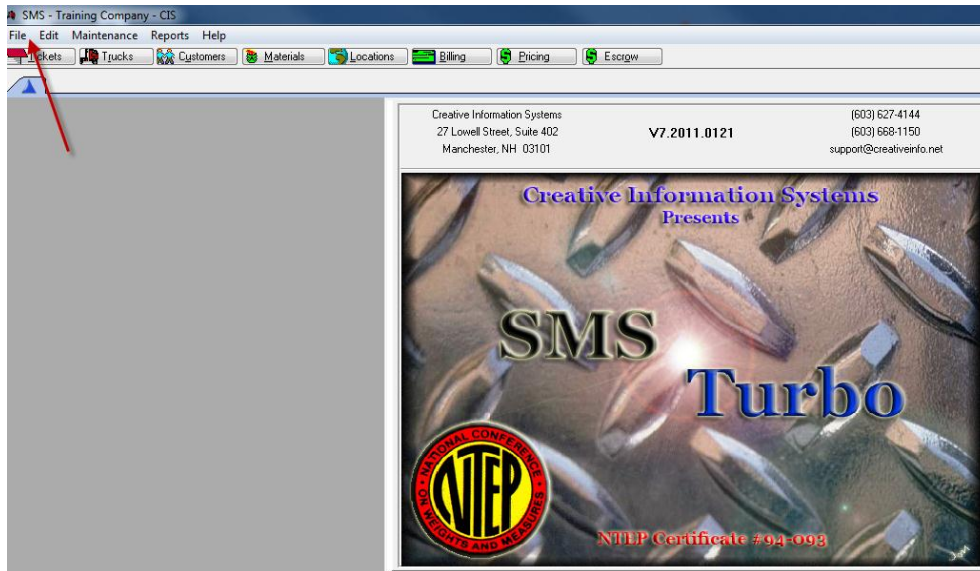


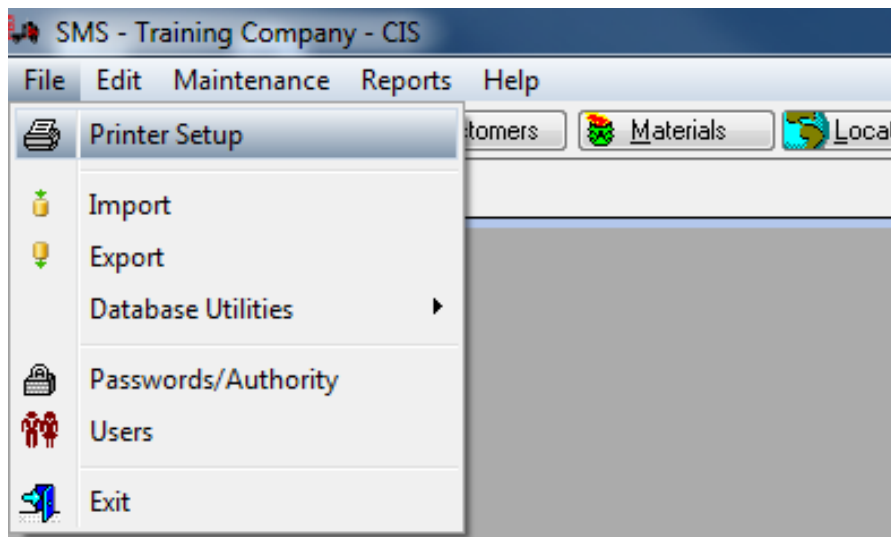
# Lesson 1 Configuration of SMS

1/11

From the Main SMS page choose *File*.



Choose Printer Setup:



The Printer Setup box:

The screenshot shows a 'Printer Setup' dialog box with the following elements and annotations:

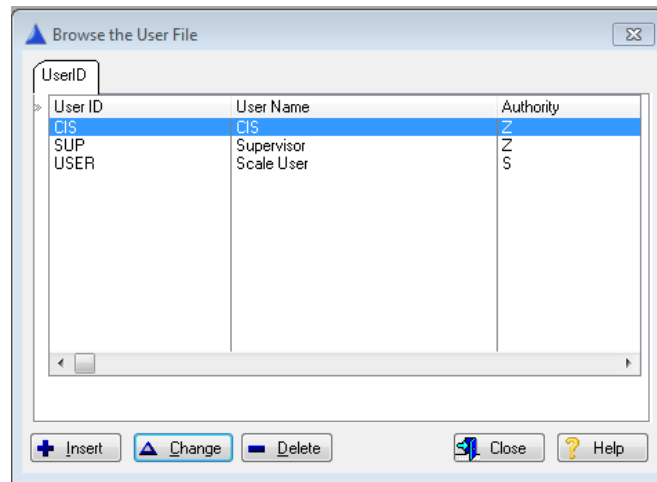
- 1:** Points to the 'Ticket Form' text box containing 'TKFORMZ'.
- 2:** Points to the 'Ticket Printer' text box containing '\\cissserver\Brother HL-2040 series'.
- 3:** Points to the empty 'Ticket Form 2' text box.
- 4:** Points to the empty 'Ticket Printer 2' text box.
- 5:** Points to the 'Split Ticket Form' text box containing 'TKSPLITZ'.
- 6:** Points to the 'Split Ticket Printer' text box containing '\\cissserver\Brother HL-2040 series'.
- 7:** Points to the 'Report Printer' text box containing '\\cissserver\Brother HL-2040 series'.
- 8:** Points to the 'Preview Ticket' checkbox.
- 9:** Points to the 'Show Site Settings' checkbox.
- 10:** Points to the 'Save' button.

Other visible elements include 'Allow Ticket Form Selection' and 'Always Prompt for Printer' checkboxes, a 'Hit Save or changes will be lost.' warning, and 'Cancel' and 'Exit' buttons.

- 1: This is the ticket form (crystal report) used by your company.
- 2: This is the printer associated with Ticket Form.
- 3: This is reserved for a secondary form (Check)
- 4: This is the printer associated with Check.
- 5: This is the ticket form (crystal report) used by your company.
- 6: This is the printer associated with the ticket form.
- 7: This is the printer associated with reports.
- 8: Check this box if you wish to review the form before printing (usually testing).
- 9: Used for Multi Sites Option
- 10: Save any changes and then click on the Exit Button.

From the Main SMS page choose *File* again.

Choose Users: the User Browser.



Choose the Insert Button: the Adding a User box.

General

User ID: >

User Name:

Password:

Authority:  ▾

OK Cancel Help

1: Enter the ID for the User (15 or less letters or numbers no space)

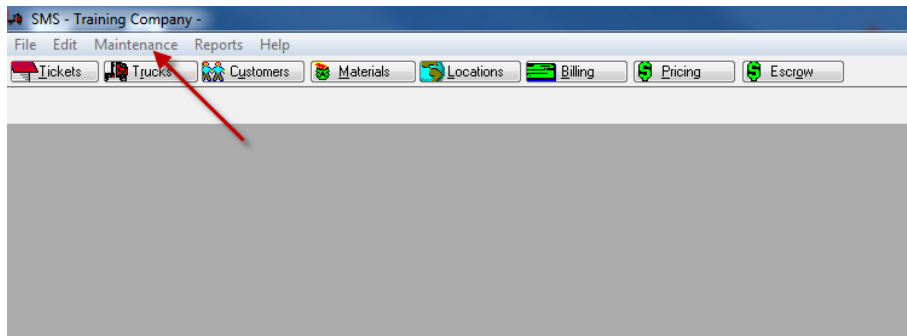
2: The Users name and or scalemaster number.

3. A password for this user (not usable without Authority Option).

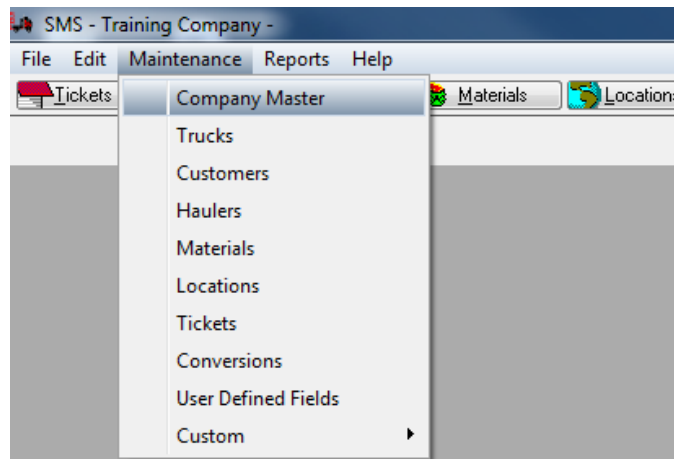
4: Authority Level from the Authority Table (not usable without Authority Option).

Save using the OK Button. Click the Close Button.

From the Main SMS page choose Maintenance.



Choose Company Master.



The Company Master entry screen. The General Tab.

A screenshot of the "Record Will Be Changed (Training Company)" dialog box. The "General" tab is selected. The form contains the following fields:

- Name: Training Company (1)
- Address: 27 Lowell St
- Address: POBOX 4183
- City: MHT
- State: NH
- Zip: 03101
- Country: USA
- Phone: (603)627-4144 (2)
- Fax: (603)668-1150
- Email: sales@creativeinfo.net (3)
- Region Code: (4)
- Note2: (5)
- Note3: (5)

On the right side, there is a "Company Notes" section with the text "Thanks" and a red "6". At the bottom of the dialog, there is a banner for "SMS Turbo" and "Creative Information Systems". The bottom of the dialog has "OK", "Cancel", and "Help" buttons.

1: In the boxes, fill out the complete name and address. This information will be used on the ticket form.

2: Type the numbers only no characters (Eg: 6036274144).

3: Enter the email address for the company.

4: Region code is for Multi Sites Option.

5: Notes 2 and 3 are for User information as required.

6. Notes that can be used on the ticket (days and hours, holidays, etc).

Click on the Labels Tab.

Field Name	Value
Truck UDF 1:	Driver
Truck UDF 2:	Driver2
Trailer UDF 1:	Trailer1
Trailer UDF 2:	Trailer2
Customer UDF 1:	Customer1
Customer UDF 2:	Customer2
Order UDF 1:	Order1
Order UDF 2:	Order2
Material UDF 1:	Material1
Material UDF 2:	Material2
MT Category UDF 1:	MTC1
MT Category UDF 2:	MTC2
Location UDF 1:	Location1
Location UDF 2:	Location2
Paid Label:	Paid

There is a UDF (User Defined Field) in each of the database tables listed. The name can be changed here. Example Truck UDF 1 has been changed to Driver. This would collect information about the trucks' driver.

Click on the SMS Info Tab.

Section:

1: The Labels section allows you to change the label of the ticket entry boxes. Example, Order may be called Job.

2: The System Remark enters the remark on each ticket.

The Tax Rate Pct is the rate of the State Sales Tax. Other taxed will be set elsewhere.

The Units per ton in the US is set, the Units of Weight is the output of the scale.

3: The Misc Charges are additional charges such as Fuel or Loading charges. The label is the next block.

4: The Truck Warning refers to the Expires input in the Truck File.

5: Ticket Range is for multiple site operations. The Current ticket # allows changes to the next number in sequence.

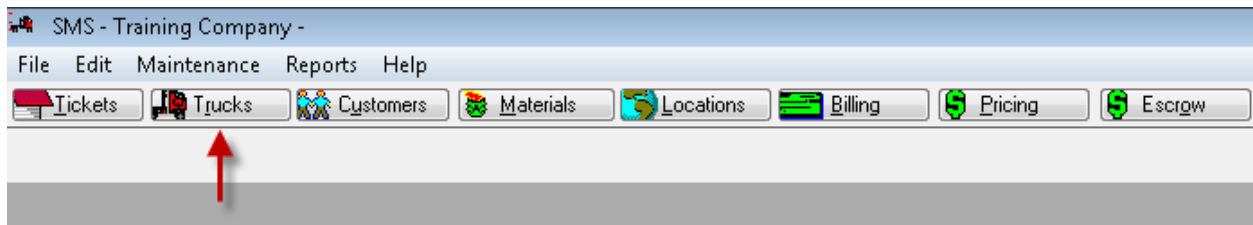
6: All checkboxes refer to helpful items universal throughout SMS such as setting Cash Received to on.

7: This area sets the site limits and gives the ability to reset the amount when required.

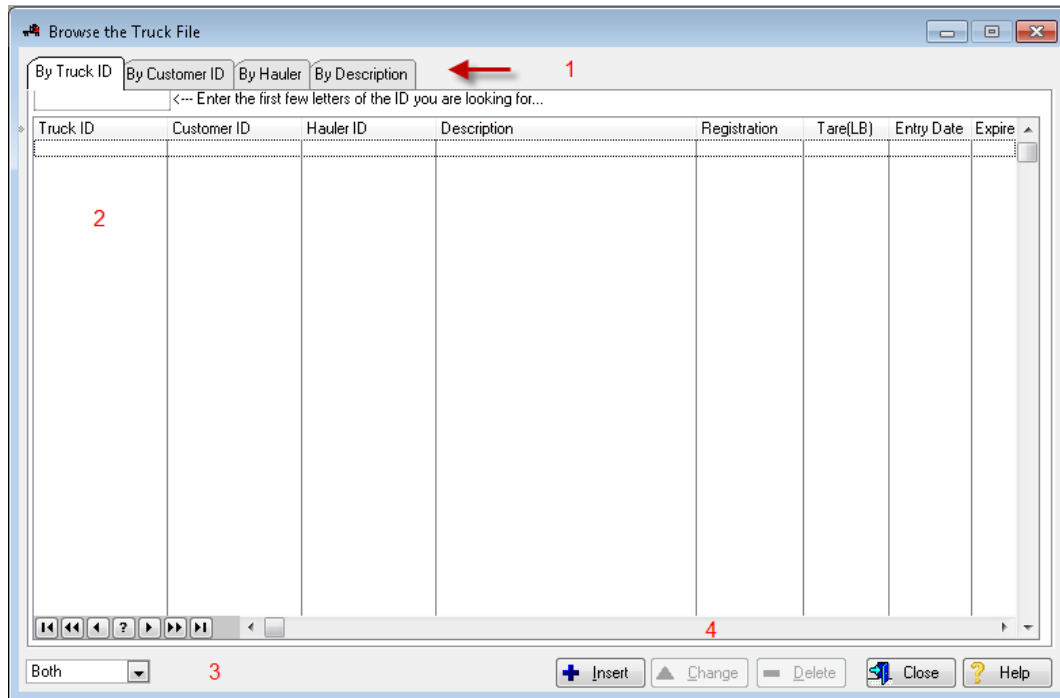
8: This area is used by CIS personnel to set up peripherals.

The ScaleCom Tab is used by CIS personnel to set the scale interface.

From the main SMS page choose the Trucks Button.



The Trucks Browser :



- 1: The trucks in the listing may be re organized by Truck ID Number, Customer ID Number, Hauler or Description as an aid to finding a truck listing.
- 2: This area is where the trucks will be listed. There is an entry box in the second row of the header that will allow you to enter the first characters of the truck and tab to that listing.
- 3: The selection box allows SMS with the Trailers option to view Trucks, Trailers, or Both in the listing.
- 4: The buttons allow entry, deletion or changes to the truck listings.

Choose Insert at the bottom of the Truck Browser. The truck detail screen will appear. Tab between fields.

The screenshot shows a software window titled "Adding a Truck Record" with a "General" tab. The form contains the following fields and values:

Truck ID:	AB103	Description:	A. Bradley #103
Registration:	DRT103	Comment:	Triaxel
Tare Wgt (lb):	32,450.00	Max Weight:	70,000.00
Entry Date:	3/23/11	Expire Date:	7/07/11
Container Size:	0.00	Split Wgt Code:	0
Customer ID:		Hauler ID:	
Driver:		Driver2:	
Single Weighment:	<input type="checkbox"/>	Trailer Attached:	<input type="checkbox"/>

Summary statistics:

Tons this Year:	0.000
Tons last Year:	0.000
Last Ticket	0

Buttons at the bottom: OK, Cancel, Print, Help.

Section:

1: Truck ID is a required field. Use up to 15 characters in LETTERS OR NUMBERS. You cannot use spaces or special characters. (AB #103 is not allowed because of a space and a the special character used). All other fields are optional.

Registration is generally the license plate or DOT Number.

Tare Weight can be entered here if your state allows stored tare weights. This will speed scale operations by allowing one weighment per transaction.

Entry Date is the date of the tare weight.

Container size can be used for yards or tons.

Customer ID will link the truck to a customer if the truck usually works for a customer. (Example, trucks that haul exclusively for their own company)

Driver is a user definable field for reporting purposes.

Single weighment is allow one weight for this truck. (Example a public weigh where only the total weight is needed)

Section:

2: Description is a 30 character field for any kind of text including special characters. Its primary function is to provide definition for the Truck ID to ensure proper truck selection on the ticket.

The comment field is provided for extra remarks.

Max. Weight field if filled out will provide a warning to the weighmaster if the truck weighs more than the maximum allowed. The warning may be overridden by the weighmaster.

Expire Date provides a warning if the ticket date is later than the expire date. This is helpful to warn of permits or insurance policies expiring.

Split Weight code allows multiple weighments of the same vehicle. This is used for truck combinations longer than the available scale or to weigh a double trailer.

Hauler ID allows the lookup of a hauler or dispatch company from the Hauler Table.

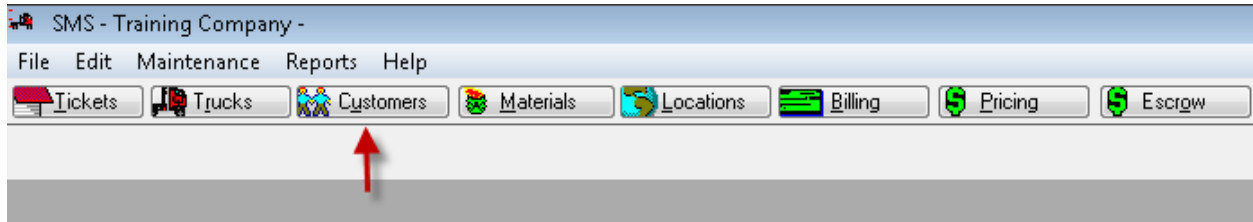
Driver 2 is another user definable field for reporting purposes.

Trailer Attached is for use with tractor/trailer combinations to denote the tractor portion. If checked the ticketing screen will ask for the Trailer ID. This allows many trailers to be used by one tractor.

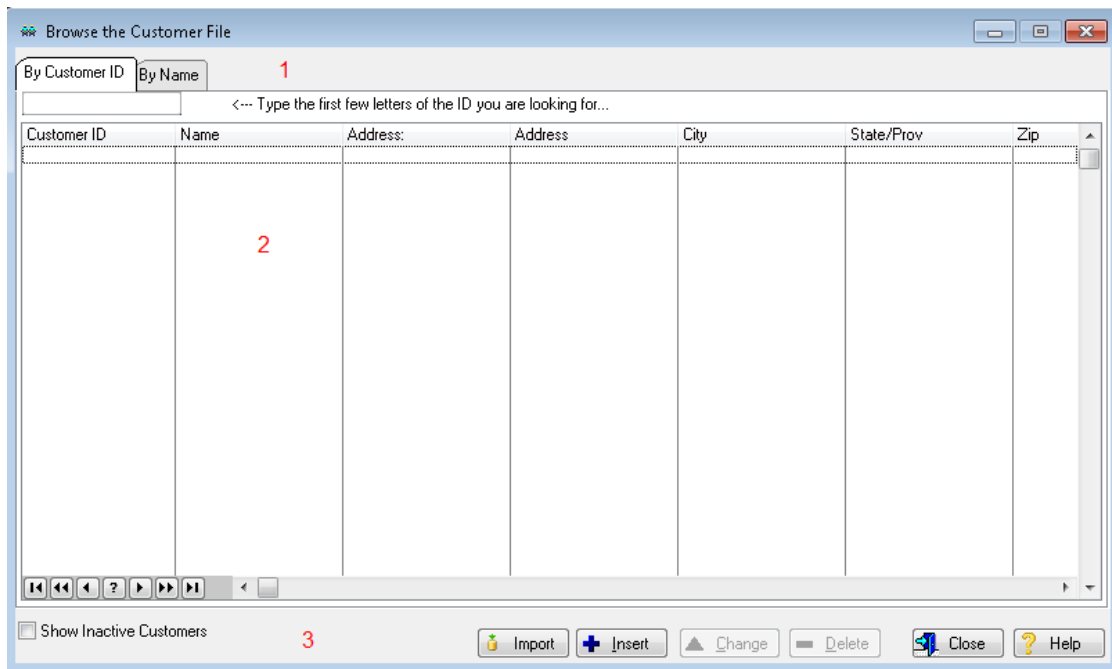
Section

3: This section records the number of tons hauled and the last ticket used for this truck. It is reset by using the end of period tool in the file menu.

From the main SMS page choose the Customers Button.



The Customers browser:



- 1: The Customers in the listing may be re organized by Customers ID Number or Customer Name as an aid to finding a Customer listing.
- 2: This area is where the Customers will be listed. There is an entry box in the second row of the header that will allow you to enter the first characters of the Customer and tab to that listing.
- 3: The selection box allows viewing of Inactive status customers. The buttons allow entry, deletion or changes to the Customers listing. The Import Button is for adding customers from an accounting interface if purchased.

Choose Insert at the bottom of the Customer Browser. The customer detail screen will appear. Tab between fields.

Record Will Be Added (New)

General Notes Truck Order

Customer ID: RIV01  Tax Exempt Status: OK 1

Name: Rivals Landscaping, Inc

Address: 29 River Road

Address:

City: Manchester 2

State/Province: NH

Postal Code: 03121 Miles: 0

Country:

Contact:

Phone: (603)898-7575

Fax: »

Email:

Customer1 3

Customer2

Credit Limit: 0.00 Credit Warning: 0

Pricing Level: 0 4

Invoice Terms: 0

OK Cancel Help 5

## Section

1: Customer ID is a required field. Use up to 15 characters in LETTERS OR NUMBERS. You cannot use spaces or special characters. All other fields are optional.

The Tax Exempt box would be checked if the customer is *always* exempt from sales tax. (EG: a municipality).

The Status field indicates the payment status of this customer. The drop box selections are:

Status: OK

- OK
- HOLD
- CASH
- INACTIVE
- STOP

The *OK* is a customer is buying on credit; a *Hold or Stop* status will warn the weighmaster to check with management before ticketing; a *Cash* customer will be paying at the time of ticketing. An *Inactive* customer will remain in the system for reports but will not be listed on the browser.

Section:

2: From Address through Email, the entries are optional. When typing the telephone or fax numbers, type only the numbers; SMS will format the numbers for you. The two buttons to the right of Postal Code and county allow you to save the information or call up the address on MapQuest to display a map or directions.

Section:

3: Lines marked Customer 1 and Customer 2 are User Definable fields. The names may be changed in the Labels section of Company Master. They are used for additional information on reports.

Credit Limit may be set as a dollar amount not to exceed. A warning will appear during the ticketing process at the time the customer exceeds his limit or by an amount listed in the Credit Warning box.

Section:

4: The Pricing Level box works with the Orders option if purchased. The Invoice Terms box works with the Billing option if purchased.

Section:

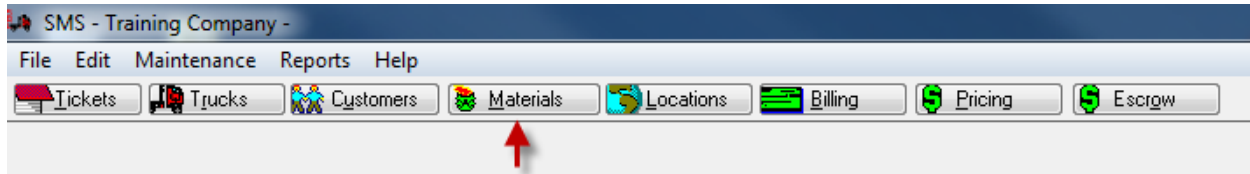
5: The Buttons allow you to Store (OK) or Cancel the entry of this customer.

After the customer is saved, if the customer is recalled from the browser, both a Change button and a Delete will appear. Only the Customer ID may not be changed. If there have been no tickets created using this customer the The Delete Button may be used.

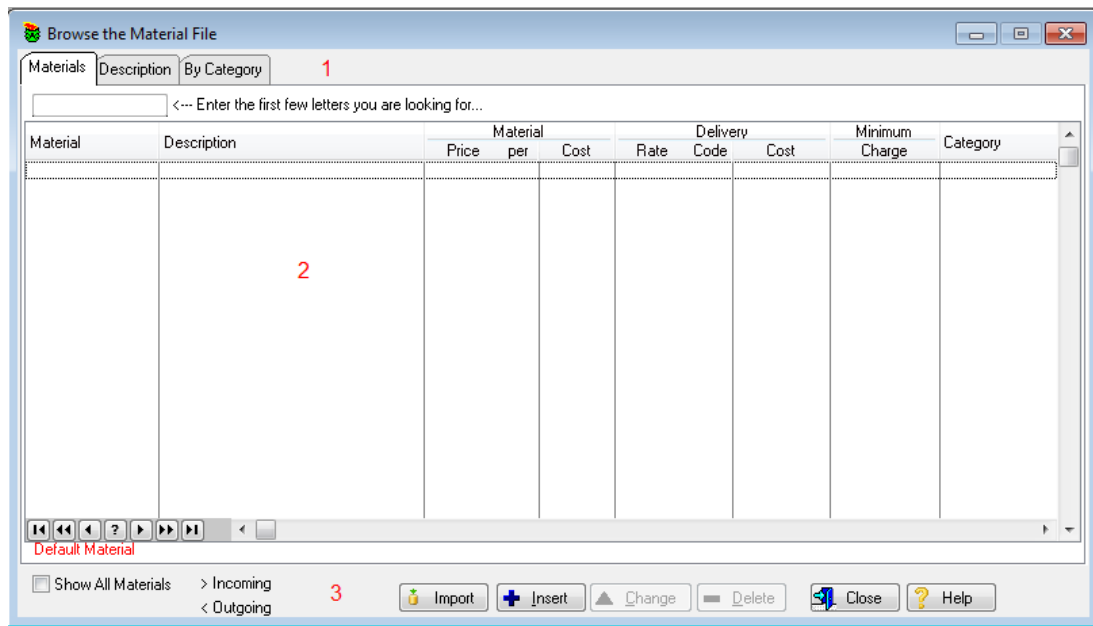
The Notes tab will allow the addition of usefull notations about the customer.

The Trucks tab will show a listing of the trucks that have been linked to this customer.

From the Main SMS page choose the Materials Button.



The Materials browser:



1: The Materials in the listing may be re organized by Materials ID Number or Materials Description or by Category. A Category is a group of like materials.

2: This area is where the Materials will be listed. There is an entry box in the second row of the header that will allow you to enter the first characters of the Material and tab to that listing.

3: The selection box allows viewing of Inactive status Materials. The buttons allow entry, deletion or changes to the Materials listing. The Import Button is for adding customers from an accounting interface if purchased.

Choose Insert at the bottom of the Materials Browser. The materials detail screen will appear. Tab between fields.

The screenshot shows a window titled "Adding a Material Record" with a "General" tab. The fields are as follows:

- Material ID: SAND (1)
- Description: DOT ref 334A766 (2)
- Inactive:  (2)
- Category: [lookup icon] (1)
- Direction: Incoming  Outgoing  Unknown  (2)
- Conversion: 0.0000000
- Adjustment(%): 0.0000000
- Taxable:  (3)
- Material1: [text box]
- Material2: [text box]
- Restricted:  (3)
- Material section:
  - Price: 23.85 tn (4)
  - Cost: 0.0000 (4)
  - Min. Charge: 0.00 (4)
  - Misc Charge: 0.0000 (4)
  - G/L#: [text box]
- Delivery section:
  - Rate: 0.0000 (5)
  - Cost: 0.0000 (5)
  - Code: Q (5)
  - G/L#: [text box]
- TOTAL section:

Sales	\$0.00	Total tn	0.000
-------	--------	----------	-------

 (6)
- Buttons: Use as Default  OK (7) Cancel Help (7)

Section:

1: Material ID is a required field. Use up to 15 characters in LETTERS OR NUMBERS. You cannot use spaces or special characters. All other fields are optional.

The Category lookup allows materials to be sub grouped for reporting purposes. This allows for easier reporting of EPA or Mining reports available by custom Crystal Reports.

2: The Description box allows 30 characters for a description and may be printed on the ticket.

The Inactive checkbox removes the Material from the browser box. It still may be used for reports.

Direction tells the software if the weights will be light on the first weighment and heavy on the second weighment (Outbound) or the opposite. This helps track the flow of materials across the scale and builds an "inventory" as a total of the inbounds minus the outbounds. Set to the most common direction and change if necessary on the ticket.

3: Conversions are an advanced option having to do with converting scale weight to a different unit of measure.

The taxable checkbox should be checked if the Material is *ever* taxable.

The restricted checkbox should be checked if there is a limit to the amount of the Material processed.

4: The Material Price is the standard price charged for the Material. Special prices created in other options of SMS will override this amount. The price is set per Unit of Measure.

Materials Cost is an option for tracking royalties.

Minimum charge allows the entry of a dollar figure as a minimum amount charged for a load.

Miscellaneous Charge is for loading fees or fuel charges and is set here and in company master.

GL# is an option for reporting the sales of this material into accounting..

5: The entire Delivery section is an option.

6: The totals section tracks the total dollars and amount by unit of measure of this material.

7: The use as default checkbox when checked will allow this material to be automatically added to the ticket. This can speed ticket completion by saving a step in the process.

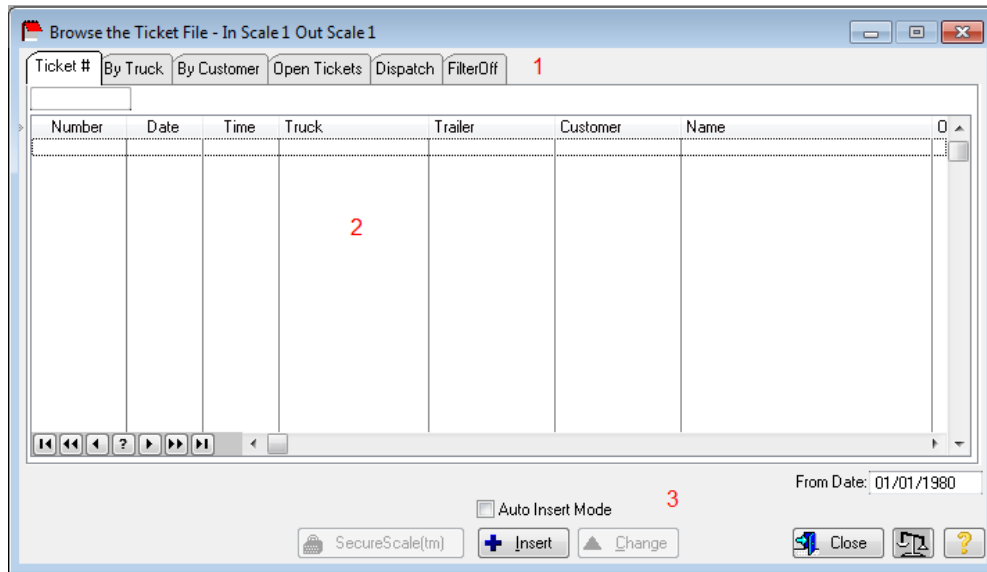
The Buttons allow you to Store (OK) or Cancel the entry of this Material.

After the Material is saved, if the Material is recalled from the browser, both a Change button and a Delete will appear. Only the Material ID may not be changed. If there have been no tickets created using this Material the Delete Button may be used.

From the Main SMS page choose *Tickets*.



The ticket browser opens:



Section:

1: The five tabs allow you to re-order the tickets by the heading of the tab. The default is ordered by ticket number. The Filter Off tab is for advanced users to reconfigure the browser columns in a different order.

2: This space is where the tickets will be listed. There is an entry box in the second row of the header that will allow you to enter the first characters of the Ticket and tab to that listing. The scroll bar at the bottom allows you to slide the view over to see the other columns.

3: The From Date box allows you to view fewer tickets by only showing tickets after the date.

The Auto Insert Mode will return to the ticket insert screen when the previous ticket is stored.

The small scale icon will allow you to add the tare weight to a truck already on file.

The buttons at the bottom allow you to Insert a new ticket or change an existing ticket.

Choose Insert at the bottom of the Tickets Browser. The ticket detail screen will appear. Tab between fields.

The screenshot shows a software window titled "Adding a Ticket Record (New) Scale #1". The window contains several input fields and sections:

- Header:** Ticket # 1, Ticket # 3/28/11, Operator: CIS, Weighment # 1.
- Fields:** Truck, Trailer, Customer, Order (each with a lookup icon).
- Remarks:** A text area containing "Thanks".
- Weight - lb:** Gross: 0 1, Tare: 0 1, Net: 5 0.
- Total:** Material 0.00, Delivery 0.00, Misc 0.00, Tax 0.00, Total Ticket: 0.00.
- Payment:** Paid , Received: , Check # 7, Invoice # .
- Buttons:** Replacement Ticket  Void , Photo, Photo, Signature.
- Table:** A table with columns: Material, Location, Quantity, Material, Delivery, Total \$.
- Toolbar:** A row of icons for navigation and actions.

Section:

1: The information gathered for the ticket is recorded on the Ticket tab. Additional information gathered via the User Defined Fields option is generally recorded on the Misc. tab.

The Ticket # will be generated from the last ticket number stored in the Company Master.

The Date reflects the computers date.

Operator is the User Name of the person who signed into SMS. To change the operator you must close and re-open SMS with a different log on.

Weighment 1 indicates that this is the first weight entry for this ticket.

2: The information in this section is the ID of the individual item. You may type the information into the block or use the lookup found at the end of the block.

3: The Remarks is a free form block of 500 characters that can be handy for street directions.

4: The + Button is used to add a material to the ticket. A Material Detail window will appear.

Totals	
Material:	0.00
Delivery:	0.00
Misc	0.00
Tax:	0.00
Total	0.00

The Id of the Material may be typed into the block or use the lookup button at the end of the block.

The Location block pretains to the option Locations.

The material price will appear from the Materials table. It may be altered here.

You may add a Misc charge in dollars and cents.

You may add Delivery charge if you purchased that option.

Click on OK to add the information to the ticket.

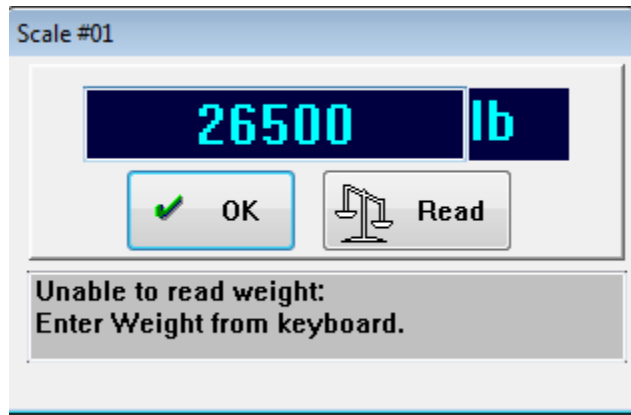
Section:

5: The weights area of the ticket includes

Gross:  0 1  
Tare: 0 1  
Net: 0

**B**   **C**

A: Click here to bring up the weight of the truck on the scale in Scale Com.



Or enter the weight into the Scale Com window. Click OK to add to the ticket.


B: The arrow indicates the direction of the material Inbound or Outbound and will be pre-set if the material was marked with a direction.

C: The + Button here is to add a material to the ticket if the Split Ticket option was purchased.

#### Section

6: The money section of the ticket is calculated by the software from the entries included. It will not reflect the actual dollars until the ticket is stored for the final time.

7: The payments section of the ticket

Paid <input type="checkbox"/>	Received: <input type="text"/>	
	Check # <input type="text"/>	
	Invoice # <input type="text"/>	
Replacement Ticket <input type="checkbox"/>	Void <input type="checkbox"/>	
Photo <input type="text"/>	Photo <input type="text"/>	Signature <input type="text"/>

The paid box is checked when money is collected on a cash sale.

The received box is filled in with the amount received.

A check number can be recorded in the Check # box.

The Replacement ticket box is not used.

The Void box is used for a finished ticket that will be Voided and then replaced by another ticket in the case of an error on the voided ticket.

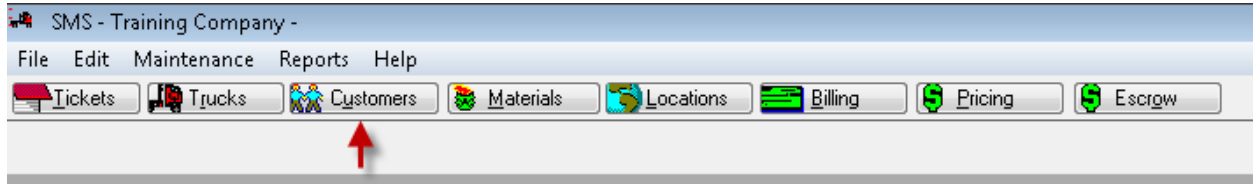
## Section

- 8: The lower part of the ticket screen includes the Print, Save, and Cancel buttons. A two weighment ticket will be Save (d) and then recalled from the browser in order to save the first weight. After the second weight is recorded the ticket can be printed and stored with the Print Button. The Cancel Button cancels the input screen and will as if you wish to cancel.

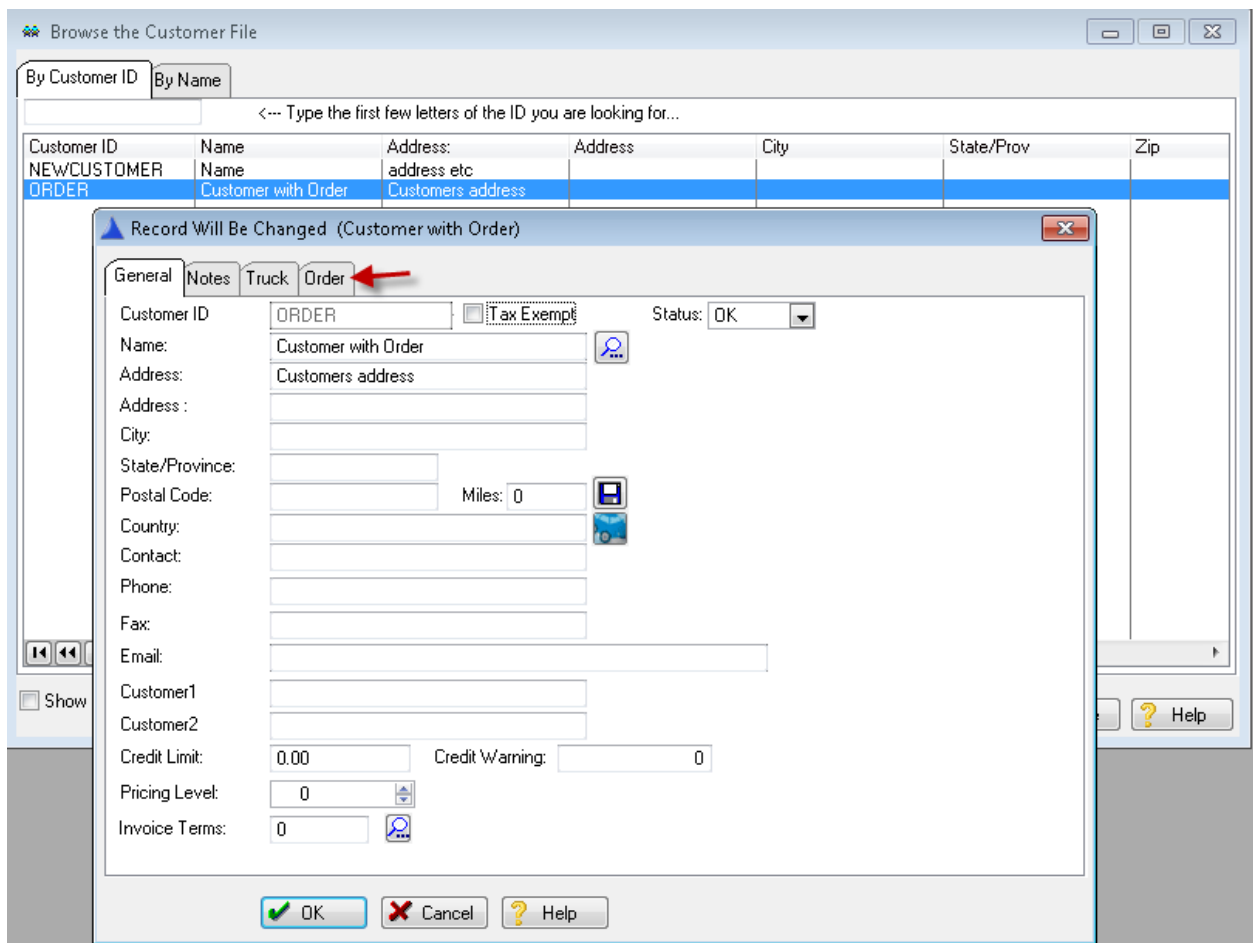
# Lesson 2 Options

Orders is the option which will allow you to give Customers special pricing, exempt the customer from taxes on a particular job, track loads by the job, invoice by the job, set limits for how much material can be sent to a job, as well as other features.

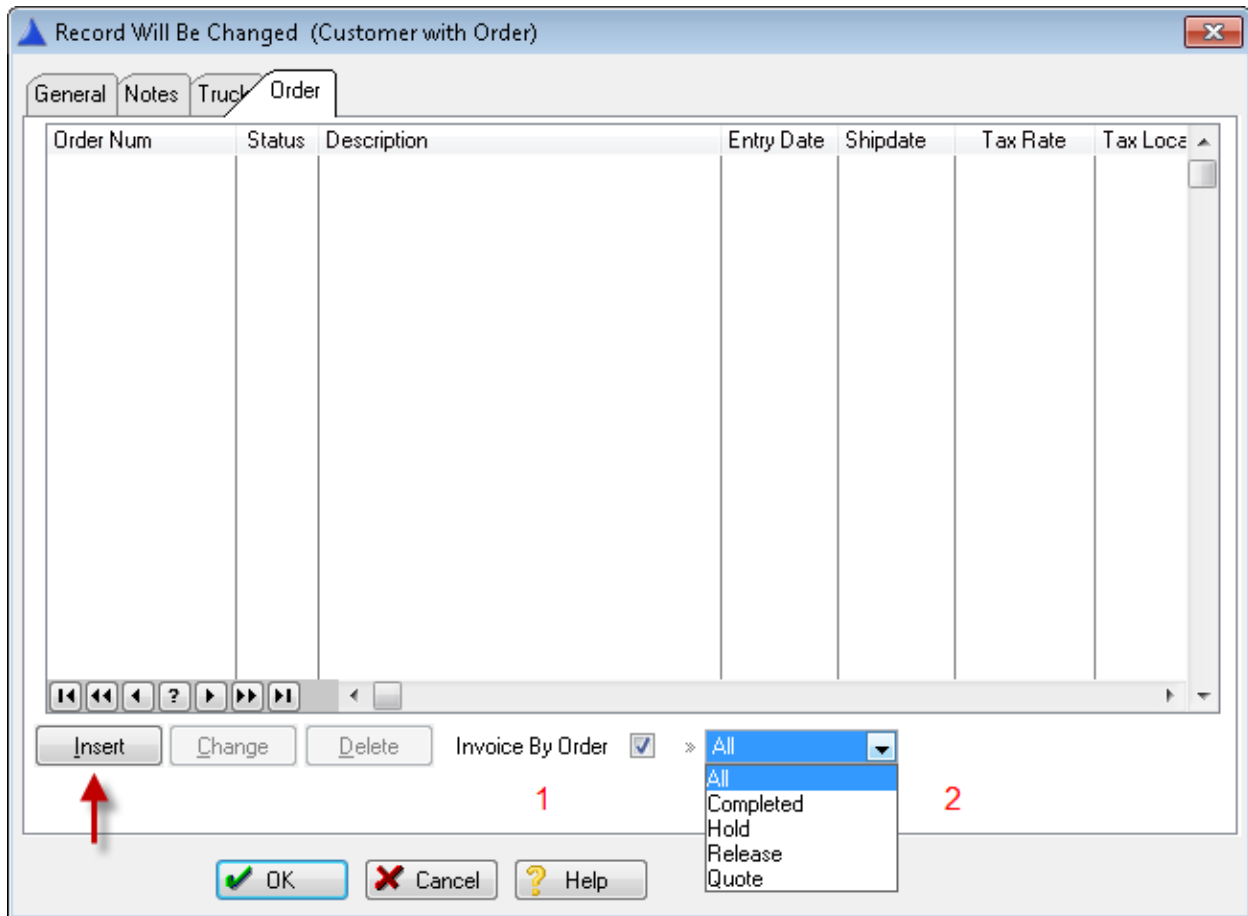
From the Main SMS page choose Customers.



The Customer Browser will open. Double click the customer to add the Order. The Customer detail screen opens. Choose the Order tab.



The Order detail screen will appear. This screen will list all orders for *THIS* customer. The orders will appear in numerical and then alphabetical order.



Selection:

1. The Invoice By Order checkbox allows the accounting interfaces to group tickets to 1 invoice per order when invoicing. If unchecked, the accounting interface will create 1 invoice per customer with all tickets.
2. A drop selection box is provided in order to filter the browser view to one type of order or all orders.

Click the Insert button to add an order. The Change and Delete buttons will appear after an order is saved. Any item except the Order ID may be changed if tickets have been processed using this order ID. Deletion is allowed only if there are no tickets processed using this order.

The Insert (Change) screen will appear.

#### Section:

1. Order Num is a required field. Use up to 15 characters in LETTERS OR NUMBERS. You cannot use spaces or special characters. This ID will be used by this customer; the id may also be used on an order for a different customer.  
The # button can be used to automatically number the order.  
The Status box contains a drop list box to assign the order to R released for use by the scale, H hold for orders on credit hold, C complete orders not to be used anymore (but will appear on reports), and Q quoted orders put into the system for later release.  
The Description field should contain the common name for the job. This is useful when the job is a PO# for billing purposes and yet is referred to by a name by the trucks.  
The Address 1 through Postal Code boxes can be used to add detail to the order. The small button with a car on it connects to MapQuest.  
The Cost Code box is used by the accounting interfaces to supply a cost code for accounting.
2. The entry date is the date of the initial order creation.  
The ship date can be the first date on which to use the order.  
Tax Locale and the associated Rate box can be used with the Locations option for a 3<sup>rd</sup> level of taxation.  
The Location ID box can be used with the Locations option for a 2<sup>nd</sup> level of taxation.

The Miles box can be used to enter the mileage to/from the job. This works with the delivery function to compute the delivery rate by the mile.

The Remarks field is for this order only and could be added to the scale ticket.

3. The Escrow Order checkbox, Minimum and Warning At entry box can be used with the Escrow Option.

The Order1 and Order2 are user defined fields and can be used for reporting.

The Invoice Terms box can be used to apply different terms to this order from the terms set in the Customer file.

4. The Pricing checkbox when checked will print the material prices from the order on the ticket.

The Any Material checkbox allows any material to be chosen by the weighmaster not just the materials specified in the order.

The Tax exempt checkbox when checked exempts this order from sales tax. This is used when this customer is usually taxed but should not be for this job.

5. The Limits section can be used to set total tons or units for the entire order. As tickets are created, the amount will be added to the shipped section and a balance to be shipped will be computed. The warning box can specify at what tonnage the weighmaster is warned that the order is almost complete. These limits can be set to a time period in the next area by clicking on the appropriate button.

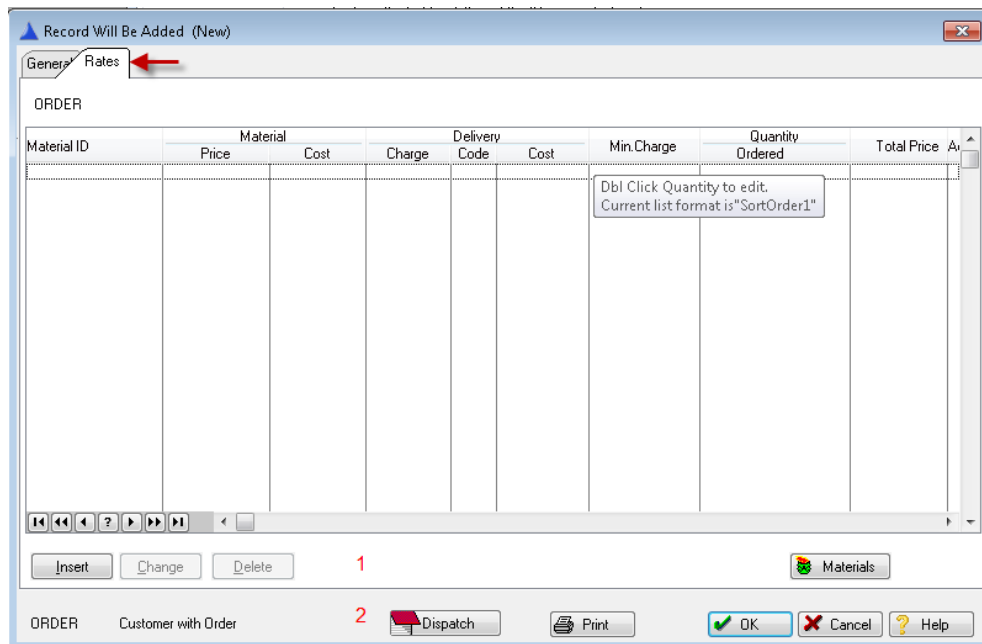
The totals area is for this order and can allow the deposit amount be entered. When tickets are created, the load count and the balance of the order dollars can be computed.

6. The Dispatch Button can be used with the Dispatch option.

The Print button can print a report of the items in this order.

The OK Button stores the order data and the Cancel Button returns you to the previous screen.

Click on the Rates Tab. The material rates entry screen will open.

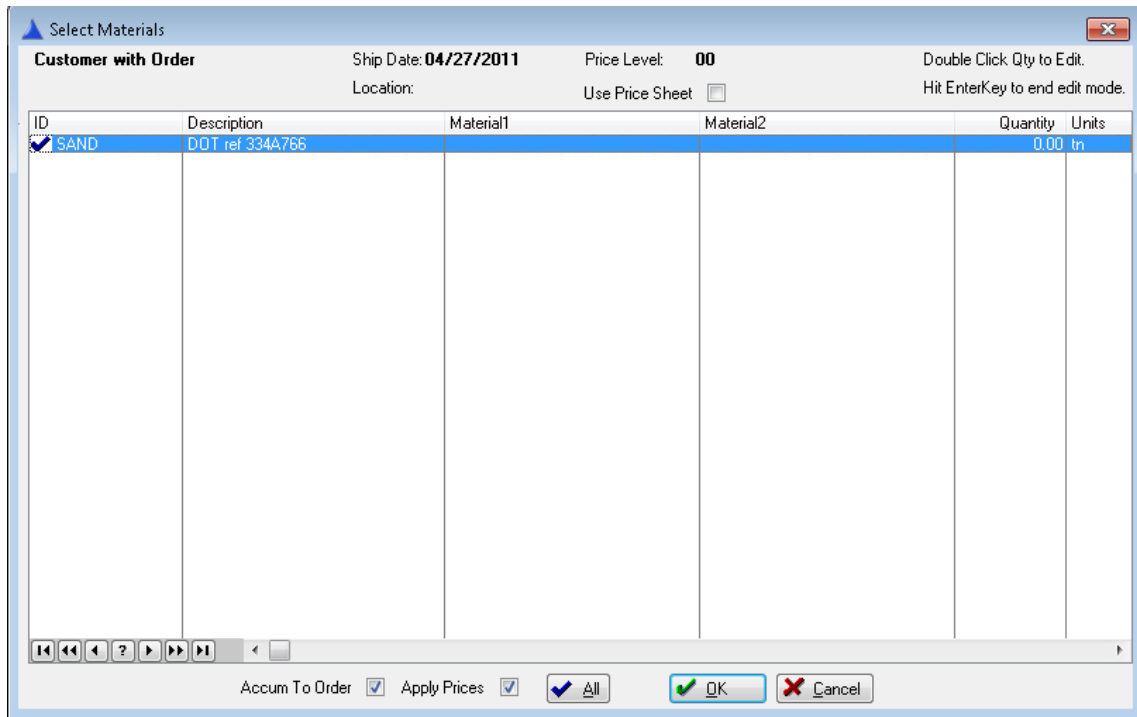


Section:

1. The insert button will allow the addition of a material. No materials are required on an order if the order is only tracking loads to a job. The Change and delete button functions will be available after a material has been added.
2. The Dispatch Button can be used with the Dispatch option. The Print button can print a report of the items in this order. The OK Button stores the order data and the Cancel Button returns you to the previous screen.

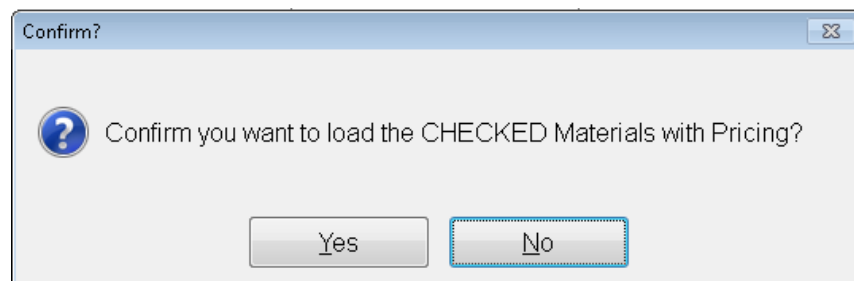
Click on the insert to add 1 material – click on the Materials button to add numerous materials.

Materials:



Double click the checkbox to add the material to the rates page. The All button adds all materials to the rates page. Accumulate to Order will add these materials against an order limit.

Ok adds the materials, Cancel returns you to the previous screen.



Click Yes to confirm and add the materials to the rates page.

The material will be added to the rates page with the pricing details from the materials browser.

Material ID	Price	Cost	Charge	Delivery Code	Min.Charge	Quantity Ordered	Total Price	Accu
SAND	23.6500	0.0000	0.0000	Q	0.00	0.000 /tn	23.6500	Y

Double click to change the details of the material within this order.

Record Will Be Changed (SAND)

Customer ID: ORDER      Customer with Order  
Order Number: ORDER

Rate

Material ID: SAND      DOT ref 334A766       Default Material  
 Accum To Order

Material  
Price: 23.6500 /tn  
Cost: 0.0000  
Minimum: 0.00

Delivery  
Charge: 0.0000  
Cost: 0.0000  
Code: Q

Discount  
Base: 0.00  
Increment: 0.00  
Amount: 0.0000

Total tn  
Ordered: 0.000  
Shipped: 0.000  
Balance: 0.000  
Loads: 0

OK    Cancel    Help

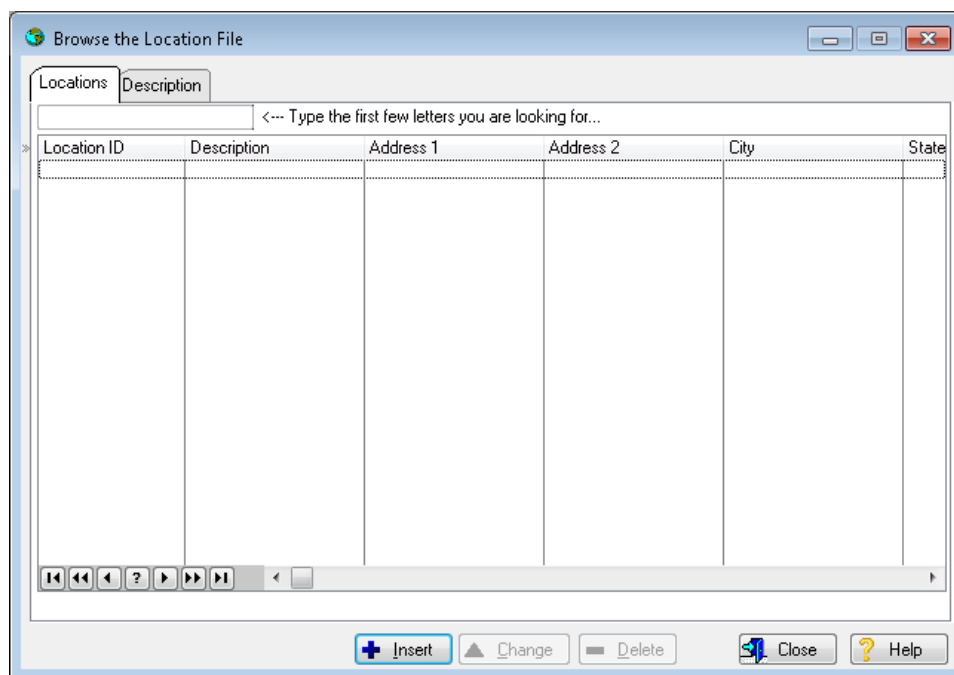
Change the details for this order and click OK to save. During ticketing, if THIS customer and THIS order and THIS material is chosen, the special details here will apply. By checking the Default Material checkbox, this material will automatically add to the ticket if this order is chosen.

Locations is the option which will allow you to track the locale to which the goods have been shipped for sales tax purposes. This uses in conjunction with the tax rate in the Company Master file as well as the Local provided in the orders option to allow three levels of taxation and record keeping.

From the Main SMS page choose Locations.



The Locations Browser will open.



Click the Insert button to add a Location. The Location detail screen will appear.

The screenshot shows a software dialog box titled "Adding a Location Record". It has a "General" tab. The fields are as follows:

- Location ID: FIRSTLOCATION
- Description: most uses sales tax region
- Address 1: (empty)
- Address 2: (empty)
- City: (empty)
- State/Province: (empty)
- Postal Code: (empty)
- Tax Rate Pct: 1.000
- Location1: (empty)
- Location2: (empty)
- GL Number: (empty)

Below these fields is a "Delivery" section with:

- Rate: 0.0000
- Code: City (dropdown menu is open showing options: City, Mile, Both, Flat)
- Tax On Delivery: (checkbox, unchecked)

At the bottom are buttons for "Use as Default" (checkbox, unchecked), "OK", "Cancel", and "Help".

**Section:**

Location ID is a required field. Use up to 15 characters in LETTERS OR NUMBERS. You cannot use spaces or special characters.

The Description field should contain the name of the tax location.

The address and related fields are not required but can contain handy information.

The Tax Rate Pct is the tax rate percent that will be taxes IN ADDITION TO THE TAX IN COMPANY MASTER. In there is zero tax percent in the company master, then the whole tax for this location may be listed.

The Location 1 and Location 2 fields are used defined fields that can be used to report information about this location.

The Use as Default, when checked, will fill in this location automatically on each ticket entry. It can be changed by the operator.

Each location can have its own delivery rate. Choose the rate in dollars and cents and define in the Code box the unit of measure to be used. Check the Tax on Delivery box to charge tax on the delivery portion of the ticket with this location.

Click the OK Button to save the Location data. The Change Button allows changing the location at a later time. The Delete Button allows the deletion of a location if it has not been used on a ticket. .