

Set-Up Despatch Stop, Secure by Client

Overview:

This feature will prevent orders being despatched to nominated clients unless the USERS performing the despatch has required permission.

Options of the '[3] Despatch Stop, Secure' tick box

- = Despatch will not be stopped
- = Despatch will be stopped until this box is un-ticked (Despatch Stop)
- = Despatch will require an internal employee password to proceed (Secure)

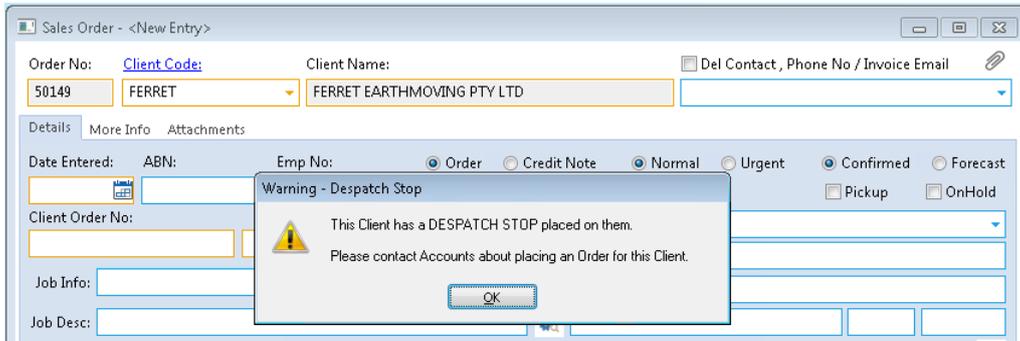
To Set the "Secure Despatch" Options: -

Option 1 – [3] Despatch Stop, Secure box ticked [3] Despatch Stop, Secure

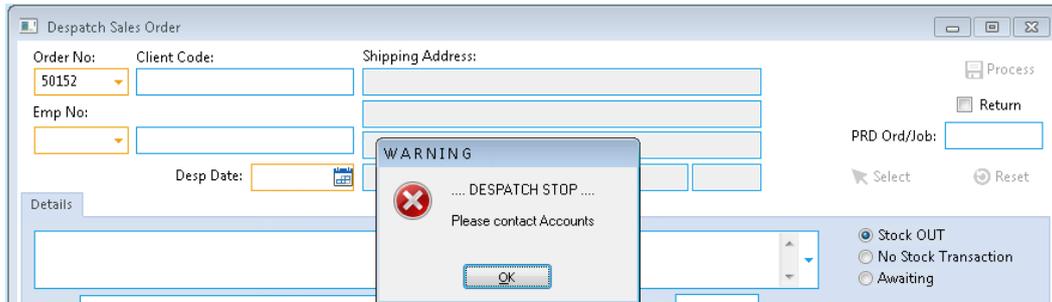
From the OPTO ribbon, select the 'Contacts' tab and **click** on the 'New/Edit Clients' icon. In the client code **press <F2>** open the client record for the required client and **press <TAB>**. **Click** on the 'Client Info' tab, **click** in the '[3] Despatch Stop, Secure' box to tick (circled below) then **press <F9>** to save.

The screenshot shows the 'Clients - Ferret Earthmoving Pty Ltd' window. The 'Client Code' is FERRET and the 'Client Name' is Ferret Earthmoving Pty Ltd. The 'Part Prefix' is empty and the 'Tax Code' is 2. The 'ABN' is ABN. The 'Client Info' tab is selected. The 'Comments' field is empty. The 'Job Ticket Text' field is empty. The 'Invoice Text' field is empty. The 'Add to QF' checkbox is unchecked. The 'Export Information' section shows 'Acc Code' as 4-1500, 'Export Name 1' as Ferret Earthmoving Pty Ltd, and 'Export Name 2' as 32. The 'Credit Information' section shows 'Credit Limit' as \$35,000.00, 'Credit Stop (On Hold)' as unchecked, 'Balance 1' as \$0.00, 'Period 1' as \$0.00, 'Period 2' as \$30,808.50, 'Period 3' as \$0.00, 'Total Amt' as \$30,808.50, 'Balance' as empty, 'Period 4' as \$0.00, 'Period 5' as \$0.00, and 'Period 6' as \$0.00. The 'E-mail (Invoice)' checkbox is checked with the email address sheridan@itmsystems.com. The 'Fax / Ph (Invoice)' checkbox is unchecked. The 'Stock Order ONLY' checkbox is unchecked. The '[3] Despatch Stop, Secure' checkbox is checked and circled in red. The 'Item Invoice' checkbox is unchecked. The 'Packing Label Speci' checkbox is unchecked. The 'No Freight for Commercial Invoice' checkbox is unchecked. The 'Alt Total Box (Invoice)' checkbox is unchecked. The 'Show Freight' checkbox is checked. The '9113223d-c6e8-46ef-97fa-4a56062e538a' is visible in the bottom right corner.

When a Sales Order or Factory Order is created for the client a warning message will appear. The USER can continue to create and save the order for the client by **clicking** on OK.

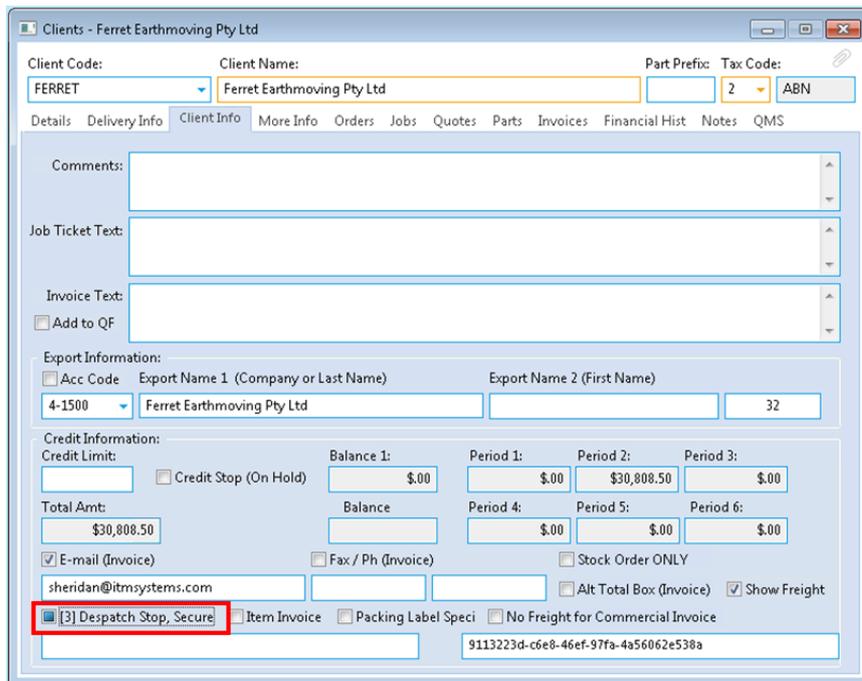


The USER attempts to despatch the Orders for that Client the 'DESPATCH STOP' warning message appears and the order cannot progress any further until the **[3] Despatch Stop, Secure** box is un-ticked by an authorised employee.



Option 2 – [3] Despatch Stop, Secure Box is Solid

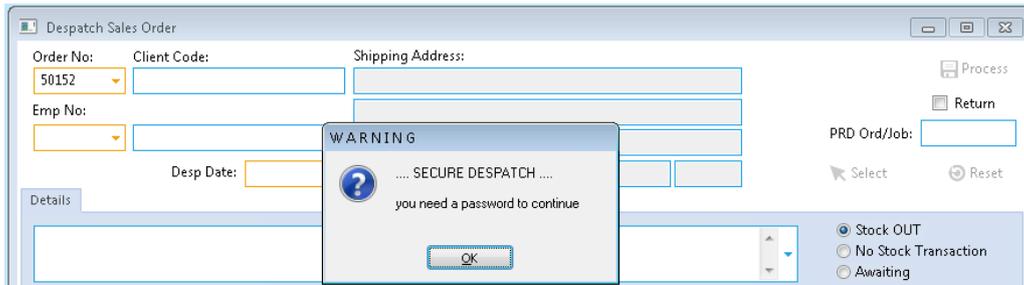
From the OPTO Ribbon, select the 'Contacts' tab then **click** on the 'New/Edit Clients' icon. **Click** on the 'Client Info' tab and **click** in the **[3] Despatch Stop, Secure** box to fill (circled below) then **press <F9>** to save.



Enter the Sales Order or Factory Order for the client but no message appears as it does for Option 1. When a USER attempts to despatch the orders the 'SECURE DESPATCH' warning message appears and the order cannot progress any further without an authorised employee entering their internal employee password to release the despatch.

The USER **clicks** on **OK** again and a message appears asking the USER to enter their password. The Order cannot be despatched until

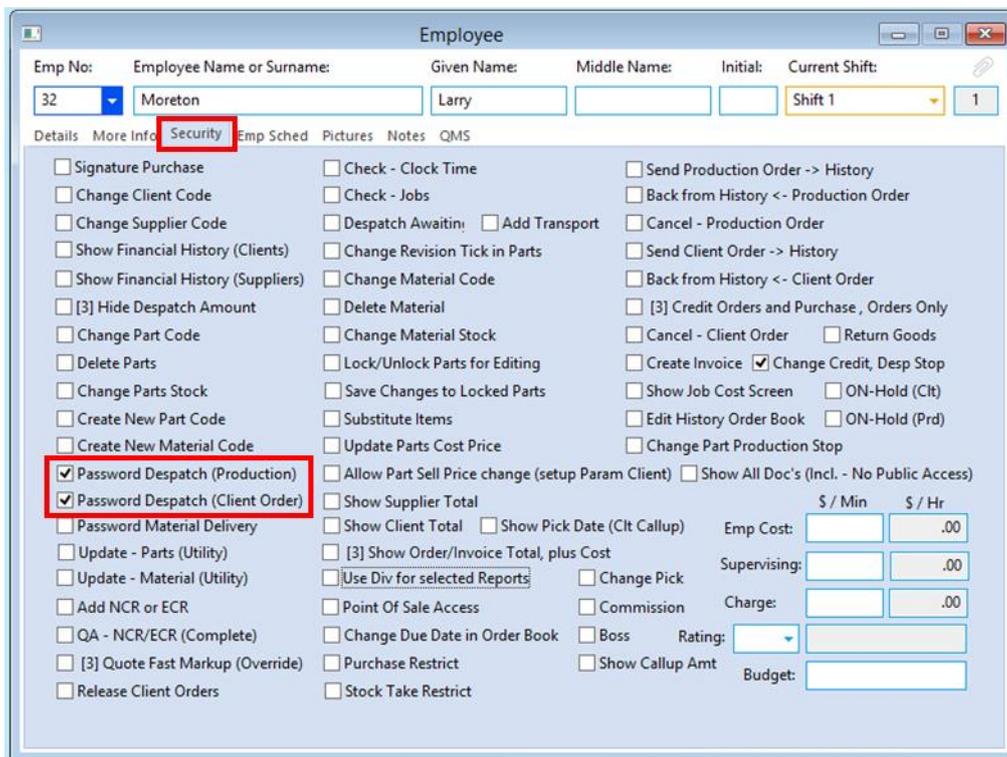
an internal password is entered. Only USERS with the correct permissions and an internal password can proceed to despatch the order.



Note: Only an authorised USER can set the necessary permissions and password.

To Set-Up Permissions for Employee

From the OPTO ribbon, select the 'Resources' tab and **click** on 'New/Edit Employee' then enter an employee's number in the **Emp No.** field or **press <F2>** and select an employee from the pop-up list then **click** OK, **press <TAB>** to display the selected employee's details. **Click** on the 'Security' tab to open. In the first column, find the **Password Despatch (Production)** and the **Password Despatch (Client Order)** tick boxes. **Click** in both boxes to tick, this will give permission to the selected employee.



While still in the 'Employee' window, **click** on the 'Details' tab to display the employee details. A password must be entered in the **Password** field (see below). This password MUST be unique to that employee, internal employee passwords cannot be the same as other USERS.

The screenshot shows the 'Employee' window with the 'Details' tab selected. The 'Password' field is highlighted with a red box. The window includes the following fields and sections:

- Emp No:
- Employee Name or Surname:
- Given Name:
- Middle Name:
- Initial:
- Current Shift:
- 1
- Details | More Info | Security | Emp Sched | Pictures | Notes | QMS
- Group Pos: ADMINISTRATION
- Emp Start Date: Sales Team:
- Position:
- Acting Position:
- Password:**
- Div:
- Is Active
- Lunch - Auto
- Smoko - Auto
- Multi On Only / Multi On & Off
- Rounding
- Round 15 Min -> <
- Web Despatch
- Table with columns: N, Day, <<<, Early Start, Std Start, Std Finish, Late Finish, >>>, Break, Norm Time, Over Time
- Address:
- Other Details:
 - Email Office:
 - SMTP PW:
 - Email Private:
 - Phone No: Mobile No:
- SubCont Supplier

Press <F9> when finished to save settings.