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INTUITIVE SFDC

USER MANUAL

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Contents

Overview

This document provides the overview for the Intuitive 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 Intuitive 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 Intuitive 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 Intuitive 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.

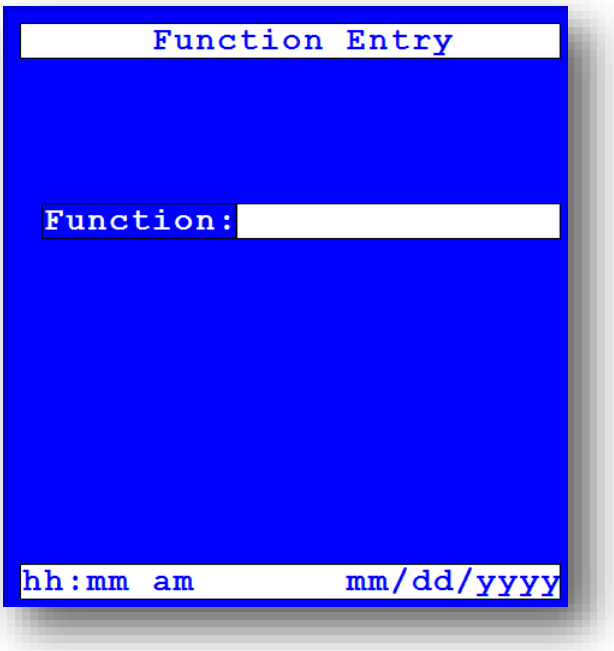
Please be aware that the transactions included in the documentation are the standard included items in the Intuitive SFDC Basic and Premier System. As evidenced by the many types of devices supported above, other possibilities exist for interfacing to Intuitive ERP and if requested, the product can be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

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

Interface Software

Function Entry

The system can optionally be configured using the function entry screen. User may scan the appropriate function value corresponding with the transaction they intend to perform from the following initial screen:



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 may also be configured to present a menu driven interface to the user, which is how SFDC is configured upon installation. 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 Intuitive SFDC has its own script instance that runs the application.

The Main Menu appears as follows:

Many menu options contain sub-menus. A sub-menu is a subsequent menu with additional 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.

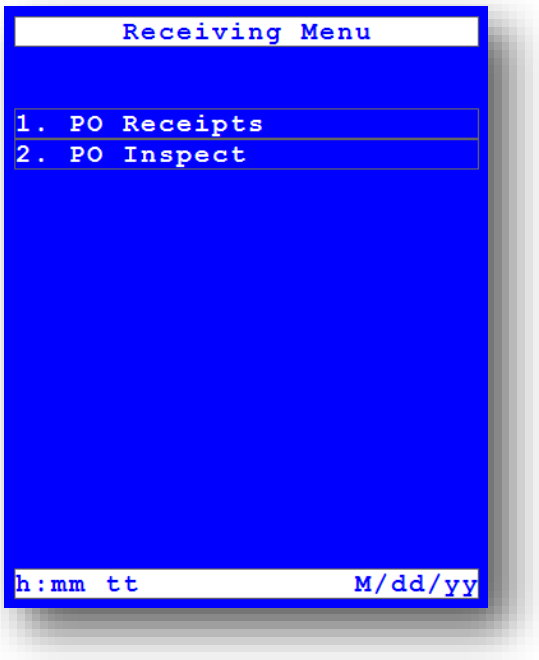
Sys Logon

The system may also be configured to use a System logon screen, where the user logs into the scanner at the begging and then are taken to the Main Menu. Using this configuration, user will not be prompted for Employee ID during transaction, excluding labor, and the ID entered in the System Logon Screen will be posted along with the transactions. This logon screen is needed for use with SFDC Security. Note, if SFDC Security is not used, and the logon screen is used, the password is not validated. The SYS Logon screen appears as follows:


Employee Logon
Login ID:
Password:
h:mm tt
M/dd/yy

Receiving Menu

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



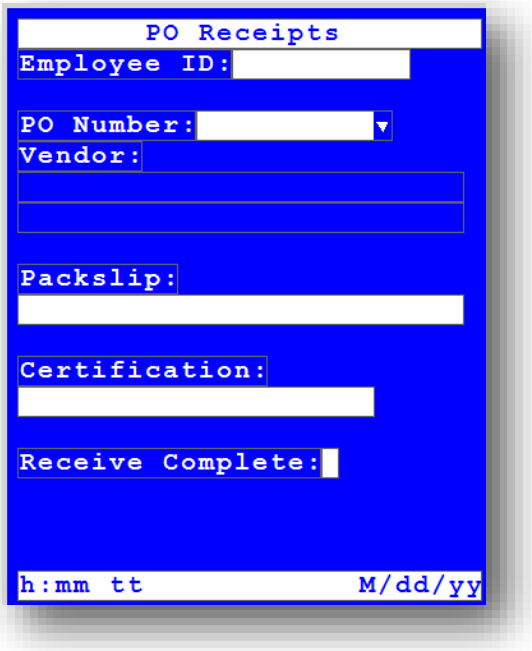
Described below is a brief description of general usage of the Inventory Menu options.

PO Receipts is used to move receive items from purchase orders.

PO Inspect is used to inspect items received that are marked as requiring inspection. Only available in 9.x with Web API.

PO Receipts (F8)

Selecting the PO Receipts option from the Reciving Menu (or scanning F8 from the Function prompt) will display the following screen:



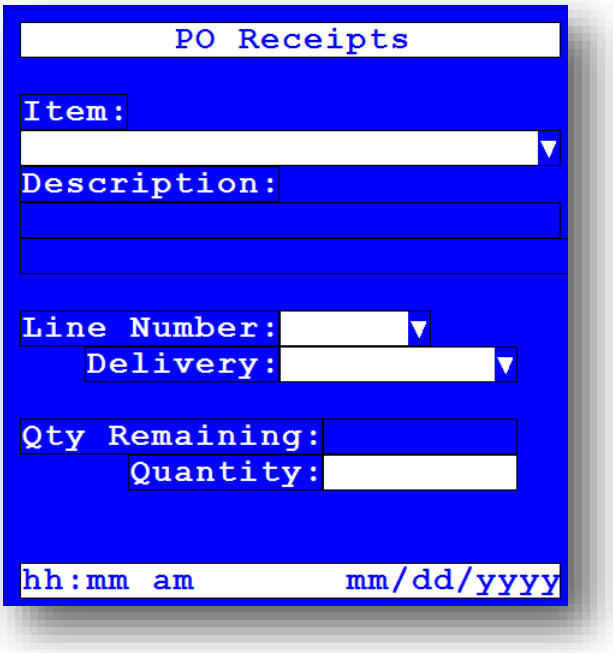
PO Number – Key, scan or press F2 to select Purchase Order from choice list.

Vendor – Display only field of Vendor name associated with indicated purchase order.

Packslip – Key or scan the Packlist value for the material being received.

Certification – Key or scan the Certification value for the material being received.

Receive Complete – Key or scan Y for Yes if the system should receive complete all material. for the indicated PO, or N for No if each material will be received individually.



Item – User may press F2 to display choice list that shows the line number and associated Item ID for all parts with quantity remaining to be received for the indicated purchase order. In addition, user may scan an Item ID/Part Number value from this prompt and system will validate if item exists on PO with quantity to be received; system will generated “Item not on PO!” error if validation fails and user will have option to view choice list.

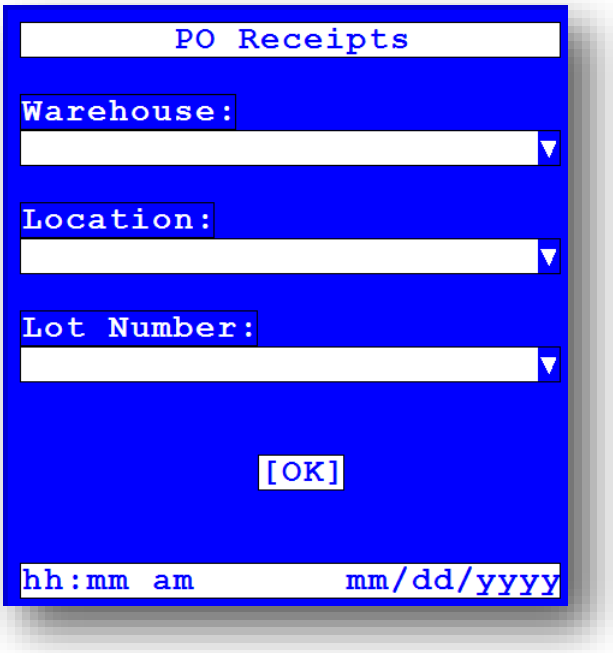
Description – Display field of Description associated with Item being received.

Line Number – Display field of Line Number for Item being received. If Item exists on more than one PO line, user may press F2 to display choice list of Line Numbers for the indicated Item and select which line is being received.

Delivery – Display field of delivery for Item being received. If there is more than one delivery for the PO line, user may press F2 to display a choice list of deliveries for the indicated Line and select which delivery is being received

Quantity Remaining – The Quantity of material yet to be received.

Quantity – Key or scan the Quantity of material to be received. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being received. This screen will be discussed later in this document.



Warehouse – Key, scan or press F2 to select Warehouse from choice list. If only one Warehouse exists, value will be defaulted

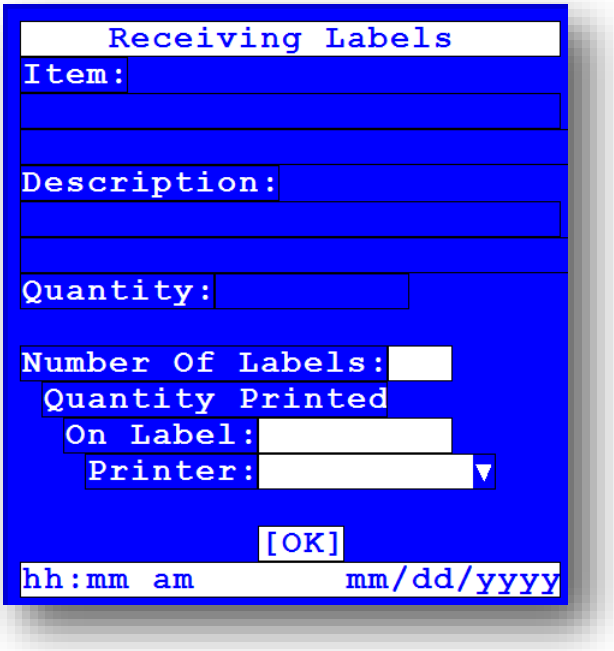
Location – Key, scan or press F2 for choice list of Location part is received into

Lot Number– Key or scan lot value for part being received, if applicable

OK – Press Enter key to complete transaction for posting to Intuitive ERP

Print Receiving Labels

If the system has been configured to print Receiving labels, upon completion of transaction the following screen will be displayed:



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 Intuitive.INI file.

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.

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

PO Inspect

Selecting the PO Inspect option from the Receiving Menu will display the following screen:

PO Number – Key in or select the PO Number to inspect items for.

Item – Key in or select the item to inspect.

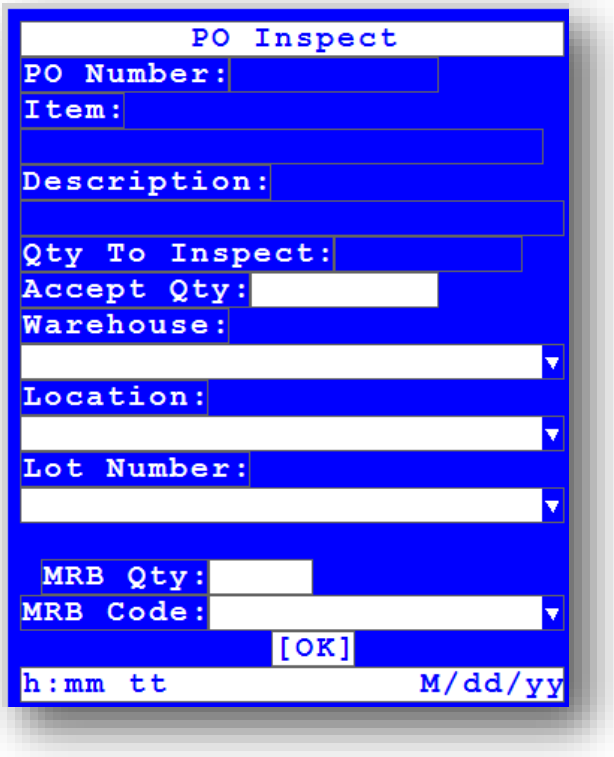
Description – display only of the description of the item.

Line Number – display only of the line number of the PO that the item was received against.

Delivery – display only of the delivery date of the PO that the item was received against.

Qty To Inspect – display only of the quantity to inspect for the item/line/delivery.

OK – press enter to proceed to the second screen of the transaction.



PO Number – display only of the PO Number entered on page A of the transaction.

Item – display only of the Item entered on page A of the transaction.

Description – display only of the description of the item.

Qty To Inspect – display only of the quantity to inspect for the item/line/delivery.

Accept Qty – enter the quantity of items accepted.

Warehouse – enter or select the warehouse the items inspected are moved to

Location – enter or select the location the items inspected are moved to

Lot Number – enter or select the lot number of the item inspected.

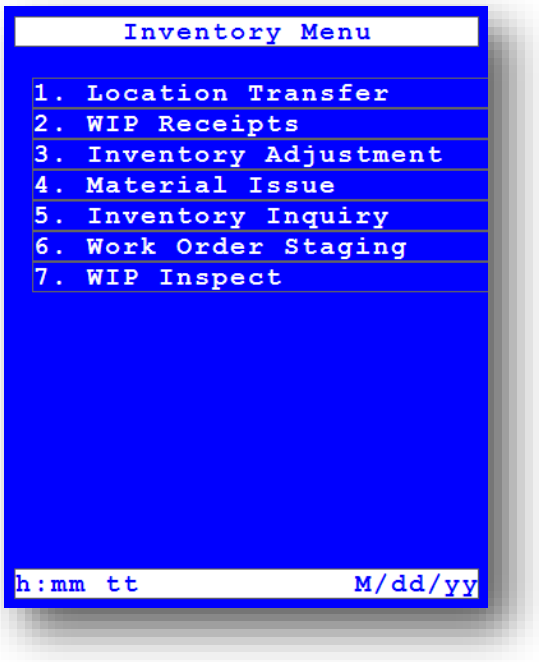
MRB Qty – enter the quantity to be sent to material review board.

MRB Code – enter or select the MRB code.

OK – press enter here to complete the transaction and mark the items as inspected.

Inventory Menu

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



Described below is a brief description of general usage of the Inventory Menu options.

Location Transfer is used to move parts from one location to another location.

WIP Receipts is used to receive finished material from job orders into inventory

Inventory Adjustment is used to update inventory quantity in a specified location

Material Issue is used to issue material to a job

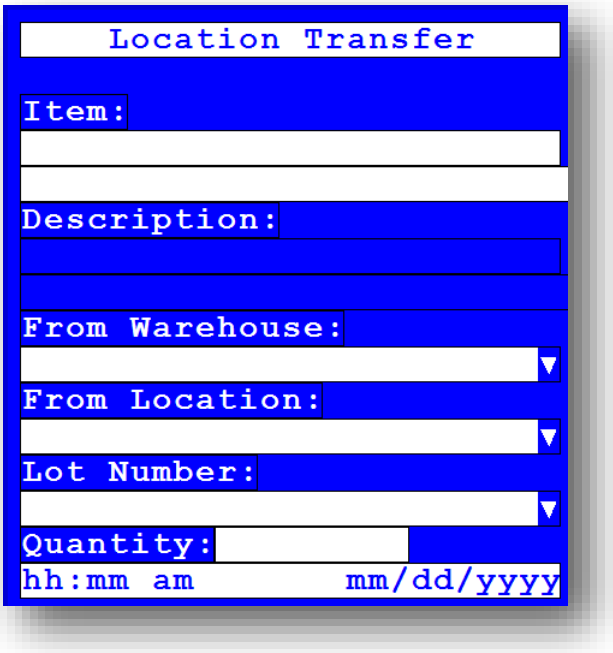
Inventory Inquiry is used to view on hand quantities for a selected part.

Work Order Staging is used to get to the Work Order Staging sub menu.

WIP Inspect is used to perform inspection of items from a work order. Only available in 9.x with Web API.

Location Transfer (F10)

Selecting the Location Transfer option from the Inventory Menu (or scanning F10 from the Function prompt) will display the following screen:



Item – Key or scan Item ID/part number of item to be transferred.

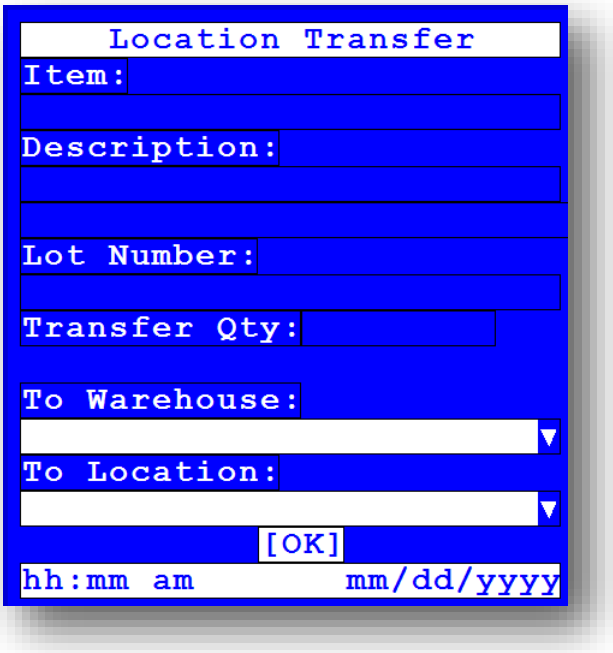
Description – Display only field of item name/description associated with indicated item id.

From Warehouse – Key, scan or ore press F2 to select Warehouse material is being transferred out of from choice list. If only one Warehouse exists, value will be defaulted.

From Location – Key, scan or press F2 for choice list of Location material is being transferred from.

Lot Number – Key or scan value of Lot of material being transferred, if applicable.

Quantity – Key or scan quantity of material to be transferred.



Item – Display only value from previous screen.

Description – Display only value from previous screen.

Lot Number – Display only value from previous screen.

Transfer Qty – Display only value from previous screen.

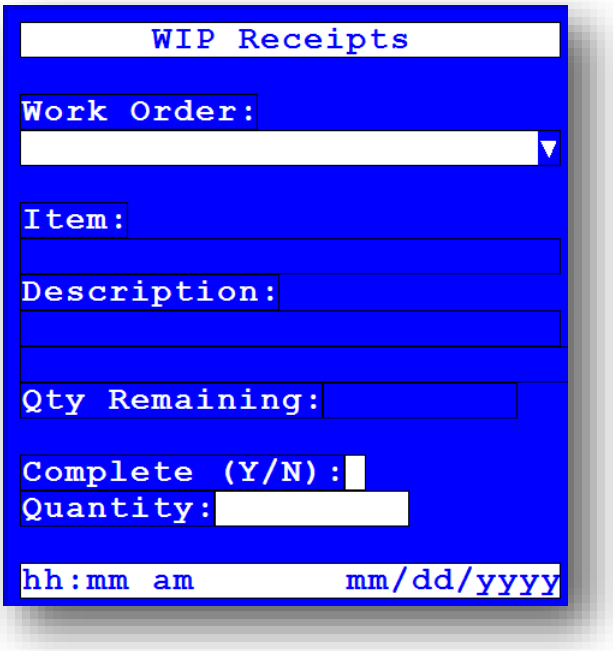
To Warehouse – Key, scan or or press F2 to select Warehouse material will be transferred to from choice list.

To Location – Key, scan or press F2 for value of Location part is being transferred to.

OK – Press Enter key to complete transaction for posting to Intuitive ERP.

WIP Receipts (F9)

Selecting the WIP Receipts option from the Inventory Menu (or scanning F9 from the Function prompt) will display the following screen:



Work Order – Key, scan or press F2 to select Work Order from choice list.

Item – Display only field of Item ID associated with work order.

Description – Display only field of item name/description associated with work order.

Quantity Remaining – The Quantity of items yet to be produced.

Complete (Y/N) – Key or scan Y for Yes if the system should update work order status to Complete regardless of quantity received, otherwise key or scan N for No.

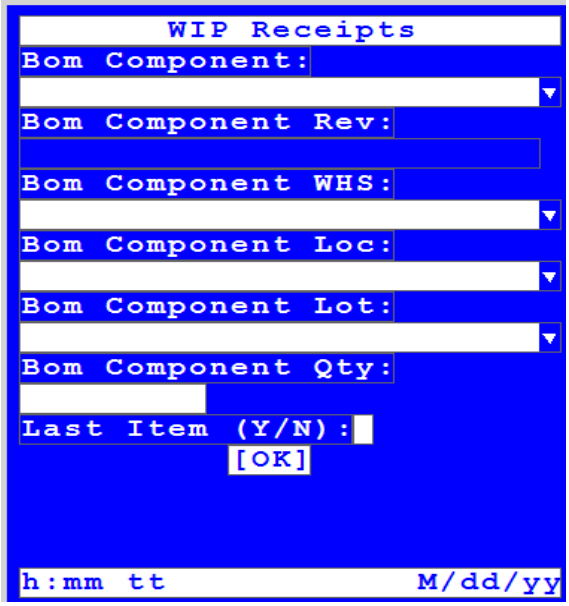
Quantity – Key or scan quantity of material to be received into inventory from work order. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being received. This screen will be discussed later in this document.

Warehouse – Key, scan or press F2 to select Warehouse from choice list. If only one Warehouse exists, value will be defaulted.

Location – Key, scan or press F2 for choice list of Location part is received into.

Lot – Key or scan lot value for part being received/completed, if applicable.

OK – Press Enter key to complete transaction for posting to Intuitive ERP. If components for the job are marked as back flushed and the component item is lot, location, or serial tracked, the user will be taken to the following screen to issue those components to the job



BOM Component – Key, scan or press F2 to select component item from choice list.

BOM Rev – Display only field of the component revision.

BOM Component WHS – Key, scan or press F2 to select warehouse for the component, if applicable.

BOM Component Loc – Key, scan or press F2 to select location for the component, if applicable.

BOM Component Lot – Key, scan or press F2 to select lot for the component, if applicable.

BOM Component Qty – Key or scan the quantity for the component. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being received. This screen will be discussed later in this document.

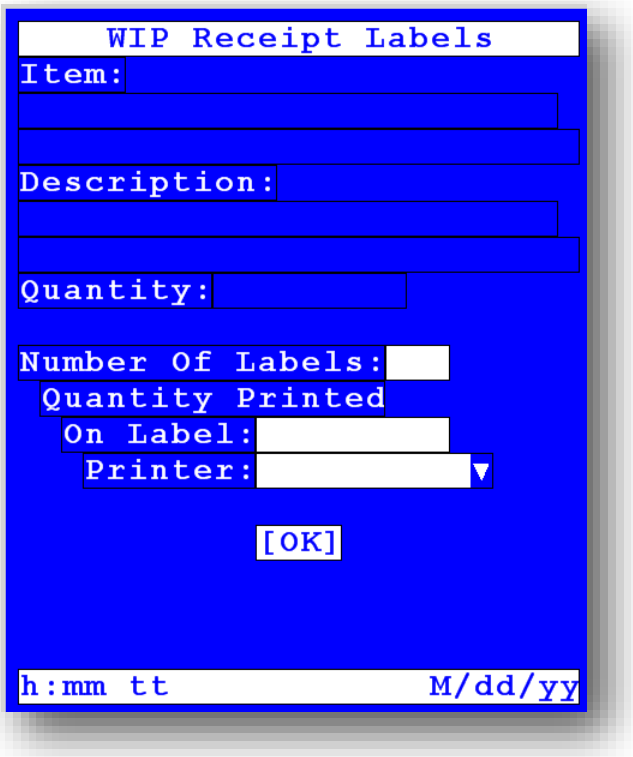
If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component part is marked as serial tracked and the parent item is marked serial tracked, the user will be taken to the “Serial Number Matching” screen to enter serial number for the items being received. This screen will be discussed later in this document.

Last Item (Y/N) – if this is the last component being back flushed, enter Y, else enter N to enter data on additional components

OK - Press Enter key to complete transaction for posting to Intuitive ERP.

Print WIP Receipt Labels

If the system has been configured to print WIP Receipt labels, upon completion of transaction the following screen will be displayed:



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 Intuitive.INI file.

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.

A Note Concerning Label Printing

- The standard WIP receipt 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 Intuitive/The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

Inventory Adjustment (F11)

Selecting the Inventory Adjustment option from the Inventory Menu (or scanning F11 from the Function prompt) will display the following screen:

Item – Key or scan Item ID/part number of material being adjusted.

Description – Display only field of item name/description associated with indicated item id.

Function – Press F2 to display choice list of “Add/Subtract” or “Replace”.

Reason – Press F2 to display choice list of reasons for the adjustment.

Item – Display only field from previous screen.

Warehouse – Key, scan or press F2 to select Warehouse from choice list. If only one Warehouse exists, value will be defaulted.

Location – Key, scan or press F2 for choice list of Location where part is being adjusted.

Lot Number – Key or scan lot number of part being adjusted, if applicable.

Qty On Hand – The quantity of material in Intuitive inventory records.

Quantity – Key or scan quantity of material being adjusted. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being adjusted. This screen will be discussed later in this document.

Comments – Key or scan any comments relevant to the transaction, if applicable.

OK – Press Enter key to complete transaction for posting to Intuitive ERP.

F4 = Header Info – Pressing F4 at any time prior to pressing Enter on OK prompt will display the following screen:

Inventory Adjustment – F4 Header Info

If there are specific projects, customers, or vendors associated with the item for tracking or ordering purposes, this screen can be used to include the information in the adjustment transaction.

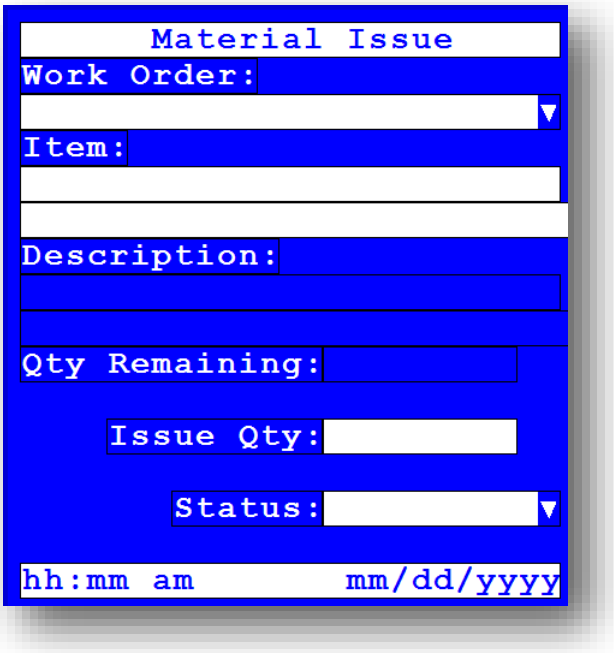
Project – Project tied to the inventory item being transacted.

Customer Ship To – Customer Ship To information tied to the inventory item being transacted.

Vendor – Vendor tied to the inventory item being transacted.

Material Issue (F12)

Selecting the Material Issue option from the Inventory Menu (or scanning F12 from the Function prompt) will display the following screen:



Work Order – Key, scan or press F2 to select Work Order from choice list.

Item – Key or scan Item ID/part number of material to be issued to the work order.

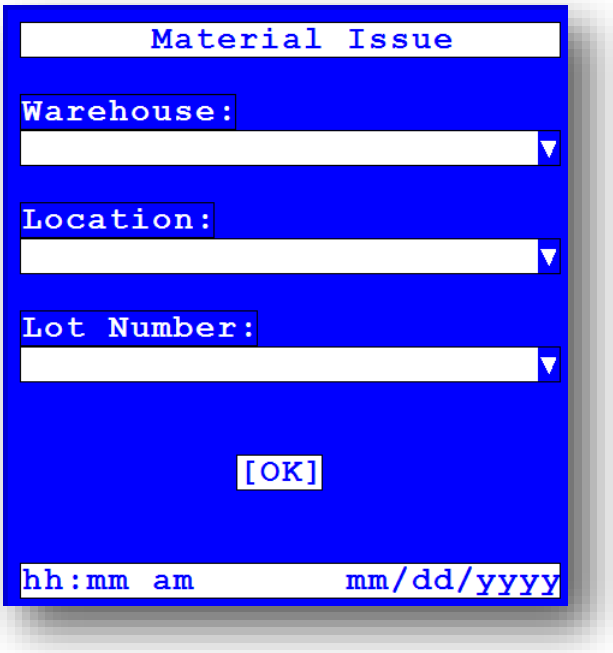
Description – Display only field of item name associated with indicated Item ID.

Qty Remaining – Display only value that shows quantity remaining to be issued.

Issue Qty – Key, scan or accept default of qty remaining to be issued. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being received. This screen will be discussed later in this document.

If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component part is marked as serial tracked and the parent item is marked serial tracked, the user will be taken to the “Serial Number Matching” screen to enter serial number for the items being received. This screen will be discussed later in this document.

Status – If Issue Qty >= to Qty Remaining, default value will be COMPLETE, otherwise it will be INCOMPLETE. User may choose/modify either value from choice list (press F2) which provides both options.



Warehouse – Key, scan or press F2 to select Warehouse from choice list. If only one Warehouse exists, value will be defaulted.

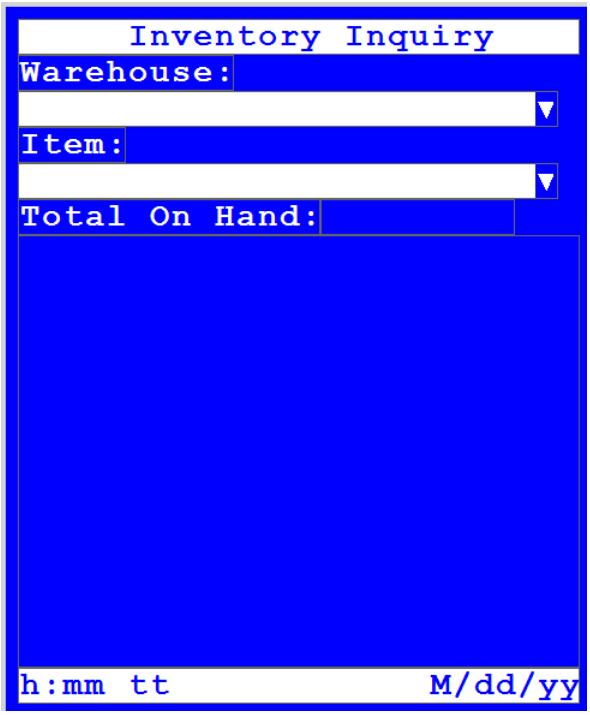
Location – Key, scan or press F2 for choice list of Locations material is being issued from

Lot Number – Key or scan lot number of material being issued, if applicable.

OK – Press Enter key to complete transaction for posting to Intuitive ERP.

Inventory Inquiry (INQ)

Selecting the Inventory Inquiry option from the Inventory Menu (or scanning INQ from the Function prompt) will display the following screen:



Warehouse – Key, scan or press F2 to display choice list that provides list of warehouses. This field may be left blank to return records from all warehouses.

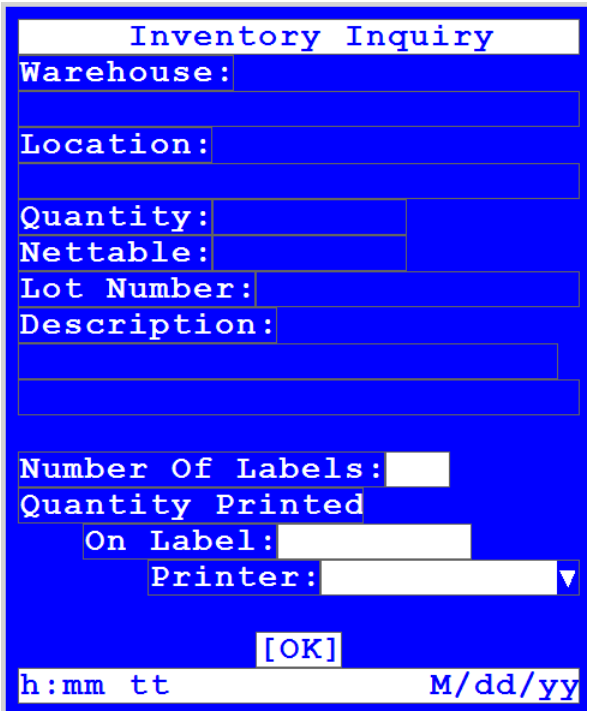
Item – Key, scan or press F2 to display choice list that provides list of item ids/part numbers. Once selection is made, system will display list box of all warehouse/locations the indicated material currently resides in as well as the quantity. User may scroll list to view all records

If F2 is pressed to provide a choice list, the list will be limited to 1000 records. User will also have the ability to apply a filter to the choice list, by first entering the first few characters of the item, and then pressing F2, and the list will return a list of items starting with the entered value.

Total On Hand – Display value of total of all item quantity, in the indicated warehouse.

Print Part Labels

If the system has been configured to print part labels, when an item is selected in the choice list, the following screen will be displayed:



Warehouse – display value of the warehouse of the item selected in the inventory inquiry list.

Location – display value of the location of the item selected in the inventory inquiry list.

Quantity – display value of the quantity of the item selected in the inventory inquiry list.

Nettable – display value of the whether or not the item selected in the inventory inquiry list is nettable.

Lot Number – display value of the lot number of the item selected in the inventory inquiry list, if the part is lot controlled.

Description – display value of the description of the item selected in the inventory inquiry 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 Intuitive configuration.

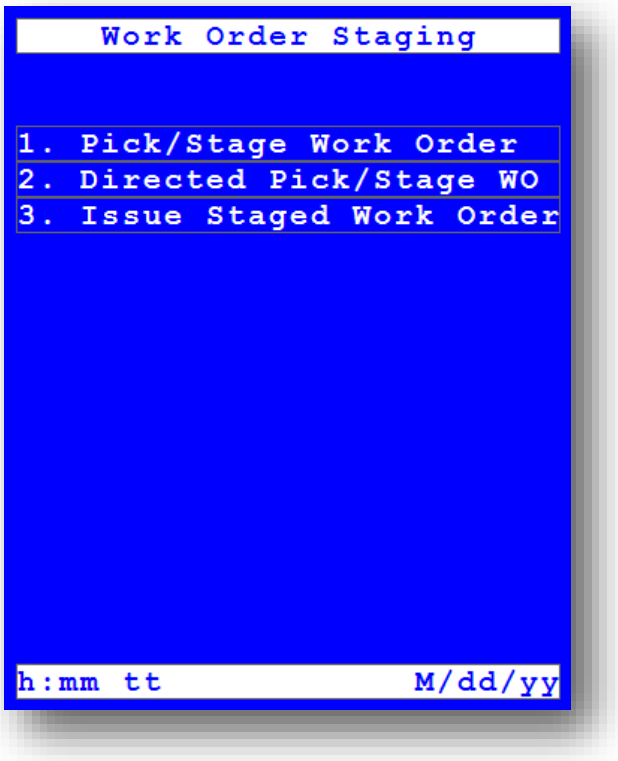
OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label.

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

Work Order Staging Menu

Selecting Work Order Staging from the Inventory Menu will display the following screen:



Described below is a brief description of general usage of the Pick Work Orders Menu options.

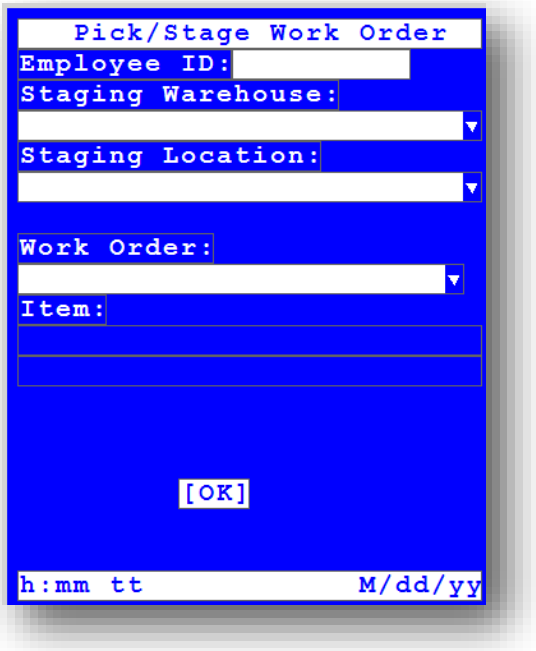
Pick/Stage Work Order is used to pick items of a work order to cart or staging location.

Directed Pick/Stage WO is used to pick items of a work order to cart or staging location where the system directs the user to the items by location order.

Issue Staged Work Order is used to issue parts picked for a work order.

Pick/Stage Work Order

Selecting the Pick/Stage Work Order option from the Pick Work Orders Menu will display the following screen:



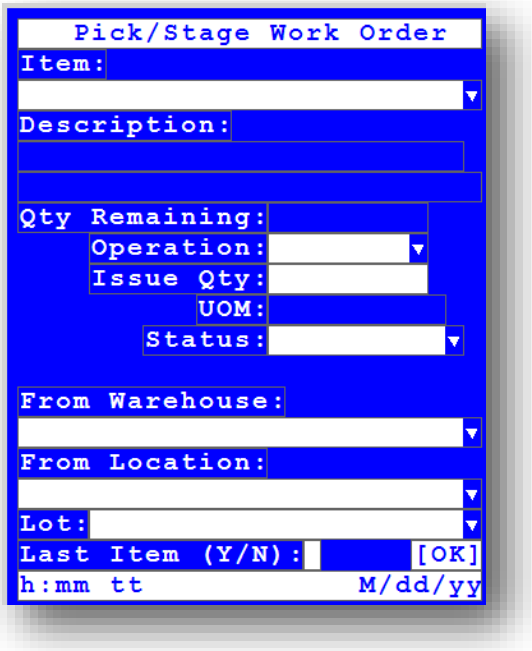
Staging Warehouse – Key, scan or select or press F2 to select the warehouse to stage the items for shipment

Staging Location – Key, scan or press F2 for choice list to select Location the item is being staged to for shipment

Work Order – Key, scan or press F2 to display choice list of Work Orders to pick items for.

Item – Display only field of item the work order is making.

OK – Press Enter key after review of information to pick items for the work order entered.



Item – Key or scan or press F2 Key to select Item ID/part number of material to be picked for work order.

Description– display only field of the description of the item being picked for shipping.

Qty Remaining – Display only value of the quantity remaining to issue for the entered part.

Operation – If the part is for a specific operation, enter or select the operation.

Issue Qty – Key, scan or accept default of qty remaining to be issued. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being received. This screen will be discussed later in this document.

If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component part is marked as serial tracked and the parent item is marked serial tracked, the user will be taken to the “Serial Number Matching” screen to enter serial number for the items being received. This screen will be discussed later in this document.

UOM – display only field of the unit of measure of the item being picked for shipping.

Status – If Issue Qty >= to Qty Remaining, default value will be COMPLETE, otherwise it will be INCOMPLETE. User may choose/modify either value from choice list (press F2) which provides both options..

From Warehouse – Key, scan or select or press F2 to select the warehouse the item is being picked from.

From Location – Key, scan or press F2 for choice list to select Location the item is being picked from.

Lot – Key or scan lot number of material being picked for shipping, if applicable

Last Item – If this is the last item to be picked, enter Y

OK – Press Enter key to complete transaction and post the location transfer of the item picked to Intuitive. If last item = N, user will be returned to the Item field to pick the next item on the work order, else screen will be cleared for next work order to be picked

Directed Pick/Stage Work Order

Selecting the Directed Pick/Stage WO option from the Work Order Staging Menu will display the following screen:

Staging Warehouse – Key, scan or select or press F2 to select the warehouse to stage the items for shipment

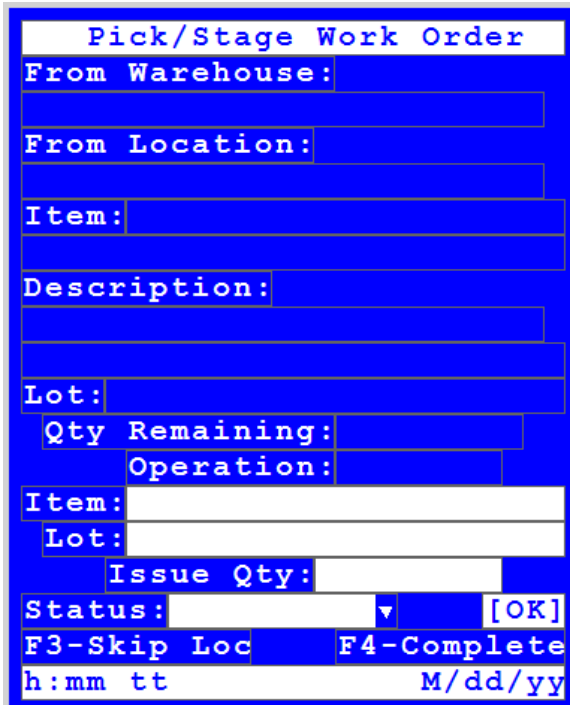
Staging Location – Key, scan or press F2 for choice list to select Location the item is being staged to for shipment

Work Order – Key, scan or press F2 to display choice list of Work Orders to pick items for.

Item – Display only field of item the work order is making.

Pick From Warehouse – Key, scan or press F2 for choice list to select Warehouse the items are to be picked from. Field is optional.

OK – Press Enter key after review of information to pick items for the work order entered.



From Warehouse – Display only field of the warehouse to go to, to pick the item.

From Location – Display only field of the location to go to, to pick the item.

Item – Display only field of the item to be picked.

Description – display only field of the description of the item being picked for shipping.

Lot – Display only field of the lot to be picked, if applicable.

Qty to Pick – Display only value that shows quantity remaining to picked for indicated item/line number

Operation – Display only field of the operation of the work order the items to be picked is for, if applicable.

Item – Scan the item to pick. Field must match the displayed item.

Lot – Scan the lot to pick. Field must match the displayed lot.

Issue Quantity – Key or scan quantity of material being picked for work order. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being shipped. This screen was discussed earlier in this document.

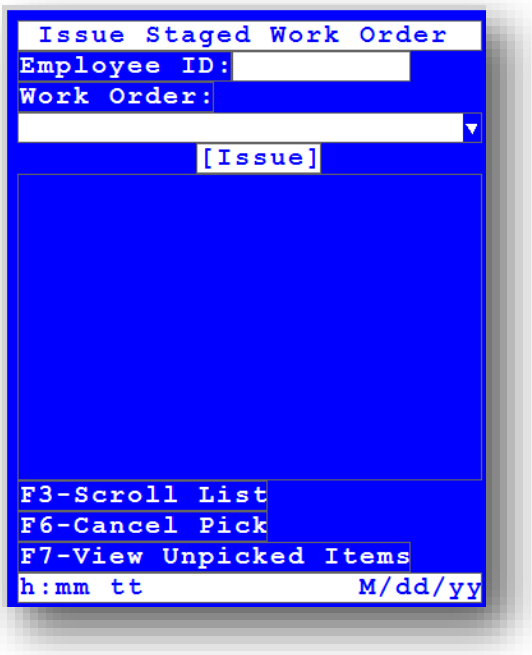
OK – Press Enter key to complete transaction and pick the item. System will then display the next item for picking information.

F3-Skip Loc – Press the F3 key on the scanner to skip the current location and move to the next item in the list of items to pick for the work order.

F4-Complete – Press the F4 key on the scanner to stop picking items for the work order entered and clear the screen for another pick.

Issue Staged Work Order

Selecting the Issue Staged Work Order option from the Work Order Staging Menu will display the following screen:



Work Order – Key, scan or press F2 to select Work Order from choice list. Once work order is entered, the list field will populate with items that have been picked for the work order.

Issue – Press Enter here to issue the items that have been picked for the work order..

F3 Scroll List – After a work order 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. If user presses enter on an item that is serial controlled, a screens displaying serial numbers picked for shipping will be displayed.

F6 Cancel Picks – After a work order has been entered, user can press the F6 key to cancel all picks made for the indicated work order. This will delete records from the table,

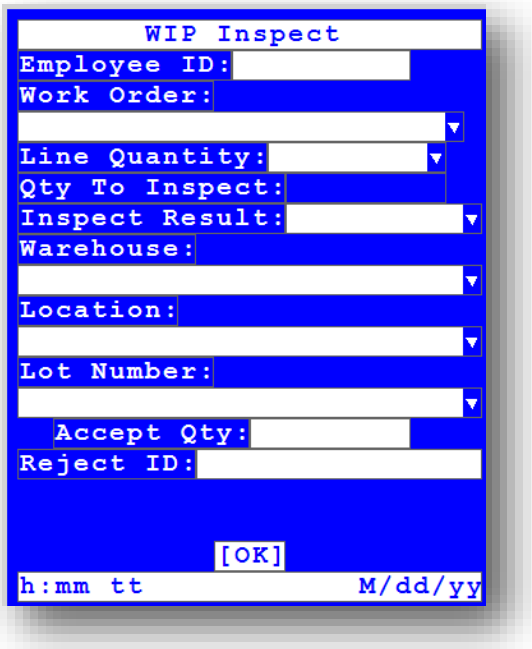
but user will need to do location transfer transactions to get items from the staging location back to an inventory locations.

F7 View Unpicked Items – After a work order has been entered and the list box has items picked, user can press F7 to view items for the picklist that have not been picked. Pressing F7 again will toggle back to viewing items that have been picked for the work order.

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

WIP Inspect

Selecting the WIP Inspect option from the Inventory Menu will display the following screen:



Work Order – Enter or select the work order to inspect items for

Line Quantity –select the line quantity the item were received against

Qty To Inspect – display only of the quantity remaining to inspect for the line quantity.

Inspection Result – select the inspection result, either ACCEPT, REJECT or SCRAP

Warehouse – enter or select the warehouse the items inspected are moved to

Location – enter or select the location the items inspected are moved to

Lot Number – enter or select the lot number of the item inspected.

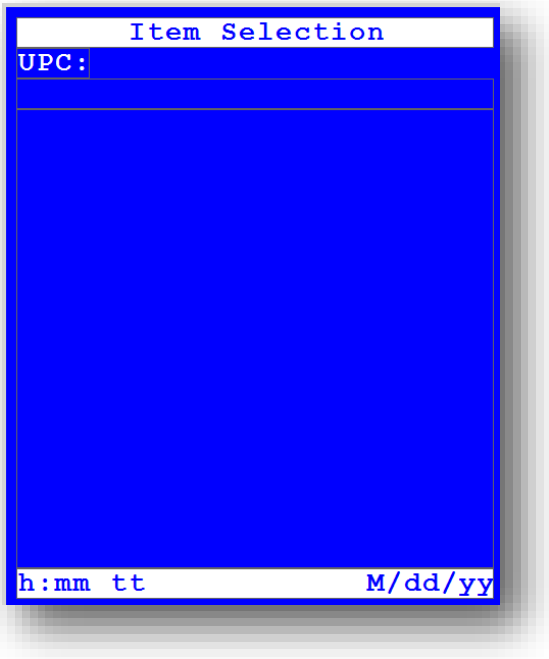
Accept Qty – enter or quantity inspected. Field caption will change based on the inspection result field

Reject ID – enter reject id. Only active if inspection result is REJECT OR SCRAP. Caption will change to Scrap ID if inspection result is SCRAP.

OK – press enter here to complete the inspection and post results.

Item Selection

If UPC scanning is enabled in the Intuitive SFDC configuration and the user scans a UPC barcode that multiple items with that value, the following screens will be displayed for the user to select the item that the UPC is associated with:

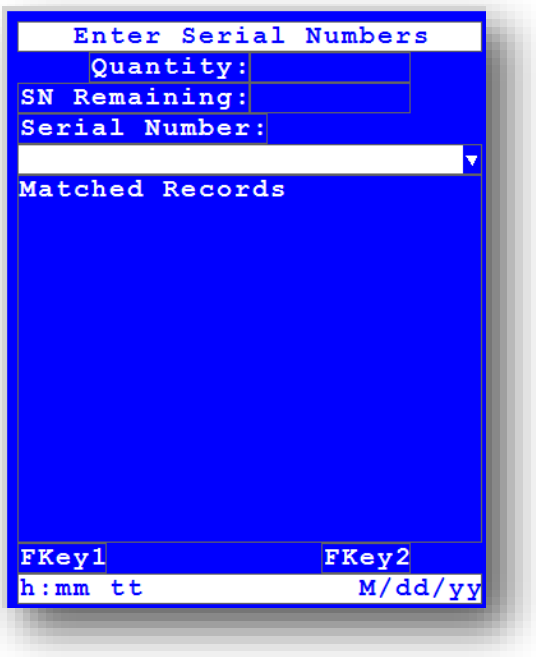


UPC – Display only value of the UPC entered.

List – The list will display the items and their description that are associated with the UPC value. User can scroll the list and select the item that they are wanting for the UPC value entered.

Enter Serial Numbers

If the Intuitive Version is set to 9.x in the Intuitive SFDC configuration, and the item being transacted against is marked as serial tracked, the following screen will be displayed for the user to enter serial numbers:



Quantity – Display only field of the quantity entered in the transaction before entering this screen.

SN Remaining – Display only field of number of serial numbers remaining to be entered. This value will start at the same value as the quantity field, and decrement by 1 each time a serial number is entered.

Serial Number – Scan or key in the serial number. If serial numbers are pre-allocated, or available in the correct status for the transaction, Press F2 to display choice list of available serial numbers for selection.

Matched Records – This list will contain all serial number entered, with the most recent being at the top.

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

> **F6=Done** - User can press the F6 key to say they are done collecting serial numbers. Depending upon setting in Intuitive, they may be able to stop short of collecting the full quantity, or they may have to collect the total quantity before

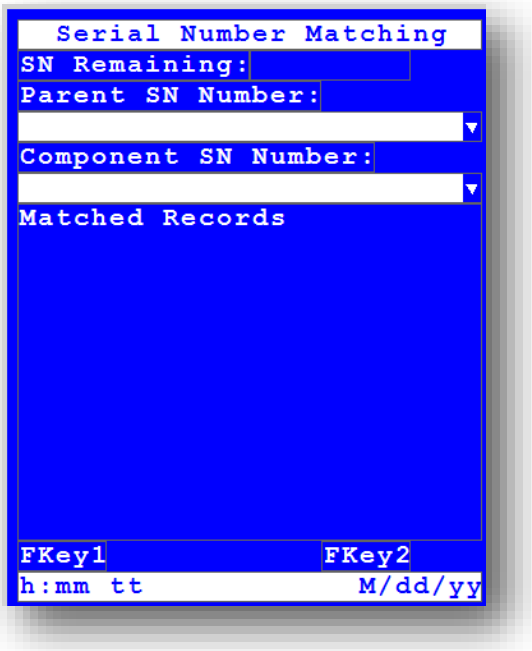
indicating done. If the user is in the Matched Records list, the F6 key will take them from the list back to the serial number prompt for more serial number entry.

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

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

Serial Number Matching

If the Intuitive Version is set to 9.x in the Intuitive SFDC configuration, and the item being transacted against is marked as serial tracked, and the parent item is also serial tracked, the following screen will be displayed for the user to enter serial numbers:



SN Remaining – Display only field of number of serial numbers remaining to be entered. This value will start at the same value as the quantity field enter in the transaction, and decrement by 1 each time a serial number is entered.

Parent Serial Number – Scan or key in the parent serial number. If parent serial numbers are pre-allocated, or available in the correct status for the transaction, Press F2 to display choice list of available parent serial numbers for selection.

Component Serial Number – Scan or key in the component serial number. If component serial numbers are pre-allocated, or available in the correct status for the transaction, Press F2 to display choice list of available component serial numbers for selection.

Matched Records – This list will contain all parent and component serial number entered, with the most recent being at the top.

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

> **F6=Done** - User can press the F6 key to say they are done matching serial numbers. Depending upon setting in Intuitive, they may be able to stop short of collecting the full quantity, or they may have to collect the total quantity before

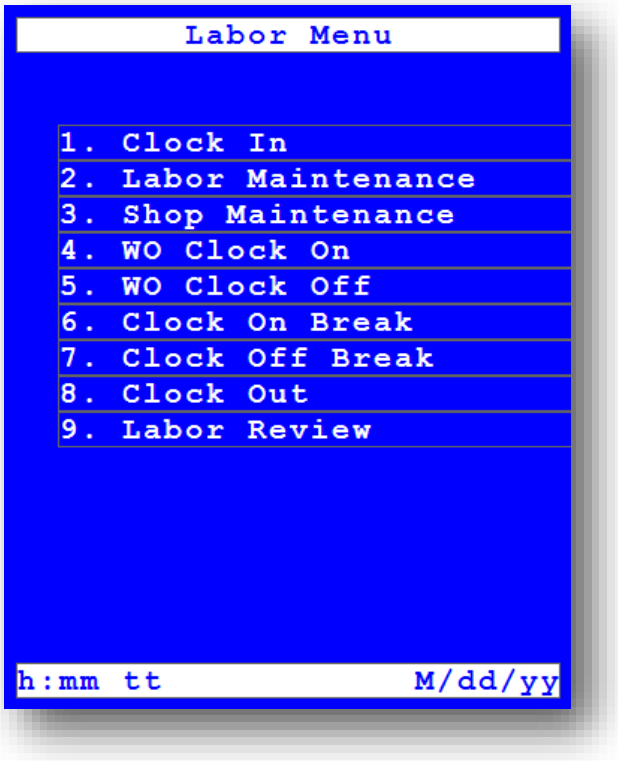
indicating done. If the user is in the Matched Records list, the F6 key will take them from the list back to the serial number prompt for more serial number entry.

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

F8=Delete - if the user is in the Matched Records list, they can press the F8 key on a parent/component serial number highlighted and remove it from the list.

Labor Menu

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



Described below is a brief description of what each of the Labor Menu options are used for.

Clock In is used to clock users into the system.

Labor Maintenance is used to record elapsed labor time against a work order.

Shop Maintenance is used to record elapsed shop time against a work order.

WO Clock On is used to start real labor time against a work order.

WO Clock Off is used to stop real labor time against a work order.

Clock On Break is used to clock users onto a break.

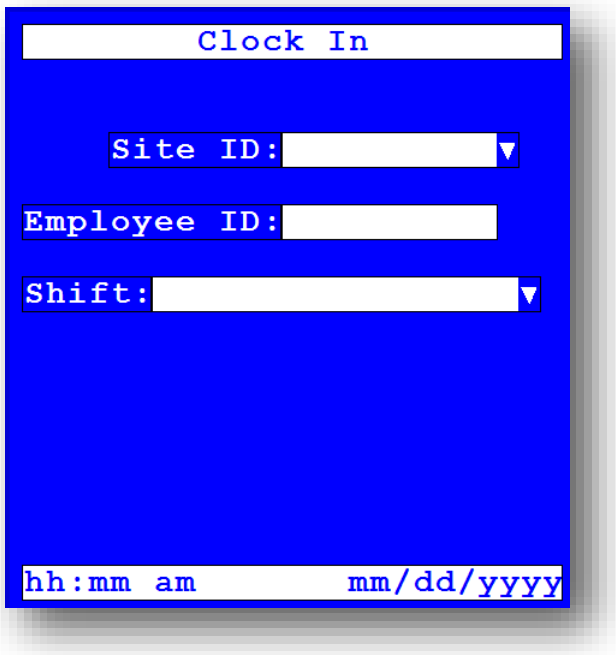
Clock Off Break is used to clock users off of a break.

Clock Out is used to clock users out of the system.

Labor Review is used to review user's hours for a timeframe.

Clock In (F1)

Selecting the Clock In option from the Labor Menu (or scanning F1 from the Function prompt) will display the following screen:



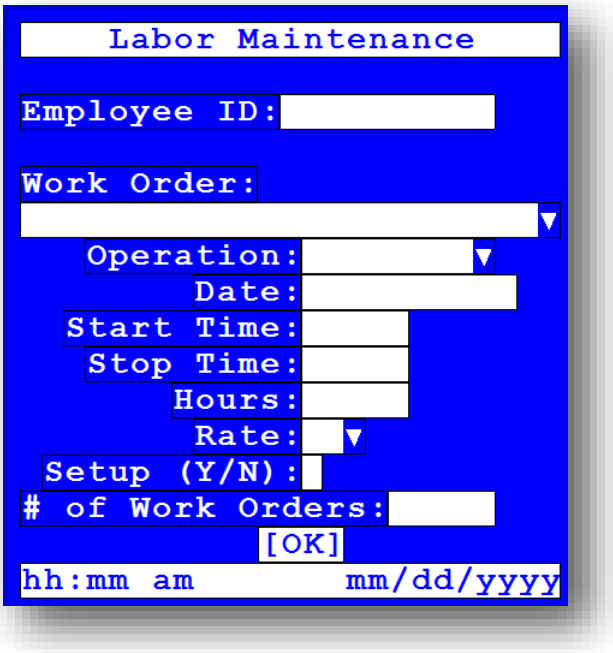
Site ID – Key, scan or select or press F2 to select the Site ID where labor will be recorded.

Employee ID – Key or scan the Employee ID of the user clocking into labor.

Shift – Press F2 to display choice list of Shifts available to record labor against, or press Enter to accept default for employee clocking into labor. Pressing Enter completes the transaction and automatically logs user into default idle work order/operation as defined in the Intuitive.INI file.

Labor Maintenance (F4)

Selecting the Labor Maintenance option from the Labor Menu (or scanning F4 from the Function prompt) will display the following screen:



Employee ID – Key or scan the Employee ID of the user recording labor

Work Order – Key, scan or select or press F2 to select from choice list the Work Order to report time against

Operation – Key, scan or press F2 to select from choice list the Operation to report time against, if applicable

Date – Key date of recorded labor; default will be current system date

Start Time – Key start time of recorded labor, 4 characters, 24-hour time format (for example, 1:00 PM would be keyed as 1300)

Stop Time – Key end time of recorded labor, 4 characters, 24-hour time format (for example, 1:00 PM would be keyed as 1300)

Hours – Display field of total hours recorded against work order

Rate – Press F2 to select the rate type to charge the recorded labor against

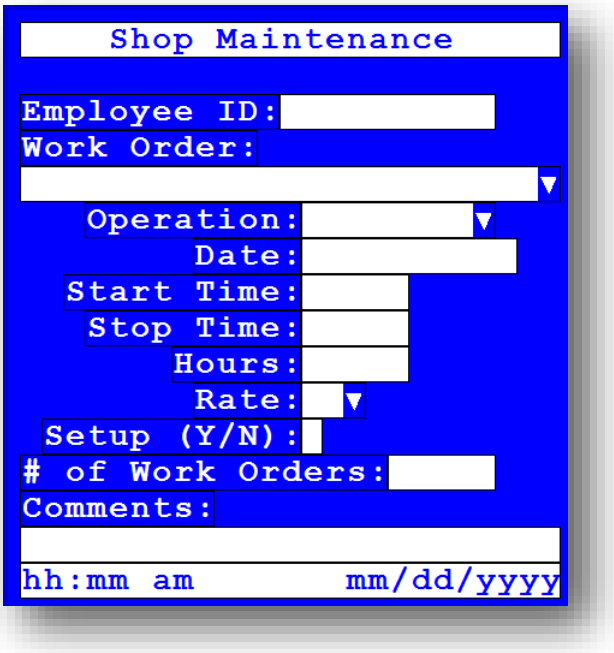
Setup (Y/N) – Key or scan Y if labor recorded was Setup time, key or scan N if it was not

# of Work Orders – Key number or work orders to record time against, or press Enter to accept default of 1

OK – Press Enter to complete the transaction

Shop Maintenance (F5)

Selecting the Shop Maintenance option from the Labor Menu (or scanning F5 from the Function prompt) will display the following screen:



Employee ID – Key or scan the Employee ID of the user recording labor

Work Order – Key, scan or select or press F2 to select from choice list the Work Order to report time against

Operation – Key, scan or press F2 to select from choice list the Operation to report time against, if applicable

Date – Key date of recorded labor; default will be current system date

Start Time – Key start time of recorded labor, 4 characters, 24-hour time format (for example, 1:00 PM would be keyed as 1300)

Stop Time – Key end time of recorded labor, 4 characters, 24-hour time format (for example, 1:00 PM would be keyed as 1300)

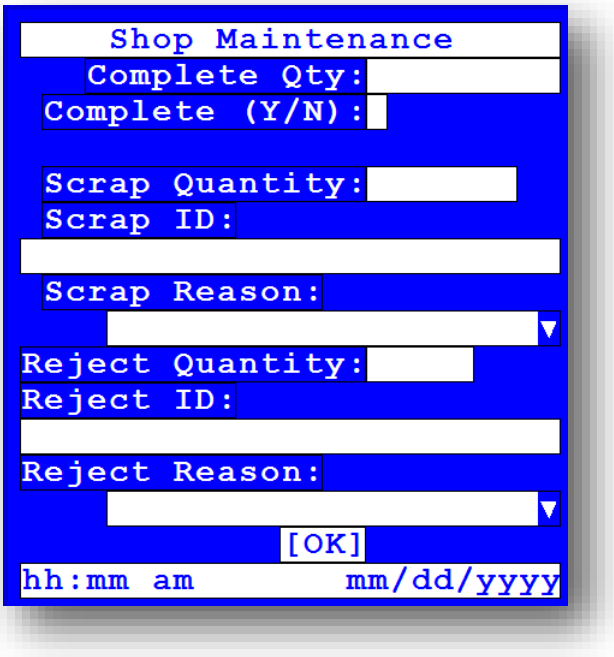
Hours – Display field of total hours recorded against work order

Rate – Press F2 to select the rate type to charge the recorded labor against

Setup (Y/N) – Key or scan Y if labor recorded was Setup time, key or scan N if it was not

Comments – Enter any comments in this field

# of Work Orders – Key number or work orders to record time against, or press Enter to accept default of 1



Complete Qty – Key or scan the quantity of materials completed on the work order

Complete (Y/N) – Key Y if quantity completed will complete the work order (if total quantity is completed, system will automatically update status to Complete)

Scrap Qty – Key or scan the quantity of materials scrapped against the work order, if applicable

Scrap ID – Key or scan the Scrap ID to associate with the scrapped materials, if applicable

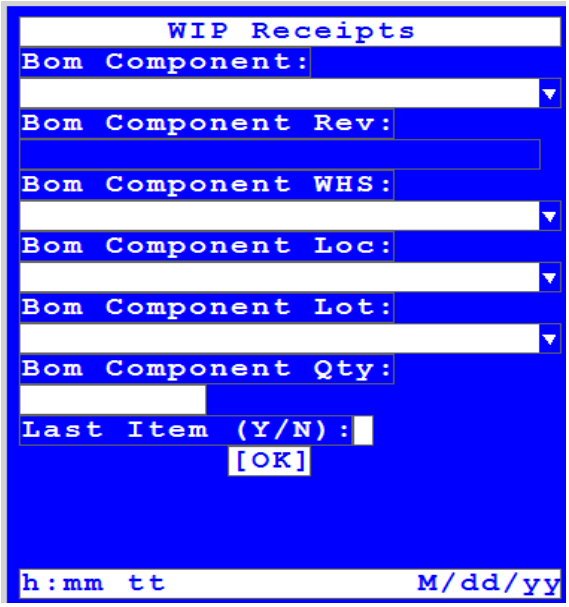
Scrap Reason – Press F2 to display choice list of scrap reasons for the scrapped material, if applicable

Reject Qty – Key or scan the quantity of materials rejected from the work order, if applicable

Reject ID – Key or scan the Reject ID to associate with the rejected materials, if applicable

Reject Reason – Press F2 to display choice list of reject reasons for the rejected material, if applicable

OK – Press Enter to complete the transaction. If components for the job are marked as back flushed and the component item is lot, location, or serial tracked, the user will be taken to the following screen to issue those components to the job



BOM Component – Key, scan or press F2 to select component item from choice list.

BOM Rev – Display only field of the component revision.

BOM Component WHS – Key, scan or press F2 to select warehouse for the component, if applicable.

BOM Component Loc – Key, scan or press F2 to select location for the component, if applicable.

BOM Component Lot – Key, scan or press F2 to select lot for the component, if applicable.

BOM Component Qty – Key or scan the quantity for the component. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being transacted. This screen will be discussed later in this document.

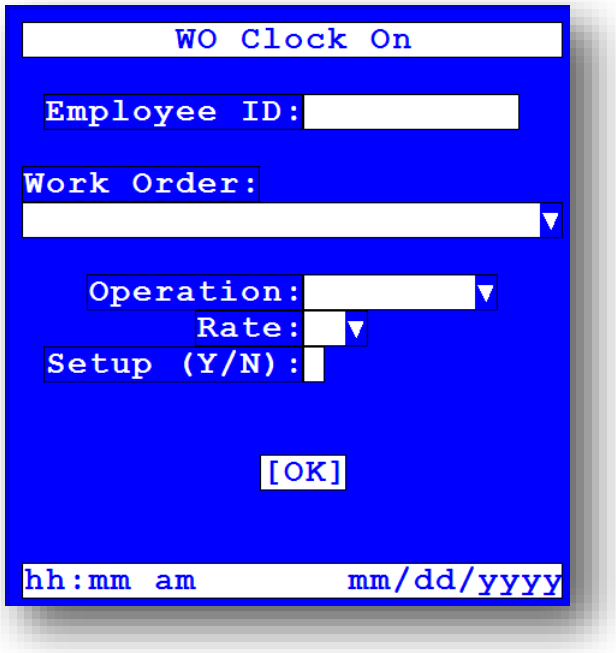
If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component part is marked as serial tracked and the parent item is marked serial tracked and have been preallocated, the user will be taken to the “Serial Number Matching” screen to enter serial number for the items being transacted. This screen will be discussed later in this document.

Last Item (Y/N) – if this is the last component being back flushed, enter Y, else enter N to enter data on additional components

OK - Press Enter key to complete transaction for posting to Intuitive ERP.

WO Clock On (WOON)

Selecting the WO Clock On option from the Labor Menu (or scanning WOON from the Function prompt) will display the following screen:



Employee ID – Key or scan the Employee ID of the user to begin recording labor

Work Order – Key, scan or select or press F2 to select from choice list the Work Order to begin recording time against

Operation – Key, scan or press F2 to select from choice list the Operation to record time against, if applicable

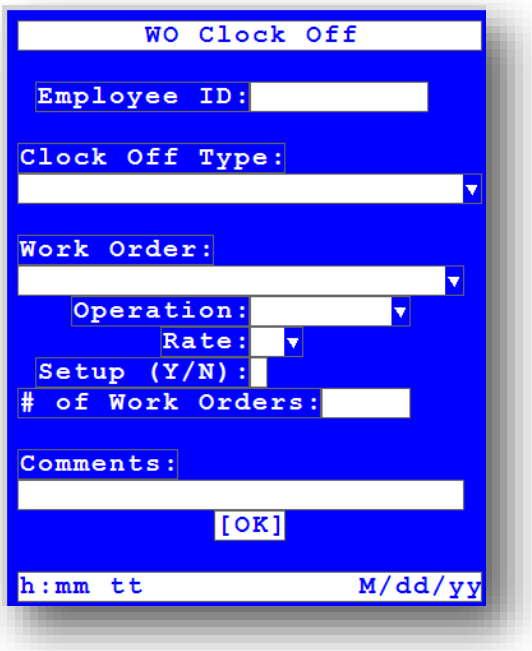
Rate – Press F2 to select the rate type to charge the recorded labor against

Setup (Y/N) – Key or scan Y if labor recorded was Setup time, key or scan N if it was not

OK – Press Enter to complete the transaction. System automatically logs user out of default idle work order/operation as defined in the Intuitive.INI file, if applicable

WO Clock Off (WOOFF)

Selecting the WO Clock Off option from the Labor Menu (or scanning WOOFF from the Function prompt) will display the following screen:



Employee ID – Key or scan the Employee ID of the user to stop recording labor

Clock Off Type – Select how to clock off. This prompt will default to “Single Work Order” which will have the transaction function by collecting each prompt below. Alternately, the user could select “All WOs No Qty” or “All WOs Remaining Qty” to clock off all the work orders that the employee is clocked onto. These options will turn the work order, operation rate and setup fields to display only, and user will only enter number of work orders, which is defaulted to the number of records the employee is clocked onto, and comments.

Work Order – Key, scan or select or press F2 to select from choice list the Work Order to stop recording time against; value will default to work order clocked into

Operation – Key, scan or press F2 to select from choice list the Operation to stop time against, if applicable; value will default to operation clocked into

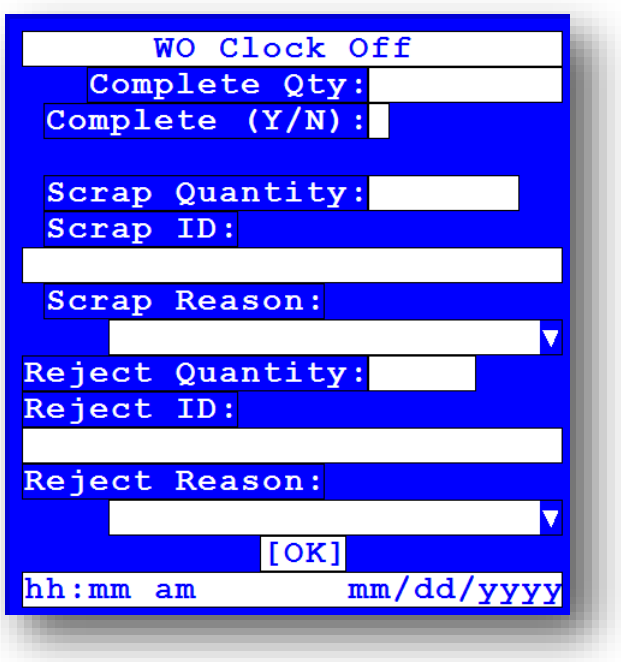
Rate – Press F2 to select the rate type to charge the recorded labor against; value will default to rate clocked into

Setup (Y/N) – Key or scan Y if labor recorded was Setup time, key or scan N if it was not; value will default to value entered on WO clock on

# of Work Orders – Key number or work orders to record time against

Comments – Key or scan any Comments related to the labor collected

OK – Press Enter to complete the transaction. System automatically logs user into default idle work order/operation as defined in the Intuitive.INI file, if applicable. Finally, the following completions screen will be displayed, if applicable:



Complete Qty – Key or scan the quantity of materials completed on the work order

Complete (Y/N) – Key Y if quantity completed will complete the work order (if total quantity is completed, system will automatically update status to Complete)

Scrap Qty – Key or scan the quantity of materials scrapped against the work order, if applicable

Scrap ID – Key or scan the Scrap ID to associate with the scrapped materials, if applicable

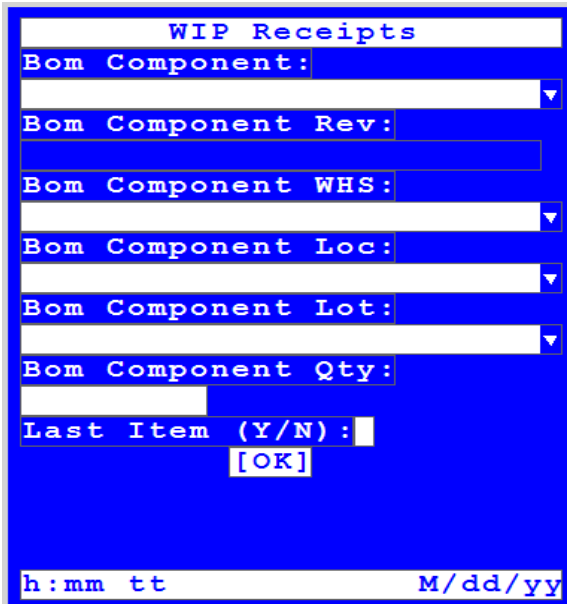
Scrap Reason – Press F2 to display choice list of scrap reasons for the scrapped material, if applicable

Reject Qty – Key or scan the quantity of materials rejected from the work order, if applicable

Reject ID – Key or scan the Reject ID to associate with the rejected materials, if applicable

Reject Reason – Press F2 to display choice list of reject reasons for the rejected material, if applicable

OK – Press Enter to complete the transaction. If components for the job are marked as back flushed and the component item is lot, location, or serial tracked, the user will be taken to the following screen to issue those components to the job



BOM Component – Key, scan or press F2 to select component item from choice list.

BOM Rev – Display only field of the component revision.

BOM Component WHS – Key, scan or press F2 to select warehouse for the component, if applicable.

BOM Component Loc – Key, scan or press F2 to select location for the component, if applicable.

BOM Component Lot – Key, scan or press F2 to select lot for the component, if applicable.

BOM Component Qty – Key or scan the quantity for the component. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being transacted. This screen will be discussed later in this document.

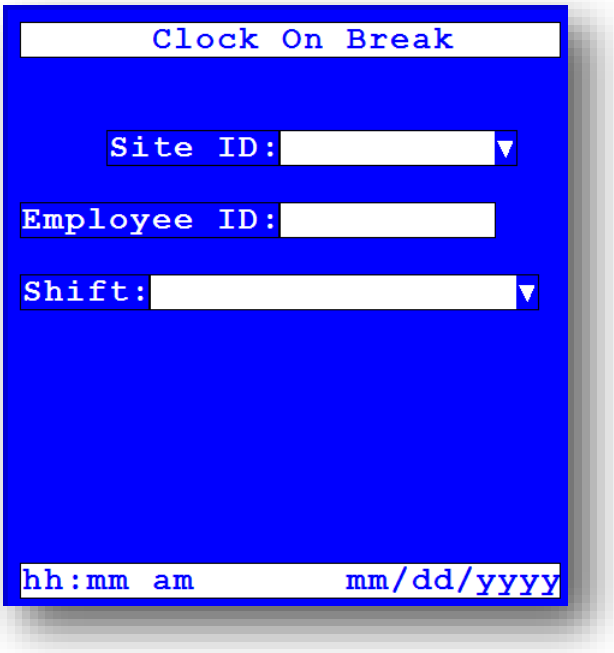
If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the component part is marked as serial tracked and the parent item is marked serial tracked and have been preallocated, the user will be taken to the “Serial Number Matching” screen to enter serial number for the items being transacted. This screen will be discussed later in this document.

Last Item (Y/N) – if this is the last component being back flushed, enter Y, else enter N to enter data on additional components

OK - Press Enter key to complete transaction for posting to Intuitive ERP.

Clock On Break (BON)

Selecting the Clock On Break option from the Labor Menu (or scanning F2 from the Function prompt) will display the following screen:



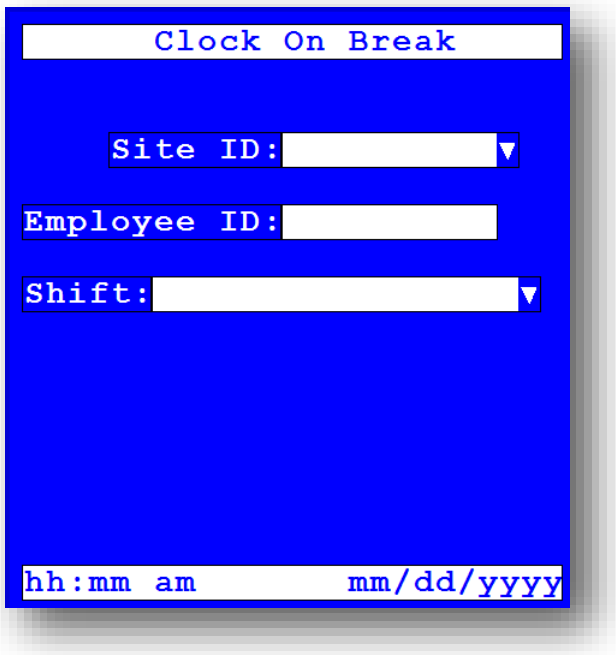
Site ID – Key, scan or select or press F2 to select the Site ID where labor was recorded

Employee ID – Key or scan the Employee ID of the user clocking out of labor

Shift – Press F2 to display choice list of Shifts available to record labor against, or press Enter to accept default for employee clocking on break. Pressing Enter completes the transaction and automatically clocks the user out of all work orders they were clocked onto. This list of work orders is saved so the system can clock the user back on these when they clock off break.

Clock Off Break (BOFF)

Selecting the Clock Off Break option from the Labor Menu (or scanning F2 from the Function prompt) will display the following screen:

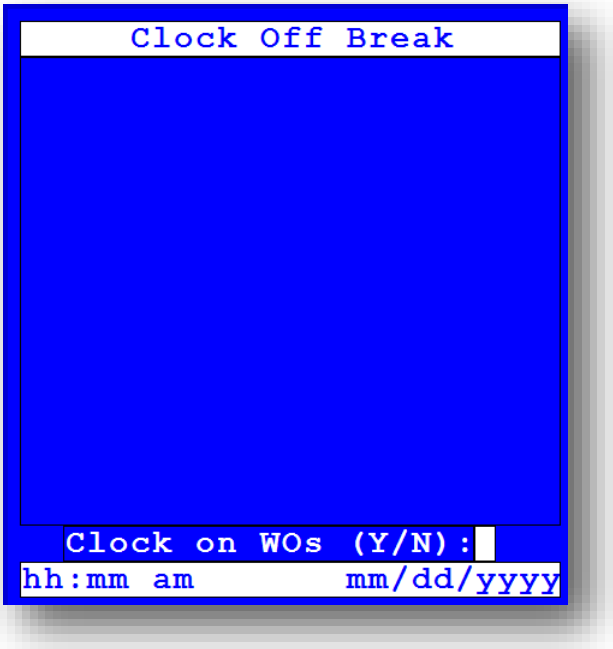


Site ID – Key, scan or select or press F2 to select the Site ID where labor was recorded

Employee ID – Key or scan the Employee ID of the user clocking out of labor

Shift – Press F2 to display choice list of Shifts available to record labor against, or press Enter to accept default for employee clocking on break. Pressing Enter completes the transaction and automatically clocks the user out of all work orders they were clocked into. This list of work orders is saved so the system can clock the user back on these when they clock off break.

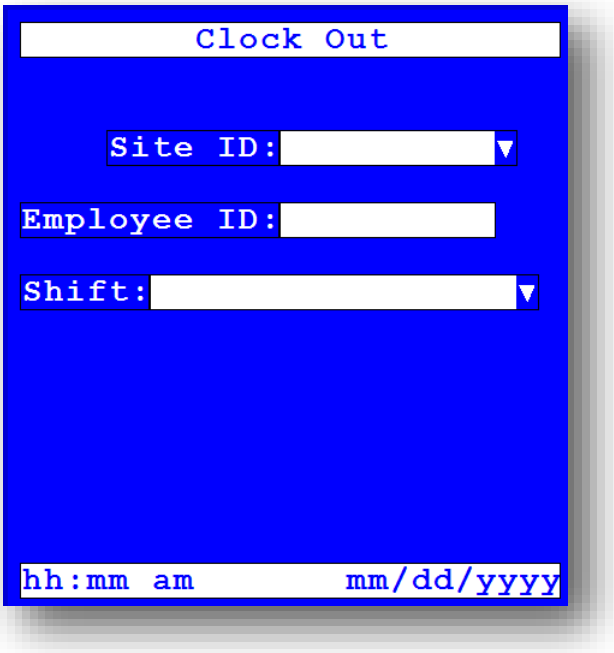
If the user was clocked on jobs when they clocked on break, they will be presented with a list of these work orders and can clock back on them as required.



Clock on WOs (Y/N) – To clock back on these work orders, enter Y, else leave blank or enter N

Clock Out (F2)

Selecting the Clock Out option from the Labor Menu (or scanning F2 from the Function prompt) will display the following screen:



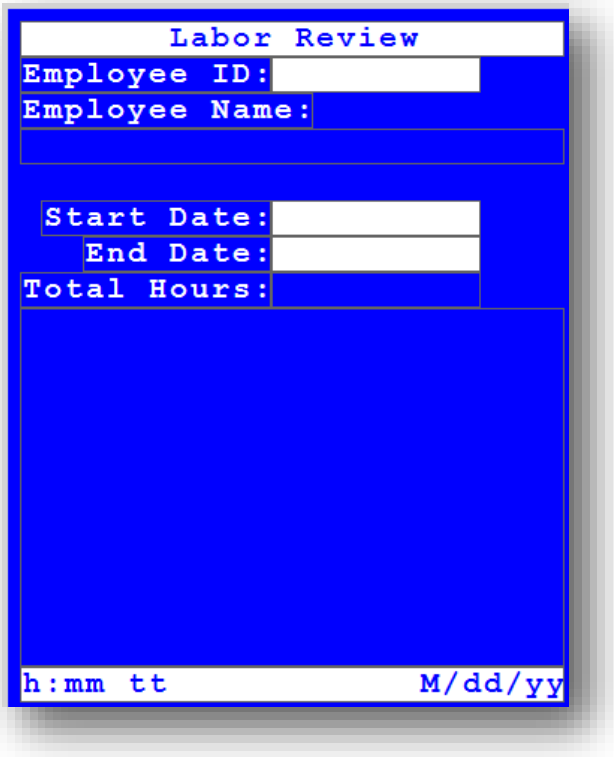
Site ID – Key, scan or select or press F2 to select the Site ID where labor was recorded

Employee ID – Key or scan the Employee ID of the user clocking out of labor

Shift – Press F2 to display choice list of Shifts available to record labor against, or press Enter to accept default for employee clocking out of labor. Pressing Enter completes the transaction and automatically logs user out of default idle work order/operation as defined in the Intuitive.INI file, if applicable

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 ID – Key or scan the Employee ID. 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 ID 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.

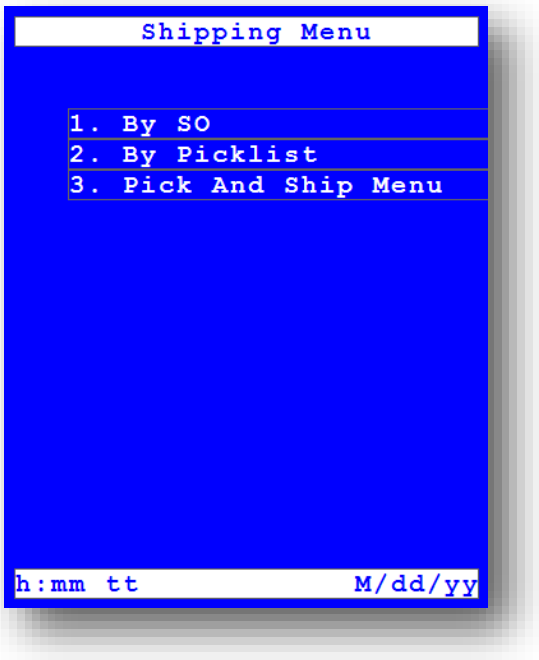
Total Hours – This display-only field will display the total number of hours recorded for employee for the date range entered.

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

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



Described below is a brief description of what each of the Shipping Menu options are used for.

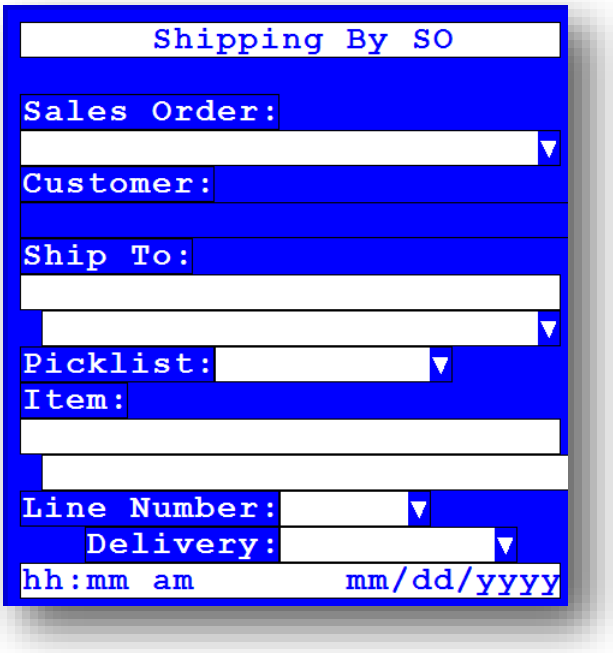
By **SO** is used to ship items by Sales Order number

By **Picklist** is used to ship items by Picklist number.

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 SO (F7)

Selecting the By SO option from the Shipping Menu (or scanning F7 from the Function prompt) will display the following screen:



Sales Order – Key, scan or select or press F2 to select from choice list Sales Order to be shipped.

Customer – Display only field of Customer name associated with indicated sales order.

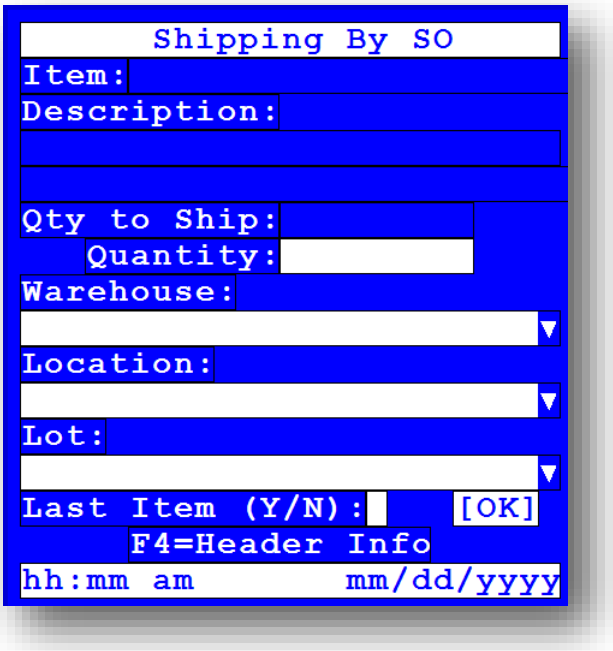
Ship To – Press F2 to display choice list of Ship To values associated with indicated sales order.

Picklist – If there is more than one picklist for this sales order and customer; enter, scan or press F2 to select from a list the picklist

Item – Key or scan Item ID/part number of material to be shipped.

Line Number – Key, scan or press F2 to select from choice list the Line Number associated with the indicated item to be shipped.

Delivery – Display field of delivery for line being shipped. If there is more than one delivery, user may press F2 to display a choice list of deliveries for the indicated line and select which delivery is being shipped.



Item – Display field from previous screen.

Description – Display field from previous screen.

Qty to Ship – Display only value that shows quantity remaining to ship for indicated item/line number.

Quantity – Key, scan or accept default of Ship Qty of material being shipped. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being shipped. This screen will be discussed later in this document.

Warehouse – Key, scan or select Warehouse from choice list. If only one Warehouse exists, value will be defaulted.

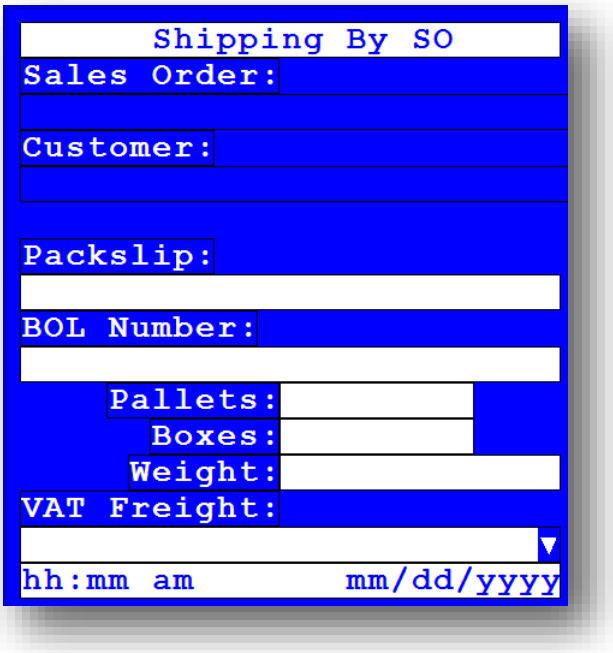
Location – Key, scan or press F2 for choice list to select Location material is being shipped from.

Lot – Key or scan lot number of material being shipped, if applicable.

Last Item – If this is the last item to be shipped, enter Y

OK – Press Enter key to complete transaction for posting to Intuitive ERP.

F4 = Header Info – Pressing F4 at any time prior to pressing Enter on OK prompt will display the following screen:



Sales Order – Display field from previous screen.

Customer – Display only field of Customer name associated with indicated sales order.

Packslip – If Master Control Setting Key for Sales Order Processing Next Packing Slip ID is set to use Auto Numbering, user can press F2 to get next packslip number. If Auto Number is not setup, user can scan packing slip number, if applicable.

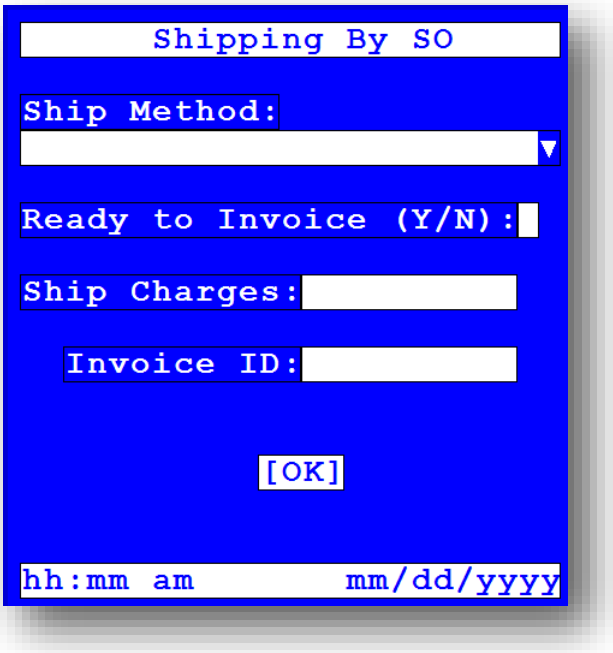
BOL Number – Key or scan BOL number, if applicable.

Pallets – Key total number of pallets for the shipment, if applicable.

Boxes – Key total number of boxes for the shipment, if applicable.

Weight – Key total weight for the shipment, if applicable.

VAT Freight – Key VAT Freight value, or press F2 to select value from choice list, for the shipment, if applicable.



Ship Method – Press F2 for choice list of Ship Methods available to the shipment.

Rdy to Invoice (Y/N) – Default value will be Y for Yes, otherwise key N for No if shipment is Ready to Invoice upon completion of transaction.

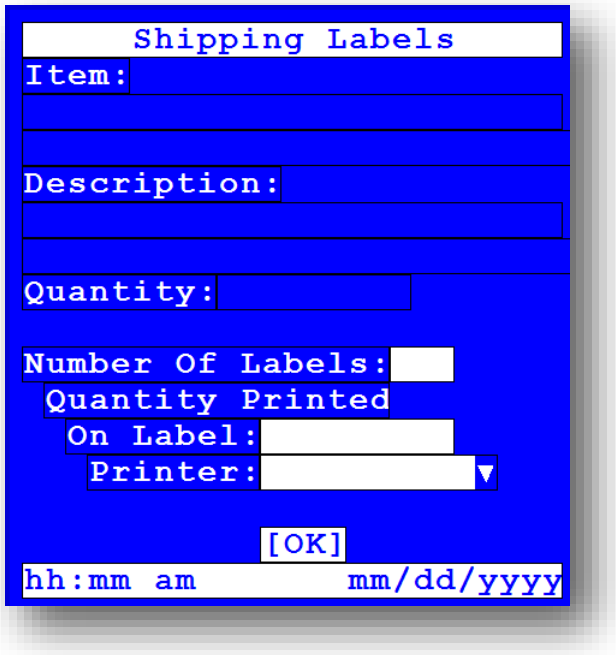
Ship Charges – Key value of Ship Charges, if applicable.

Invoice ID – Key value of Invoice ID, if applicable.

OK – Press Enter key to complete transaction for posting to Intuitive ERP. User will be returned to prompt from which they pressed F4 to key the Header Info fields.

Print Shipping Labels

If the system has been configured to print Shipping labels, upon completion of transaction the following screen will be displayed:



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.

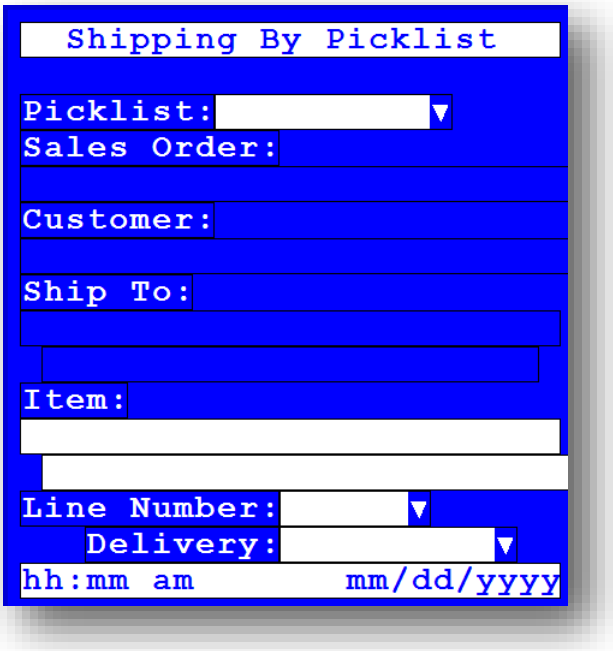
Quantity Printed on Label – Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the Intuitive.INI file.

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.

By Picklist (F7a)

Selecting the By Picklist option from the Shipping Menu (or scanning F7a from the Function prompt) will display the following screen:



Picklist – Key, scan or press F2 to select Picklist from choice list

Sales Order – Display field of Sales Order associated with indicated picklist

Customer – Display only field of Customer name associated with indicated sales order

Ship To – Display only field of Ship To name associated with indicated sales order

Item – Key or scan Item ID/part number of material to be shipped

Line Number – Key, scan or press F2 to select from choice list the Line Number associated with the indicated material to be shipped.

Delivery – Display field of delivery for line being shipped. If there is more than one delivery, user may press F2 to display a choice list of deliveries for the indicated line and select which delivery is being shipped.

Item – Display field from previous screen

Description – Display field from previous screen

Qty to Ship – Display only value that shows quantity remaining to ship for indicated item/line number

Quantity – Key, scan or accept default of Ship Qty of material being shipped. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being shipped. This screen will be discussed later in this document.

Warehouse – Key, scan or select Warehouse from choice list. If only one Warehouse exists, value will be defaulted

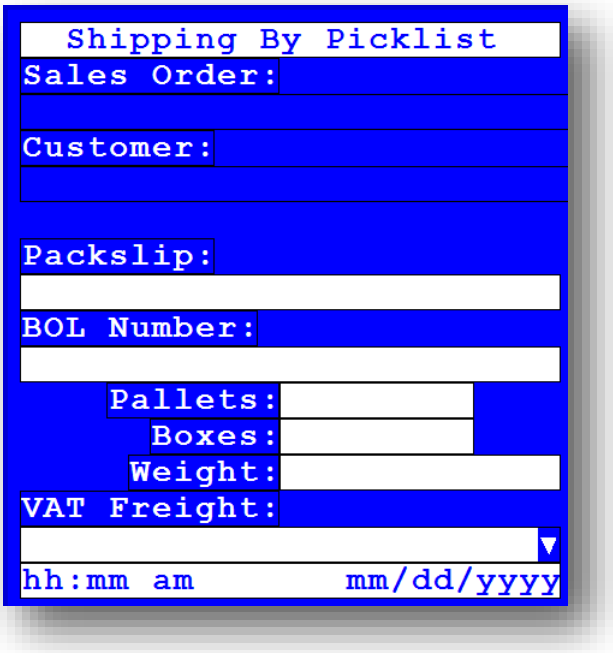
Location – Key, scan or press F2 for choice list to select Location material is being shipped from

Lot – Key or scan lot number of material being shipped, if applicable

Last Item – If this is the last item to be shipped, enter Y

OK – Press Enter key to complete transaction for posting to Intuitive ERP

F4 = Header Info – Pressing F4 at any time prior to pressing Enter on OK prompt will display the following screen:



Sales Order – Display field from previous screen

Customer – Display only field of Customer name associated with indicated sales order

Packslip – If Master Control Setting Key for Sales Order Processing Next Packing Slip ID is set to use Auto Numbering, user can press F2 to get next packslip number. If Auto Number is not setup, user can scan packing slip number, if applicable

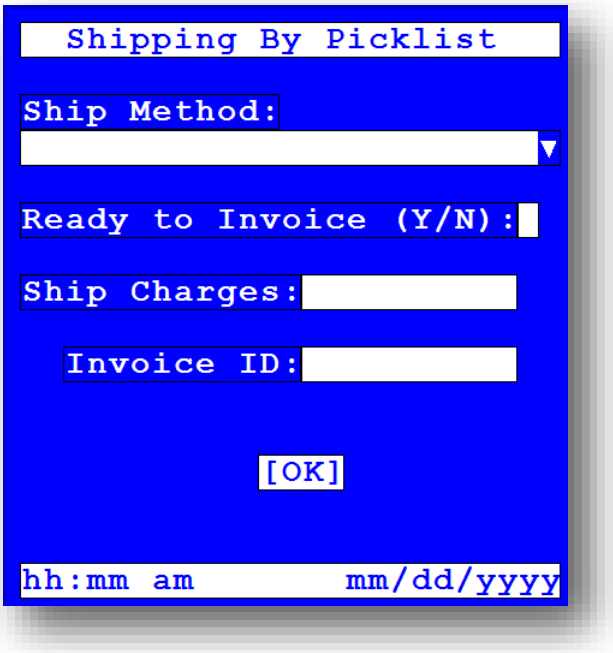
BOL Number – Key or scan BOL number, if applicable

Pallets – Key total number of pallets for the shipment, if applicable

Boxes – Key total number of boxes for the shipment, if applicable

Weight – Key total weight for the shipment, if applicable

VAT Freight – Key VAT Freight value, or press F2 to select value from choice list, for the shipment, if applicable.



Ship Method – Press F2 for choice list of Ship Methods available to the shipment.

Ready to Invoice (Y/N) – Default value will be Y for Yes, otherwise key N for No if shipment is Ready to Invoice upon completion of transaction.

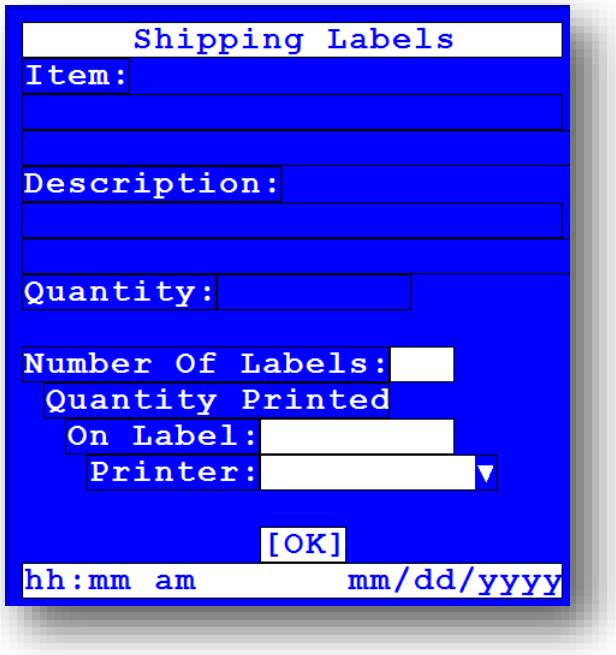
Ship Charges – Key value of Ship Charges, if applicable.

Invoice ID – Key value of Invoice ID, if applicable.

OK – Press Enter key to complete transaction for posting to Intuitive ERP. User will be returned to prompt from which they pressed F4 to key the Header Info fields.

Print Shipping Labels

If the system has been configured to print Shipping labels, upon completion of transaction the following screen will be displayed:



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 Intuitive.INI file

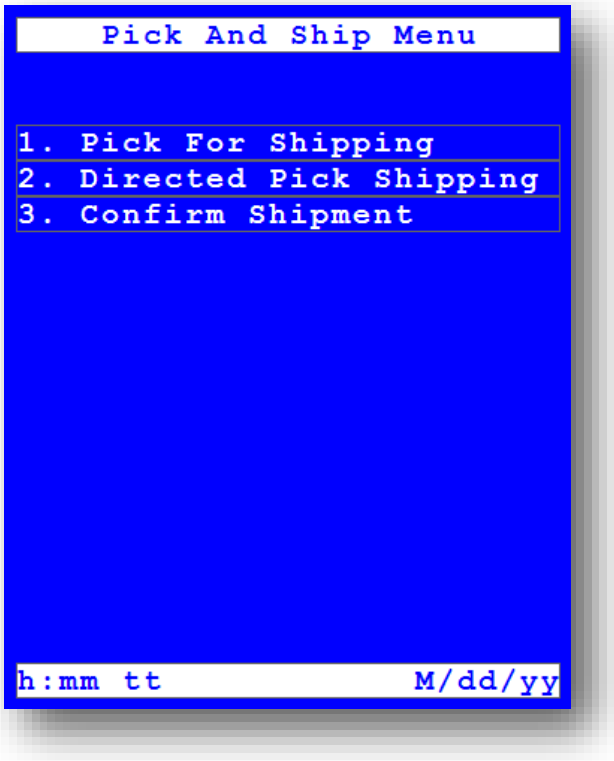
OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label that appears as follows:

A Note Concerning Label Printing

- The standard shipping 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 Intuitive/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

Selecting the Pick and Ship Menu option from the Shipping Menu will display the following screen:



Described below is a brief description of what each of the Pick and Ship Menu options are used for.

Pick For Shipping is used to gather up items on a picklist to bring them to a shipping stating location. A location transfer transaction is done to move the items to the shipment staging are.

Directed Pick Shipping is used to gather up items on a picklist to bring them to a shipping stating location, where the user is directed in order of locations to pick the items. A location transfer transaction is done to move the items to the shipment staging are

Confirm Shipment is used complete the shipment process from the shipment staging location for items that were picked for a picklist.

Pick For Shipping

Selecting the Pick For Shipping option from the Pick and Ship Menu will display the following screen:

Staging Warehouse – Key, scan or select or press F2 to select the warehouse to stage the items for shipment

Staging Location – Key, scan or press F2 for choice list to select Location the item is being staged to for shipment

Ship To – Press F2 to display choice list of Ship To values associated with indicated sales order.

Sales Order – User can select a sales order from the list or enter a sales order number. Field is not required, and if a sales order is not entered, user will enter a picklist.

Picklist – Key, scan or press F2 to select Picklist from choice list. If a picklist was entered, and only 1 picklist was created for that sales order, this field will default to that picklist.

Customer – Display only field of Customer name associated with indicated sales order

Ship To – Display only field of Ship To name associated with indicated sales order

OK – Press Enter key after review of information to pick items for the picklist entered.

Item – Key or scan or press F2 Key to select Item ID/part number of material to be picked for shipping.

Description – display only field of the description of the item being picked for shipping.

Line Number – Key, scan or press F2 to select from choice list the Line Number associated with the indicated material to be shipped.

Delivery – Display field of delivery for line being shipped. If there is more than one delivery, user may press F2 to display a choice list of deliveries for the indicated line and select which delivery is being shipped.

Qty to Pick – Display only value that shows quantity remaining to picked for indicated item/line number

Quantity – Key or scan quantity of material being picked for shipping. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being shipped. This screen was discussed earlier in this document.

UOM – display only field of the unit of measure of the item being picked for shipping.

From Warehouse – Key, scan or select or press F2 to select the warehouse the item is being picked from.

From Location – Key, scan or press F2 for choice list to select Location the item is being picked from.

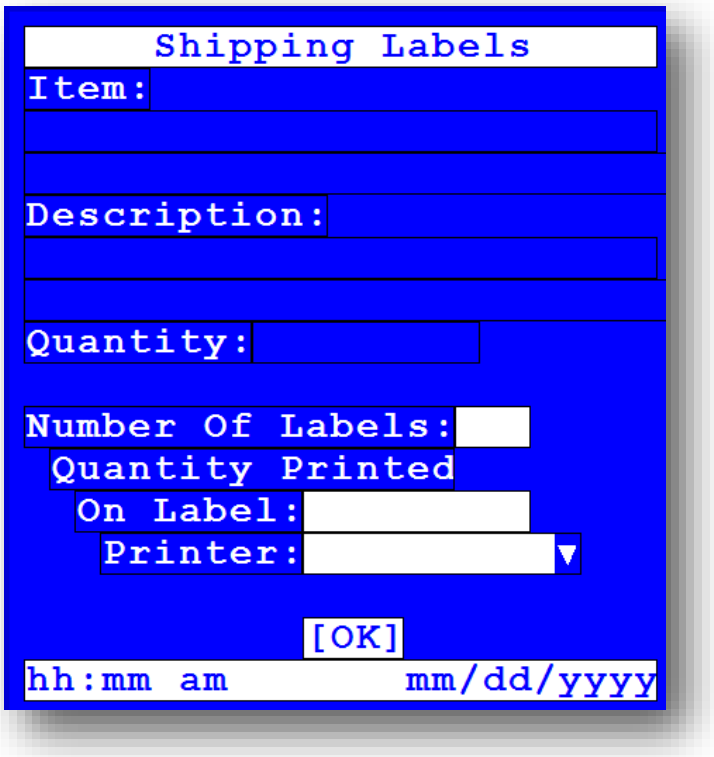
Lot – Key or scan lot number of material being picked for shipping, if applicable

Last Item – If this is the last item to be picked, enter Y

OK – Press Enter key to complete transaction and post the location transfer of the item picked to Intuitive. If last item = N, user will be returned to the Item field to pick the next item on the picklist, else screen will be cleared for next picklist to be picked.

Print Shipping Labels

If the system has been configured to print Shipping labels, upon completion of transaction the following screen will be displayed:



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 Intuitive.INI file

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

Directed Pick For Shipping

Selecting the Directed Pick Shipping option from the Pick and Ship Menu will display the following screen:

Staging Warehouse – Key, scan or select or press F2 to select the warehouse to stage the items for shipment

Staging Location – Key, scan or press F2 for choice list to select Location the item is being staged to for shipment

Ship To – Press F2 to display choice list of Ship To values associated with indicated sales order.

Sales Order – User can select a sales order from the list or enter a sales order number. Field is not required, and if a sales order is not entered, user will enter a picklist.

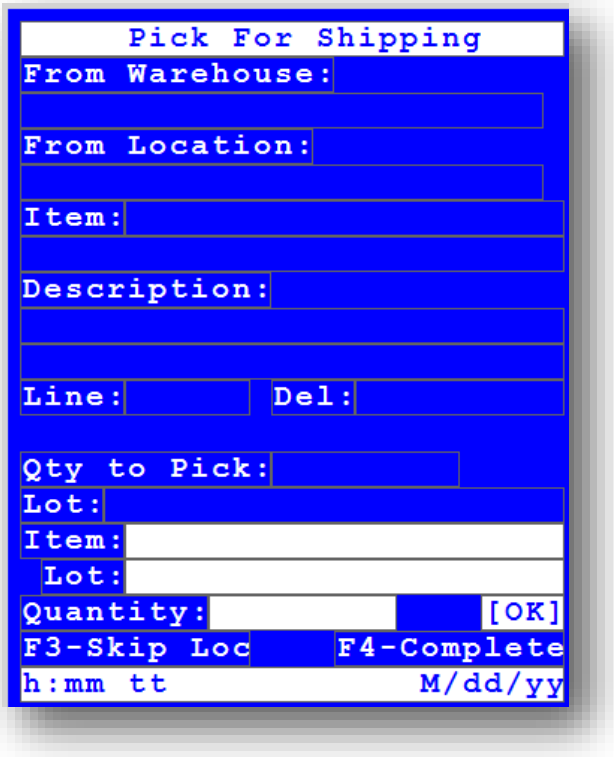
Picklist – Key, scan or press F2 to select Picklist from choice list. If a picklist was entered, and only 1 picklist was created for that sales order, this field will default to that picklist.

Customer – Display only field of Customer name associated with indicated sales order

Ship To – Display only field of Ship To name associated with indicated sales order

Pick From Warehouse – Key, scan or press F2 for choice list to select Warehouse the items are to be picked from. Field is optional.

OK – Press Enter key after review of information to pick items for the picklist entered.



From Warehouse – Display only field of the warehouse to go to, to pick the item.

From Location – Display only field of the location to go to, to pick the item.

Item – Display only field of the item to be picked.

Description – display only field of the description of the item being picked for shipping.

Line Number – Display only value of the line number that the current item is for on the shipment.

Delivery – Display only value of the delivery date that the current item is for on the shipment.

Qty to Pick – Display only value that shows quantity remaining to picked for indicated item/line number

Lot – Display only field of the lot to be picked, if applicable.

Item – Scan the item to pick. Field must match the displayed item.

Lot – Scan the lot to pick. Field must match the displayed lot.

Quantity – Key or scan quantity of material being picked for shipping. If, in the Intuitive SFDC settings, the intuitive version is set to 9.x, and the part is marked as serial tracked, the user will be taken to the “Enter Serial Numbers” screen to enter serial number for the items being shipped. This screen was discussed earlier in this document.

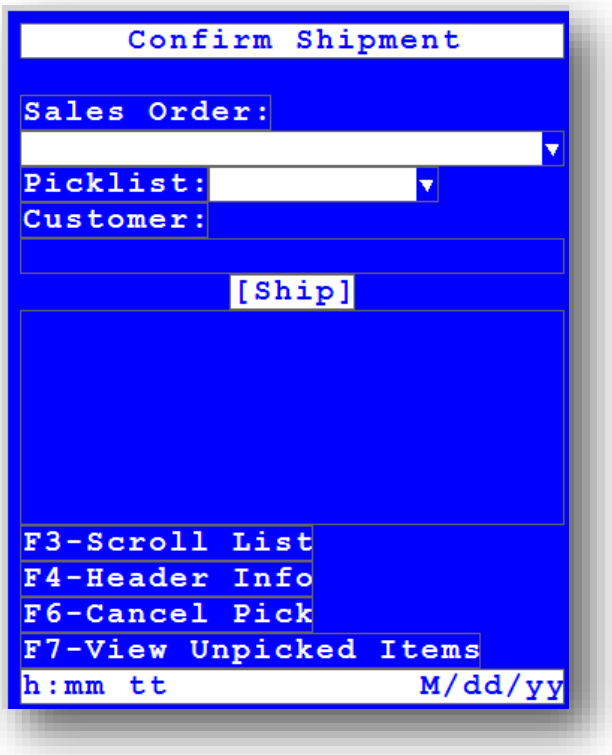
OK – Press Enter key to complete transaction and pick the item. System will then display the next item for picking information.

F3-Skip Loc – Press the F3 key on the scanner to skip the current location and move to the next item in the list of items to pick for shipping.

F4-Complete – Press the F4 key on the scanner to stop picking items for the sales order picklist entered and clear the screen for another pick.

Confirm Shipment

Selecting the Confirm Shipment option from the Shipping Menu will display the following screen:



Picklist – Key, scan or press F2 to select Picklist from choice list. Once picklist is entered, the list field will populate with items that have been picked for the picklist.

Customer – Display only field of Customer name associated with indicated picklist

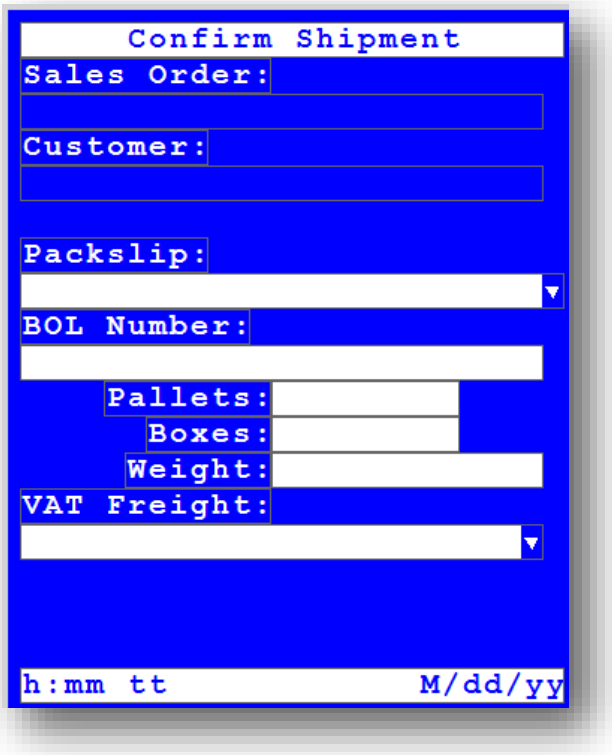
Ship – Press Enter here to ship the items that have been picked for shipping.

F3 Scroll List – After a picklist 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. If user presses enter on an item that is serial controlled, a screens displaying serial numbers picked for shipping will be displayed.

F4 Header Info – After a picklist has been entered will display the shipment header screens, discussed below.
F6 Cancel Picks – After a picklist has been entered, user can press the F6 key to cancel all picks made for the indicated picklist. This will delete records from the table, but user will need to do location transfer transactions to get items from the shipment staging location back to an inventory locations.

F7 View Unpicked Items – After a picklist has been entered and the listbox has items picked, user can press F7 to view items for the picklist that have not been picked. Pressing F7 again will toggle back to viewing items that have been picked for the picklist.

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



Sales Order – Display field of sales order associated with entered picklist.

Customer – Display only field of Customer name associated with indicated sales order

Packslip – If Master Control Setting Key for Sales Order Processing Next Packing Slip ID is set to use Auto Numbering, user can press F2 to get next packslip number. If Auto Number is not setup, user can scan packing slip number, if applicable

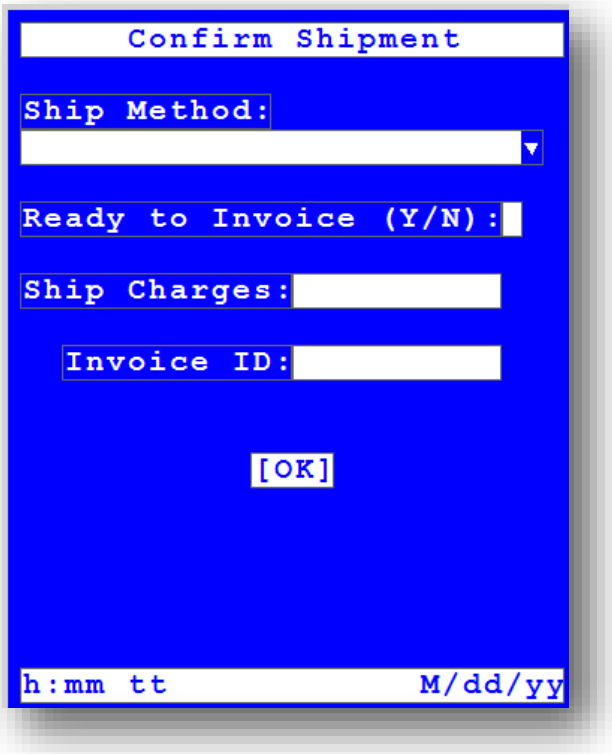
BOL Number – Key or scan BOL number, if applicable

Pallets – Key total number of pallets for the shipment, if applicable

Boxes – Key total number of boxes for the shipment, if applicable

Weight – Key total weight for the shipment, if applicable

VAT Freight – Key VAT Freight value, or press F2 to select value from choice list, for the shipment, if applicable.



Ship Method – Press F2 for choice list of Ship Methods available to the shipment.

Ready to Invoice (Y/N) – Default value will be Y for Yes, otherwise key N for No if shipment is Ready to Invoice upon completion of transaction.

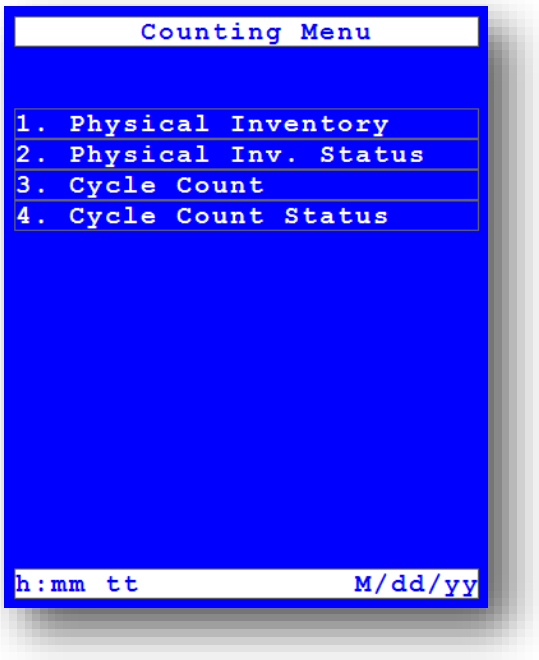
Ship Charges – Key value of Ship Charges, if applicable.

Invoice ID – Key value of Invoice ID, if applicable.

OK – Press Enter key to complete transaction for posting to Intuitive ERP. User will be returned to prompt from which they pressed F4 to key the Header Info fields.

Counting Menu

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



Described below is a brief description of general usage of the Counting Menu options.

Physical Inventory is used to count items as part of a physical inventory.

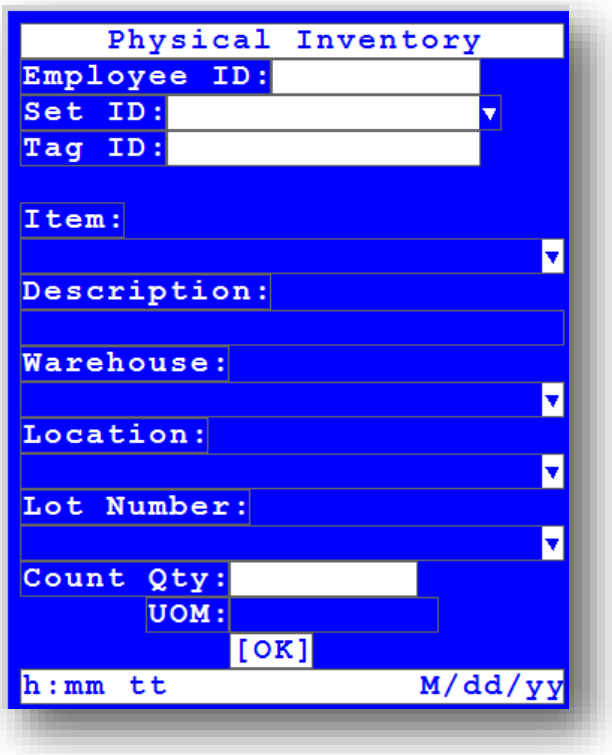
Physical Inv. Status is used to review the status of a physical inventory.

Cycle Count is used to count items as part of a cycle count.

Cycle Count Status is used to review the status of a cycle count.

Physical Inventory

Selecting the Physical Inventory option from the Counting Menu will display the following screen:



Set ID – Key in or select the physical inventory set to enter count data for.

Tag ID – Key in or scan the tag id to be counted. If the tag is for an item/warehouse/location, the information will be displayed in the fields below, and the user will only need to enter a count quantity. If the tag id is for a blank tag, the fields below will be entry fields where user can enter information for the count.

Item – If tag ID is not for a blank tag, this field will display the part to be counted for the tag. If the tag ID is for a blank tag, user will enter or select the item to be counted.

Description – display only of the description of the item being counted.

Warehouse – If tag ID is not for a blank tag, this field will display the warehouse to be counted for the tag. If the tag ID is for a blank tag, user will enter or select the warehouse to be counted.

Location – If tag ID is not for a blank tag, this field will display the location to be counted for the tag. If the tag ID is for a blank tag, user will enter or select the location to be counted.

Lot Number – If tag ID is not for a blank tag, this field will display the lot to be counted for the tag. If the tag ID is for a blank tag, user will enter or select the lot to be counted.

Count Qty – Enter the quantity of the part counted for the warehouse/location/lot entered or displayed above.

UOM – display only of the unit of measure for the item.

OK – press enter here to post the count for the information entered.

Physical Inv. Status

Selecting the Physical Inv. Status option from the Counting Menu will display the following screen:

Set ID – Key in or select the physical inventory set to review count data for.

Warehouse – Key in or select warehouse to view specific data for. Field is not required.

Total Tags – Display only field of the total number of tags associated with the physical inventory set.

Assigned Tags – Display only field of the number of tags associated with the physical inventory set that have an item associated with them.

Counted Tags – Display only field of the number of tags counted for the physical inventory set.

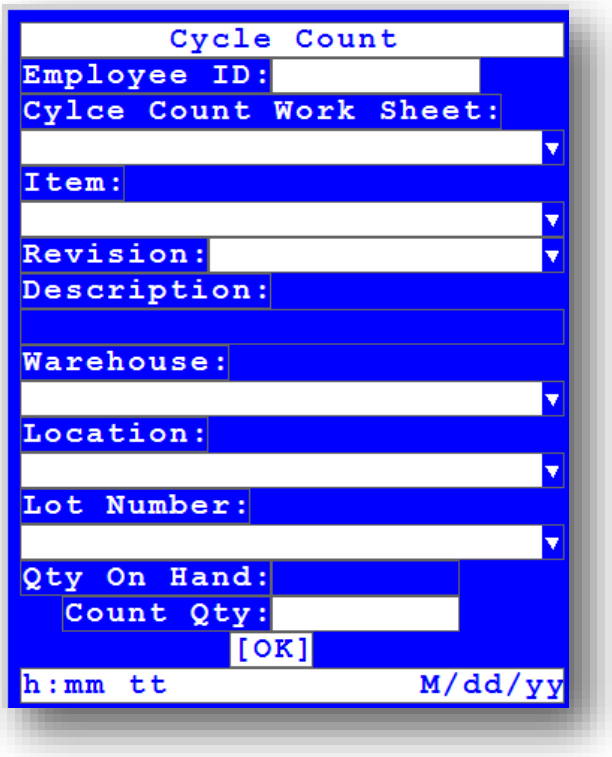
Uncounted Tags – Display only field of the number of tags not counted for the physical inventory set.

Blank Tags – Display only field of the number of blank tags for the physical inventory set.

List Field – The list will display tag count information, by warehouse, for the number of tags, counted tags and uncounted tags. If a warehouse is entered above, list will only display information for that warehouse.

Cycle Count

Selecting the Cycle Count option from the Counting Menu will display the following screen:



Cycle Count Work Sheet – Key in or select the cycle count work sheet to count items for.

Item – Enter or select the item to be counted.

Revision – Enter or select the revision to be counted. If only one revision is found on the count sheet for the item entered, this field will default to that revision.

Description – display only of the description of the item being counted.

Warehouse – enter or select the warehouse the item is being counted in.

Location – enter or select the location the item is being counted in.

Lot Number – enter or select the lot for the item being counted.

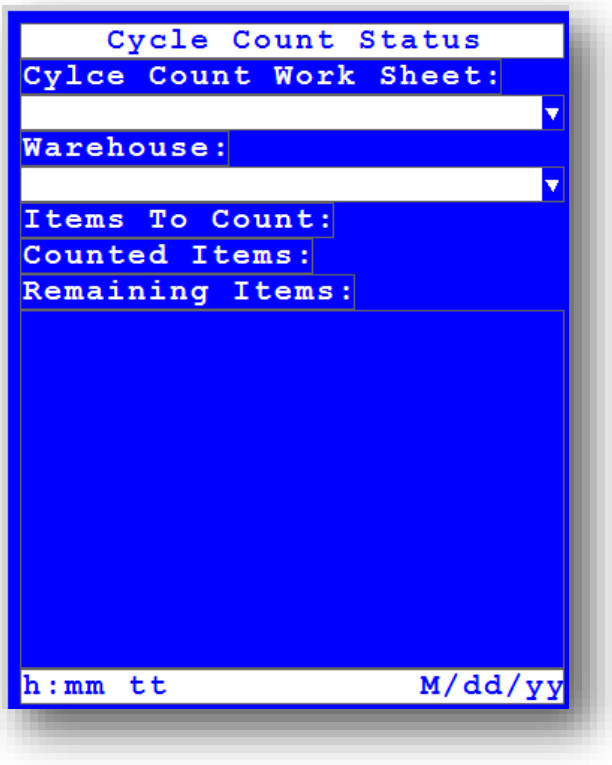
Qty On Hand– display only field of the quantity of the part/lot in the warehouse/location entered

Count Qty – Enter the quantity of the part counted.

OK – press enter here to post the count for the information entered.

Cycle Count Status

Selecting the Cycle Count Status option from the Counting Menu will display the following screen:



Cycle Count Work Sheet – Key in or select the cycle count work sheet to review count items for.

Warehouse – Enter or select a warehouse to view specific count information for. Field will be optional and list will show data for all warehouses.

Items To Count – display only of total number of items to count on the cycle count worksheet.

Items Counted – display only of the number of items counted on the work sheet.

Remaining Items – display only of the number of items still to be counted on the worksheet.

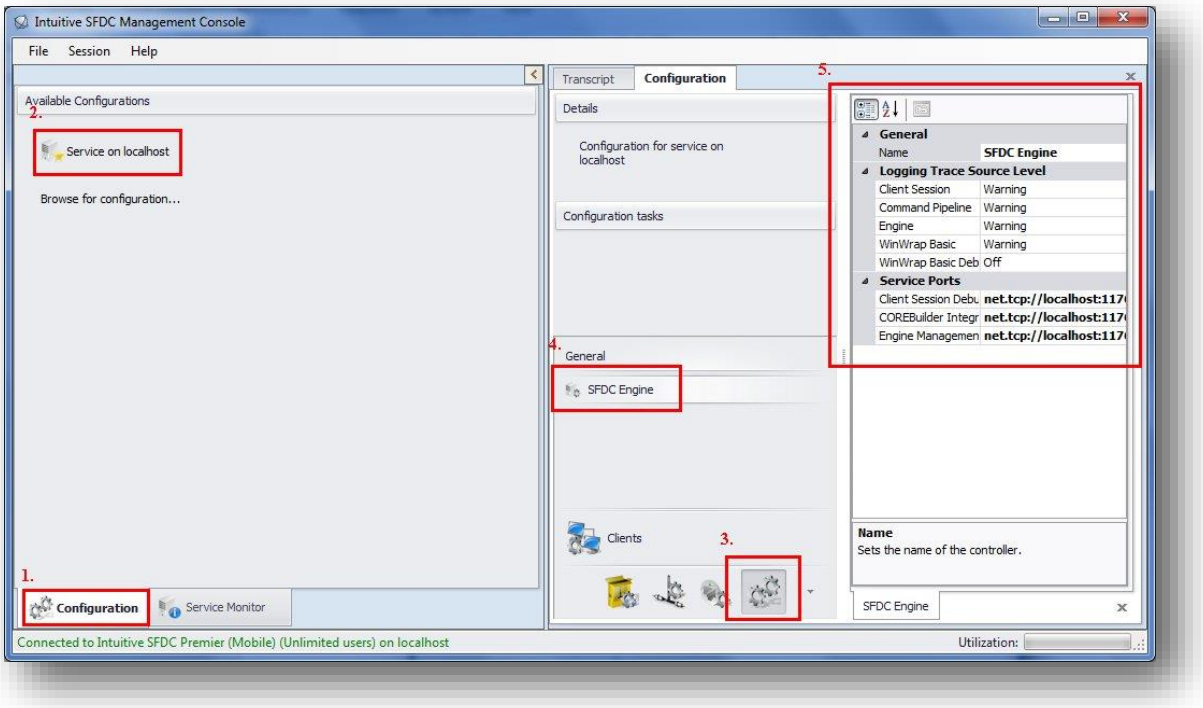
List Field – list will display breakdown of count totals by warehouse, or a single warehouse if one is entered above.

Intuitive SFDC Management Console

This chapter details the various functions available within the Intuitive 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

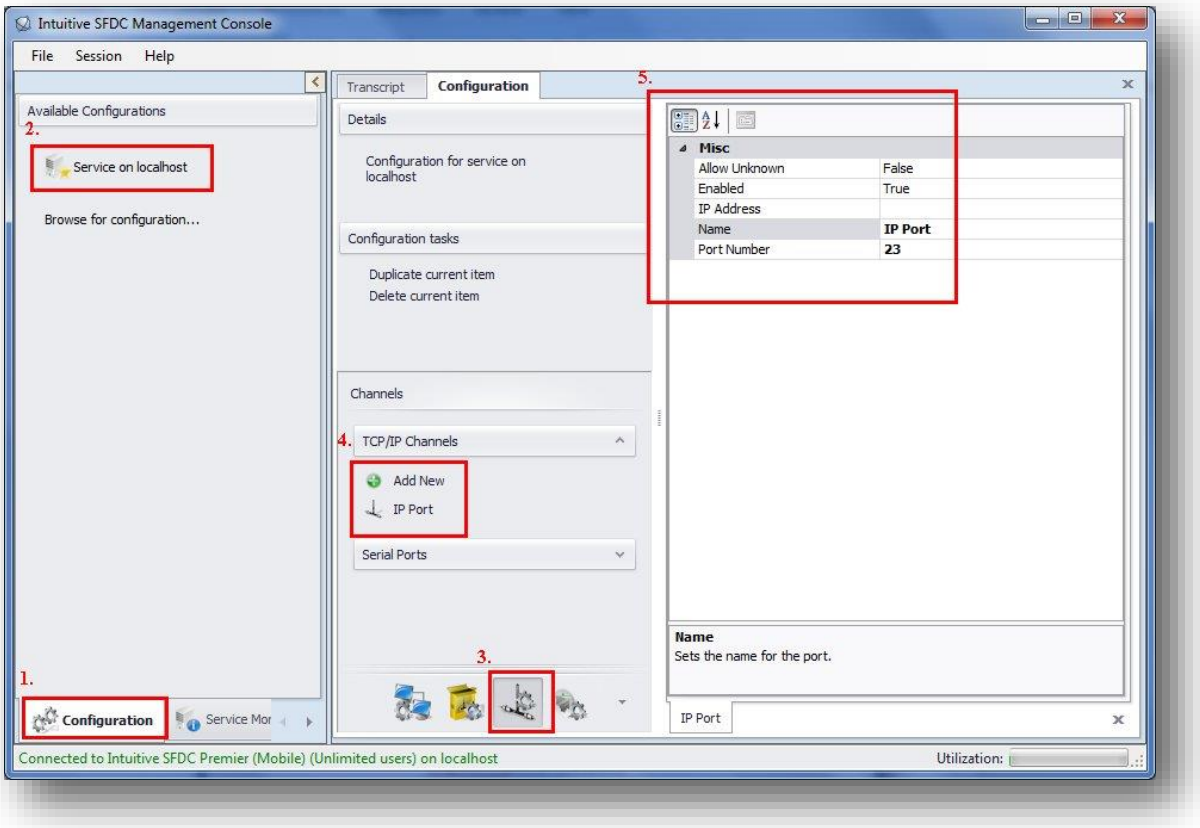
This program is used to maintain and manage system level attributes of SFDC. To manage and view these general settings, start the Intuitive SFDC Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations 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.

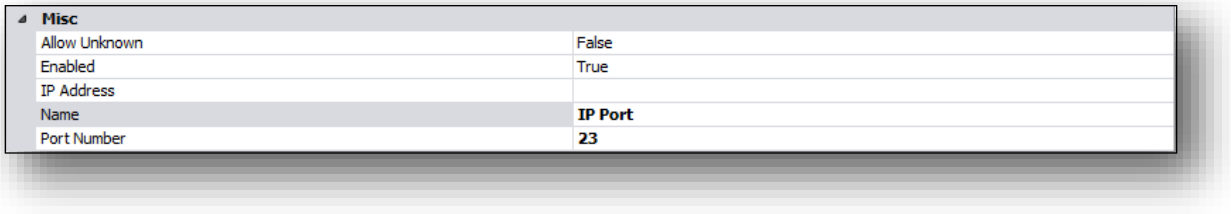
Channels Settings

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 Intuitive 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.

Misc Section



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.

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

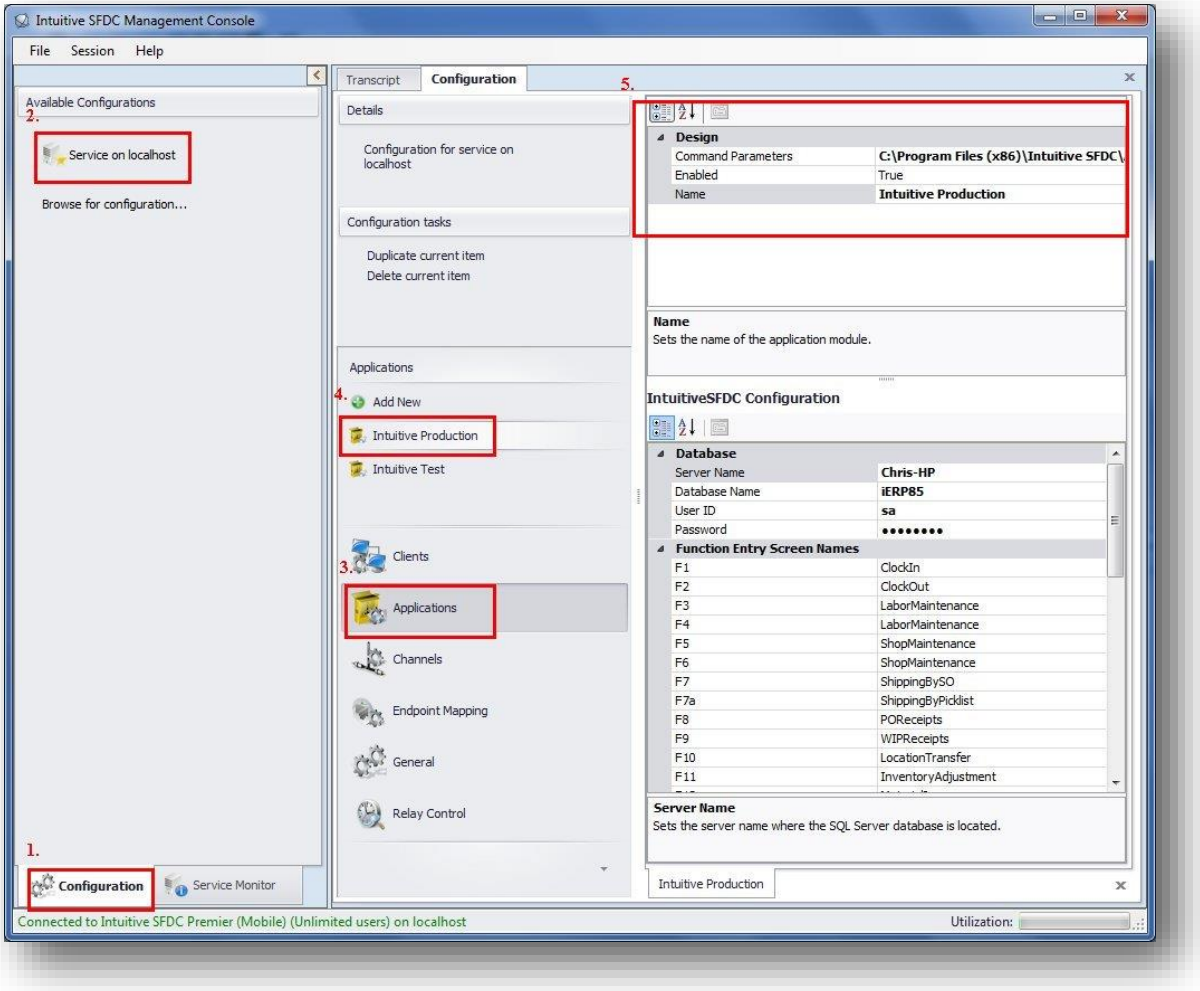
IP Address - Sets the IP Address for the port/channel, if applicable.

Name - Sets the name for the port/channel.

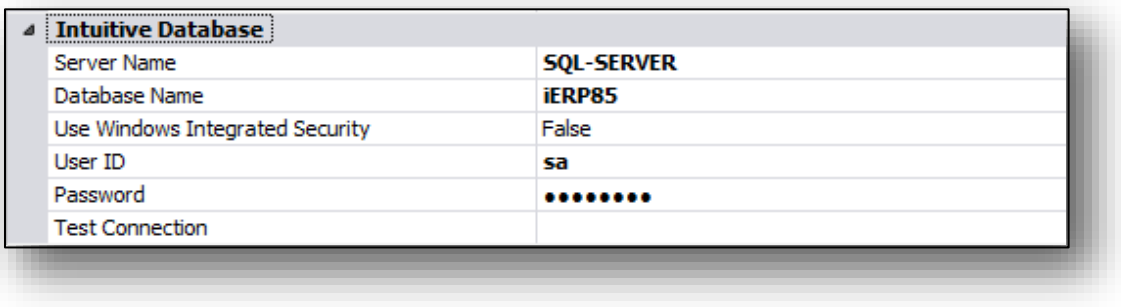
Port Number - Sets the port number for the port/channel.

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 Intuitive 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.)**.



Database Section



Server Name: The SQL Server where the INTUITIVE data resides

Database Name: The Intuitive database where "live" or "production" data is stored

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)

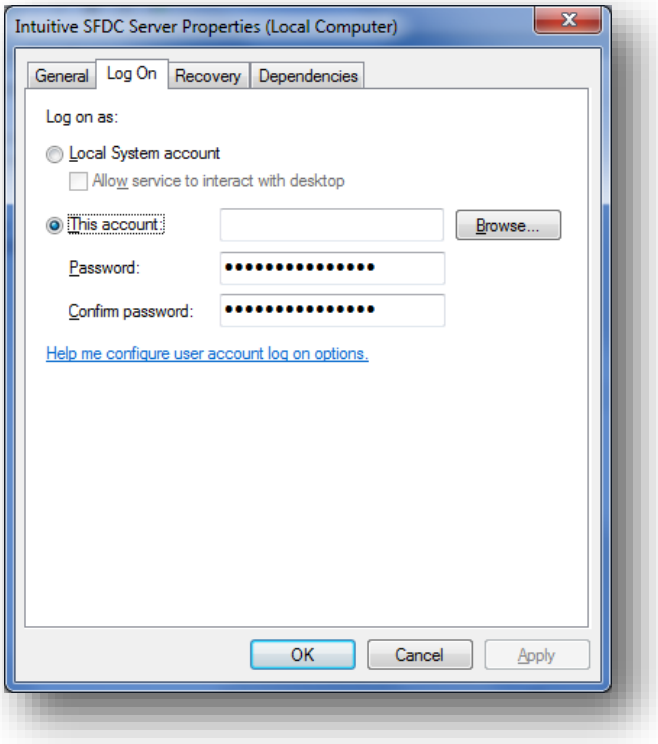
User ID: The SQL User Name can be any user that has rights to update the database, i.e. sa or the update user, used if Windows Integrated Security is set to False

Password: The login password, if any, used if Windows Integrated Security is set to False

Test Connection: Click the button to the far right of the screen and the system will verify that the SQL Server/Database/Login/Password combination is correct.

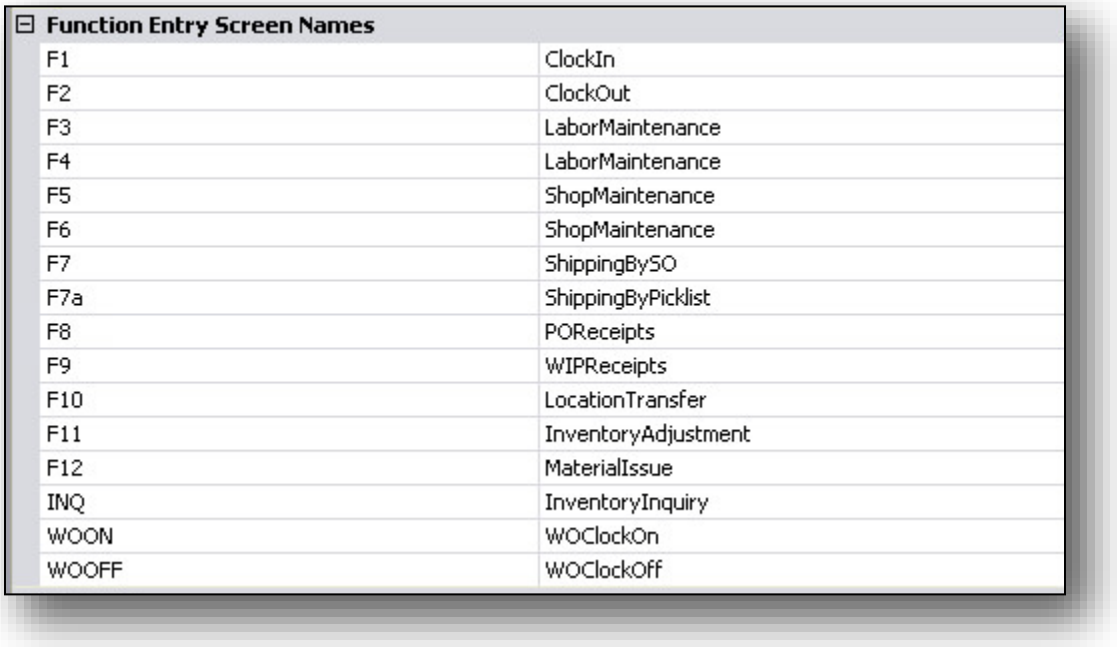
Using Windows Integrated Security

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.



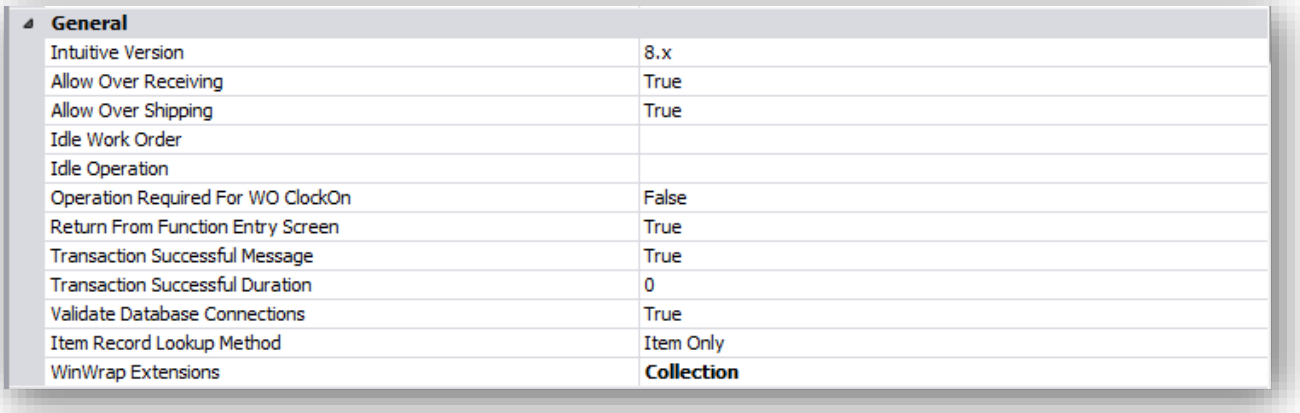
Function Entry Screen Names Section

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.



Function Entry Screen Names	
F1	ClockIn
F2	ClockOut
F3	LaborMaintenance
F4	LaborMaintenance
F5	ShopMaintenance
F6	ShopMaintenance
F7	ShippingBySO
F7a	ShippingByPicklist
F8	POReceipts
F9	WIPReceipts
F10	LocationTransfer
F11	InventoryAdjustment
F12	MaterialIssue
INQ	InventoryInquiry
WOON	WOClockOn
WOOFF	WOClockOff

General Section



General	
Intuitive Version	8.x
Allow Over Receiving	True
Allow Over Shipping	True
Idle Work Order	
Idle Operation	
Operation Required For WO ClockOn	False
Return From Function Entry Screen	True
Transaction Successful Message	True
Transaction Successful Duration	0
Validate Database Connections	True
Item Record Lookup Method	Item Only
WinWrap Extensions	**Collection**

Intuitive Version – Select the version of Intuitive ERP. Options are 8.x(default) or 9.x.

Allow Over Receiving – If checked, system will allow user to receive more parts that required on purchase order

Allow Over Shipping - If checked, system will allow user to ship more parts that required on shipper/pick list

Idle Work Order – Default work order system should use to automatically record idle time against between production work orders, if applicable.

Idle Operation - Default work order operation system should use to automatically record idle time against between production work orders, if applicable.

Operation Required For WO Clock On - If checked, the user must provide an operation when clocking on a work order

Transaction Successful Message - Checked 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.

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

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

Validate Database Connections - Checked if system should validate connections during transactions.

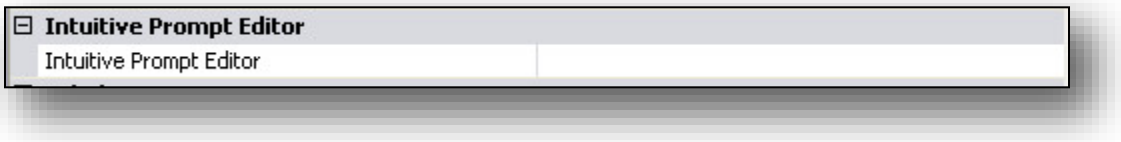
Item Record Lookup Method – This setting determines how item validation occurs with Item values and UPC values. The default option is Item Only. The following are the four available options

- **Item Only**—Only item values can be entered. UPC values entered will not be validated.
- **UPC Only**—Only UPC values for items can be entered. Item numbers will not be validated.
- **Item then UPC**—system will first check if the value entered is an item number, if it is, item validation will continue. If item is not found, value will be validated as a UPC to lookup item number.
- **UPC then Item**—system will first check the value entered is a UPC, value and if found, system will validate based on the item for this UPC value. If UPC is not found, value entered will be validated as an item number.

NOTE: if a multiple items have the same UPC value, system will prompt the user to select the item the UPC entered is for.

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

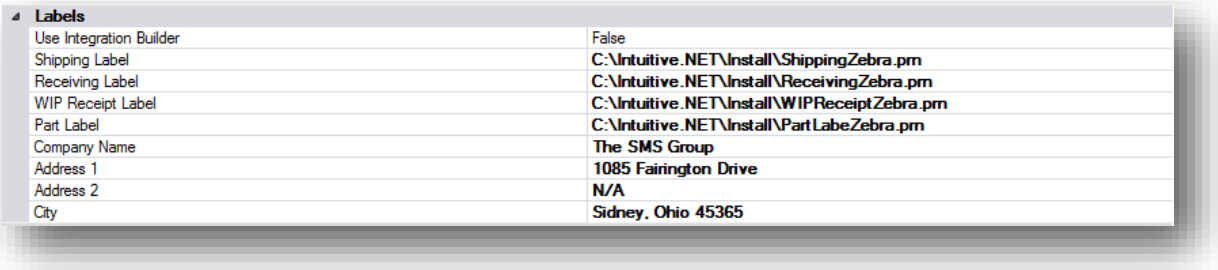
Intuitive Prompt Editor Section



Intuitive Prompt Editor - If this option is selected, a button will appear on the right side of the second column. Click that button to launch the Prompt Editor. See the section on Prompt Editor for more information.

Labels Section

This section is for setting the location of the labels and company address info. This tab is only used with Intuitive 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.

WIP Receipt Label - Valid path to the WIP receipt 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. A button will appear on the right side. Click the button to select the label file.

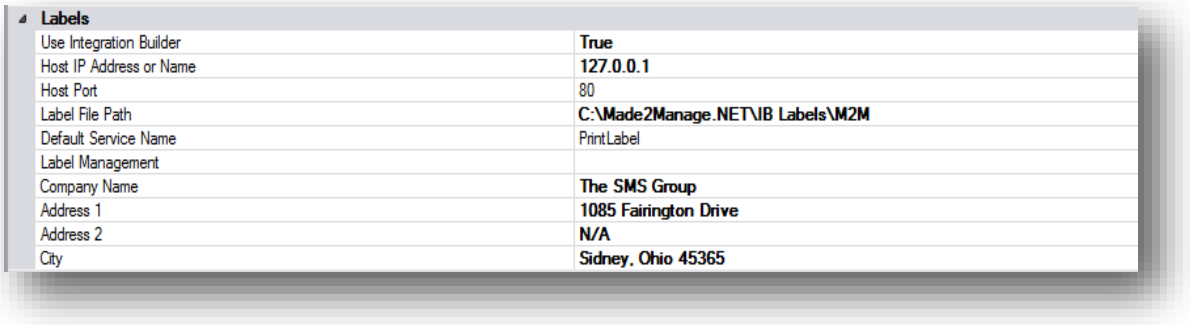
Company Name - Company name used to print on shipping labels

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

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



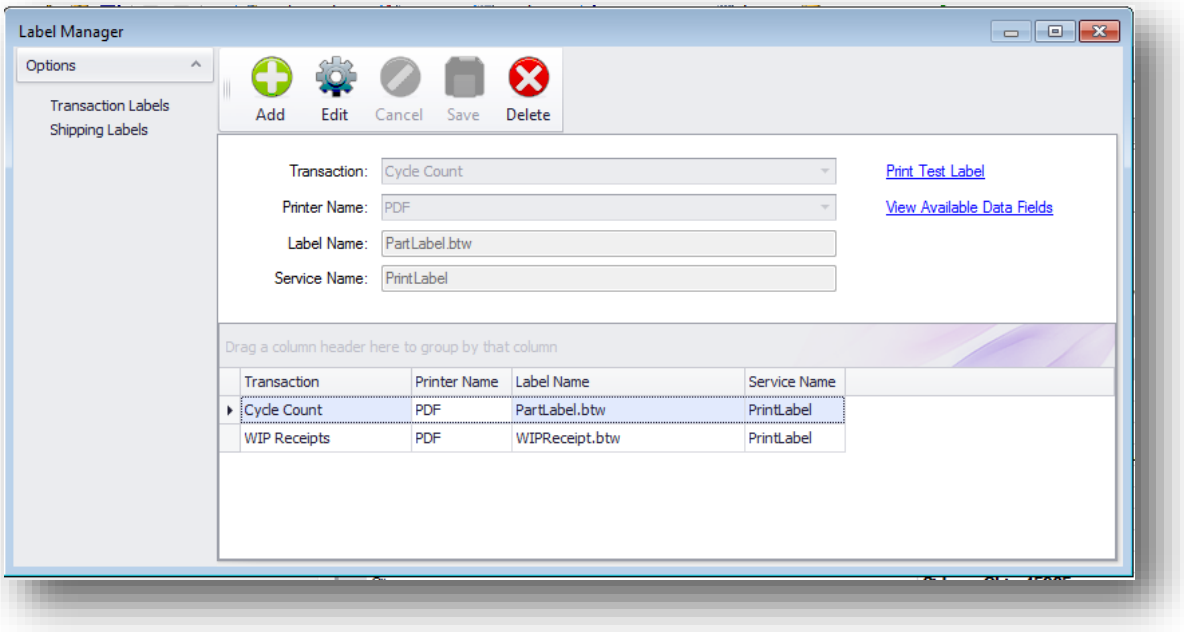
Host IP Address or Name – This is the IP address or server name of the computer running the Bartender Integration Builder.

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



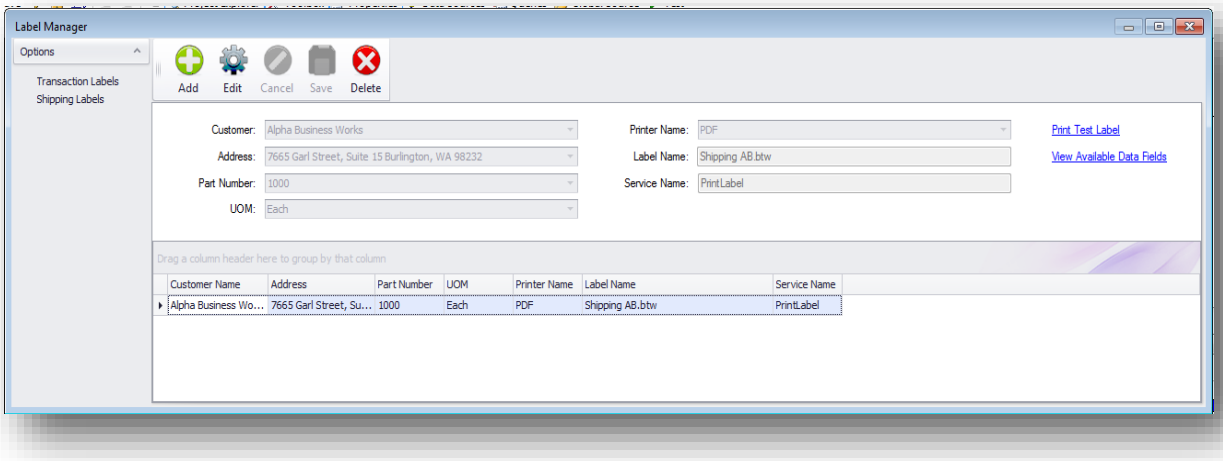
The label management tool selects which transaction in SFDC will prompt for labels to be printed after each transaction, and which printer and label file will be used. To add transaction labels, Click the Transaction Labels link, in the top left of the form, under the Options section.

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.

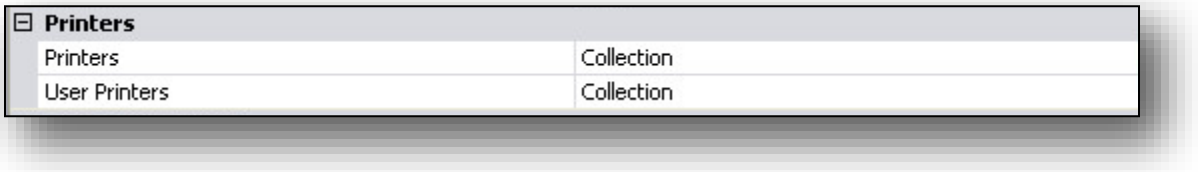
The grid at the bottom of the form show all configured transactions and their label and printer configuration. To edit or delete a configured transaction label, click on the row in the gird, and click the appropriate button. Clicking edit will enable the entry fields, populated with the data from the 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.

Printers Section



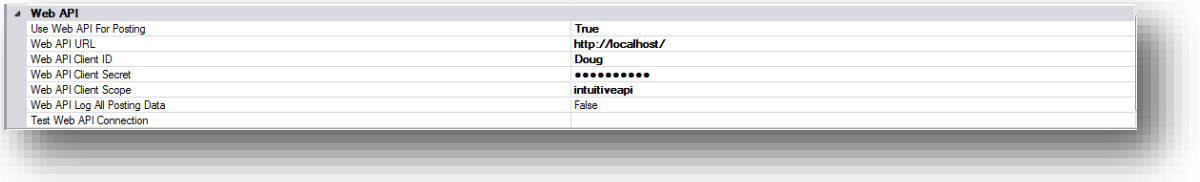
Printers - Select this line to define printers to be used when printing labels from SFDC. Once selected, a button will appear on the right side. Click the button to bring up the screen to define printers.

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.

Web API Section

If the Intutive version is set to 9 or higher, this section will be availble to configure transaction posting via the Intuitive web API instead of the ShopDataCollection table and Transaction Queue and Exchange Processors.



Use Web API For Posting – If the Intuitive Web API is to be used, set this to True, this will then expose the additional settings.

Web API URL – Enter the web address URL of the Intuitive Web API, be sure to include the ending forward slash.

Web API Client ID – Enter the Intuitive client ID used to connect to the web API. This value would be configured in the Intuitive Client Configuration screen.

Web API Client Secret – Enter the Intuitive client ID secret used to connect to the web API. This value would be configured in the Intuitive Client Configuration screen.

Web API Client Scope – Enter the Intuitive client ID scope used to connect to the web API.

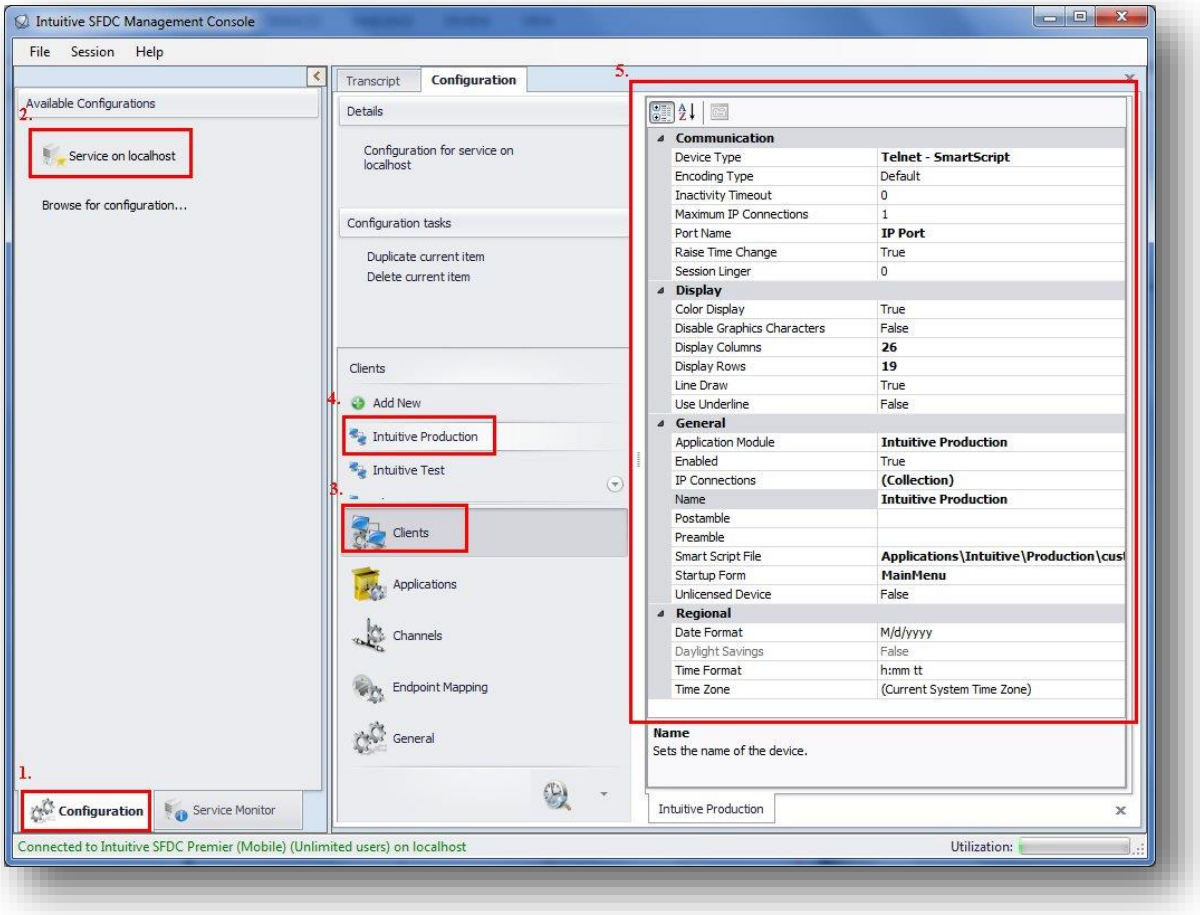
Web API Log All Posting Data – if all Web API calls are to be written to the Windows Application Event Log, set this to true, otherwise set to false. Generally, this should only be enabled for debugging purposes.

Test Web API – After entering all API information, click this button to test connectivity to the API. The test will attempt to get a login token. If this succeeds, a success message will display, otherwise an error will be displayed to the user.

NOTE: To use Intuitive Web API for posting transactions in SFDC, the Data Domain Maintenance configuration will have to be properly setup and configured, per Intuitive API documentation. If this setup is not complete, or incorrect, transactions will fail to post via Web API from SFDC. If the transaction fails to post via Web API from SFDC, an event will be created in the Windows Application Event log on the server running SFDC. This event will contain information about the attempted posting of data via Web API, including the URL, the JSON data, and the web exception of the error. If there are Issues with posting via Web API, or you need assistance configuring the Data Domain Maintenance for Web API please contact Intuitive support.

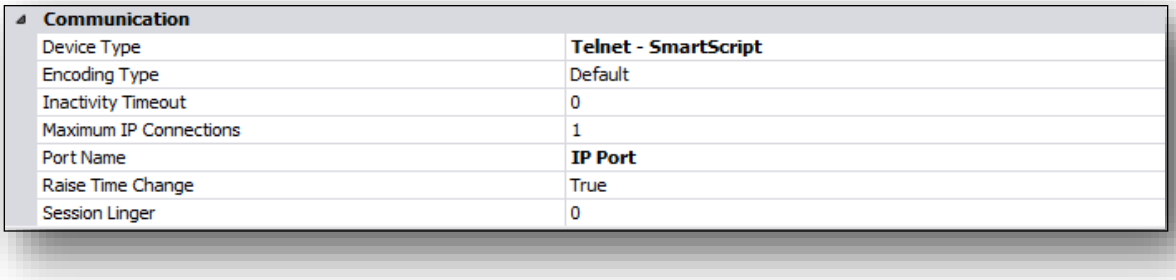
Clients Management

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 Intuitive 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 two Clients: Intuitive Production, intended to be pointed at the application module for production or "live" data, and Intuitive Test, intended to be pointed at the application module for test or "sandbox" data. Both are simple telnet clients. 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.

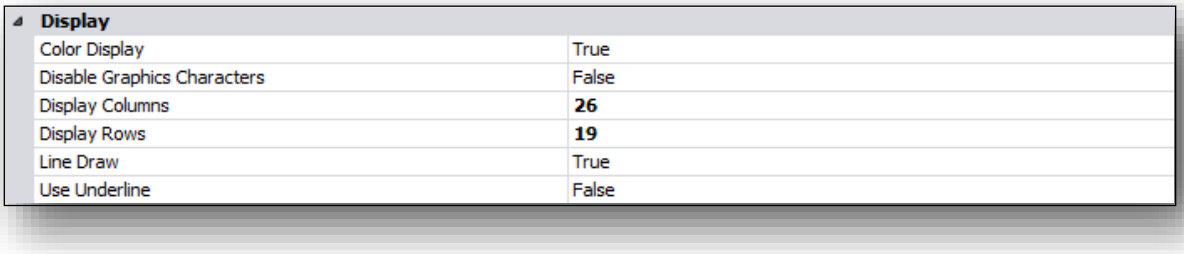
Maximum IP Connections - Controls the maximum number of concurrent connections from the client device (IP address). Typically used in Terminal Server environments.

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.

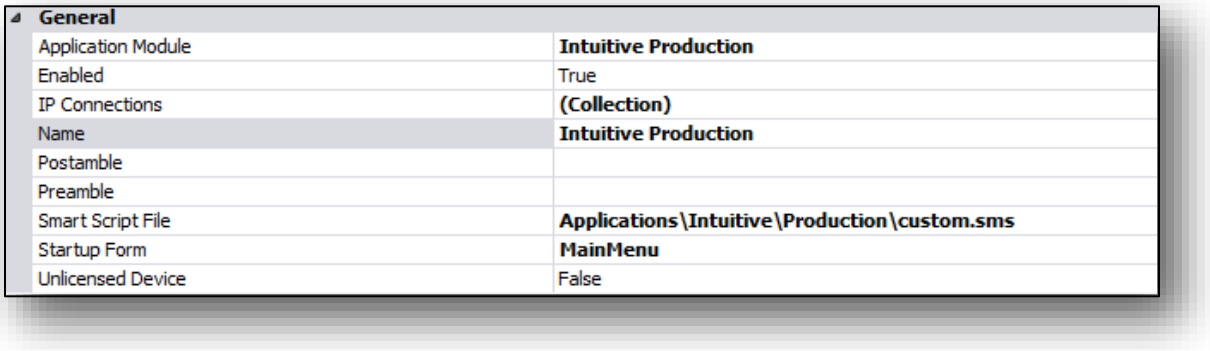
Display Columns - Sets the number of display columns (horizontal) for the client device.

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	**Intuitive Production**
Enabled	True
IP Connections	**(Collection)**
Name	**Intuitive Production**
Postamble	
Preamble	
Smart Script File	**Applications\Intuitive\Production\custom.sms**
Startup Form	**MainMenu**
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.

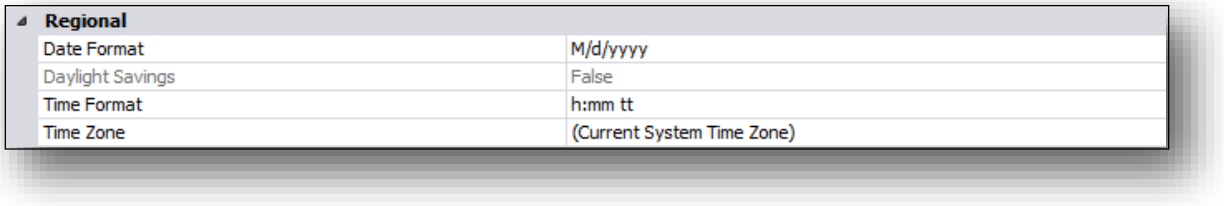
Preamble - Sets the preamble for the device, if applicable.

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.

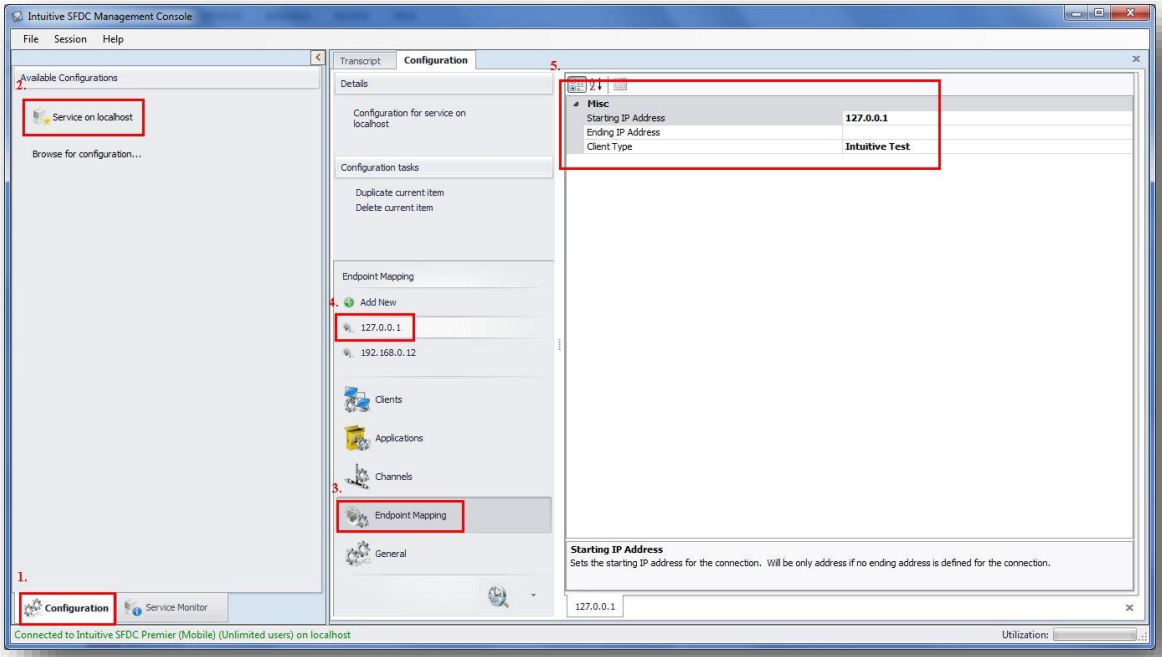
Daylight Settings - Displays whether or not the time zone the device is operating in uses daylight savings time.

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.

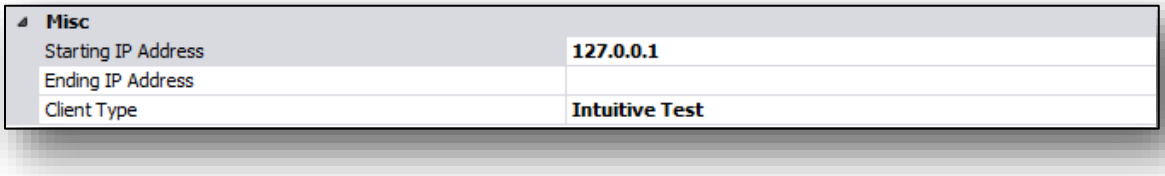
Endpoint Mapping

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 Intuitive 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



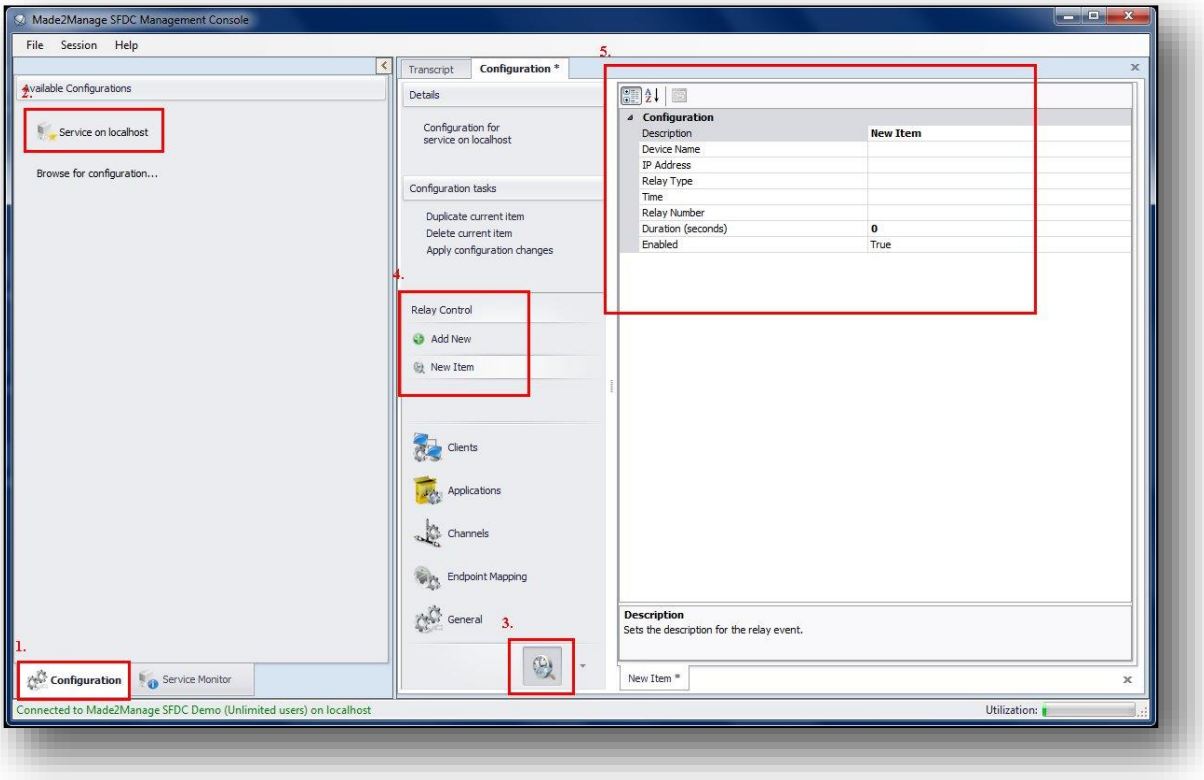
Starting IP Address - Sets the starting IP address for the connection. Will be only address if no ending address is defined for the connection.

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.

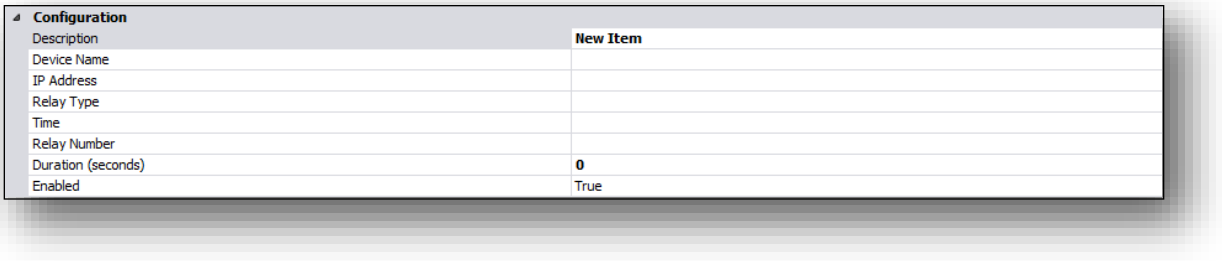
Relay Control

This program is used to maintain and manage relay devices that will be fired by SFDC. To manage Relay Control, start the Intuitive 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).

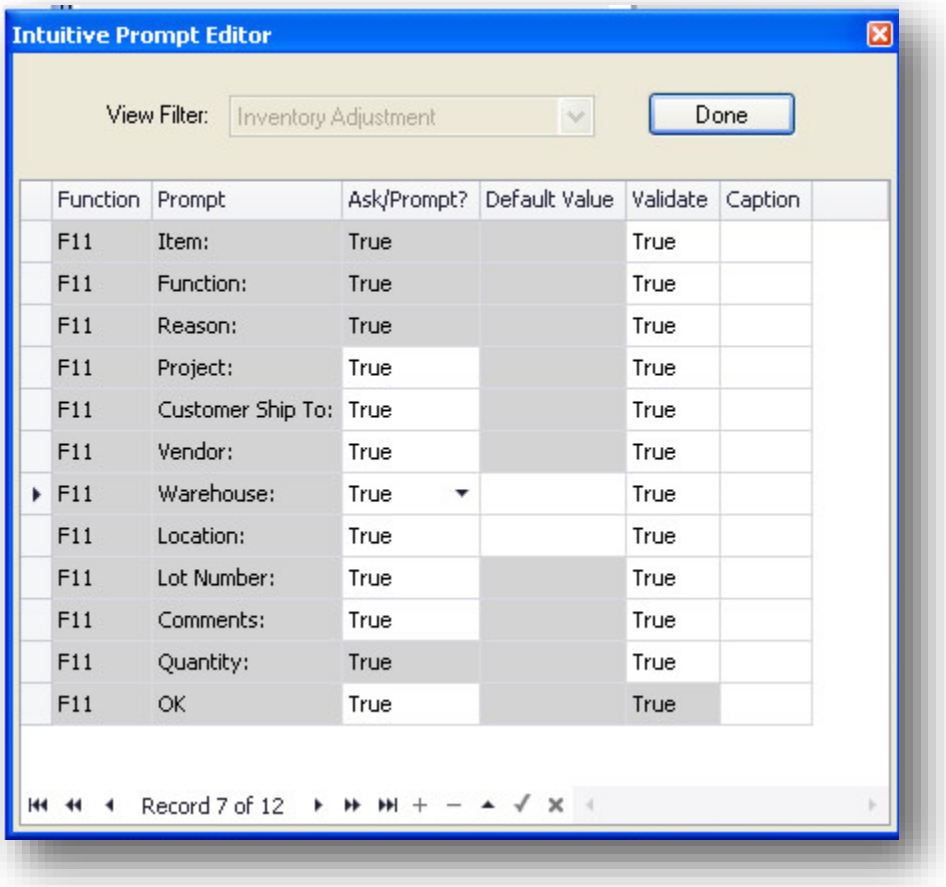
Relay Number - Sets the relay number on the end device to be used.

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.

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 Intuitive database.



To customize SFDC Prompts

1. Click the ellipsis button in the Intuitive Prompt Editor portion of the Application property gird, 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 Intuitive 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 Intuitive database for a particular prompt, Click the Validate column and select true from the dropdown. To not have the field validate against the Intuitive database, choose false in the dropdown for the cell.
8. Validation may slow user input in the SFDC transactions.
9. 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
10. Click the Done button to save your changes to the prompts database.
11. SFDC does not need to be restarted to have users see the prompt changes for the transactions; they will just need to leave the transaction screen if they are in a transaction that had the prompts modified.

Client-side Components

As the SFDC product progresses through the Beta period in its development changes can be expected to the process in areas such as error handling. This is a preliminary document outlining the setup requirements and functions needed to run the SFDC functionality with the Intuitive ERP system.

Intuitive Transactions Accessible from SFDC

The following list shows the Intuitive transactions that can be performed using the SFDC process. For information on how to use SFDC to collect data for each of the transaction types, see "Interface Software" section of this document.

Time Clock – Clock In -- Transaction Type F1
Time Clock – Clock out -- Transaction Type F2
Labor Maintenance – Setup Time reporting -- Transaction Type F3
Labor Maintenance – Run Time reporting -- Transaction Type F4
Shop Data Maintenance – Setup Time reporting -- Transaction Type F5
Shop Data Maintenance – Run Time reporting -- Transaction Type F6
Shipping -- Transaction Type F7
Purchase Order Receipt -- Transaction Type F8
WIP Receipt -- Transaction Type F9
Location Transfer -- Transaction Type F10
Inventory Adjustment -- Transaction Type F11
Material Issue -- Transaction Type F12

**No serial numbering functionality exists at this time for the SFDC transactions.*

Shop Data Collection Inbound Group

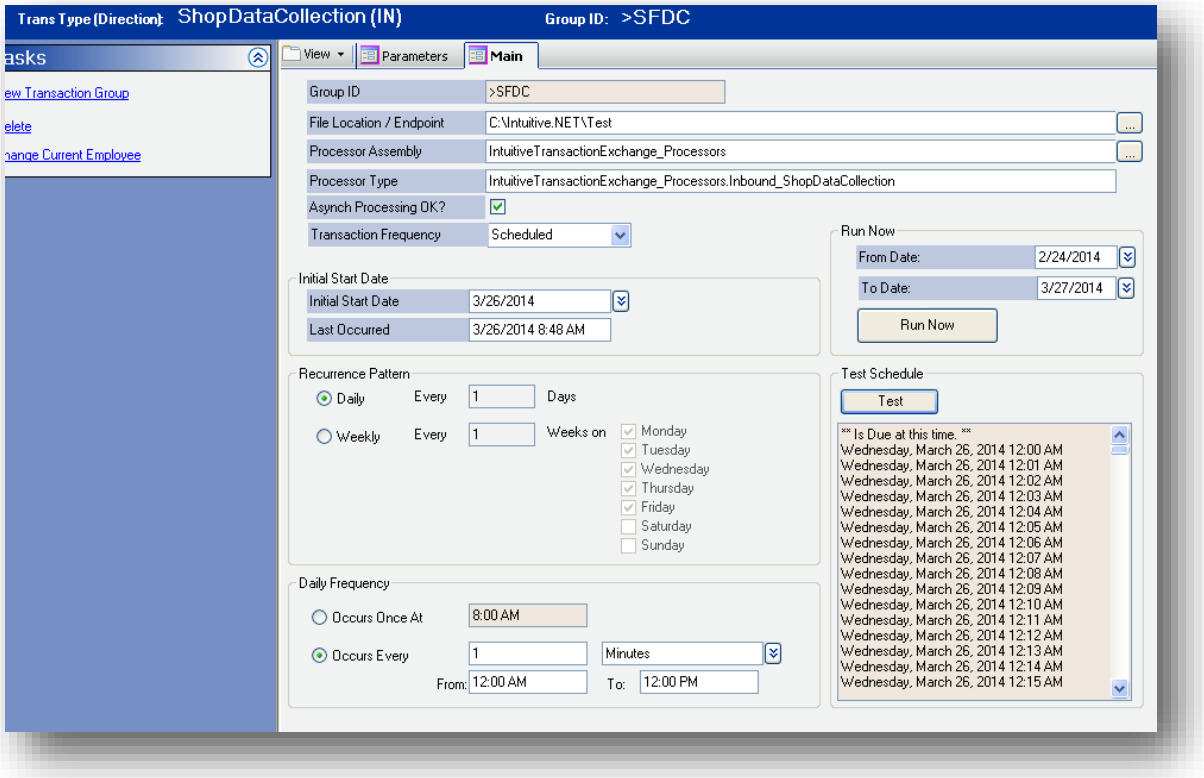
The group and schedule information for a transaction type provides the system with information about what to activity to watch for and how often to attempt to process waiting transactions.

To create the processing group for the SFDC data:

1. Open the ***Shop Data Collection Inbound*** form on the *E-Commerce Data Entry* menu.
2. Enter a **Group ID** to be used as an identifier in selector fields. Does not need the > sign in the front of the Group ID if option for Occurs Every drop down has seconds available in it.
3. **Endpoint** is a required value. The **endpoint** is where the file called ***txEmptyFile.sms*** is located.
   - By default, the SFDC installation copied this file into your client directory.

- *C:\Program Files\Intuitive MFG\Intuitive ERP Client 8.1\ServerName_DatabaseName*
- *The txEmptyFile.sms file is a required element of the Shop Floor Data Collection application. Please do not remove this file. If you move the file, make sure your Endpoint value reflects the correct location.*

4. The **Processor Assembly** is: "Intuitive Transaction Exchange Processor."
5. The **Processor Type** is: "Intuitive Transaction Exchange Processor; Inbound Shop Data Collection."
6. Select the "**Asynch Processing OK**?" option to allow the TX Processor to continue to process subsequent batches after a batch where at least one transactions in it has failed.
   - If this option is not selected, the processor will continue processing the batch in which an error is encountered, continue checking for new batches as per the schedule, but it will not process any new batches it finds until the error in the original batch is resolved. Errors are recorded in the Error Log and can be viewed in the **Transaction Exchange Batch Manager**.



7. The scheduling information can be set to a manual start or a repeating schedule such as daily from 9AM to 5PM every 10 minutes. This allows you to choose how you want to manage the processing of the collected data.

Transaction Exchange Processor

The **Transaction Exchange Processor** must be running whenever there is incoming shop floor data. The processor runs in the background and monitors the *ShopDataCollection* table for new records sent there by the SFDC server. The records, data collected on the shop floor, are transformed into SQL strings and sent to the *TransQueue* table. At this point, the Transaction Exchange Processor has completed its task and returns to monitoring the *ShopDataCollection* table.

Transaction Queue Processor

The Transaction Exchange Processor must also be running whenever there is incoming shop floor data. The processor runs in the background and monitors the transaction queue, TransQueue table, for new records to process. The records are inserted into the TransQueue table as SQL strings by the Transaction Exchange Processor. The Transaction Queue Processor reacts to the records by validating the data and processes the records to the correct transaction-specific tables. Data errors that occur at this point will cause the transaction to fail. The data remains in the TransQueue table when the transaction fails.

Transaction Queue Error Manager

When an error causes a transaction to fail there are a couple ways to handle the problem. The data can be corrected and resubmitted to the TX Queue processor for processing. The data can be deleted and then either entered manually or resubmitted via the data collection device.

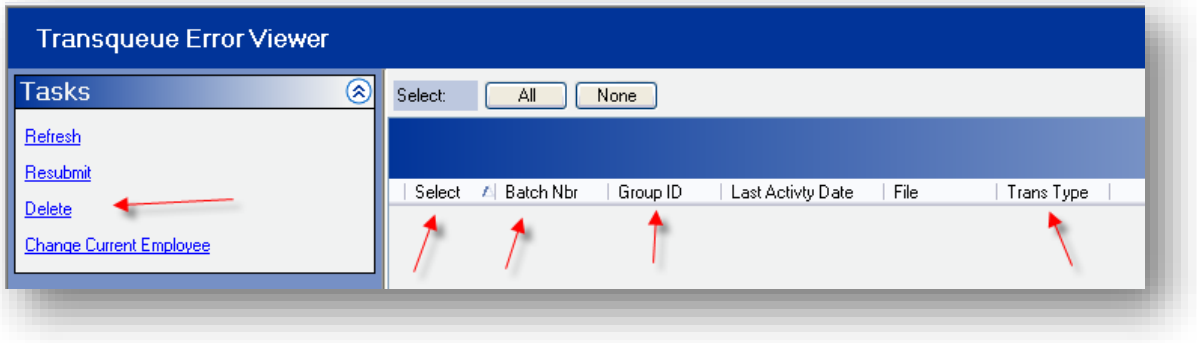
All inbound SFDC data is initially sent to the “ShopDataCollection” table in your Intuitive SQL Server database. Then as it is processed, it is moved to the TransQueue table and then validated and sent on to the transaction-specific tables. When a transaction fails to pass validation, it remains in the TransQueue table.

To view the record

The **Transaction Queue Error Manager** is used to view and edit transactions that have incurred an error and are waiting in the Transaction Queue. If there are transactions with errors in the Transaction Queue they will be displayed in list view pane. To correct the record or to delete it, open the Transaction Queue Error Manager, select the transaction and either the View Error XML or Edit Transaction XML functions. Click on the Submit to *TransQueue for Reprocessing* task link to allow the TX Queue Processor to discover the transaction and successfully process it.

Transaction Exchange Batch Manager

Another way to view errors is to use the **Transaction Exchange Batch Manager;** where failed transaction(s) will be listed by batch number, group ID, activity date, file name, and transaction type. This information will guide you to the record that caused the failure to occur. Once the corrections are made, come back to this form and select the transaction by clicking the "Select" option or by clicking the "All" button to select all of the transactions in the queue. Click on the Resubmit task link to rerun the batch.



Note: How the *Asynch Processing* option in the **Shop Data Collection Inbound** form is set will affect how failed transactions will be handled by the TX processor.

ON - Batch processing is not affected by transaction failures.

OFF - Batch processing is interrupted after the batch containing the error(s) completes processing.

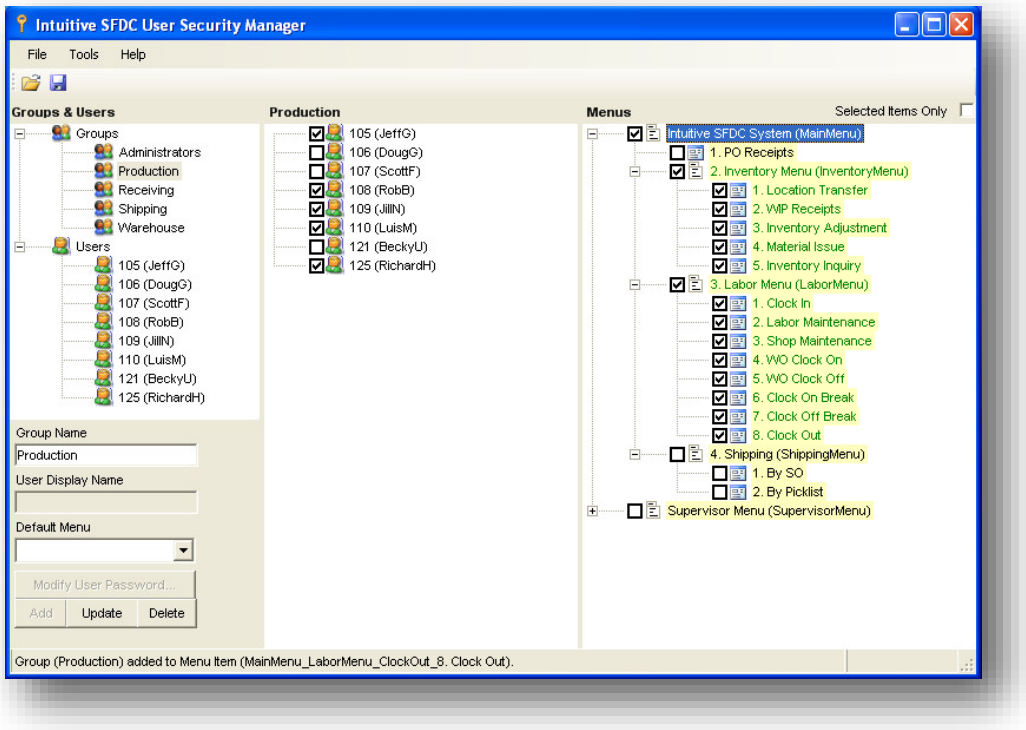
SFDC Security

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. The SYS Logon screen is needed when using SFDC Security.

SFDC Security Interface

As soon as the SFDC Security window loads 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 Intuitive 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 Intuitive 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 Intuitive SFDC System Configurator allows you to enter this string for each device. Please see the Intuitive 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 Intuitive SFDC Management Console program:

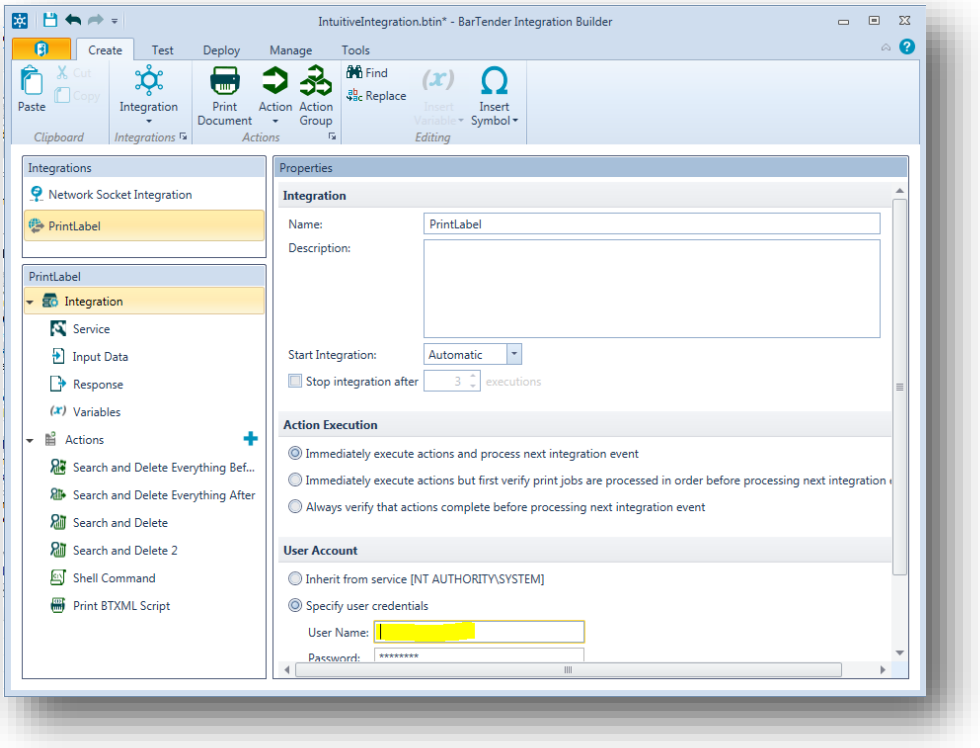
	SMS Telnet	Computerwise ET314	Computerwise ET315	Mobile Client	Motorola 9000 series	Intermec CK series
Communication						
Device Type	Telnet-SmartScript	Computerwise Ethernet Terminal	Computerwise Ethernet Terminal	Mobile Client	Telnet-SmartScript	Telnet-SmartScript
Encoding Type	Default	Default	Default	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

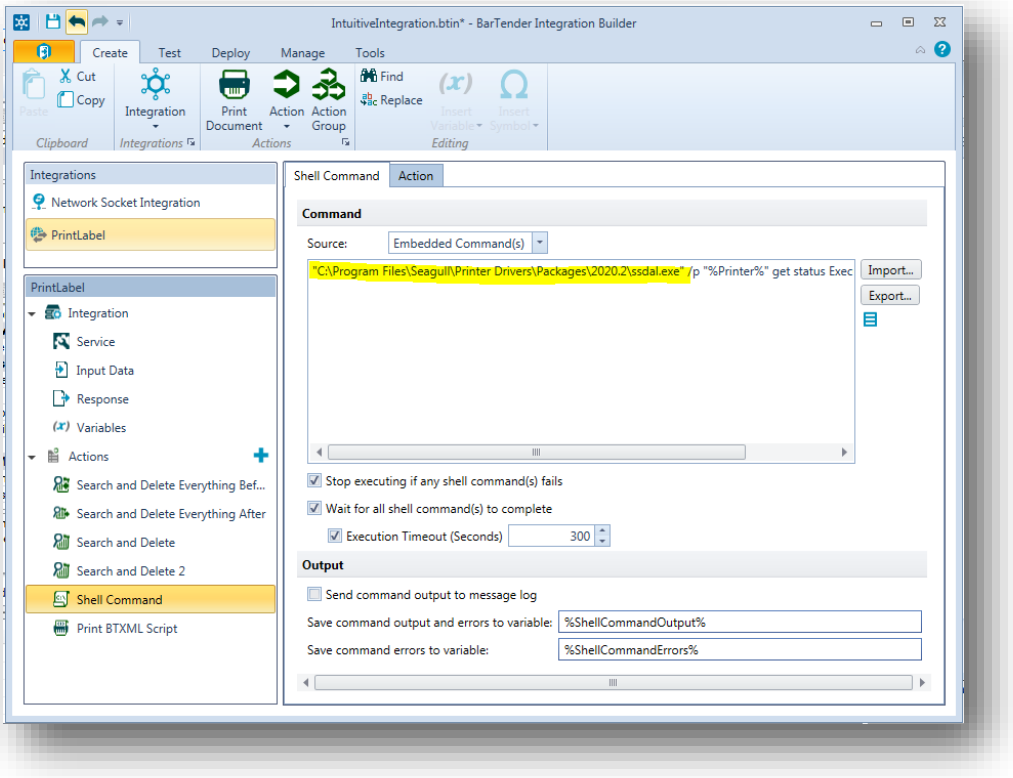
To use the Integration Builder functionality with SFDC, a copy of Seagull Scientific's Bartender software (Automation or Enterprise edition) will need to be purchased and installed to allow this functionality to work. These software packages may be purchased through The SMS Group. Bartender driver files, along with using their printer installation wizard, will need to be used to install the proper files (SSDAL.exe) used for the integration SFDC uses for label printing. Only one printer will need to be installed with this method, to install the proper files. Subsequent printers can be installed using the standard Windows Printer installation process.

On the Intuitive SFDC installation CD, there will be an Integration Builder folder. This folder will contain an IntuitiveIntegration.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 WIP Receipts 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.