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## **Bill of Lading Overview**

The Bill of Lading module (BOL) integrates with the Sage Pro Series Sales Order and Inventory Control modules to print customizable Bill of Lading Shipping documents. The BOL is designed to reduce document preparation time from several minutes of data entry at a workstation or typewriter to a matter of seconds with more detail and accuracy.

By using the BOL shipments with multiple orders can be organized into a customizable Bill of Lading document and then printed on any designated printer. The BOL program runs from the Pro Series "Custom Menu"... Sage Pro source code is not required.

## **Installation of Bill of Lading**

### **Install**

1. Using Winzip, extract to the root of Pro Series. Make certain that the option for "Use Folder Names" in Winzip is checked so that the files are extracted into the correct directories.
2. Open the System Manager and import the data dictionary. Choose the DICT directory off the root of Pro that was created when you extracted the zip file.
3. Update from Data Dictionary (all users need to be out for this step). Update the IC and SO modules.

### **Add a Custom Menu Option for the Bill of Lading**

1. Open the System Manager.
2. Maintain – Setup -System Installation.
3. Click on the Custom button.
4. Click on Edit and add a custom menu option with the description Bill of Lading and a command line of DO ddpbol.prg (If you only want specific users to have this available, add the menu option to each user in User Maintenance.)
5. If using Freight Codes add an additional custom menu pad with the description BOL Freight Codes and a command line of DO ddpftc.prg. This will be for Freight Code Maintenance routine
6. To reprint BOL's one at a time add another custom menu option with a description of BOL Reprint and a command line of DO ddpbolpn.prg
7. Save the changes and exit Pro Series.

## Configure BOL Settings For Versions of Sage Pro 7.x

Customizable Settings:

- Use Freight Codes (default is Yes)
- Ship Multiple or Single Sales Order on One Bill of Lading (default is Single per order)
- Next BOL # (default is 1)

*The BOL is ready to use if the defaults described above do not require any changes.*

**If changes are required:** go to Foxpro Access and USE DDPBOL.DBF. This table will reside in the root directory of the Sage Pro Installation. If you do not see your company # in the table, then add a new record and populate the company field with the correct company #. The fields are as follows:

Company = Pro Series Company #

Nxtbol = Next BOL # to print. This can be changed at any time but the program will check to see if the number has been used already and if it has will reset this to the next number in sequence of the last BOL# actually in the system.

Multiso = F or Blank for one sales order per BOL, T for multiple sales orders on one BOL.

Frtcode = F or Blank if Freight Code Field not needed on line items, T if using Freight Codes and/or shipping hazardous materials.

After setting up these options, close the table and exit Foxpro Access and you are ready to use the Bill of Lading module.

## Configure BOL Settings For Versions Pro 5, 6, 6.5

Customizable Settings:

- Use Freight Codes (default is Yes)
- Ship Multiple or Single Sales Order on One Bill of Lading (default is Single per order)

The BOL is ready to use if no changes are required to the defaults above.

A full Visual Foxpro application is required to make changes:

1. Run Visual Foxpro
2. Modify ddpbol.h
3. Change the following settings for how you will be using the system:

```
#DEFINE Cl_MultiSO .f.
```

```
#DEFINE Cl_FrtCode .t.
```

Cl\_MultiSO -.f. for one sales order per BOL, .t. for multiple sales orders on one BOL

Cl\_FrtCode = .f. or Blank if Freight Code Field not needed on line items, .t. if using Freight Codes and/or shipping hazardous materials.

4. Compile the custom BOL programs and screens  
Example: COMPILE ddp\*.prg COMPILE FORM ddp\*

After setting up these options, exit Visual Foxpro to open and use the BOL.

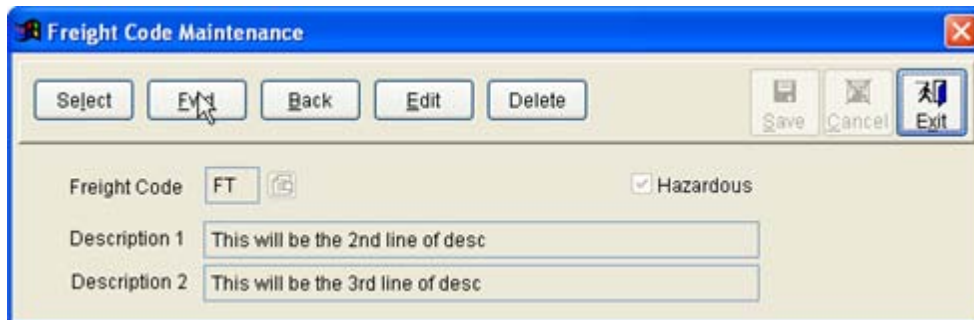
Data Developers Plus can provide technical assistance on a time and billing basis if needed.  
Call 702-487-9711.

# Using The Bill of Lading Module

## Setting Up Freight Codes/Classifications and Shipping Hazardous Materials

To assign Freight Codes/Classifications and/or shipping hazardous materials you will need to set up the available codes along with the required descriptions. If the materials are hazardous, then check the Hazardous box for that particular freight code. On the printed BOL: if the code is marked as hazardous it will be noted on the BOL and the 1<sup>st</sup> and 2<sup>nd</sup> description lines will print in addition to the description line entered for each line item on the Detail Tab of the BOL entry screen.

Access the Freight Code Maintenance Screen with the custom menu option set up in Step 5 of the Setup Instructions as previously described in this Guide.

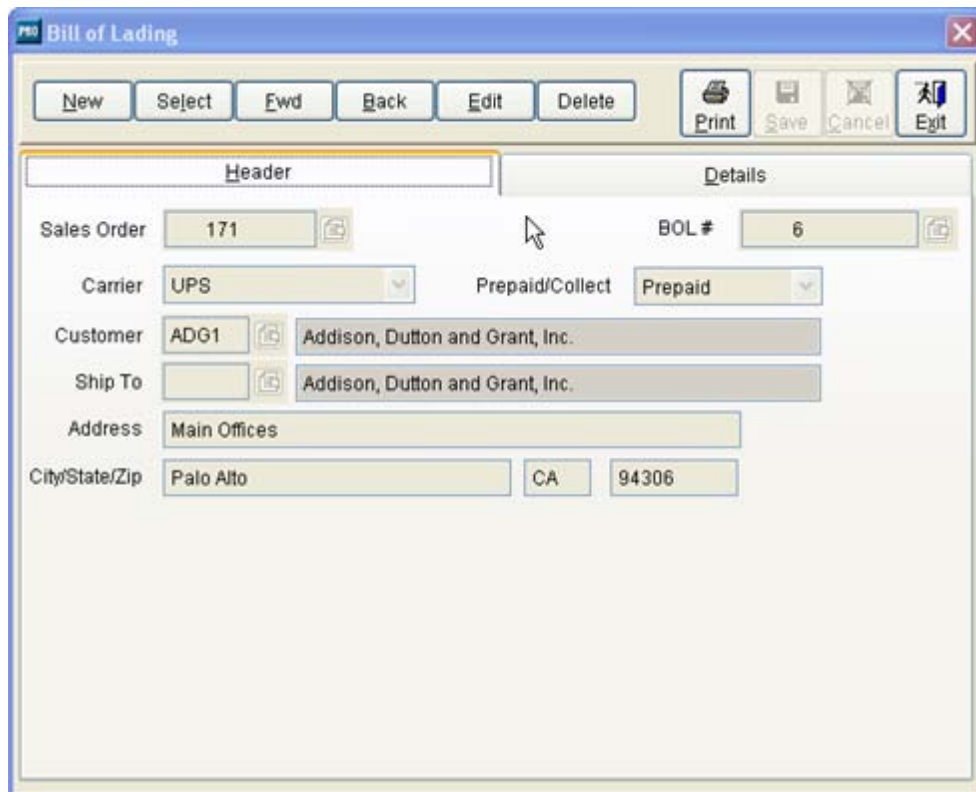


## Bill of Lading Entry for Single Sales Order per Shipment

During BOL data entry, on the Header tab (shown below) you can either lookup an existing BOL to edit or print.

To create a new BOL, click on the New button. The BOL# will be automatically assigned, starting with the #1 unless you have customized your DDPBOL.DBF per the configuration section of this document.

1. Select the Sales Order for the BOL to be created.
2. Select the Carrier (list comes from the SHIPVIA rule).
3. Select Prepaid or Collect
4. Edit the address fields as needed
5. Select the Detail Tab...see instructions in this Guide for the Detail Tab.



The screenshot shows a software window titled "Bill of Lading" with a toolbar at the top containing buttons for "New", "Select", "Fwd", "Back", "Edit", "Delete", "Print", "Save", "Cancel", and "Exit". The window is divided into two tabs: "Header" and "Details". The "Header" tab is active and contains the following fields:

Sales Order	171	BOL #	6
Carrier	UPS	Prepaid/Collect	Prepaid
Customer	ADG1	Addison, Dutton and Grant, Inc.	
Ship To		Addison, Dutton and Grant, Inc.	
Address	Main Offices		
City/State/Zip	Palo Alto	CA	94306

## Detail Tab of BOL Entry for Single Sales Order per BOL

After entering all pertinent information on the Header Tab, you can continue to the Detail Tab. All of the items from the sales order will automatically be entered in the grid. To Delete or Edit a line, simply select the item in the grid and then choose the Delete or Edit button. When the changes are complete, click on the Save button in the details section.

If using Freight Codes, you will see the Freight Code field. If not using Freight Codes, as described earlier in this manual, the field will not be on the screen.

Upon completion of the header and detail: click on the Save button at the top right hand corner of the screen. You can then Print the BOL or print at a later time using the single BOL print option set up on the custom menu pad, per the setup instructions earlier in this Guide.

The screenshot displays the 'Bill of Lading' application window. The 'Details' tab is active, showing the following fields and values:

- BOL ID:** 1
- Frtcode:** FT
- Description:** Line Descrip
- Weight:** 20
- Extweight:** 1000
- Class:** PERI

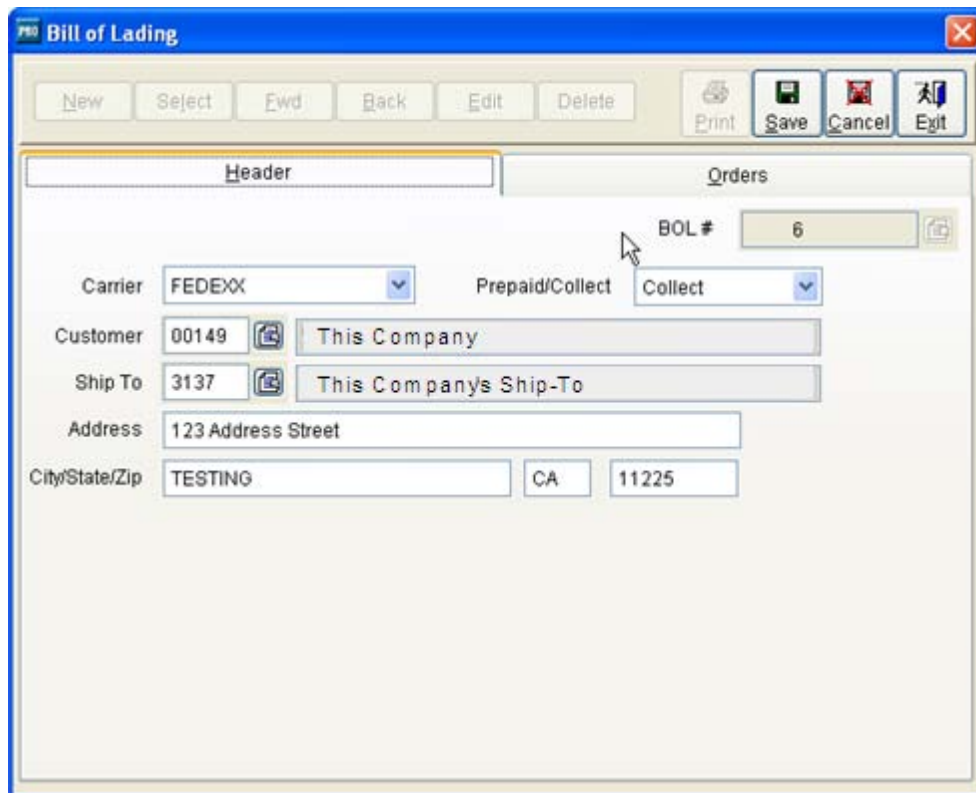
Below these fields is a table with the following data:

Qty	Item	Description	Weight	Ext Weight	Class
50	MOUSE	Line Descrip	20	1000	PERI

## Bill of Lading Entry with Multiple Orders on Single BOL

During BOL data entry, on the Header tab (shown below) you can either lookup an existing BOL to edit or print. To create a new BOL, click on the New button.

1. Select the Carrier (list comes from the SHIPVIA rule)
2. Select Prepaid or Collect
3. Select the Pro Series Customer
4. Optionally select the Pro Series Ship To if necessary. If selected, the sales orders on the Detail Tab will be filtered to that Customer + Ship to
5. Make any changes to the address that are needed
6. Go to the Detail Tab (see section of document regarding the Detail Tab for Multiple Sales Orders on single BOL)



The screenshot displays the 'Bill of Lading' application window. The title bar reads 'Bill of Lading'. The interface is divided into two main sections: 'Header' and 'Orders'. The 'Header' section contains the following fields and controls:

- Carrier:** A dropdown menu set to 'FEDEXX'.
- Prepaid/Collect:** A dropdown menu set to 'Collect'.
- Customer:** A text field containing '00149' with a lookup icon and a display field showing 'This Company'.
- Ship To:** A text field containing '3137' with a lookup icon and a display field showing 'This Company's Ship-To'.
- Address:** A text field containing '123 Address Street'.
- City/State/Zip:** Three separate text fields containing 'TESTING', 'CA', and '11225'.

The 'Orders' section is currently empty. At the top of the 'Header' section, there is a 'BOL #' field containing the number '6'. Above the main form area, there is a toolbar with buttons for 'New', 'Select', 'Fwd', 'Back', 'Edit', 'Delete', 'Print', 'Save', 'Cancel', and 'Exit'.

## Detail Tab of Bill of Lading Entry with Multiple Orders on Single BOL

On the Detail Tab (shown below), select the Sales Orders that will be included on the Bill of Lading. Type in or look up the sales order number and then click on the Add button next to the Sales Order # field. If you need to delete a sales order, select that order in the top grid and click on the delete button by the Sales Order # field. Remember, if you selected a Ship-To on the Header Tab the Sales Orders available to select are filtered down to that customer + ship-to.

The screenshot shows the 'Bill of Lading' application window. At the top, there are navigation buttons: New, Select, Ewd, Back, Edit, Delete, Print, Save, Cancel, and Exit. Below this is the 'Header' section with 'Sales Order' set to 298233 and 'BOL ID' set to 15. There are 'Add' and 'Delete' buttons next to the Sales Order field. The 'Orders' section contains a table with the following data:

SO #	Entry Date	Req Date	Order Amt	Ship Amt
298233	11/11/05	11/18/05	33.3000	0.0000

Below the table are 'Edit', 'Delete', and 'Save' buttons. The 'Item' section shows a list of items with the following data:

Qty	Item	Description	Weight	ExtWeight	Class
9	20102	308P RED 90CM X 9M 194815	0	0	FM
9	20120	308P EMERALD 90CM X 9M 1	0	0	FM

After selecting the sales orders, you have the ability to delete line items that are not in this shipment. This is done by clicking on the item in the bottom portion of the screen and then clicking the Delete button.

If the quantity, description or weight needs to be changed on an item, this can be done by selecting the item in the bottom portion of the screen, clicking the Edit button, and once changed, clicking on the Save button.

The Freight Code field is required if freight codes are utilized. If not using Freight Codes, as described earlier in this manual, the field will not be on the screen. You can add the Freight Code to an item by selecting the item in the bottom portion of the screen, clicking the Edit button, and after selecting the appropriate code, clicking on the Save button.

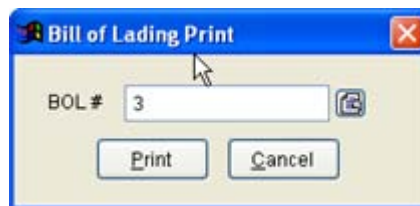
When all orders and items are correctly entered: click on the Save button at the top right hand corner of the screen. You can then Print the BOL or print at a later time using the single BOL print option set up on the custom menu pad, per the setup instructions earlier in this Guide.



## Re-Print Single BOL

To print a single Bill of Lading, choose the custom menu option that was set up in step 6 of setting up the custom menu options on page 2 of this Guide.

Either type in the BOL# or look it up and then click on Print. You can continue to select and print BOL's until exiting out of this screen with the Cancel Button.



# Technical Information

## **BOL Program Files (all should reside in root of Pro Series installation):**

DDPBOL.PRG/FXP – Main BOL Program

DDPBOL.SCX/SCT – Main BOL Screen

DDPBOLPN.FRX/FRT – BOL Report Form

DDPBOLPN.PRG/FXP – Program to print individual BOL

DDPBOLPN.PRG/FXP – Screen to print individual

BOL DDPFTC.PRG/FXP – Program to Edit Freight Codes

DDPFTC.SCX/SCT – Screen for maintaining Freight Codes

GENLIB.VCX/VCT – DDP Class Library

## **BOL Data Files:**

DDPBOL.DBF – **(only in versions of Sage Pro 7.x and greater)** contains settings for next Pro Series Company #, Next BOL#, Using Freight Codes and Multiple or Single Sales Orders on a BOL. Resides in root of Pro Series installation.

### *Company Specific Data Files for BOL (reside where Inventory Control/IC data is)*

BOLDTL $nn$ .DBF – Bill of Lading Detail File

BOLHDR $nn$ .DBF – Bill of Lading Header

BOLSNO $nn$ .DBF – Bill of Lading Sales Orders

FTCODE $nn$ .DBF – Freight Codes

Technical support: Data Developers Plus, Corp. at [support@ddpcorp.com](mailto:support@ddpcorp.com)  
702-487-9711 x303.



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