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.

💷 Clients - Ferret E	arthmoving Pty Ltd					• 🔀
Client Code:	Client Name:			Part	Prefix: Tax Code:	Ð
FERRET	 Ferret Earthmov 	ing Pty Ltd			2 🔫 A	ABN
Details Delivery I	nfo Client Info More Info	Orders Jobs	Quotes Parts	Invoices Financial H	ist Notes QMS	
Community [
Comments:						
						~
Job Ticket Text:						^
						-
Invoice Text:						~
🔲 Add to QF						-
- Export Informati	on:					
🔲 Acc Code 🛛 🗄	Export Name 1 (Company or I	.ast Name)	Export	Name 2 (First Name)		
4-1500 🗸	Ferret Earthmoving Pty Ltd				32	
Credit Informati	on:					
Credit Limit:	Credit Stop (Op Hold)	Balance 1:	Period 1:	Period 2:	Period 3:	
Total Amt		Balance	Period 4:	Period 5:	Period 6:	
\$30,808.	50	Dalatice	Fellou 4.	\$.00 \$.00	\$.00	
🔽 E-mail (Invoid	e) [Fax / Ph (Invoic	e)	Stock Order ON	LY	
sheridan@itmsy	/stems.com			📃 Alt Total Box (In	voice) 🔽 Show F	reight
☑ [3] Despatch \$	Stop, Secure 📃 Item Invoice	📃 Packing La	bel Speci 📃 No	Freight for Commercial	Invoice	-
			9113223d-		:538a	

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 <u>OK</u>.

1



■ Sales Order - <new entry=""></new>		
Order No: <u>Client Code:</u>	Client Name:	🔲 Del Contact , Phone No / Invoice Email 🛛 🖉
50149 FERRET	FERRET EARTHMOVING PTY LTD	· · · · · · · · · · · · · · · · · · ·
Details More Info Attachments		
Date Entered: ABN: E	mp No: Order Credit Note	Normal OUrgent Oconfirmed OForecast
Client Order No:	rning - Despatch Stop	Pickup 🖸 OnHold
	This Client has a DESPATCH STOP placed on ther	m. 👻
	Please contact Accounts about placing an Urder to	r this Client.
500 1110.	OK	
Job Desc:	WC	

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.

Despatch Sales Order		
Order No: Client Code:	Shipping Address:	Process
Emp No:	WARNING	Return PRD Ord/Job: Select OReset
	Please contact Accounts	Stock OUT No Stock Transaction Awaiting

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.

💵 Clients - Ferret Ear	thmoving Pty	Ltd									-		×
Client Code:	Clie	ent Name:						Part P	refix:	Tax	Code:		
FERRET	👻 Fe	rret Earthmovir	ng Pty Ltd							2	•	ABN	
Details Delivery In	fo Client Info	More Info	Orders	Jobs	Quotes	Parts	Invoice	s Financial His	t No	otes	QMS	5	
													_
Comments:													^
													Ŧ
Job Ticket Text:													^
													-
Invoice Text:													~
🕅 Add to QF													-
Export Information	n:												
Acc Code Ex	port Name 1 (Company or L	ast Name)			Export	Name 2	(First Name)					
4-1500 - F	erret Earthmov	ing Pty Ltd									32]
Credit Information	n:												
Credit Limit:	Credit Stor	(On Hold)	Balance 1:	\$ 00	Pe	riod 1:	1 00.2	eriod 2: ¢30 909 50	Perio	d 3:	\$ 00	1	
Total Amt:	- or cure ocop	(Balance	4.00	J L	riod 4:	****	eriod 5:	Peri	nd fi:	4.00		
\$30,808.50			Datatice		1 Г	1104 4.	\$.00	\$.00	- City	5a 0.	\$.00	1	
E-mail (Invoice))		Fax / Ph (1	nvoice)				Stock Order ONL	Y				
sheridan@itmsys	tems.com							Alt Total Box (Inv	oice)	V	Show	Freigh	nt
3] Despatch St	op, Secure	Item Invoice	🔲 Packir	ng Labe	el Speci	📃 No I	reight f	or Commercial I	voice				
					91	13223d-	- 6e8-46e	f-97fa-4a56062e5	38a				

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

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

Despatch Sales Order		
Order No: Client Code:	Shipping Address:	Process
Emp No:	WARNING	Return PRD Ord/Job: Select Reset
	QK	Stock OUT No Stock Transaction Awaiting

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.

	Employee 🗾 🗉 💌
Emp No: Employee Name or Surna	me: Given Name: Middle Name: Initial: Current Shift:
32 Voreton	Larry Shift 1 🔫 1
Details More Info Security Emp Sched	Pictures Notes QMS
Signature Purchase	Check - Clock Time Send Production Order -> History
Change Client Code	Check - Jobs Back from History <- Production Order
Change Supplier Code	Despatch Awaiting Add Transport Cancel - Production Order
Show Financial History (Clients)	Change Revision Tick in Parts Send Client Order -> History
Show Financial History (Suppliers)	Change Material Code Back from History <- Client Order
[3] Hide Despatch Amount	Delete Material [3] Credit Orders and Purchase , Orders Only
Change Part Code	Change Material Stock Cancel - Client Order Return Goods
Delete Parts	□ Lock/Unlock Parts for Editing □ Create Invoice ♥ Change Credit, Desp Stop
Change Parts Stock	Save Changes to Locked Parts Show Job Cost Screen ON-Hold (Clt)
Create New Part Code	Substitute Items Edit History Order Book ON-Hold (Prd)
Create New Material Code	Update Parts Cost Price Change Part Production Stop
Password Despatch (Production)	Allow Part Sell Price change (setup Param Client) Show All Doc's (Incl No Public Access)
 Password Despatch (Client Order) 	Show Supplier Total
Password Material Delivery	Show Client Total Show Pick Date (Clt Callup) Emp Cost:00
Update - Parts (Utility)	[3] Show Order/Invoice Total, plus Cost Supervising:
Update - Material (Utility)	Use Div for selected Reports
Add NCR or ECR	Point Of Sale Access Commission Charge:
QA - NCR/ECR (Complete)	Change Due Date in Order Book Boss Rating:
[3] Quote Fast Markup (Override)	Purchase Restrict Show Callup Amt Budget:
Release Client Orders	Stock Take Restrict

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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 <u>MUST</u> be unique to that employee, internal employee passwords cannot be the same as other USERs.

				Linpic	ycc					
mp No:	Employee Na	ime or Suri	name:	Given	Name:	Middle Name:	Initi	ial: Cur	rrent Shift:	i
32	 Moreton 			Larry	,			Sh	ift 1	•
etails _M	ore Info Security	Emp Sch	ed Pictures I	Notes QMS						
Group	Pos: 10 🗸	ADMI	NISTRATION					Is Active		
	Emp Start Date	± [Sale	es Team:	- Y	es 🗌	Lunch -	Auto	
Positi	ion:					Y	es 🗌	Smoko -	Auto	
A	ting							Multi On	Only / Multi	On & Off
Positi	ion:							Roundin	q	
									-	
Passw	ord:	Di	v: 🔽					Round 1 Web Des	5 Min · >	
Passwo	ord:	Di	v: 🗸	Std Start	Std Finish	Late Finish	->>-] Round 1:] Web Des Break	5 Min · >	Over Time
Passwe N 1 MON	Day	Di	V: Early Start 00:00:00	Std Start 07:00:00	Std Finish 15:06:00	Late Finish 00:00:00	->>-	Round 1 Web Des Break .50	5 Min · > spatch Norm Time 7.60	Over Time
Passwo N 1 MON 2 TUESU	Day DAY	Di	V: Early Start 00:00:00 00:00:00	Std Start 07:00:00 07:00:00	Std Finish 15:06:00 15:06:00	Late Finish 00:00:00 00:00:00	->>- 5 5	Round 1 Web Des Break .50 .50	5 Min · > spatch Norm Time 7.60 7.60	Over Time 3.0 3.0
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Press <F9> when finished to save settings.

