

PBS Tips and Tricks #4 - Contextual Help

Not sure of what to do next, or not sure of what a particular field in PBS does?

PBS actually has two Help functions: 1. Help/information about the field you are currently on, known as Contextual Help, and 2. a general Help function which is essentially an online manual.

Here is how Contextual Help works:

Let's say you have to enter a brand new vendor and, since you don't do this very often, you have forgotten what the "Vendor's ref#" field is all about and is it necessary for what you're doing right now.

The screenshot shows the 'Vendors' window for 'Company 00 Passport Software, Inc.'. The window has a menu bar (File, View, Print, Contacts, Options, Tools, Help) and a toolbar (New, Edit, Save, Save / New, Delete, Cancel, Exit). Below the toolbar is a list of vendors with columns for 'Vendor #' and 'Vendor name'. The vendor 'ACME Bike and Wagon, Inc.' with ID '1200' is selected. To the right of the list is a 'Current period: July, 2018' label. Below the list are tabs for 'General', 'Terms', 'Accounts', 'Totals', and 'Contacts'. The 'General' tab is active, showing various fields: 'Payment group' (NET), 'Vendor type' (SUP), 'Vendor status' (Always take discount), 'Vendor's ref #' (empty), 'Terms type' (Days), 'Terms desc' (Net 30), 'Due days' (30), 'Discount days' (0), 'Discount percent' (empty), 'Cutoff day' (empty), '1099 information' (1099 type: None, 1099 ID #: empty, 1099 ID type: empty), and 'ACH payments' (Bank code: None, Bank account #: empty, Account type: empty, Prenote: unchecked, Prenote date: 00 00 0000, State ID #: empty).

Select Help at the top of the screen (or keyboard commands: alt-H or ctrl-F1) and then select the first item in the drop down (or alt-e):

Help	Ctrl+F1
MySet Help	Ctrl+F2
MySet (View only)	Ctrl+F7
MySet (List-box sort)	Ctrl+F8
MySet (Toggle on/off)	Ctrl+F11

The following page will be displayed in your default browser:

Vendor's ref #

This optional field is the number that this vendor uses to refer to your company. It is printed on the checks you send to him, as an aid to identification.

Format : 30 characters

Example : Tvoc 12769

Here is information about the field in question. It informs you that the field is optional but can be used as an aid for your vendors to identify you, i.e. the customer number your vendors would use for you in their system.

This help feature is available through-out the PBS system. For example, on the trailer screen of Order Entry, what is the "Total order weight"?

The screenshot shows a software window with a menu bar (File, Edit list, Options, Tools, Help) and a toolbar with buttons: New, Edit, Save, Save / New, Delete, Cancel, Payments, Exit.

Reference Tab:

Order #	134	Customer #	1200
Type	ORDER	Gear Up Repair Shop	
CR limit	72,000.00	Order total	1,819.50
Balance	1,921.85	Ship total	1,819.50
Terms	30 - NET 30	Taxable total	.00

General Tab:

Order discount %	.00	Discounted net	1,819.50
Miscellaneous charge	0.00	Account #	
Freight	102.35	Account #	4030-100
Tax amount	0.00	Billed total	1,921.85
Commission amount	.00	** Commission calculated during posting **	
Commission %	3.00	on Margin	
Number of ship labels	0	Comment	
Number of COD labels		<input type="checkbox"/> Cash only	
Total order weight			
Total ship weight	.00		
Cash received	.00		
Check #			
Reference			
Cash account			

<F6> = notes

In this case produces:

Total order weight

Entry in this field is allowed only for order types **O** and **I**. For a type O order, you can access this field only using *Field number to change ?*.

The order weight is calculated based on the accumulated weights of the items on the order.

The total order weight entered here may be printed on the form including a picking ticket.

Format : 9999999.99

