



## Exact Macola Progression Version 7.7.200 Enhancements

The following enhancements are available in Progression version 7.7.200:

[A/R - Displaying Credit Card Numbers](#)

[A/R - Generate Taxable Amount on 0% Tax](#)

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[Enabled PSQL v10 for Customer Use \(for Pervasive only\)](#)

### Displaying Credit Card Numbers

The combination of Progression packages you have affects using the F2 key to display the credit card number on the Customer Maintenance Order Entry Prepayment screen. The packages that affect this are A/R without O/E and Credit Card Processing; A/R and O/E without Processing; or A/R, O/E, and Credit Card Processing.

#### **A/R without O/E and Credit Card Processing**

When on the credit card number field on the A/R Customer Maintenance screen, you can press the F2 key, and the credit card number is displayed. Without the Order Entry package, you cannot access the O/E Setup screen to set up Warn or Prevent with a password on the field.

### **A/R and O/E without Credit Card Processing**

When on the credit card number field on the A/R Customer Maintenance screen and on the O/E Order Entry Prepayment screen, you can press the Enter key; the credit card number will be displayed. You can access the O/E Setup screen and set up Warn or Prevent with a password on the field.

### **A/R, O/E, and Credit Card Processing**

When on the credit card number field on the A/R Customer Maintenance screen and on the OE Order Entry Prepayment screen and you press the Enter key, the result is based on the O/E Setup screen: Neither, Warn, or Prevent (with password prompt). You can access the O/E Setup screen at anytime. All credit card fields on the O/E Setup screen will be enabled on the credit card setup section.

## **Generate Taxable Amount on 0% Tax**

The Accounts Receivable Setup screen has a check box called "Taxable Amt on 0% Tax?". This check box applies to tax schedules, not to items. Select this check box to calculate a taxable amount for an item using a tax schedule, even if the schedule has a tax code set up as 0%.

For example, Item 1 has a price of \$100. A customer with a tax schedule that has a tax code set up with a 0% tax purchases Item 1. If the **Amt on 0% Tax?** check box is cleared, Item 1 has no taxable amount. If the **Taxable Amt on 0% Tax?** check box is selected, Item 1 has a taxable amount. The Tax Analysis by Tax Code report in System Manager will show the taxable amount.

**A/R Setup - [Change]**

File Edit Window Help

DEMO

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**Discount Setup**

Discount Miscellaneous?

Discount Freight?

Discount Sales Tax?

Discount Acct: **03150 00000 00000**

**Sales Discounts**

**Processing Options**

Distribute Sales?       Multiple Writeoff Accts?

Distribute Misc?       Use Multi-Currency?

Distribute Freight?       Use Job Numbers?

Multiple Cash Accts?       Keep Cust Audit Trail?

Taxable Amt On 0% Tax?

Create Service Open Items  
Based On Invoice Date?

Tax Schedule Usage: **0=Optional**

Lock Protected Fields?

**Note Literals**

Note 1:

Note 2:

Note 3:

Note 4:

Note 5:

Date:

Amount:

**Serialized Documents**

Use Serial Docs?

**Settlement Discount**

Use Settlement Disc?

Macola Ele-SQL      Tuesday, July 07, 2009

## Print Bill of Lading and Packing List for In Transit Inventory

The Enter In Transit Inventory screen allows you to transfer inventory from one location to another using a temporary location to store it in transit. Access the Enter In Transit Inventory screen under Inventory Management \ Trx \ Transit Inventory.

On the Enter In Transit Inventory screen, there are buttons to print the bill of lading and packing list for in transit inventory.

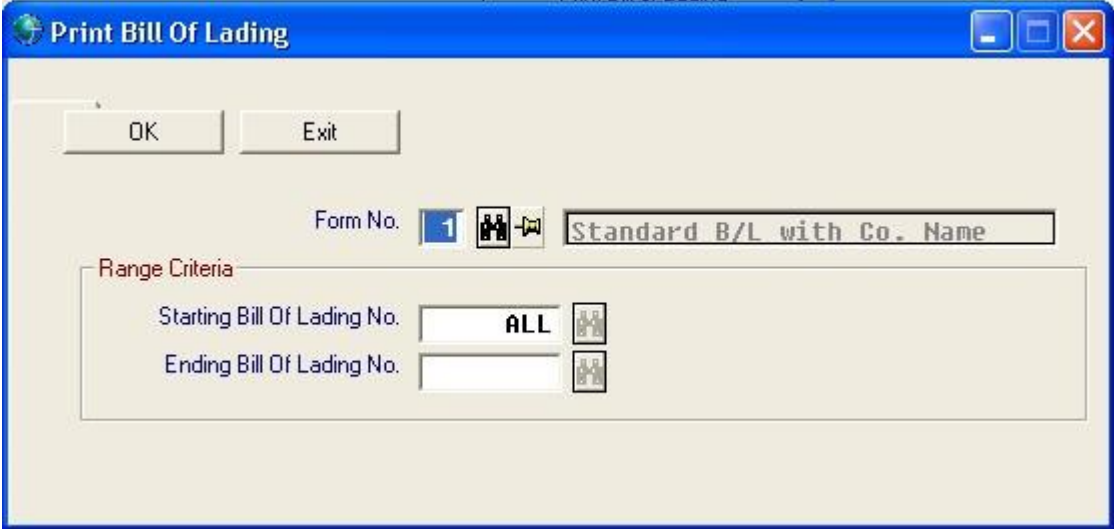
The screenshot shows the 'Enter In Transit Inventory' application window. The window title is 'Enter In Transit Inventory'. The menu bar includes 'File', 'Edit', 'Window', and 'Help'. The toolbar contains icons for file operations and navigation. The main area is divided into several sections:

- Top Left:** Fields for 'Transit No.', 'Status', 'Document Date', 'Ship Date', 'Due Date', 'Order No.', and 'Order Type'.
- Top Middle:** Fields for 'From Location', 'Temp Location', and 'To Location'.
- Top Right:** A vertical stack of buttons: 'Print Transit Doc', 'Landed Cost', 'View Bin/Serial Lots', 'Enter Bill of Lading', 'Print Bill of Lading', and 'Print Packing List'. The last two buttons are highlighted with a red rectangle.
- Middle:** Two 'Comments' text areas.
- Bottom Left:** 'Item Description' text area.
- Bottom Middle:** Fields for 'From Account', 'Temp Account', and 'To Account', each with a grid icon.
- Bottom Right:** Fields for 'From Account Desc.', 'Temp Account Desc.', and 'To Account Desc.'.
- Bottom:** A row of fields for 'Item No.', 'Trx Quantity', 'UOM', 'Cost', and 'Project'.

The status bar at the bottom displays 'Search (F7)', 'Macola Ele-SQL', and 'Tuesday, July 07, 2009'.

## Print Bill of Lading

Use this screen to print a bill of lading. A bill of lading is a document that lists the contents of a shipment. This bill serves as the carrier's contract to transport the goods to a given destination and deliver them to a specified person. This document also serves as the basis for claims that may result from loss, damage, or delay of the shipment.



The screenshot shows a software window titled "Print Bill Of Lading". At the top left, there are two buttons: "OK" and "Exit". Below these buttons, the text "Form No." is followed by a dropdown menu showing "1" and a list of icons. To the right of this is a text box containing "Standard B/L with Co. Name". Below this section is a "Range Criteria" box. Inside this box, there are two rows: "Starting Bill Of Lading No." with a dropdown menu showing "ALL" and a list of icons, and "Ending Bill Of Lading No." with an empty dropdown menu and a list of icons.

**Print Packing List**

Use this screen to print a packing list. A packing list is a document that lists all the items on an order that have been taken from stock (shipped from a particular warehouse).

Print Packing List

Save Exit

Form No. 1

Starting Order No.

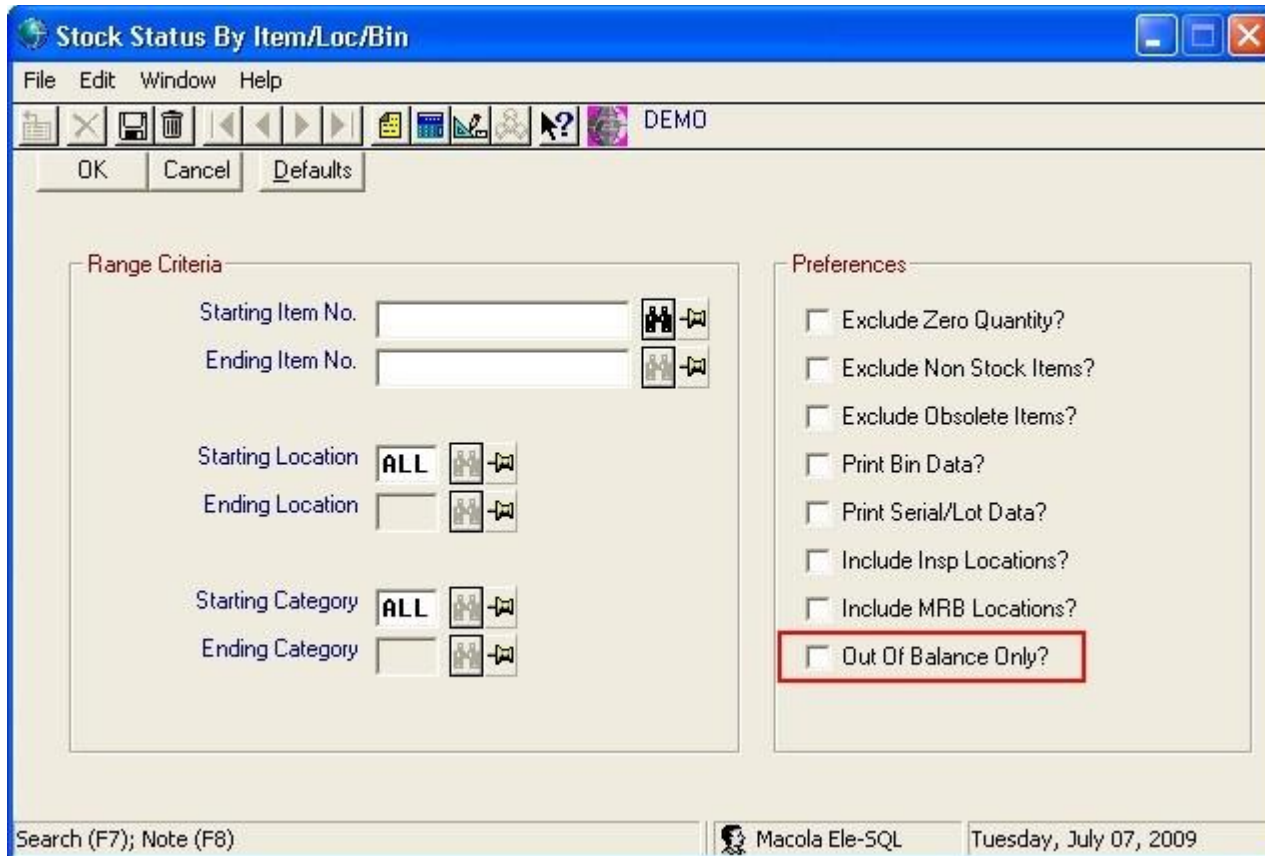
Ending Order No.

To Warehouse Location

## Stock Status Report Quantity Alignment

There is a new process to reconcile and align quantities at Location, Bin and Serial/Lot levels.

There is a check box called "Out of Balance Only?" on the Stock Status by Item/Loc/Bin screen and the Stock Status by Loc/Item/Bin screen prints a report when an item/location is out of balance with the bins, lots, or serials. (Note: This check box is not enabled if you do not select the Bin Data? check box or the Print/Serial Lot Data? check box.)



## Enter a G/L Distribution Date for Confirm Pick and Confirm Ship

Use the G/L Distribution Date to enter the date for Confirm Pick and Confirm Ship transactions to post to the General Ledger. This allows you to choose the date in the proper financial period, which can be especially important during month end procedures.

On the O/E Setup screen, select to use Confirm Ship or Confirm Pick.

Enter and save a sales order using O/E Order Entry.

Complete Confirm Picking (or Confirm Shipping).

The Request Date From Line Item screen opens to allow entry of G/L distribution date. The date must be in an open period. The date entered is used as the date for Confirm Pick or Confirm Ship Distributions as well as the Inventory Transaction Document Date. The G/L Distribution will not appear during Confirm Ship, if it was entered during Confirm Pick. The field defaults to the system date and can be changed.



Request Date From Line Item

OK Cancel

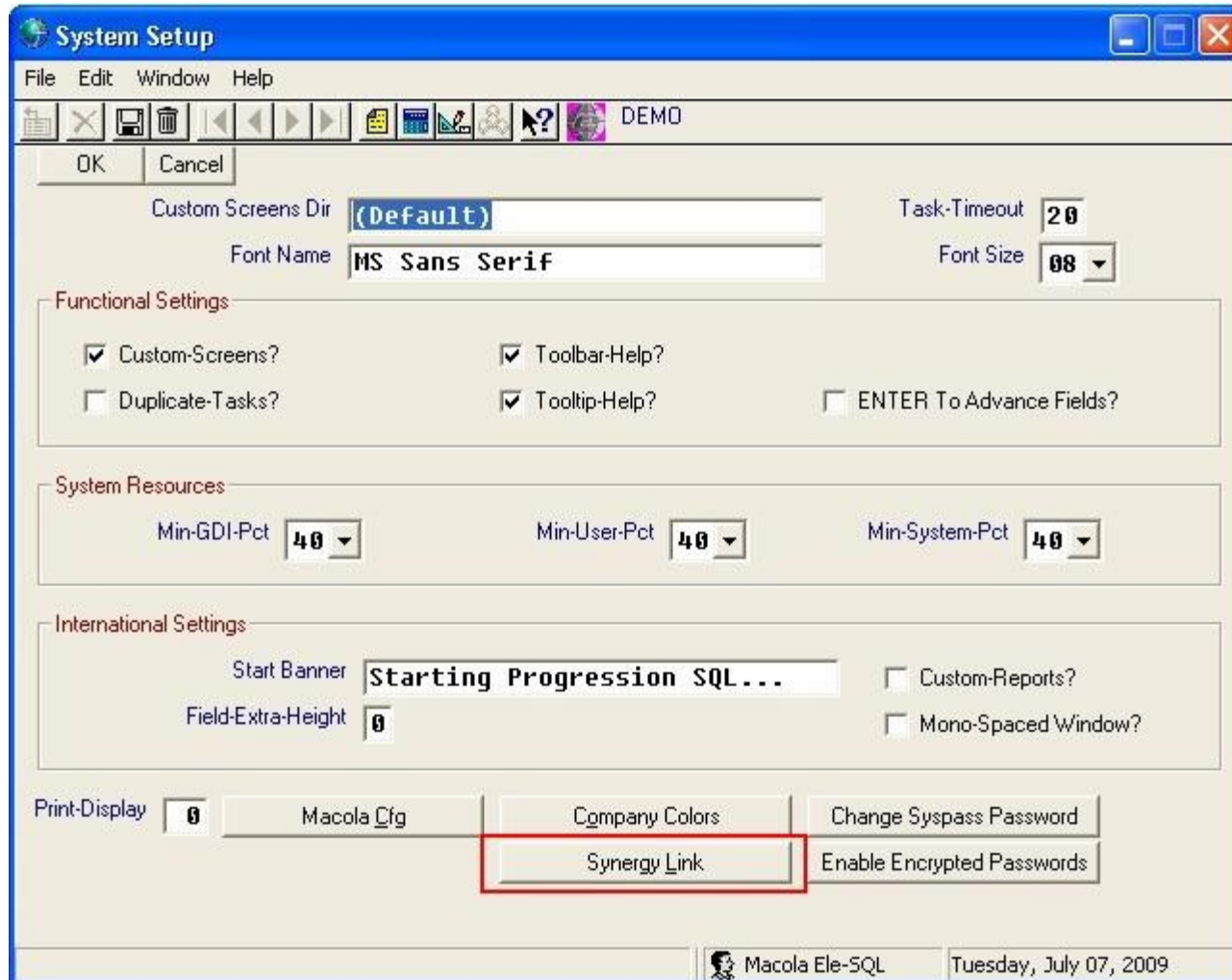
Pick Cutoff Date 12/10/94

G/L Distribution Date 12/10/94

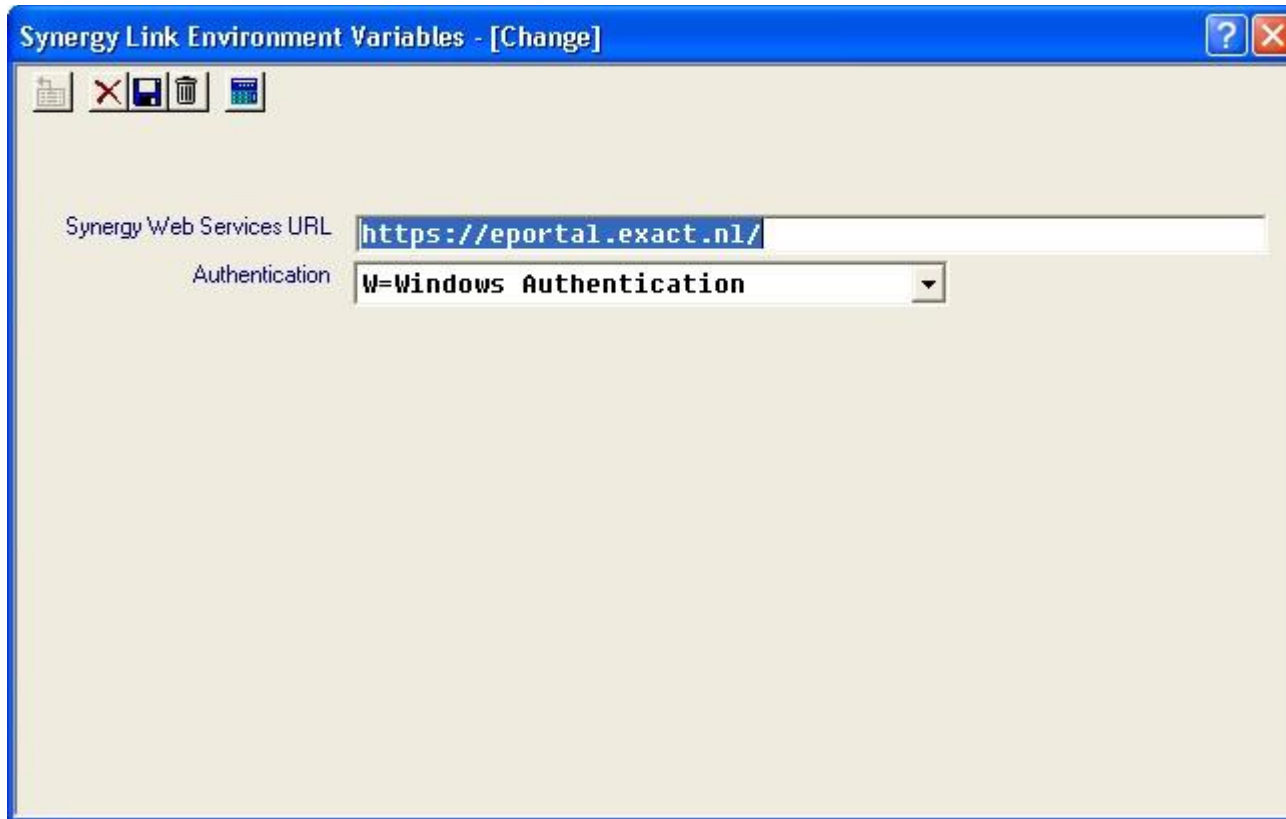
## Dynamic Synergy Workflow Link for Exact Synergy Enterprise

Some Progression screens can create Exact Synergy Enterprise workflow requests (checked tasks) without leaving Progression. The request uses some information from the Progression screen. To set this up, open the System Setup screen. (Select File \ Preferences).





Click the **Synergy Link** button. This opens the Synergy Link Environment Variables screen.



**Synergy Web Services URL:** Enter the address to your company's Exact Synergy Enterprise installation.

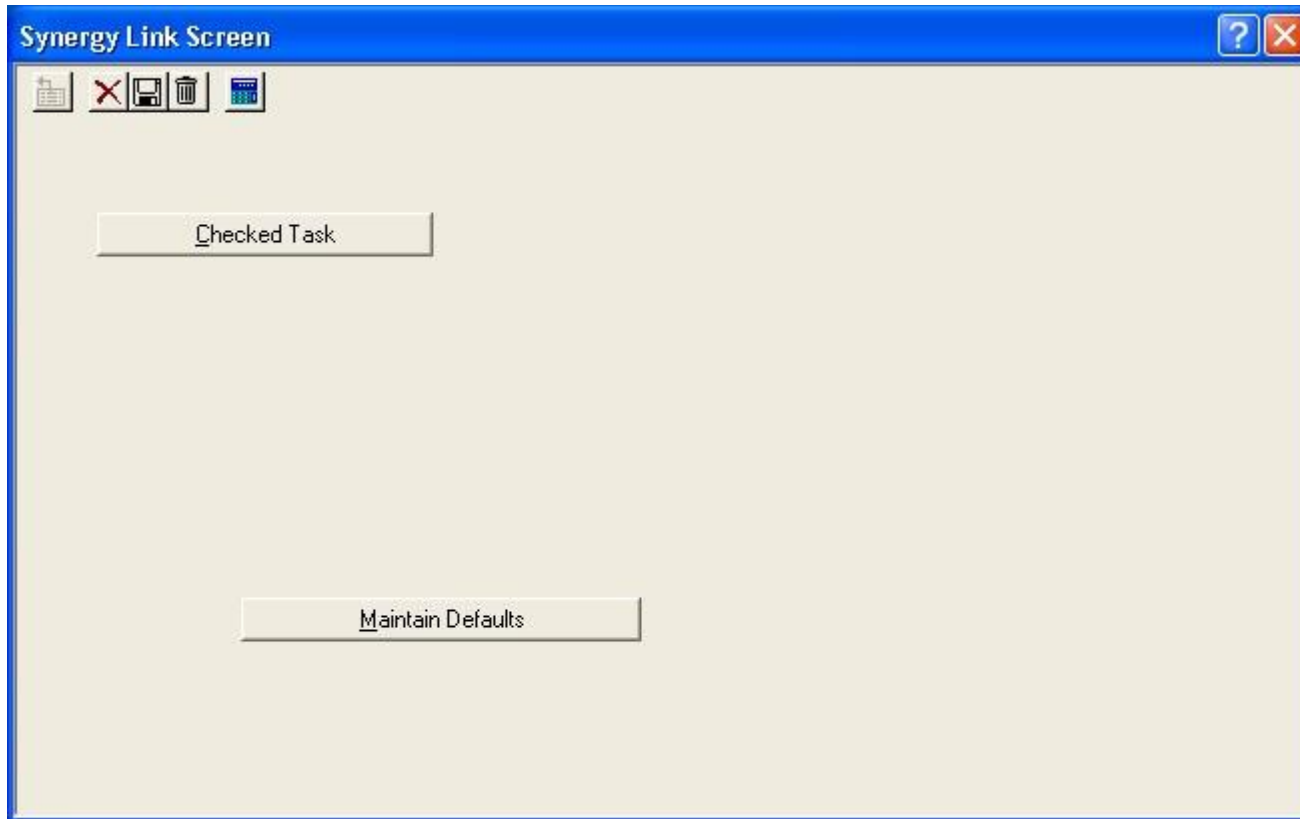
**Authentication:** Select W=Windows Authentication (this is the only choice).

Completing these fields activates the Synergy button on the toolbar of various Progression screens.

When a record is entered on a Progression screen, for example, a sales order is saved (O/E Order Entry), the Synergy button is enabled



Click this button to open the Synergy Link screen.



Click the **Maintain Defaults** button. This opens the Synergy Link Maintenance screen. (The Synergy Request defaults need to be set up the same request defaults will be used for each request.)

Synergy Link Maintenance Screen

Request Type **C - Checked Task** Resource

Description

Priority Security Level

Project Item

Account

Remark 1

Remark 2

Remark 3

Remark 4

Remark 5

Remark 6

Remark 7

Remark 8

Remark 9

Remark 10

Synergy Request Category

Synergy Request #

Enter the request defaults. These defaults will be used for each request until changed.

Synergy Link Maintenance Screen - [Change]

Request Type: C - Checked Task      Resource: SLSPSN NO

Description: Order Additional Components for Customer Order

Priority: 2 - High      Security Level: 010 - Internal

Project:      Item: ITEM\_NO

Account: CUS\_NO

Remark 1  
Remark 2  
Remark 3  
Remark 4  
Remark 5  
Remark 6  
Remark 7  
Remark 8  
Remark 9  
Remark 10

Synergy Request Category: 0

Synergy Request #: 0

Save the defaults and close the Synergy Link Maintenance screen.

Click the **Checked Task** button to open the Synergy Link Maintenance screen again. If needed, make any changes.

Save and exit the screen.

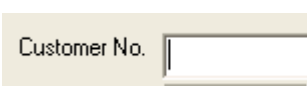
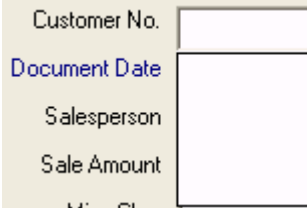
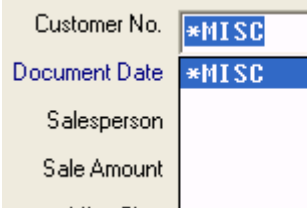
This opens the Exact Synergy Enterprise checked task entry screen. Changes can be made before submitting the checked task.

## Setting to Disable the Auto Fill Feature

This allows or disables the auto fill feature. (This is user specific.) When changing existing data on a screen, data entry can be faster with feature turned off.

Modify the Macola7.INI file by adding a line to enable or disable an auto fill option for various search fields such as vendor, customer, item

Enabling this feature adds a drop down arrow to various fields and enables the F6 key to auto fill the drop down list. You can use this to drop down list and select a value.

Search drop down list beside some fields	
Initially the drop down list is empty	
While in the field, press the F6 key to fill the drop down list with v	

Disabling this feature removes the drop down arrow and does not enable the F6 key.



The auto fill option does not affect the search button.

### **Enable the Auto Fill Option**

To enable this feature, add the following line in the Macola7.INI file or change it to:

```
Disable-Fillfield = Y
```

### **Disable the Auto Fill Option**

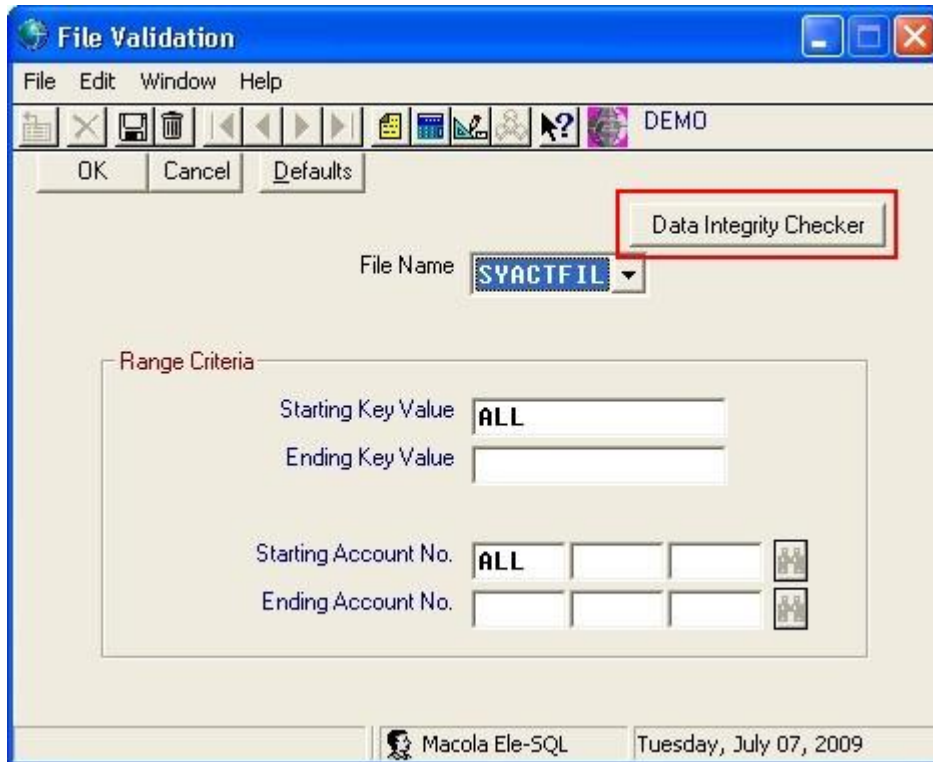
To disable this feature, change the following line in the Macola7.INI file to:

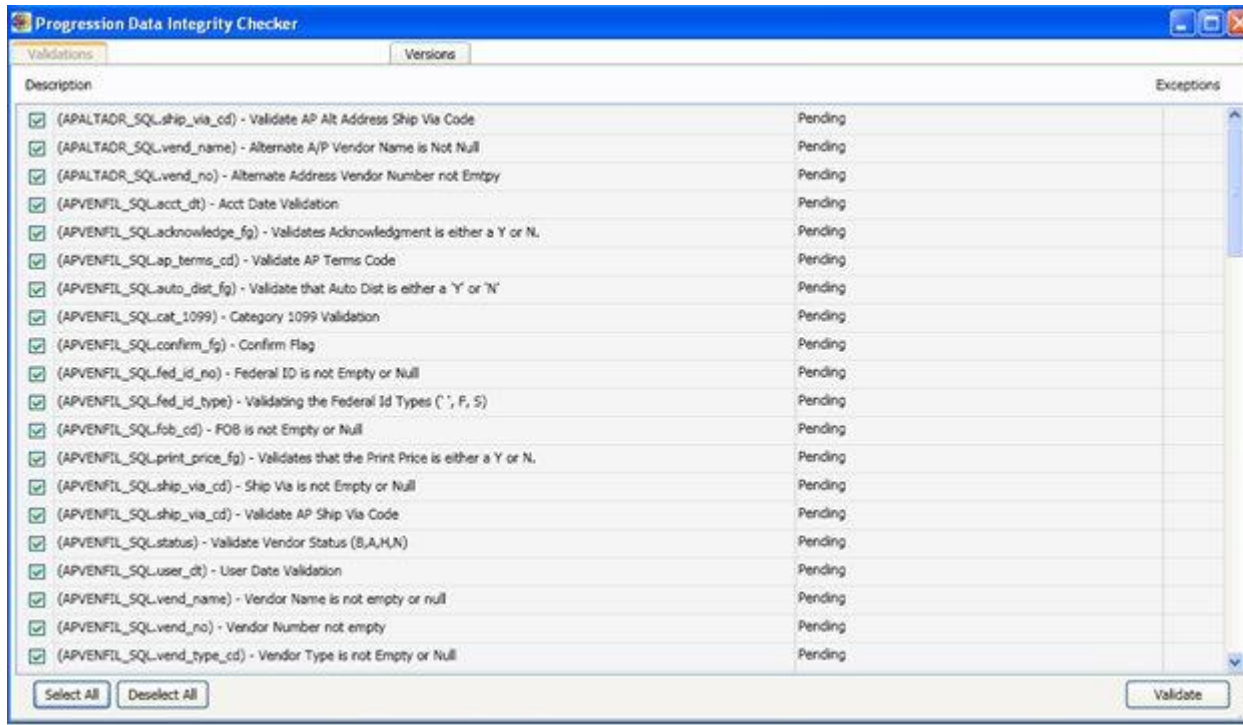
```
Disable-Fillfield = N
```

## **Added Data Integrity Checker for Progression SQL**

The Data Integrity Checker validates the integrity of the data in a Progression database. This is available in Progression SQL only.

To run the data integrity checker, open the File Utility screen in System Manager \ Maintain \ System Utilities \ File Validation, and click **Integrity Checker** button.





## Enabled PSQL v10 for Customer Use (for Pervasive only)

This allows customers using Pervasive SQL (Btrieve) the ability to update to Pervasive SQL version 10 to stay current with the Pervasive features and functionality.

Please note that Exact Software has not tested Progression functionality on Pervasive.SQL version 10.

Back to [Progression 7.7.200 Downloads Page](#).

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