

Pending Parts Verification (PPV)

Scan Products Prior to Assigning to Deliver Driver / Scan Outbound Store Transfers / Scan Products Prior to Finalizing Sales Orders

Scan SO/ST before assigning to Driver

Jun 4, 2013

An update has been pushed to improve the scan products option in the PDM (pending delivery module), which is an optionally required scan of products on a SO while assigning to a driver. This same update has also been pushed to the outgoing store transfers page where you can now assign those to drivers and require a pre-scan as well. Additionally another new feature has been created and pushed called PPV, which only allows counterman (probably more of a phone-room application) to save a SO to PPV, which is pending product verification. This would then allow a picker to pull the parts, and then go to the PPV page to scan/verify all parts are accounted for, which then finalizes the SO and prints the invoice docs.

Scan Products Prior to Assigning to Deliver Driver

For those users that use the Delivery module within Fuse5 you have the ability to select which delivery methods are sent through as pending deliveries. This is set up within Custom Settings.

Deliver

Delivery Methods

Will Call
Our Truck
UPS
DHL
Speedee

+ Add Deliver Method

Our Truck
USPS
Deliver
Elite Extra

Delivery methods sent to Fuse5 PDM

Delivery Methods List (All Options)

To access the sales orders that have been pushed to the delivery module, go to **DELIVERIES > PENDING DELIVERIES**. Within the pending delivery module there is a button for Settings.



Fuse5 Training Documentation

Assigned Deliveries Delivery Log Awaiting Store Transfers

Pending Deliveries

View deliveries for Multi-locations : ☒ Bora Bora ☐ Fiji ☐ Tahiti ☐ Samoa ☐ Easter Island ☐ Cook Islands ☐ Solomon Islands ☐ French Polynesia

Process **Settings** Remove Deliveries Deliver/Picked Up Assign Deliveries To

	Minutes until You're Late ▼	TDT	Location	Route	SO #	SO Total	Vendor
	27 Days, 20 Hrs, 50 Mins, 19 Secs LATE	6:54 PM 06-13-13	Bora Bora	GTT DS	BB13132513	5063.580	Exide Technologies
	27 Days, 20 Hrs, 47 Mins, 19 Secs LATE	6:57 PM 06-13-13	Bora	GTT DS	BB13132519	250.000	Exide



Once pushed you have the option to do a couple of things including selecting to “Scan Products?”

Pending Deliveries Settings

Require Assigned Products To Be Scanned

Scan Products ? ☒

Pending Deliveries Level Setting

Level	Minimum Time (Minutes)	Maximum Time (Minutes)	Color
Level -2	-701 ▼	INFINITE ▼	
Level -1	0 ▼	-700 ▼	

Once a sales order is assigned to the delivery module and you attempt to assign to a driver you will be prompted to scan the products.

Scan Products			
Bar Code	Line Code	Product Number	Qty
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

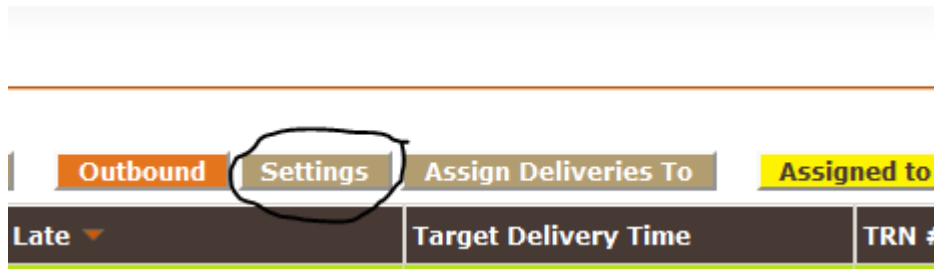
Product Details				
<input type="checkbox"/>	Line Code	Product Number	Total Qty	Qty Scanned
<input type="checkbox"/>	TRN	Part20	2 <input type="text"/>	<input type="text"/> 0
<input type="checkbox"/>	WIX	51515ST	1 <input type="text"/>	<input type="text"/> 0
<input type="checkbox"/>	WIX	51515R	1 <input type="text"/>	<input type="text"/> 0

The picker or driver should scan the parts in and then move forward with the delivery.

Scan Outbound Store Transfers

Pending Parts Verification (PPV) is an extra step added between creating a sales order and printing the invoice. The extra step is used to scan/verify quantity and parts picked before releasing the invoice. When a sales order is created with PPV on, a pick ticket will print (based on the account's default documentation preference), but the rest of the documents including the invoice and packing slip will not print at that time, and the sales order will then be listed in the 'PPV' page. You can access the PPV page through the white button at the top of the 'create Sales Order' page, or under the Sales Order Menu. Using a pick ticket or fuse5 scanner a user will pick the parts, then go to the PPV page, select the invoice and scan the parts to verify all parts were found and picked. This will then print the rest of the documents for this sales order including the invoice and the packing slip.

To access the PPV module within to verify parts prior to sending out on an outbound store transfer, go to DELIVERIES > AWAITING STORE TRANSFERS. There is a setting button at the top of the list of store transfers, between the OUTBOUND and ASSIGN DELIVERIES TO buttons.



If you check the box next to a store transfer and hit the ASSIGN DELIVERIES TO button, you will get the pop up that requires that the parts be scanned to verify all of the correct parts have been chosen.

Doesn't seem to let you manually enter Qty Scanned like you can when doing PPV????

The 'Assign to driver' dialog box contains two main sections. The 'Scan Products' section has a table with columns: Bar Code, Line Code, Product Number, and Qty. The 'Product Details' section has a table with columns: Line Code, Product Number, Total Qty, and Qty Scanned. The table in 'Product Details' shows three rows of data with checkboxes in the first column.

	Line Code	Product Number	Total Qty	Qty Scanned
<input type="checkbox"/>	CEN	12161026	2	0
<input type="checkbox"/>	CEN	30003100	1	0
<input type="checkbox"/>	PRE	515058	1	0

At the bottom of the dialog box are 'Proceed' and 'Cancel' buttons.

Scan Products Prior to Finalizing Sales Orders (Pending Product Verification or PPV)

Pending Parts Verification (PPV) is an extra step added between creating a sales order and printing the invoice. The extra step is used to scan/verify quantity and parts picked before releasing the invoice. When a sales order is created with PPV on, a pick ticket will print (based on the account's default documentation preference), but the rest of the documents including the invoice and packing slip will not print at that time, and the sales order will then be listed in the 'PPV' page. You can access the PPV page through the white button at the top of the 'create Sales Order' page, or under the Sales Order Menu. Using a pick ticket or fuse5 scanner a user will pick the parts, then go to the PPV page, select the invoice and scan the parts to verify all parts were found and picked. This will then print the rest of the documents for this sales order including the invoice and the packing slip.

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There are several settings that must be set appropriately in order to use the PPV functionality.

Custom Setting: If this is turned OFF, none of the PPV functionality at the point of sales will be available.

Push SO to PPV instead of finalizing	<input checked="" type="checkbox"/> ON This setting will push Charge or COD SO to PPV instead of finalizing.
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Custom Setting:

Deliver	
Delivery Methods	<div><div>Will Call UPS DHL FedEx We Deliver</div><div>>></div><div>We Deliver Dereks Bike FedEx</div></div> <div>+ Add Deliver Method</div> <div>Delivery Methods List (All Options)</div>

Location Setting: If this is turned OFF, none of the PPV functionality at the point of sales will be available. The reason there is a custom and locations setting is to meet the needs of organizations that want to use the PPV functionality, but only in specific locations.

Show Save to PPV button on SO: ?	Yes
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User Setting: This allows you to set a User preference to display the PPV Notification pop up for pending PPV's when user logs in so that the user knows to complete PPV and can jump directly to the PPV page.

Show PPV Notification	No ?
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Pending Part Verification requires users verify sufficient quantity after picking and inorder to finalize the Sales Order. - need to clean up this help file

If you select one of the delivery methods available in Delivery Methods (Custom Setting), you will get the option to push to PPV. You can avoid doing this by unchecking the “Push SO to PPV instead of Finalizing” button. If you do that you can finalize the SO with any payment method acceptable for that account. The only payment methods available when pushing to PPV are Charge and COD.

Account Balance : **13980.78**

Push SO to PPV instead of Finalizing ☒

Charge (F8)

COD

Need to update the help file next to “Push SO to.....”.

If you push a SO to PPV it WILL show up on the Sales Orders listings page as a pending SO.

<div> <div>Search</div> <div>Go to Advanced Search</div> </div> <div> <div>Search for</div> <div></div> <div>In</div> <div>SalesOrder No</div> <div>Exact match</div> <div> Begins With</div> </div> <div> <div>A</div><div>B</div><div>C</div><div>D</div><div>E</div><div>F</div><div>G</div><div>H</div><div>I</div><div>J</div><div>K</div><div>L</div><div>M</div><div>N</div><div>O</div><div>P</div><div>Q</div><div>R</div><div>S</div><div>T</div><div>U</div> </div>							
Delete Showing 1 - 2 of 2							
SalesOrder No	Account Name	Account No	Customer PO #	Created Time	Web Order	Status	Cou
<input checked="" type="checkbox"/> S1106	Training	T123456		07-10-2013 14:54:09	No	Pending	admi
<input type="checkbox"/> S1100	Test	A100		07-09-2013 16:25:19	No	Finished	Dani

It will also show up in the PPV module. Click the PPV button on either the Sales Orders listings page or on an open sales order page. It is at the top center of the screen.

Personal & Admin

Create Repair Multi Print SO Unlock SO **PPV**

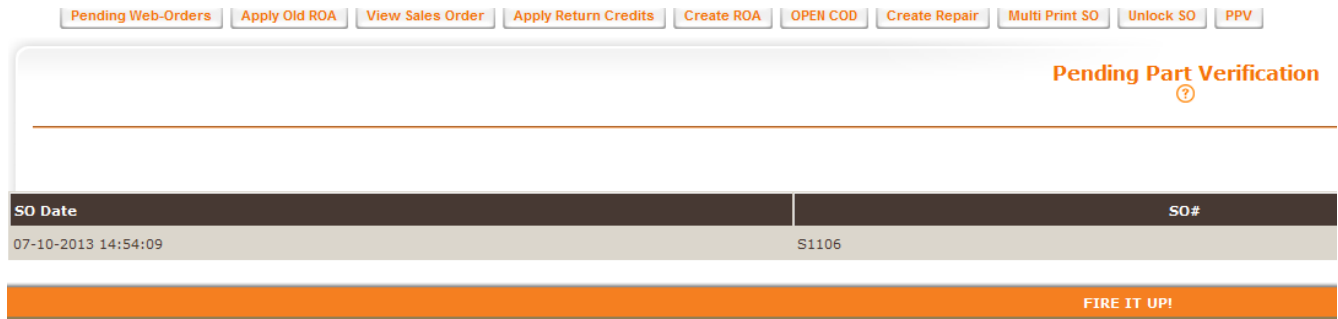
Sales Orders

In SalesOrder No Exact match Begins W

J K L M N O P Q R

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Once you click into the PPV module you will see all sales that have been pushed to PPV.



The screenshot shows the PPV module interface. At the top, there is a navigation bar with buttons: Pending Web-Orders, Apply Old ROA, View Sales Order, Apply Return Credits, Create ROA, OPEN COD, Create Repair, Multi Print SO, Unlock SO, and PPV. Below the navigation bar, the title "Pending Part Verification" is displayed with a question mark icon. A table lists sales orders with columns "SO Date" and "SO#". The first row shows "07-10-2013 14:54:09" and "S1106". At the bottom, there is an orange bar with the text "FIRE IT UP!".

SO Date	SO#
07-10-2013 14:54:09	S1106

Click on the VERIFY QTY button at the right to pick and then finalize the SO.



The screenshot shows a table with two columns: "# Of Sales pieces" and "Action". The first row has the value "1" in the "# Of Sales pieces" column and a "Verify Qty" button in the "Action" column. The button is highlighted with a yellow box. Above the table, there is a dropdown menu set to "20" and a checkbox labeled "Auto Refre:". At the bottom, there is a copyright notice: "© Copyright 2013. Green Team Technologies. All Rights Reserved".

# Of Sales pieces	Action
1	Verify Qty

Once you have selected Verify Qty in the PPV module you will get a pop up that asks you to scan and verify Qty. At this point the user should put the cursor in the Bar Code box and either scan the bar code, enter the barcode manually (followed by enter), or enter the Qty Scanned manually.

Scan and Verify Qty

Scan Products

Bar Code	Line Code	Product Number	Qty

Product Details

Line Code	Product Number	Ship Qty	Qty Scanned
TRN	Part1	1	0

Proceed & Finalize SO

Cancel

Once the barcode number is entered you will see the Qty Scanned increase. Once you have scanned all the parts, click on Proceed & Finalize SO. If it was a charge sale the user in PPV will see nothing else.

Scan and Verify Qty

Scan Products

Bar Code	Line Code	Product Number	Qty

Product Details

Line Code	Product Number	Ship Qty	Qty Scanned
TRN	Part1	1	1

Proceed & Finalize SO

Cancel

The sale is now finalized and the account has been charged for the parts. If the sale was COD it will show up on the Sales Order listings page as pending.

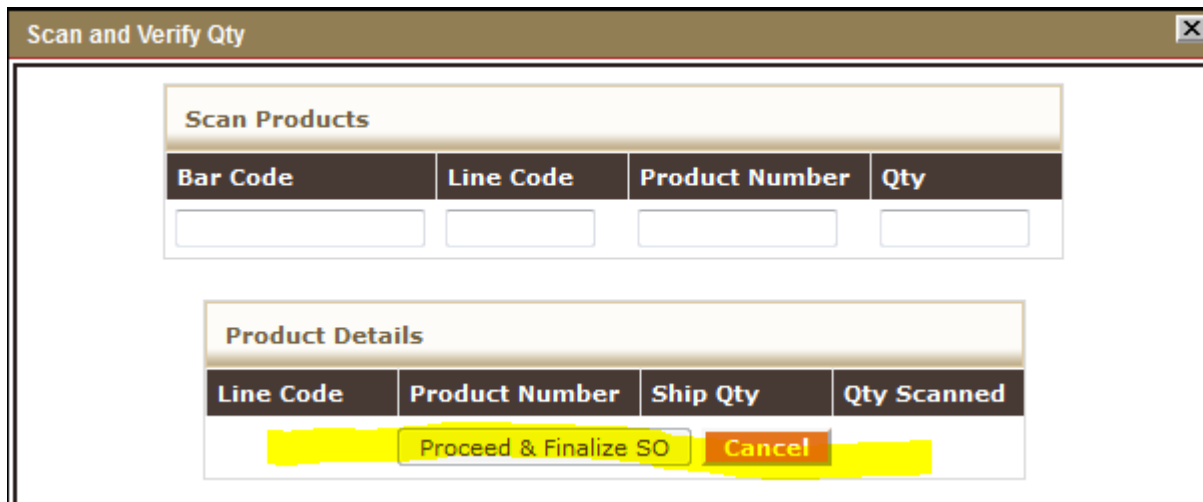
If COD and it was a Will Call delivery method, the person that handles the final transaction would access the SO through the listings page and all available payment methods will be available.

If UPS or Fed Ex, or another third party delivery method is selected, the person that puts the parts in

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the box and ships them should finalized the SO or it can be finalized once the customer receives the package. All payment methods are now available.

If you pull up the Scan and Verify Qty and there are no parts showing under Product Details, then the SO has already been verified. The Proceed & Finalize SO button will not be clickable either.



The screenshot shows a window titled "Scan and Verify Qty". It contains two main sections: "Scan Products" and "Product Details".

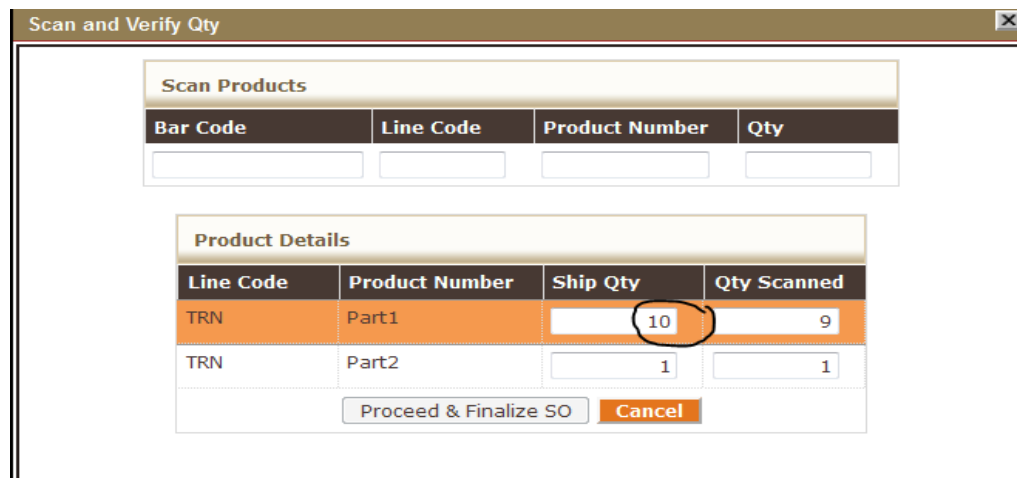
Scan Products

Bar Code	Line Code	Product Number	Qty
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Product Details

Line Code	Product Number	Ship Qty	Qty Scanned
<div><div>Proceed & Finalize SO</div><div>Cancel</div></div>			

If the person doing the verifying does NOT have the ability to scan all the parts, they can change the Shipped Qty.



The screenshot shows the same "Scan and Verify Qty" window, but now with data entered in the "Product Details" table. The "Ship Qty" field for "Part1" is circled, indicating it can be edited.

Scan Products

Bar Code	Line Code	Product Number	Qty
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Product Details

Line Code	Product Number	Ship Qty	Qty Scanned
TRN	Part1	<input type="text" value="10"/>	<input type="text" value="9"/>
TRN	Part2	<input type="text" value="1"/>	<input type="text" value="1"/>

Proceed & Finalize SO

Cancel

Scan and Verify Qty

Scan Products

Bar Code	Line Code	Product Number	Qty

Product Details

Line Code	Product Number	Ship Qty	Qty Scanned
TRN	Part1	9	9
TRN	Part2	1	1

Proceed & Finalize SO

Cancel

Once the shipped quantity is changed, the user has the ability to Proceed & Finalize SO. Once clicked you will get the following pop up.

As you have changed Ship Qty, You can NOT finalize this SO from this popup.
Please click OK to open this SO in edit and CANCEL to cancel the operation.

OK

Cancel

If you click OK, Fuse5 will take you directly to the pending sales order. The ship quantity adjustment made above will NOT follow through to the pending SO. At this point the user should manage the sales order as if it was never in the PPV module. The user must now make the appropriate adjustments to the sales order (regarding ship quantity) before finalizing the SO.

For those of you with warehouses and dedicated pickers, we have a new function that would allow you to save all SO to "PPV" which will print a pick ticket, but NOT finalize the SO and NOT print the invoice, but instead push the SO to "PPV" which you can access from the top of the Sales Order or Create Sales Order page. This page then allows you to go pick the parts, then come to a PC and scan all parts to verify you have them in your possession which will then release the invoice. This would eliminate the ability to finalize an invoice without confirming inventory on hand and also confirm that you have pulled the correct part, all before finalizing the SO and printing the invoice. There are 3 custom settings related to this and each one has the same ? help button that will walk you through how to enable it.