Set Defaults for Post and Print PO Dialog Screen

Overview

This document explains how to save your responses to the Post and Print Purchase Order dialog screen so that the "next" time you post and print a purchase order, the dialog screen will pre-fill with your saved entries. Your saved responses are called "defaults."

In order to use this feature, you must be running Tag-n-Trak Release 4.10.000 or higher. For Lighting Showrooms on Cloud Servers, you must be running Tag-n-Trak Release 5.10.000 or higher.

Your new default entries are saved in a file with a ".dft" extension. <u>For Lighting Showrooms with multiple store locations, the default settings are separate by store</u>. This gives you the flexibility to have the dialog screen "pre-fill" differently on a store by store basis.

How to Save Default Entries on the Post and Print Screen

1. The next time you Post & Print a PO, follow these steps.

2. If you have multiple store locations, change to the appropriate store to set the defaults.

3. Select to Post and Print a Purchase Order.

4. Fill out the dialog screen as you would normally like it filled in, but <u>STOP</u> on the last field BEFORE leaving the screen.

5. Press F12 for the Action Box and then select **'S' for "Save defaults**." This will save your entries in a file. The file will have a ".dft" extension.

   SHOULD DEFAULT START AND STOP NUMBER BE BLANK? Y (YN)

   Under normal circumstances, <u>you should respond "Y" or simply press ENTER to respond Yes to this question</u>. A "Y"es response means you want to save how you answered all of the questions on the dialog screen EXCEPT for the Start/Stop PO number that is currently displayed. This allows you to save the defaults without saving the Start/Stop PO number that you're currently working on.

   After responding 'Y' or Enter for Yes, you'll be returned to the last field of the Post and Print P.O. dialog screen. Enter past that field to finish the post and print process.

   Note: You are allowed to save the defaults at any point while on the Post and Print P.O. Report dialog screen. So, if you pressed F12 and S while not on the last field, when you return to the dialog screen after saving defaults, the program returns you to the field you were positioned when initially pressing F12 and S.

6. The next time you Post and Print a P.O., the program should "load" your saved entries into the dialog screen. The dialog screen fields should pre-fill with the default settings you specified, except that the START and STOP number should be the Purchase Order number that you select. Carefully review the screen to verify that you have saved off your entries correctly. Pay particular attention to the Start and Stop number to verify that it contains the SAME number and is the PO that you just selected.

7. If you wish to CHANGE the defaults, simply follow the EXACT same procedure described above. Each time you press F12 and S while on the Post & Print PO dialog screen, the current entries become the new "defaults" and update the .dft file. (If you have multiple stores, the program updates the .dft file for the store you are in.) If you need assistance with setting the defaults, contact Mylee Customer Support.