2Manage Production**
Enabled	True
IP Connections	**(Collection)**
Name	**Made2Manage Production**
Postamble	
Preamble	
Smart Script File	**Applications\M2M\Production\custom.sms**
Startup Form	
Unlicensed Device	False

Application Module - Sets the application module for the client device. Click the field for a dropdown menu for selection of available application module options.

Enabled - Controls if the client device is enabled. Click the field for a dropdown menu for selection of True or False.

IP Connections - Sets the IP addresses that will use the client device. Press the button to browse to bring up the Collection Editor that allows you to set individual IP addresses, or a range.

Name - Sets the name of the device.

Postamble - Sets the postamble for the device, if applicable.

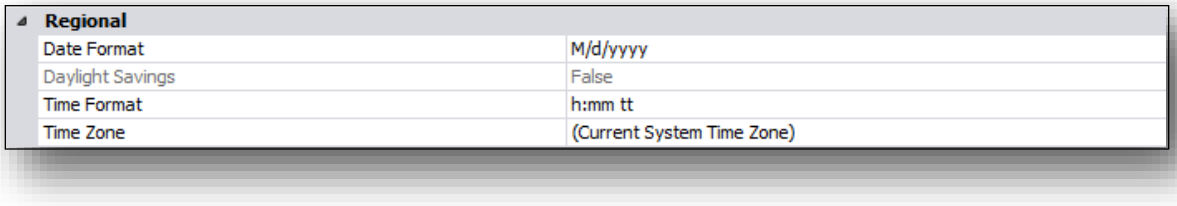
Preamble - Sets the preamble for the device, if applicable.

Smart Script File - Sets the smart script file location for the client device. Press the button to browse to the project (.sms) file to be used with the indicated client device (usually custom.sms). The indicated path will be the folder containing all the files necessary for the application to function.

Startup Form - Sets the startup form/screen for the client device, if desired. Click the field for a dropdown menu for selection of available startup form/screen options.

Unlicensed Device - Controls if the device is unlicensed.

Regional Section



Date Format - Sets the date format for the client device. Press the button to bring up screen to configure the format as it should be handled by the client.

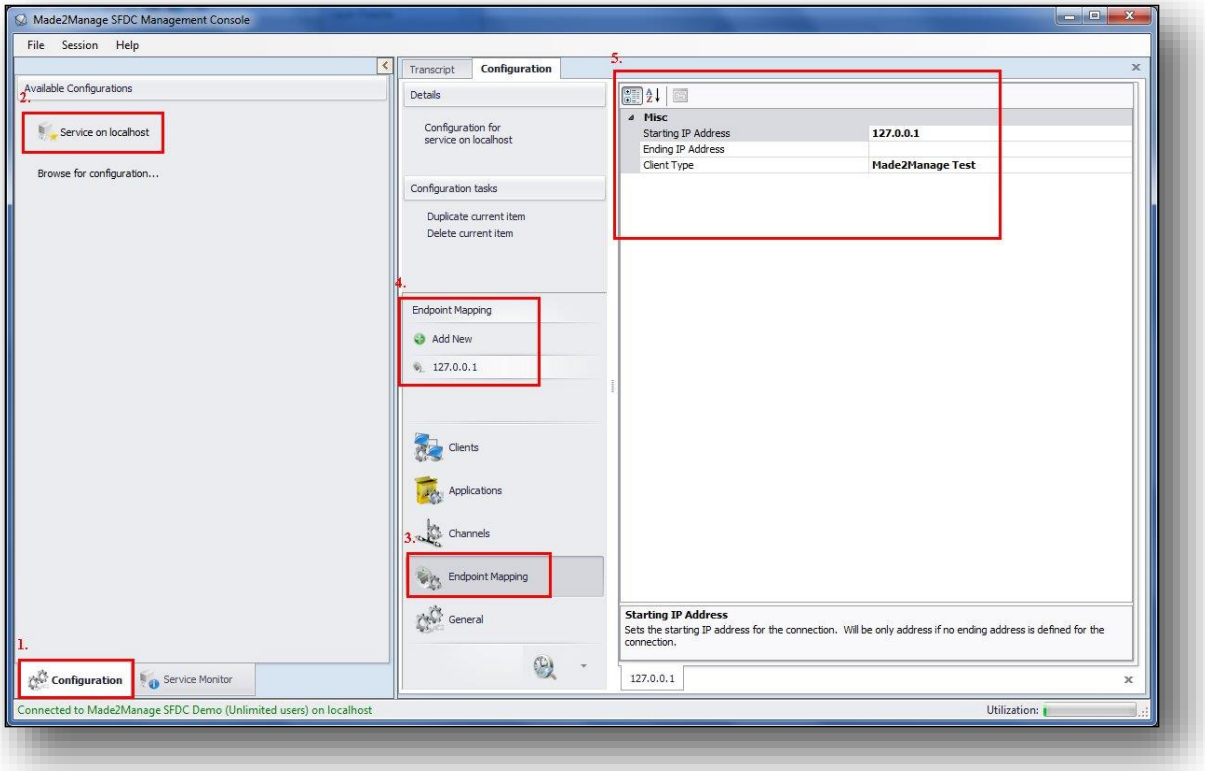
Daylight Settings - Displays whether or not the time zone the device is operating in uses daylight savings time.

Time Format - Sets the time format for the client device. Press the button to bring up screen to configure the format as it should be handled by the client.

Time Zone - Sets the time zone for the client device. Press the button to bring up screen to select available options.

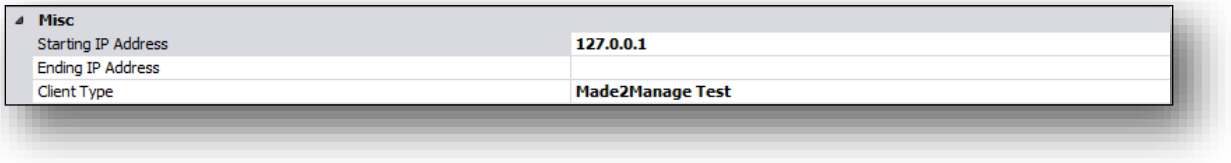
Endpoint Mapping

This program is used to maintain and manage IP addressed and their associated SFDC Clients/Devices. From here an administrator may associate IP addresses, or ranges of IP addresses, to specific clients. To manage Endpoint Mapping, start the Made2Manage SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Endpoint Mapping icon in the lower middle of the screen **(3.)**, then select an address (or add a new one) **(4.)**. Shown below is the screen that will appear with the settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates one address, that of the local host. It will be necessary for additional addresses to be added based on the devices to be used.

Misc Section



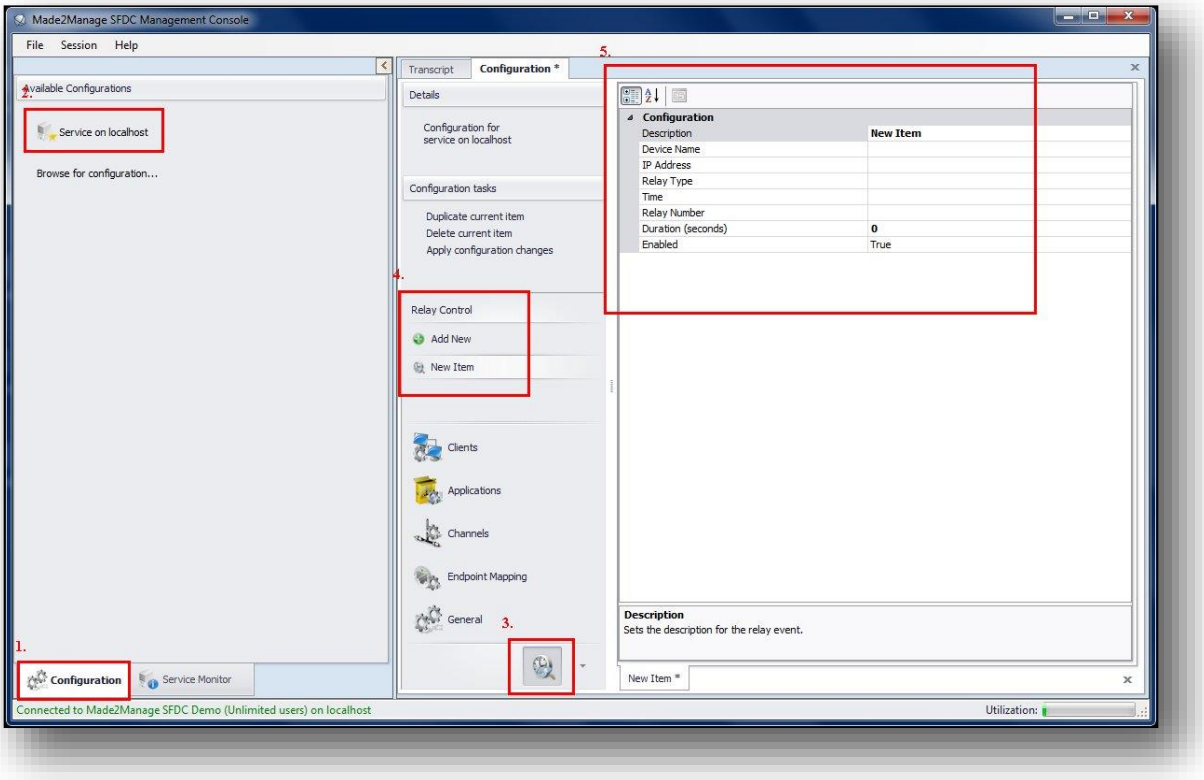
Starting IP Address - Sets the starting IP address for the connection. Will be only address if no ending address is defined for the connection.

Ending IP Address - Sets the ending IP address for the connection. Used only if defining a range of connection addresses.

Client Type - Sets the client/device type for the IP Connection. Click the field for a dropdown menu for selection of available client/device options.

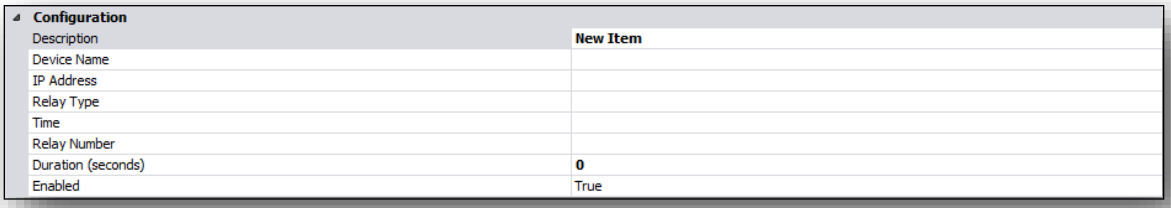
Relay Control

This program is used to maintain and manage relay devices that will be fired by SFDC. To manage Relay Control, start the Made2Manage SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Relay Control icon in the lower middle of the screen **(3.)**, then select Add New **(4.)**. Shown below is the screen that will appear with the Configuration settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC does not create any relay devices, so any device containing a relay that you would like SFDC to fire will need set up by the administrator.

Configuration Section



Description - Sets the description for the relay event.

Device Name - Sets the client/device where the relay is located, if applicable. Click the field for a dropdown menu for selection of available client/device options.

IP Address - Sets the IP address for the client/device.

Relay Type - Sets the type of relay. Click the field for a dropdown menu for selection of available options.

Time - Sets the time for the relay to be fired. Format is 24 hour clock (HH:MM).

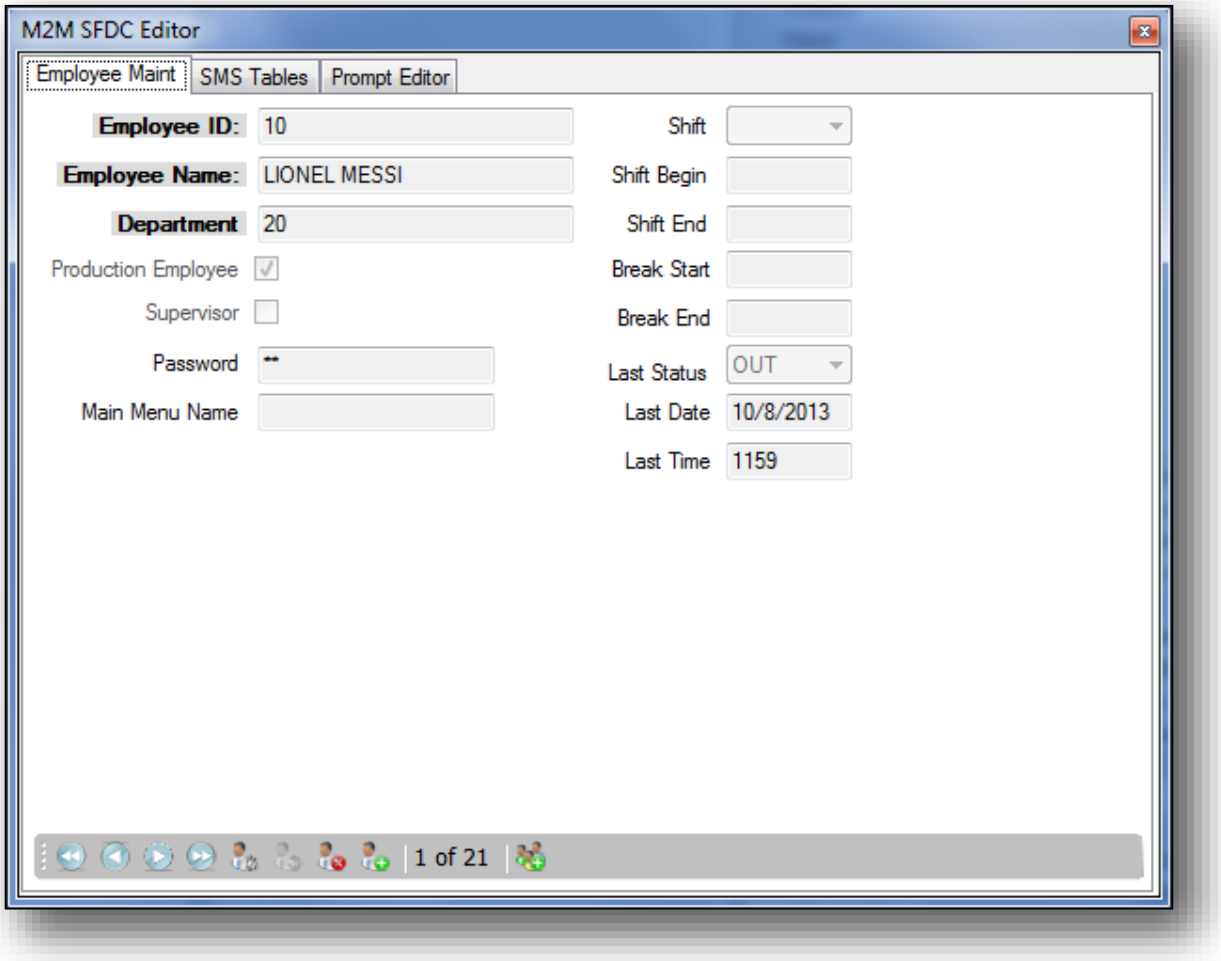
Relay Number - Sets the relay number on the end device to be used.

Duration (seconds) - Sets the duration the relay will sound.

Enabled - Controls if the relay event is enabled. Click the field for a dropdown menu for selection of True or False.

M2M SFDC Editor

Clicking the button for the M2M SFDC Editor from the SFDC Configuration screen will load the M2M SFDC Editor program, with tab options for Employee Maint, SMS Tables, and the Prompt Editor.

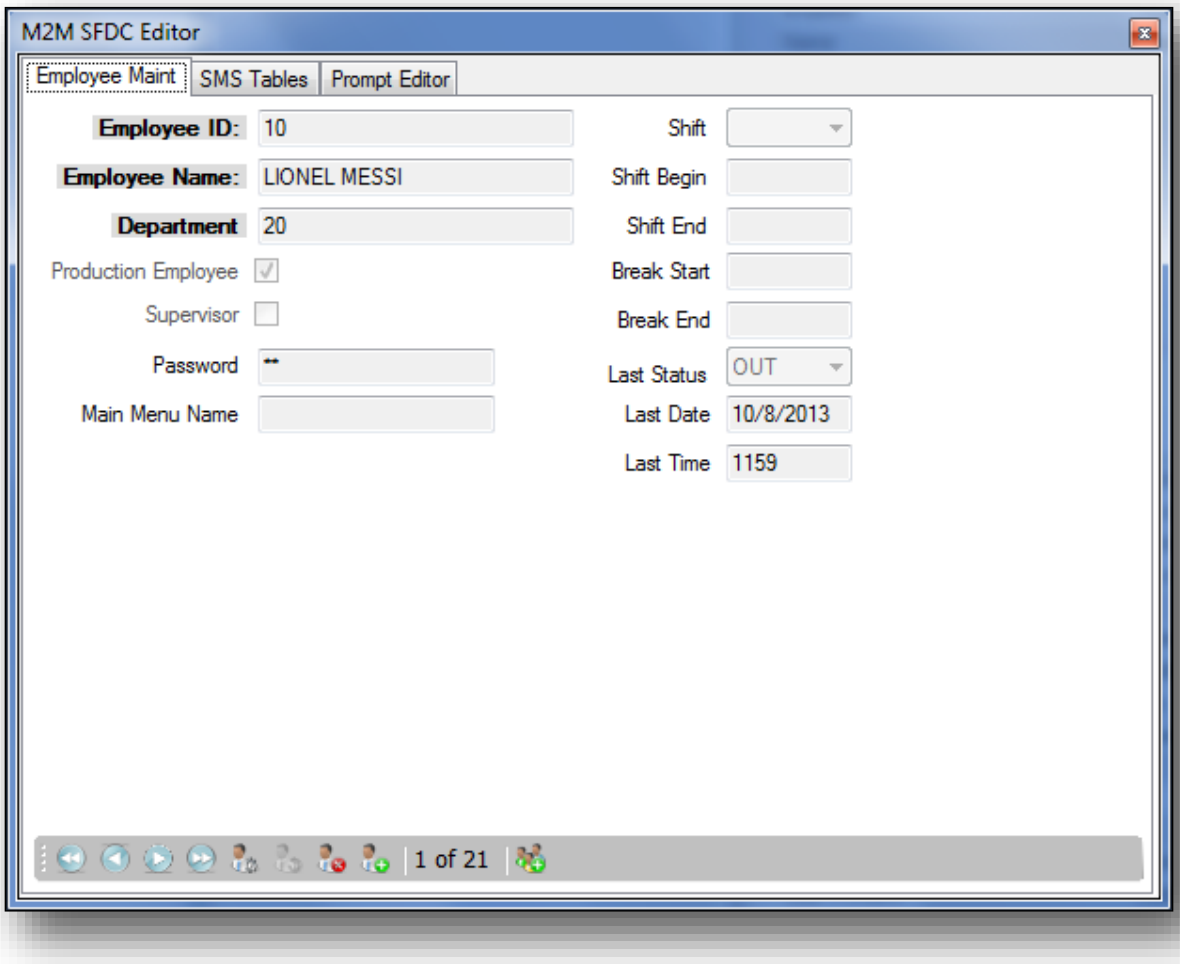


Each tab option will be defined in the following.

Employee Maint

This tab will allow the user to change, add, or delete employees out of the SFDC database (SMSM2MDATA.EMPLOYEE). The employee records that are in this database are used to hold additional data about each employee that is not contained in the Made2Manage employee master file (table PREMPL). Information as to whether they are production employee or a supervisor, shift and status codes is maintained here.

Records are added to this file automatically as the Made2Manage SFDC System processes. For example, when a user enters an employee number, the system first looks in this data file to validate. If a record is found the employee number is considered valid. If not, the system will look in the Made2Manage PREMPL table for validation. If a record is found, the record is added to the M2M SFDC employee master file.



Employee ID – Employee number value from PREMPL

Employee Name – Employee first and last name from PREMPL

Department – Employee department from PREMPL

Production Employee – By default, all records are flagged as production employees

Supervisor – Check if employee is a supervisor. This field is not populated from PREMPL, nor is it necessary for SFDC functionality

Password– Key the user password for logging on if SFDC is configured to use the SYS Logon Screen (prompts for user name and password upon connecting to SFDC)

NOTE: In M2M SFDC, the password set here and the password set in the M2M User Security application (see below) must match if User Security will also be used!

Main Menu Name – Key in the main menu the user should connect to. This field is not necessary for SFDC functionality

Shift –This field is not populated from PREMPL, nor is it part of standard SFDC functionality

Shift Begin – This field is not populated from PREMPL, nor is it part of standard SFDC functionality

Shift End – This field is not populated from PREMPL, nor is it part of standard SFDC functionality

Break Start – This field is not populated from PREMPL, nor is it part of standard SFDC functionality

Break End – This field is not populated from PREMPL, nor is it part of standard SFDC functionality

Last Status – Current status of employee.

[The next several lines refer to the icons in the lower left of the Employee Maint screen]

First Button – Retrieve the first record

Previous Button – Retrieve the previous record

Next Button –Rretrieve the next record

Last Button – Retrieve the last record

Edit Button – Edit the current record

Cancel – Cancel the current edit

Delete Button – Delete current record

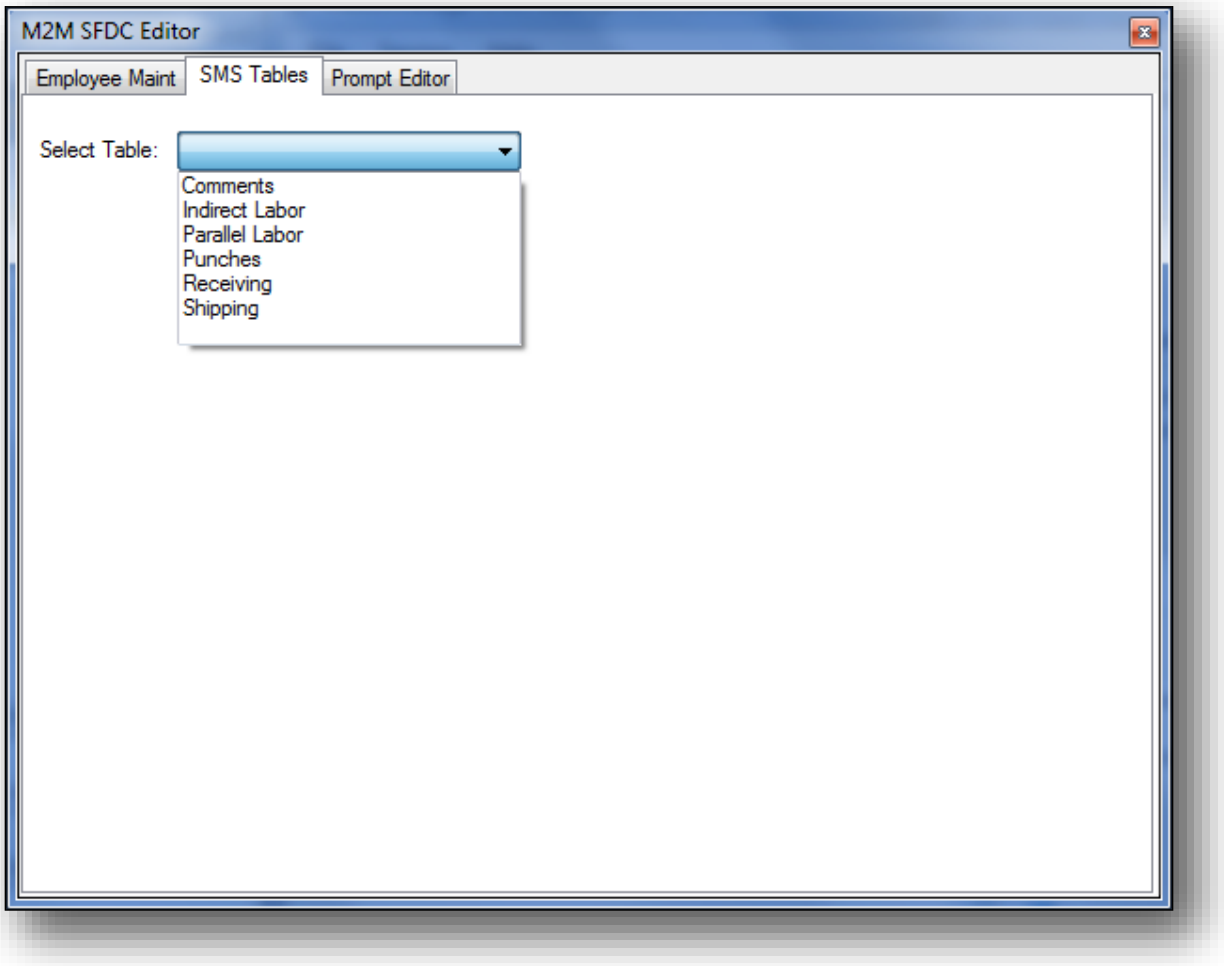
Import Button – Import records from a from the PREMPL table. Password is imported as the same value as the user ID value.

> Note: When an employee is no longer employed and you do not want that employee number to be considered valid, make sure that the employee record is deleted from this database.

SMS Tables

This tab will allow the user to view and purge records from the tables residing in the SMSM2MDATA database on the SQL server.

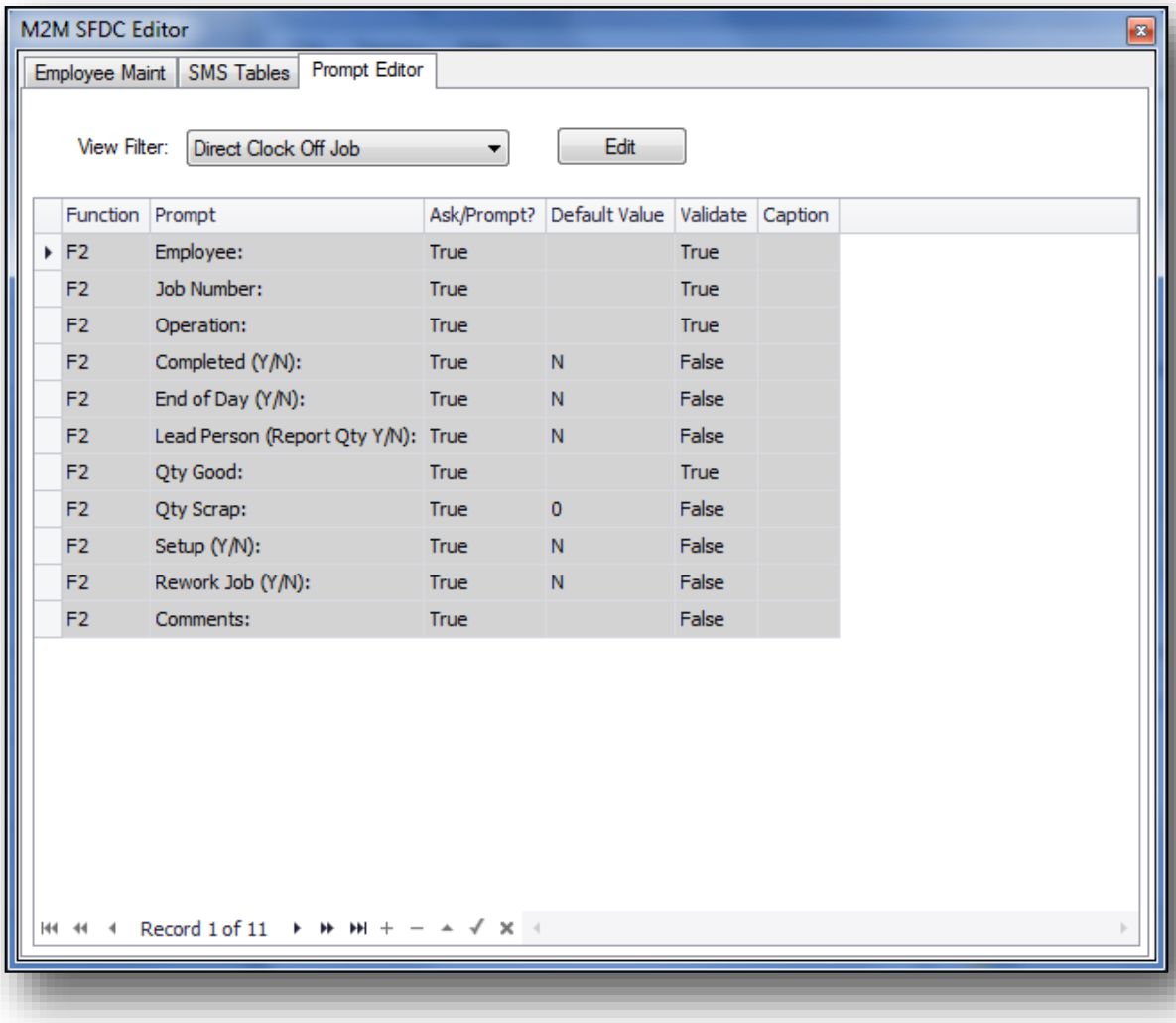
Pressing the down arrow will display a list of the available table options for viewing, as shown:



Each option allows the user to view records within the selected table, as well as purge them. Generally, neither the Shipping nor Receiving tables should contain stored records. These tables are only written to during the process of an individual Receiving or Shipping process, then purged when Last Item = Yes. If records are found here and all Receiving/Shipping processes have completed for the day, then they are likely there as a result of user error.

Prompt Editor

To customize prompts for the SFDC system, use the Prompt Editor. You can set default values for, and turn off, many of the prompts SFDC presents users for each transaction. You may also choose whether to validate fields against the Made2Manage database.



To customize SFDC Prompts

1. Click the Prompt Editor tab in the M2M SFDC Editor and the prompt editor form will be displayed.
2. Choose from the 'View Filter' drop down, the transaction you wish to modify. Once a transaction has been selected, the prompts and any of their current values will be displayed in the grid. Each Made2Manage SFDC transaction will have its own option in the 'View Filter' dropdown.
3. Click the Edit button.
4. Cells that may be modified will turn white; fields that cannot be modified will remain gray.
5. To turn off a prompt Click the 'Ask/Prompt?' cell and choose false from the dropdown.
6. To set a default value, click the Default Value cell and type the new default value.

7. To validate user input against the Made2Manage database for a particular prompt, Click the Validate column and select true from the dropdown. To not have the field validate against the Made2Manage database, choose false in the dropdown for the cell.
8. To set a new field caption for a field, type the new caption into the Caption cell for the field you want to change the caption of
9. Click the Done button to save your changes to the prompts database.

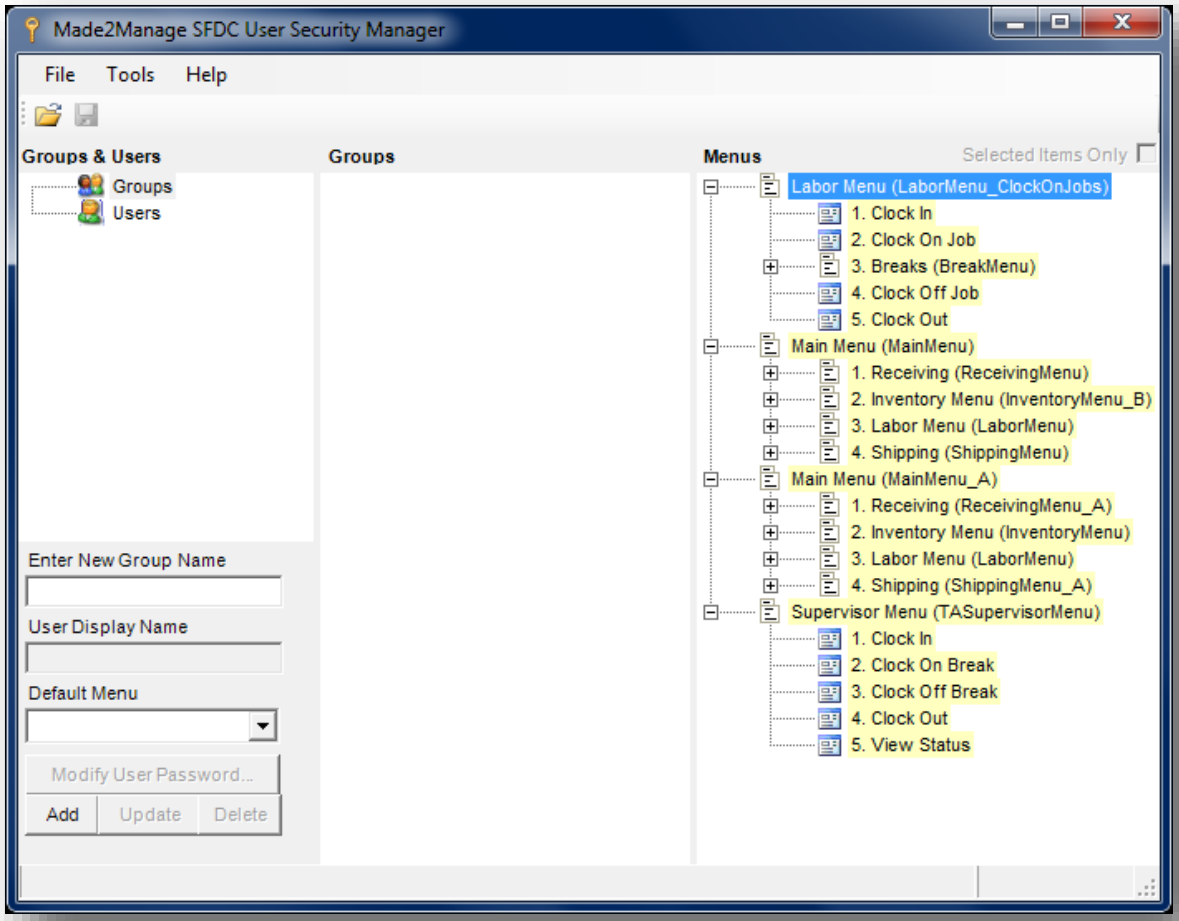
SFDC Security

What is SFDC Security?

The SFDC Security program gives an Administrator the ability to set permissions on menus and menu items by restricting access to only selected groups and users. It also allows for the password protecting menus and menu items.

SFDC Security Interface

As soon as the SFDC Security window loads (accessed via the shortcut that installs on teh desktop, or from the Programs menu) you will see four separate window panes. The first pane, labeled Groups & Users, will have a node for each group and user defined within the current smart script file. The second pane, labeled Groups or labeled Users, will contain a node for each user defined when a group is selected in the Groups & Users pane or a node for each group defined when a user is selected in the Groups & Users pane. If the node is checked, it indicates that the checked user is a member of the selected group. The third pane, labeled Menus, will have a node for each menu and screen defined. If the node is checked, it indicates that the selected group or user has permission to the checked menu item. The fourth pane, no label, is below the Groups & Users pane and is used for maintaining groups and users.



MenuBar

File: Allows for the opening and saving of an SMS Smart Script file and for exiting the program.

Tools: Allows for the importing and exporting of security information.

Help: Access to help file.

ToolBar

Open: Allows for the opening of an SMS Smart Script file.

Save: Allows for the saving of an SMS Smart Script file.

Pop-Up Menus (right click on the pane to display the menu)

Groups or Users pane

Check All checks all of the groups.

Uncheck All un-checks all of the groups or users.

Menus pane

Check All checks all of the menu items giving the selected group or user access to all menu items.

Uncheck All un-checks all of the menu items removing the selected group or user access to all menu items.

Expand All expands all of the menu items in the menu tree.

Collapse All collapses all of the menu items in the menu tree.

Modify Password… displays change password form for setting a password on a menu item.

See ***Modifying a Menu Item Password***

Color Coding in Menus pane

Menu tree fore color green = security via group membership.

Menu tree fore color blue = security via user name.

Menu tree back color white = menu item built from custom script file.

Menu tree back color yellow = menu item built from include file.

Groups

Adding a New Group

Select Groups from the Groups & Users pane.

Enter the name of the group in the Group Name field.

Click the Add button.

Modifying Group Information

Select the group you want to modify from the **Groups & Users** pane.

Enter the updated **Group Name**.

Click the **Update** button.

Deleting a Group

Select the group you want to delete from the **Groups & Users** pane.

Click the **Delete** button.

- This will remove the selected group or user from access to all menu items.

Users

Adding a New User

Select Users from the Groups & Users pane.

Enter the id of the user in the User Id field.

Enter the display name of the user in the User Display Name field.

Select the default menu for the user from the User Default Menu dropdown list.

Click the Add button.

- The **User Display** Name and **User Default Menu** fields are optional. The initial password for a new user is the same as the **User Id**. To change the user's password see ***Modifying a User Password***

Modifying User Information

Select the user you want to modify from the **Groups & Users** pane.

Enter the updated **User Id**, **User Display Name** and/or **User Default Menu**.

Click the **Update** button.

Modifying a User Password

Select the user whose password you want to modify from the **Groups & Users** pane.

Click the **Modify User Password…** button.

(Change Password screen will be displayed)

Enter the old password in the **Old Password** field.

Enter the new password in both the **New Password** and **Confirm Password** fields.

Click the **Accept** button.

Deleting a User

Select the user you want to delete from the **Groups & Users** pane.

Click the **Delete** button.

Note This will remove the selected user from access to all menu items.

Adding a User to a Group

Select the user you want to add from a group in the **Groups & Users** pane.

Check the check box for the group you want to add the user to in the **Groups** pane.

Or

Select the group you want to add the user to from the **Groups & Users** pane.

Check the check box for the user you want to add to the group in the **Users** pane.

Removing a User from a Group

Select the user you want to remove from a group in the Groups & Users pane.

Uncheck the check box for the group you want to add the user to in the Groups pane.

Or

Select the group you want to add the user to from the Groups & Users pane.

Uncheck the check box for the user you want to remove from the group in the Users pane.

Menus

Granting Access to a Group or User

Select the group or user you want to add to or remove from a menu item in the **Groups & Users** pane.

2Check the check box for the menu item you want to add the group or user to in the **Menus** pane. Selected group or user will now have access to the checked menu item.

Removing Access to a Group or User

Select the group or user you want to add to or remove from a menu item in the **Groups & Users** pane.

Un-check the check box for the menu item you want to remove the group or user to in the **Menus** pane. Selected group or user will be unable to access the unchecked menu item.

Modifying a Menu Item Password

Right-click on the menu item from the **Menus** pane.

Select **Modify Menu Password…** from the menu.

(Change Password screen will be displayed)

Enter the old password in the **Old Password** field.

Enter the new password in both the **New Password** and **Confirm Password** fields.

Click the **Accept** button.

Tools

Importing Security Information

From the MenuBar, select **Tools | Import** and then select the security information you want to import.

Groups and Users imports only groups and users.

Menu Rights imports only the menu rights of groups and users.

All Security Info imports both Groups and Users and Menu Rights.

Select a sms script file or a previously exported security file from which to import the security information from. The security information from the selected script will then be merged into the currently opened script.

- The import only adds information and will not modify or remove existing information contained in the script.

Exporting Security Information

From the MenuBar, select **Tools | Export** and then select the security information you want to export.

Groups and Users exports only groups and users.

Menu Rights exports only the menu rights of groups and users.

All Security Info exports both Groups and Users and Menu Rights.

Select a file for which to export the security information to. The security information from the selected script will then be exported.

- The export will not modify or remove information in the currently opened script.

Device Configuration

Devices are an ever changing component of Made2Manage SFDC as existing hardware technologies evolve, current devices upgrade, new devices are added, etc. What follows are configurations for common devices.

Computerwise Configuration

ETx/TTx Hard-wired Devices

Register Settings

To configure Computerwise TT-xx terminals, press the blue (S2) key followed by the red (S1) key, followed by the blue (S2) key. This will present you with the settings for SR1. See the following sections for the specific settings for each device.

To configure Computerwise ET-xxx terminals, press the blue (S2) key and the red (S1) key together, then the F1 key. This will present you with the settings for device IP address, server IP address, gateway, etc. See the following sections for the specific settings for each device.

Initialization String

This string is sent to the Computerwise terminals by the Made2Manage SFDC System Server to program the function keys and other device specific options. See the following sections for the specific string for each device.

The Made2Manage SFDC System Configurator allows you to enter this string for each device. Please see the Made2Manage SFDC System Users Manual for more information.

TT4/ET204/ET214 Initialization String

{ESC}W1$~01{CR}${BREAK}{ESC}W2$~02{CR}${BREAK}{ESC}W3$~LF{CR}${BREAK}{ESC}W4$~RT{CR}${BREAK}{ESC}W5$~UP{CR}${BREAK}{ESC}W6$~DN{CR}${BREAK}{ESC}W7$~{CR}${BREAK}{ESC}W8$~ES{CR}$

TT4 Register Settings

SR1=00000000
SR2=00011000
SR3=00001100
SR4=10100000
SR5=11111111

SR6=00000010
SR7=00000000
SR8=00000000
OPERATING MODE=003
UNIT ADDRESS=065 (must be unique for each device)
DISPLAY SCALE=001
OPTIONS=000

TT5/ET205/ET215 Initialization String

{ESC}W1$~01{CR}${BREAK}{ESC}W2$~02{CR}${BREAK}{ESC}W3$~LF{CR}${BREAK}{ESC}W4$~RT{CR}${BREAK}{ESC}W5$~UP{CR}${BREAK}{ESC}W6$~DN{CR}${BREAK}{ESC}W7$~{CR}${BREAK}{ESC}W8$~ES{CR}$

TT5 Register Settings

SR1=00000000

SR2=00011000

SR3=00001100

SR4=10100000

SR5=11111111

SR6=00000010

SR7=00000000

SR8=00000000

OPERATING MODE=003

UNIT ADDRESS=065 (must be unique for each device)

OPTIONS=000

ET-xxx Network Settings

Network Setup Screen

To enter the Network Setup on the ET215 devices, press and hold down the red S1 and blue S2 keys, and then press the F1 key. This will display the Network Setup screen.

Two options are displayed:

Defaults - This will set the network settings back the factory defaults

Modify - This will allow you to view/modify the current network settings

Configure Network Settings

From Network Setup Screen, press 2 to view or modify the current settings. To move from setting to setting, use the Enter key. Do NOT use the F7/Accept key.

The following is a list of the settings and their values::

My_IP - This will be the assigned IP address for the device

Netmask - This will be the IP address of the network mask

Gateway - This will be the IP address of the gateway

HostName - This can be any descriptive name for the Host PC (i.e. SFDC server)

Server - This will be the IP address of the SFDC server

TCPPort - This is the IP Port of the CORE server. The required value is 23.

AUXPort - This will be the setting for the serial port. The default value is 9600, 0, 8, 1, 1

Mode - The Mode needs to be set to 2

Once the settings are specified, the device will return the main screen for the Network setup. Press the Enter key again to be prompted to reset the device. (i.e. Reset (7 = Yes)).

Press the 7 key to reset the device. If none of the settings were modified, you will not be prompted to reset the device.

Specific Device Configuration

The following table defines several common devices as they should be detailed in the Clients configuration of the Made2Manage SFDC Management Console program:

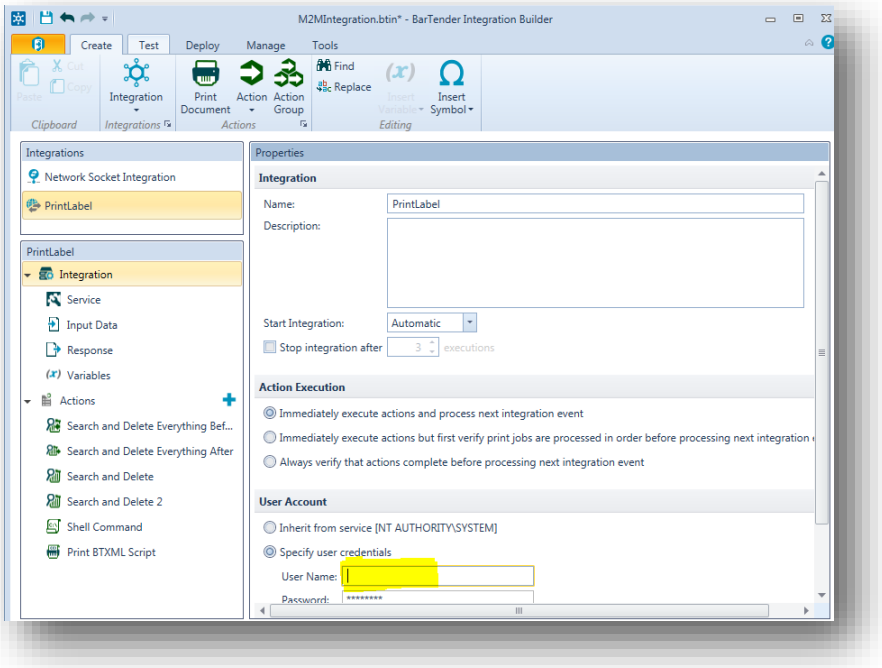
	SMS Telnet	Computerwise ET314	Computerwise ET315	Mobile Client	Motorola 9000 series	Intermec CK series
Communication						
Device Type	Telnet-SmartScript	Computerwise Ethernet Terminal	Computerwise Ethernet Terminal	Mobile Client	Telnet-SmartScript	Telnet-SmartScript
Encoding Type	Default	Default	Default	UTF8	Default	Default
Inactivity Timeout	0	0	0	0	0	0
Max IP Connections	1	1	1	1	1	1
Port Name	IP Port	IP Port	IP Port	IP Port	IP Port	IP Port
Raise Time Change	TRUE	FALSE	FALSE	TRUE	TRUE	TRUE
Session Linger	0	0	0	0	0	0
Display						
Color Display	TRUE	FALSE	FALSE	TRUE	TRUE	TRUE
Disable Graphic Chrs.	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE
Display Columns	26	24	24	26	26	26
Display Rows	19	8	2	19	19	19
Line Draw	TRUE	FALSE	FALSE	TRUE	TRUE	TRUE
Use Underline	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE
General						
App Module	*	*	*	*	*	*
Enabled	TRUE	TRUE	TRUE	TRUE	TRUE	TRUE
IP Connections	*	*	*	*	*	*
Name	*	*	*	*	*	*
Postamble						
Preamble						
Smart Script File	*	*	*	*	*	*
Startup Form	*	*	*	*	*	*
Unlicensed Device	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE
Regional						
Date Format	*	*	*	*	*	*
Daylight Savings	*	*	*	*	*	*
Time Format	*	*	*	*	*	*
Time Zone	*	*	*	*	*	*

Integration Builder

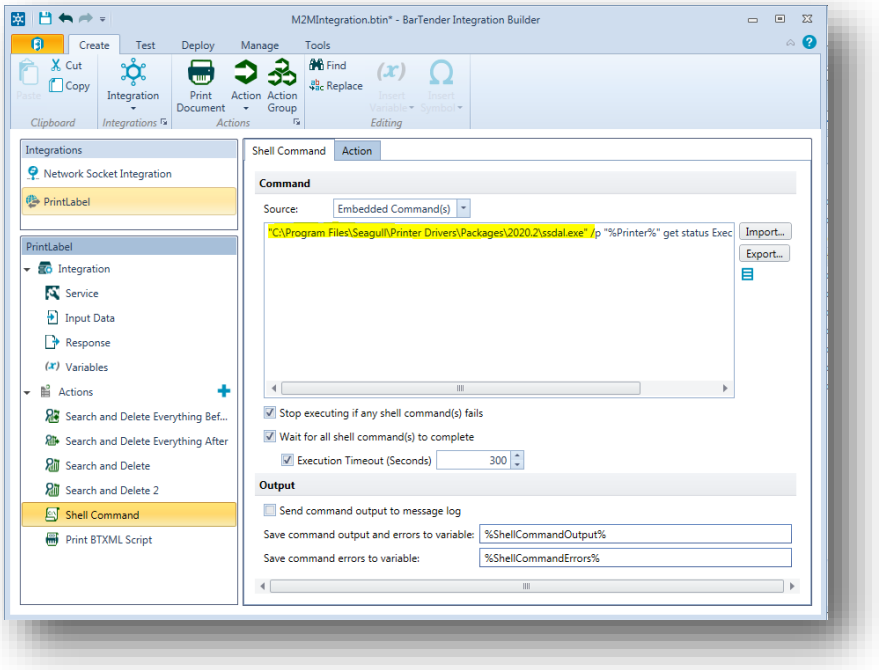
To use the Integration Builder functionality with SFDC, a copy of Seagull Scientific's Bartender software (Automation or Enterprise edition) will need to be purchased and installed to allow this functionality to work. These software packages may be purchased through The SMS Group.

On the Made2Manage SFDC installation CD, there will be an Integration Builder folder. This folder will contain an M2MIntegration.btin file that will need to be saved to the computer running Integration Builder, opened, configured and deployed in the Bartender Integration Builder application. Most of the configuration settings should already be configured, but the following setting will need to be adjusted and verified to ensure proper functioning.

Once the file has been loaded in Integration Builder, Click on the Print Label Integration, and this will load the for the integration package. In the below portion of the configuration, the Specify User credentials will need to be setup with a valid network user that that integration package will run under. Note the highlighted fields to set the user.



The Shell Command setting will need to be reviewed to verify the path is correct for the Bartender installation being used. Note the highlighted section below, and verify the path is correct. If not, correct the path to where the ssdal.exe file exists on the Integration Builder computer.



After updating and verify the integration, save it, and then deploy and test it to verify things are working and then SFDC can be configured to print labels using integration builder.

Also, on the installation CD, in the Integration builder folder, is another folder, Integration Builder Labels, that will have sample labels for Shipping, Receiving, Part, and Job To FG labels, one for an Intermec PD43, one for a Zebra ZT410 and one for a Sato CL408e. These can be used as the base for labels for other printer models, or those printer models. These will need to be copied to the Integration Builder computer, and the path where these labels are will need to be set in the Made2Manage SFDC configuration.

Printers used for Integration Builder will need to be installed on the Integration Builder computer and, if the Integration Builder computer is separate from the SFDC sever, on the SFDC server using Seagull Scientific printer drivers. The printers configured in the SFDC Printer configuration will need to point to the actual installed printer, and not a network path or an IP address, that are used with the non-Integration Builder labels. Printers installed on the SFDC server will show in the SFDC Printer configuration drop down for selection.

NOTE: Configuration support for Bartender Integration builder, label design assistance, or setup of SFDC for use with integration builder is not covered under standard SFDC maintenance. These services can be provided as part of billable services for SFDC installation, or as a separate billable service just for labelling and configuration.