OverDrive™
Vehicle Scale Software

User's Manual

Software Version 2.2.0

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INTRODUCTION

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Mettler-Toledo, Inc.
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1 Installing the Program

Introduction

OverDrive™ vehicle scale software is designed to control transactions in which material is bought, sold, or processed on a scale. It enables you to store a detailed record of each transaction, to print tickets and reports, and to export data for use with other software packages.

OverDrive software can connect to as many as six scale indicators and to peripheral devices such as traffic lights, gates, card readers, and unattended weighing stations.

Capabilities

In addition to the basic OverDrive software package, we offer a selection of add-on modules. The modules provide special capabilities that are not included in the basic package. Note that some of the features described in this manual are available only if one of the add-on modules is installed. The following lists provide a summary of which features are included in the basic software package and the add-on modules.

Basic Package

OverDrive Module

- Control of up to six scales plus manual weight entry
- SQL Server 2005 database (or MSDE 2000 database)
- Transaction screen
- Database tables for Account, Carrier, Company, Container, Contract, Destination, Driver, Generator, Origin, Origin Price Type, Permit, Product, Profile, Remark 1, Remark 2, Surcharge, Tax, Trailer, Vehicle, and 25 additional tables
- Advanced pricing
- Credit limits for individual customers
- Multi-axle and split weighing
- Product sampling
- Presets and groups
- Security setup for assigning access rights to users

- Transaction maintenance
- Weights and Measures log
- Standard reports and tickets (can be customized with Crystal Reports® software)
- GUI editor
- Wizards for database import/export, pricing, creating transaction types, and running transactions
- Languages: English, French, Spanish, Swedish, Norwegian, Dutch

Optional Add-On Modules

Unattended Module

- Enables unattended weighing with transaction wizard, touch screen, or four-line display

Invoicing Module

- Tools for creating and working with invoices

Overview

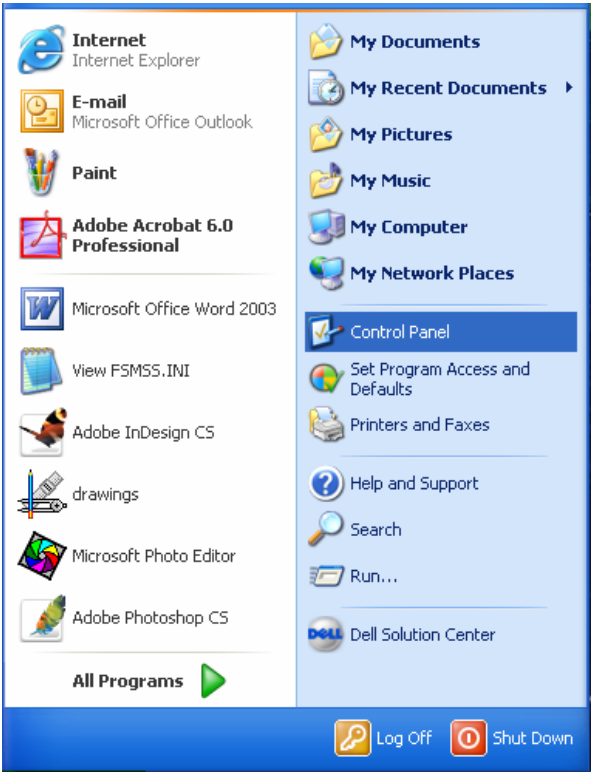
The following list outlines the basic steps involved in setting up and operating your OverDrive system:

1. Have your supplier install and configure the OverDrive software. Discuss your processing needs with the supplier ahead of time to make sure the installation is configured to meet them. An installation can include the following tasks:
   - Install the software on a single PC or network
   - Register the software
   - Connect to scales and peripheral devices
   - Change the appearance of screens
   - Enable/disable individual functions
   - Enable supervisors and operators
   - Set up tickets and reports for printing
2. Create database records. Before you can process transactions, you will need to enter information about products, accounts, contracts, vehicles, etc., in your database.
3. Process transactions. Once you have had your OverDrive system configured and have entered information in the database, you can begin processing transactions. You can speed up transactions by creating groups and presets.
4. Print tickets and reports. OverDrive software can print a ticket automatically for each transaction. It also provides a selection of standard reports that you can print. If Crystal Reports® software is installed, you can design your own tickets and reports.
5. Manage records of transactions. OverDrive software stores a complete record of each transaction. It gives you the ability to void, modify, and export transactions.
6. Manage the database. OverDrive software enables you to import information into the database and export information from the database for use with other software packages.
7. Change default settings. You can change a wide range of default settings to modify the way your OverDrive system operates.

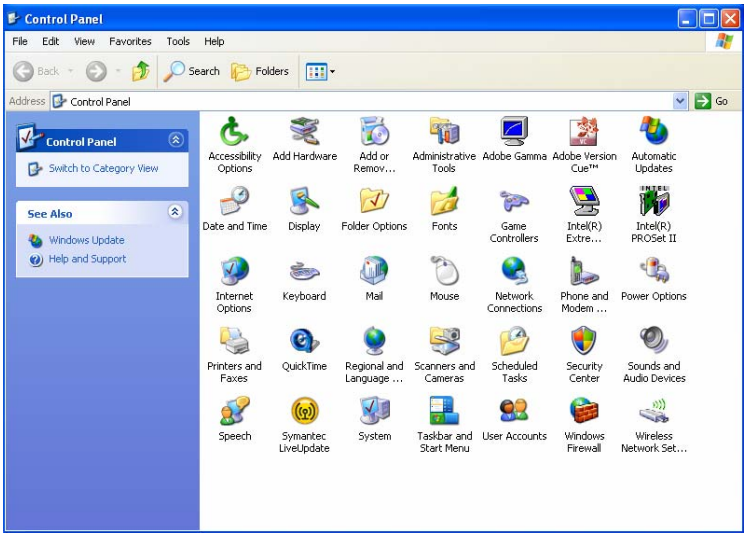
Installation

The following instructions explain how to install the OverDrive program. Once you have installed the program, you will need to complete the license registration procedure. If the program is not registered, you will be able to use it in demonstration mode for 14 days, after which it will shut down.

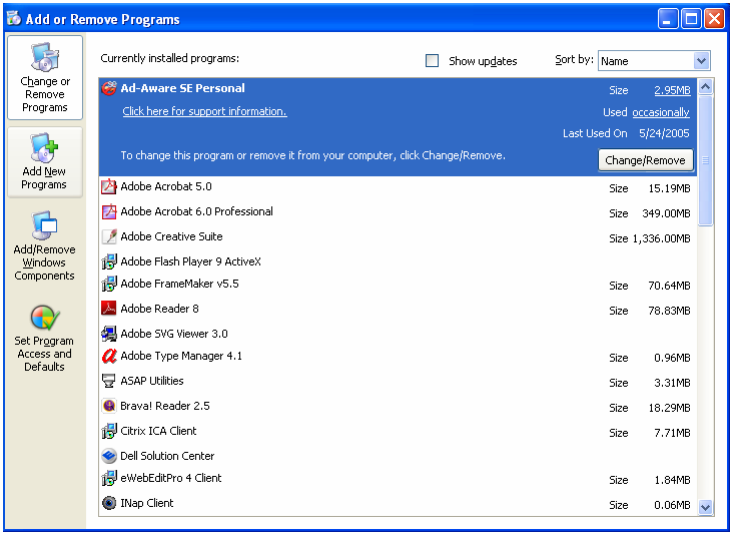
1. Click the **Start** button in the lower left-hand corner of the computer screen.



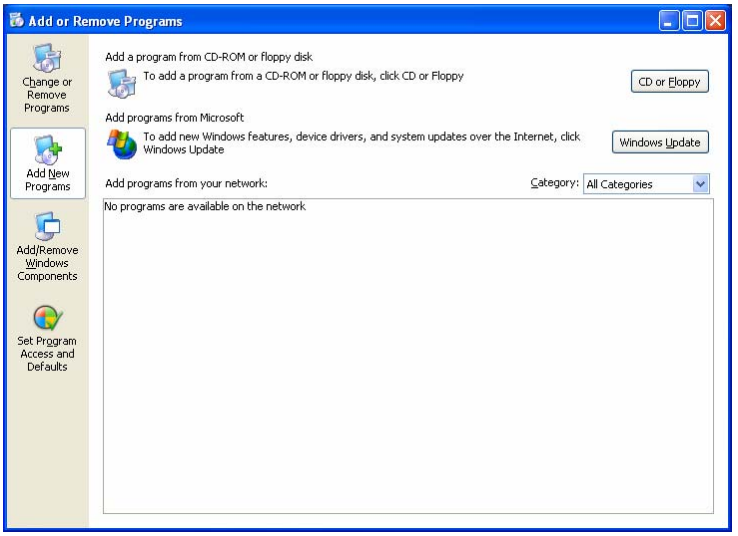
2. Select **Control Panel** from the **Start** menu.



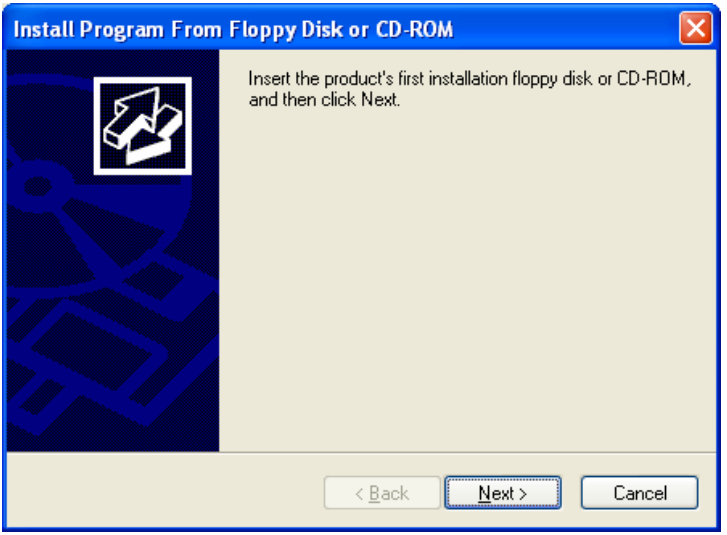
3. Double-click the **Add or Remove Programs** icon in the control panel.



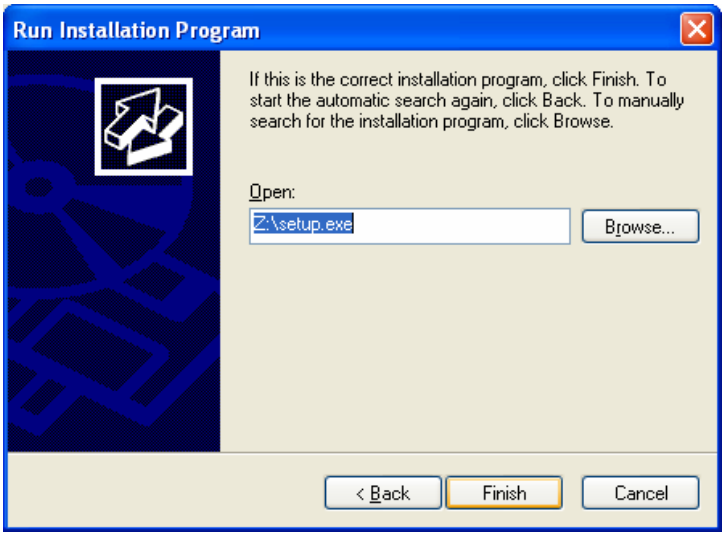
4. Click the **Add New Programs** icon on the **Add or Remove Programs** window.



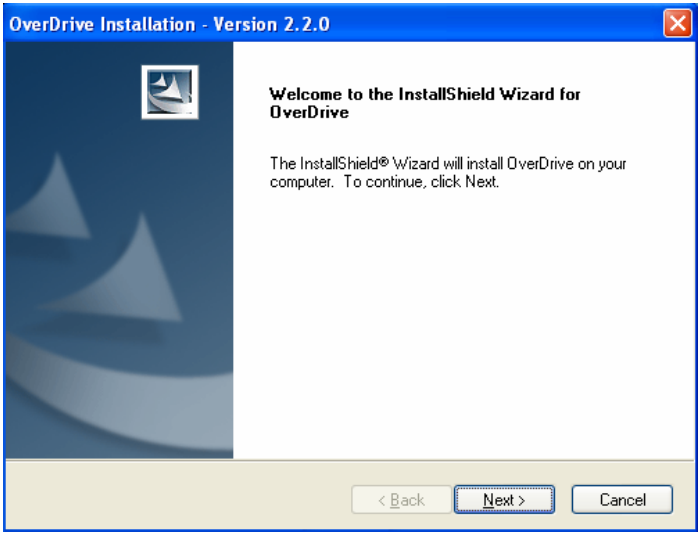
5. Click the **CD or Floppy** button on the **Add or Remove Programs** window.



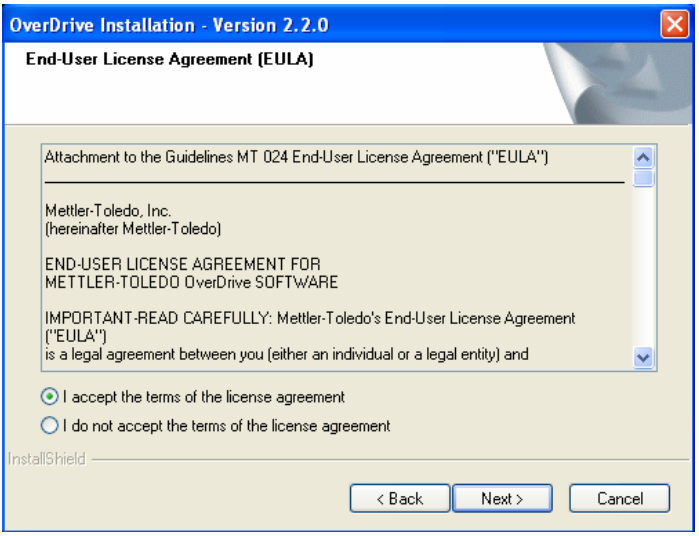
6. Place the OverDrive installation CD in the computer's CD drive. Then click the **Next** button.



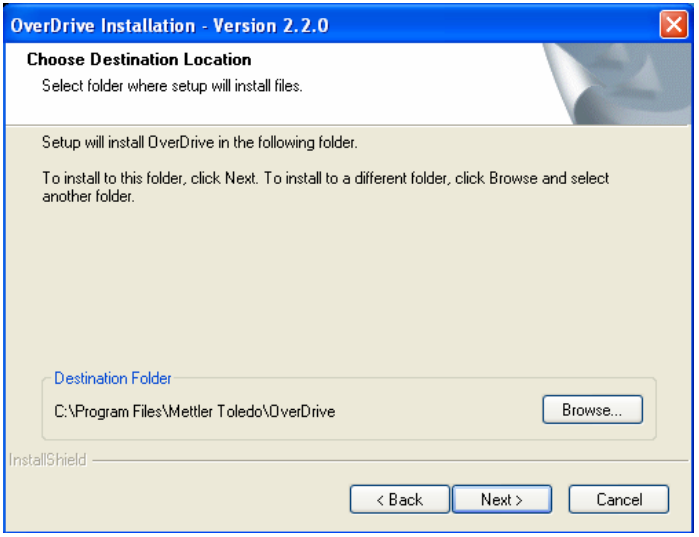
7. Once Windows has located the Setup.exe installation file, click the **Finish** button. You can use the browse button to locate the Setup.exe file manually.



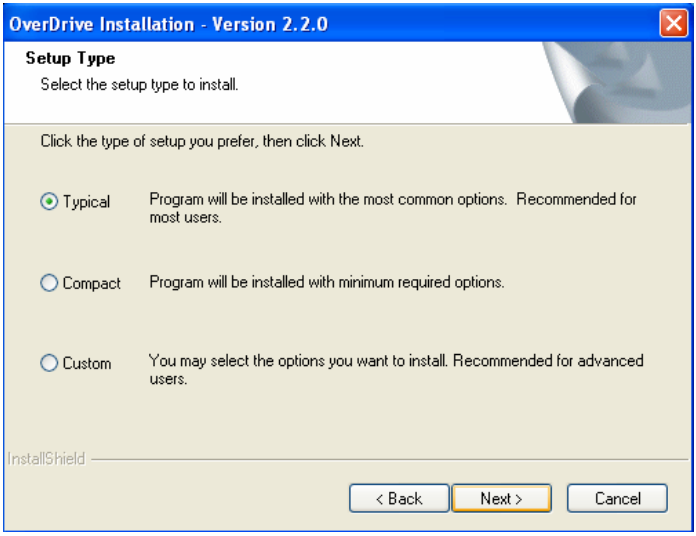
8. When the **InstallShield Wizard** window appears, click the **Next** button.



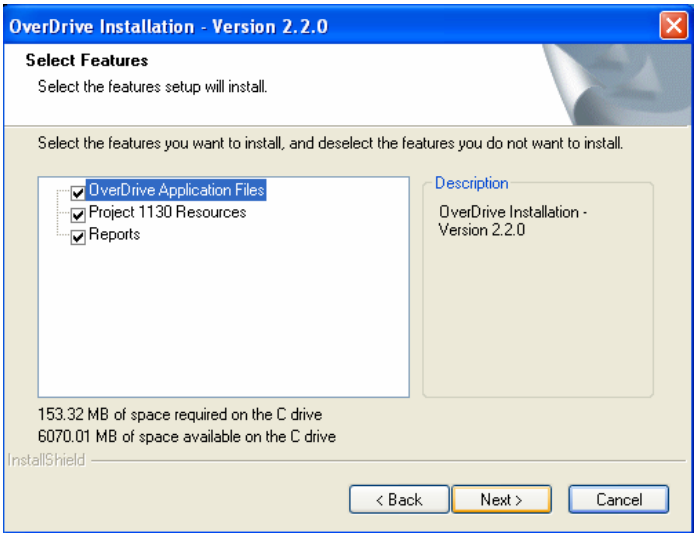
9. Read the end-user license agreement, use the radio button to accept the terms, and click the **Next** button. If you do not accept the terms, you will not be able to install the program.



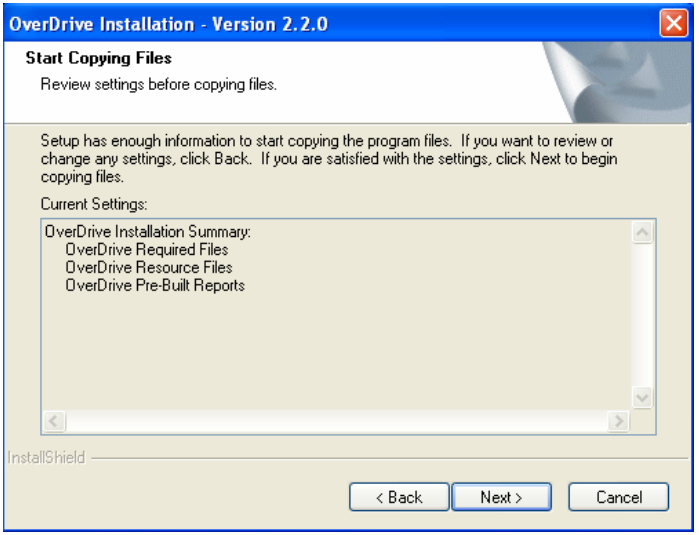
10. Select the location where the OverDrive files will be installed. The default is C:\Program Files\Mettler Toledo\OverDrive. If you want to install the files at a different location, use the **Browse** button to select the location. Then click the **Next** button.



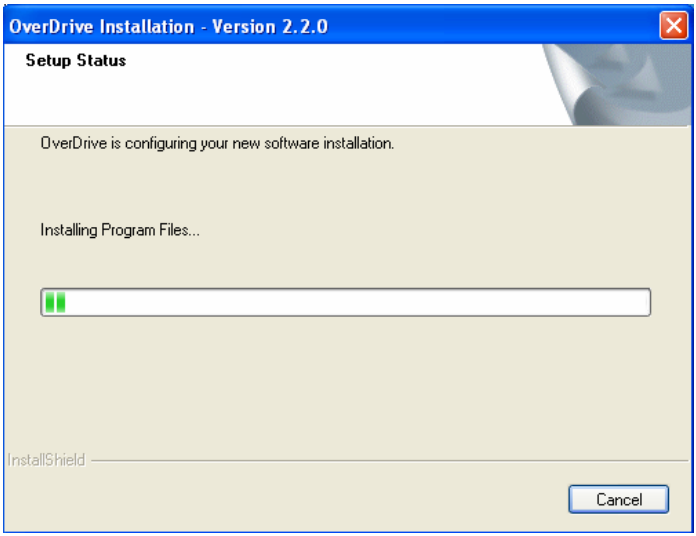
11. Select the setup type, and then click the **Next** button.
    - **Typical** installs all components. If you select the typical setup, continue to Step 13.
    - **Compact** installs the minimum required components. If you select the compact setup, continue to Step 13.
    - **Custom** allows you to select the components that you want to install. If you select the custom setup, continue to Step 12.



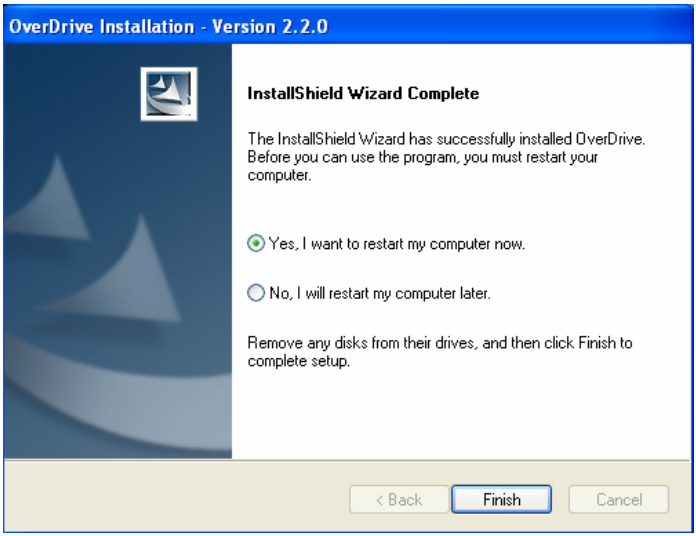
12. Enter a check mark next to the OverDrive features that you want to install.



13. This window lists the components that you selected. Click the **Next** button to start copying the files to your computer.



14. The **Setup Status** window shows the progress of the copying process. When the copying process reaches 100%, wait for the **InstallShield Wizard Complete** window to appear.

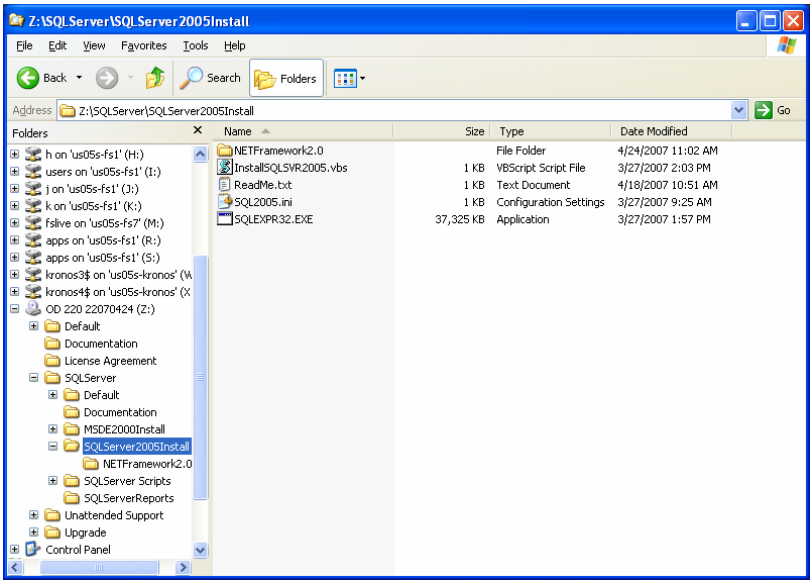


15. The installation has been completed. You will need to restart your computer to be able to open the program. Select **Yes** and then click the **Finish** button.

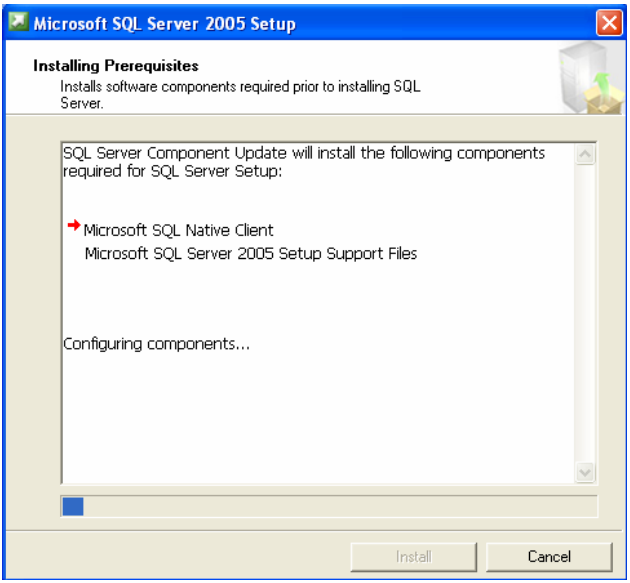
SQL Server

After installing the OverDrive program, you will need to install the SQL Server 2005 database. Microsoft .NET Framework 2.0 must be installed on the computer before you can install the SQL Server 2005 database. The Microsoft .NET Framework 2.0 installation file is provided in the SQL Server 2005 Install directory in case you need to run it.

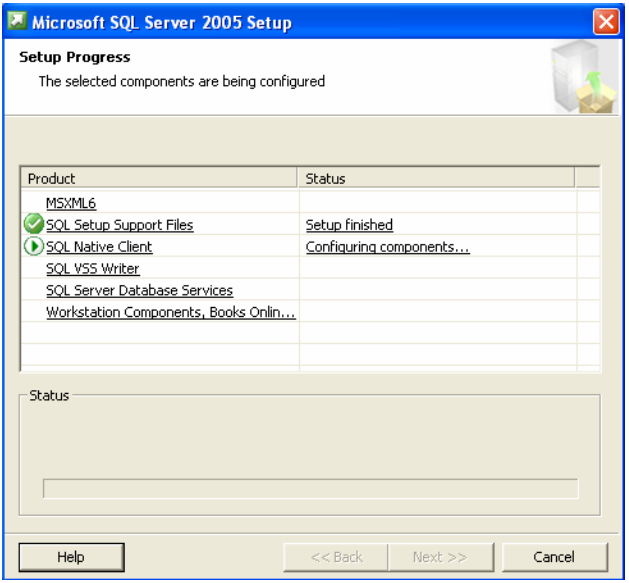
With the OverDrive installation CD in the computer's CD drive, use Windows Explorer to locate the installation file: Z:\SQLServer\SQLServer2005Install.



1. Run the InstallSQLServer2005.vbs file.



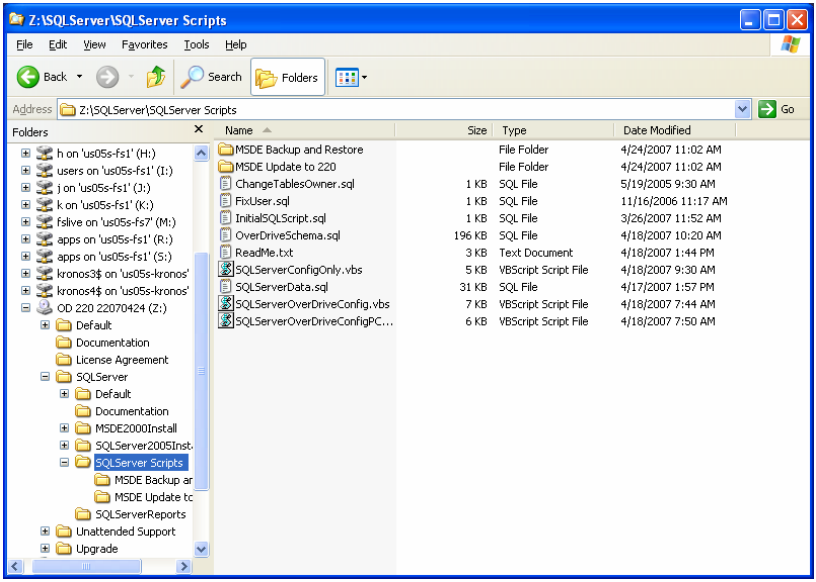
2. The software will be installed automatically.



3. You do not need to restart the computer after the installation has been completed.

Configure Database

After installing the SQL Server 2005 database, you will need to configure it for use with the OverDrive program. With the OverDrive installation CD in the computer's CD drive, use Windows Explorer to locate the installation file: Z:\SQLServer\SQLServer Scripts.

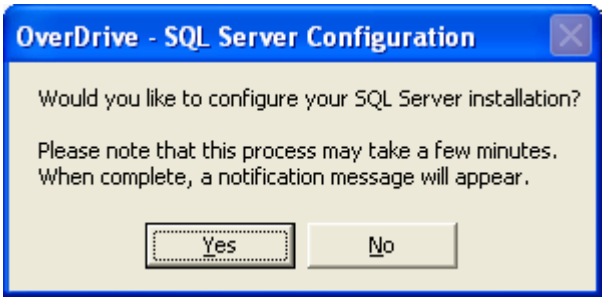


There are three configuration files:

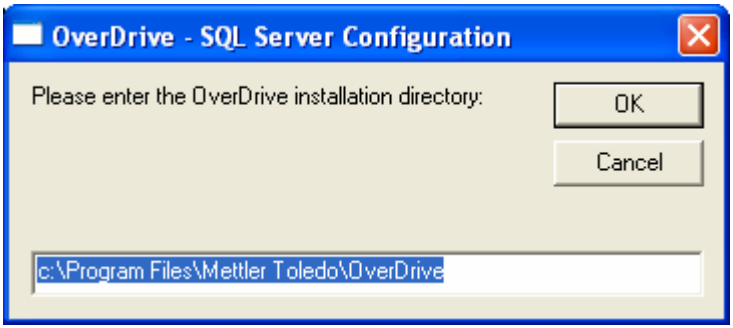
- SQLServerOverDriveConfig.vbs should be run when the OverDrive program and SQL Server database are installed on the same computer.
- SQLServerConfigOnly.vbs should be run on a computer that has the SQL Server database installed but not the OverDrive program.
- SQLServerOverDriveConfigPCOnly.vbs should be run on a computer that has the OverDrive program installed in order to connect to a SQL Server database on a different computer or server.

Run only one of the three files. The first option is the most commonly used and is shown in the following steps:

1. Run the SQLServerOverDriveConfig.vbs file.

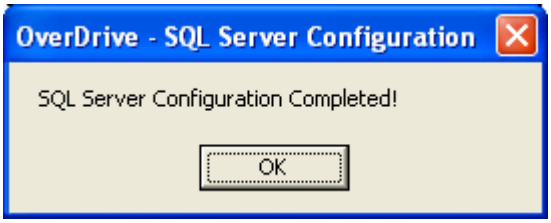


2. Click the **Yes** button to start the installation procedure.



3. Enter the path for the OverDrive installation directory (the default path is C:\Program Files\Mettler Toledo\OverDrive). Then click the **OK** button.

4. Click the **Yes** button (and then change the password) or click the **No** button to continue without changing the password.



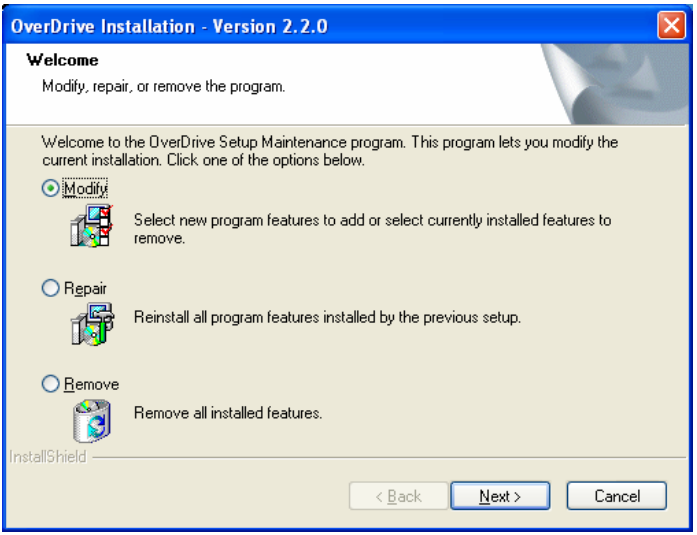
5. Click the **OK** button. You do not need to restart the computer after the installation has been completed.

Modification

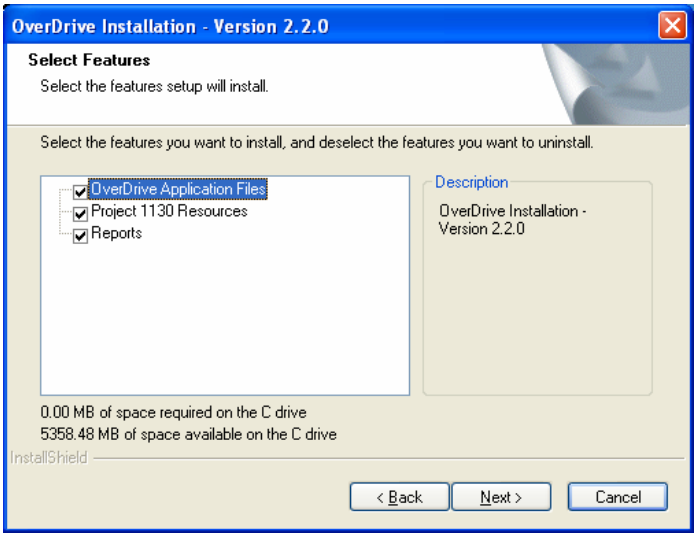
Once the program has been installed, you can use the InstallShield Wizard to add, repair, or remove system components.

Modify/Repair

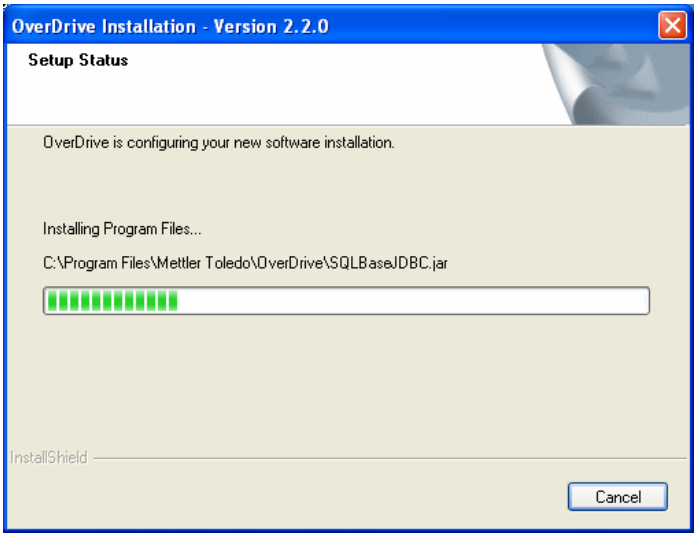
You will need the OverDrive installation CD to modify or repair the system. Place the CD in the computer's CD drive, and the window shown below will be displayed.



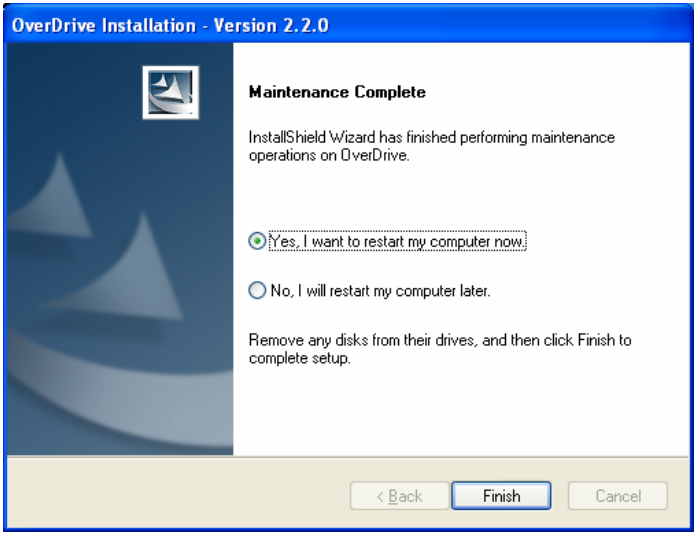
1. Select a modification option, and then click the **Next** button.
   - **Modify** lets you add new components to your system or remove components that are currently installed. Continue to Step 2.
   - **Repair** lets you repair your system by replacing the components that were selected during the previous installation. Continue to Step 3.
   - **Remove** lets you remove all components that are currently installed. Refer to the Remove procedure described on Page 1-20.



2. There will be a check mark next to each OverDrive component that is currently installed. To add a new component, enter a check mark next to it. To remove a component, delete the check mark next to it. Click the **Next** button.



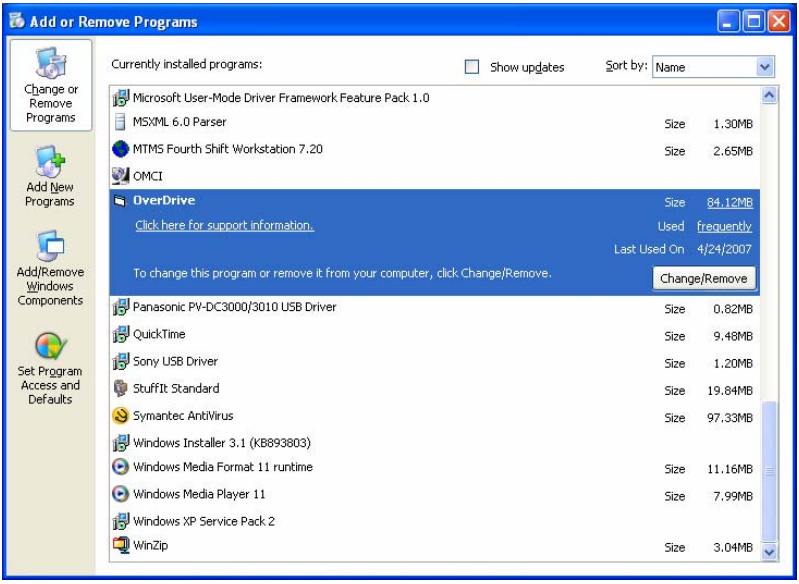
3. The **Setup Status** window will show the progress of the modification procedure. When it reaches 100%, wait for the **InstallShield Wizard Complete** window to appear.



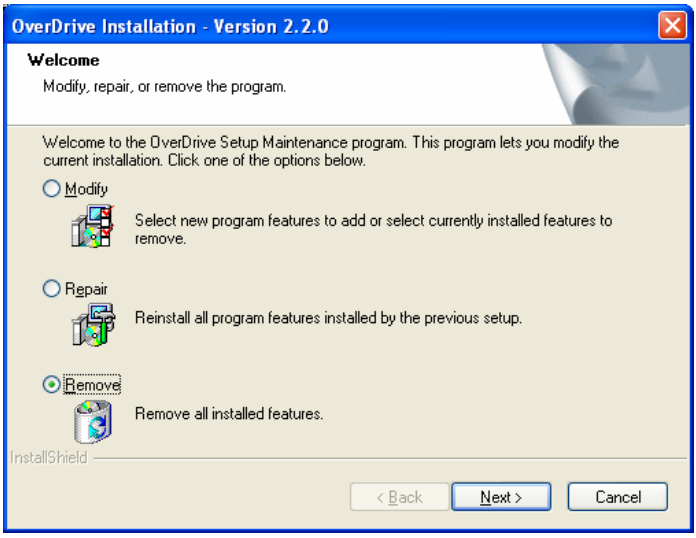
4. The procedure has been completed. You will need to restart your computer to be able to open the program. Click the **Finish** button to close the InstallShield Wizard.

Remove

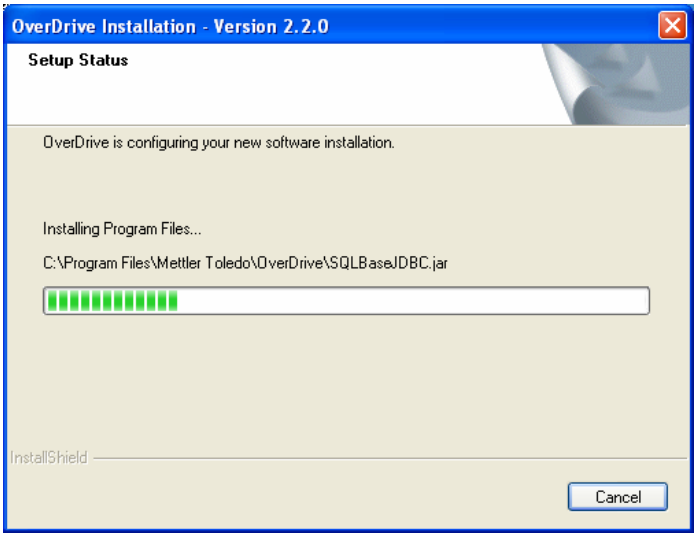
To remove all OverDrive components, follow Steps 1-3 of the installation procedure. When you click the **Add/Remove Programs** icon, the following window will be displayed.



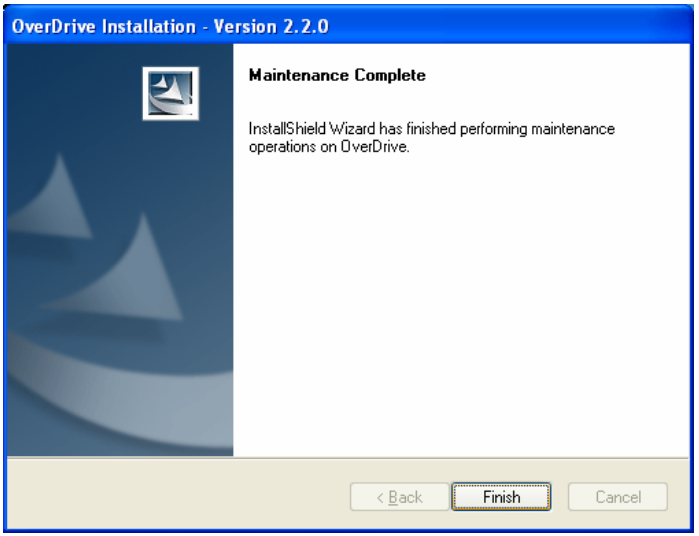
1. Select the OverDrive program from the list box, and then click the **Change/Remove** button.



2. Select the **Remove** option, and then click the **Next** button.



3. The **Setup Status** window will show the progress of the removal procedure. When it reaches 100%, wait for the **Maintenance Complete** window to appear.



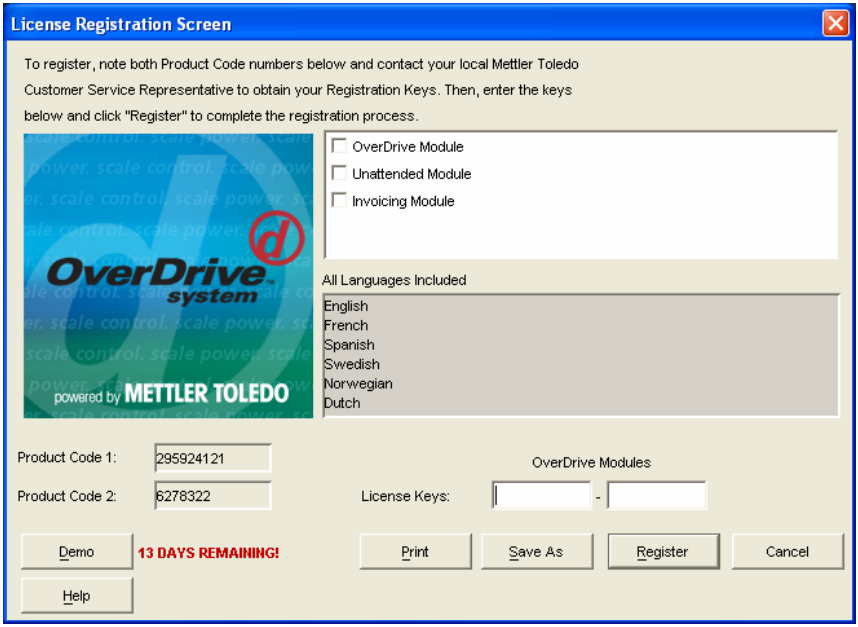
4. Click the **Finish** button to close the InstallShield Wizard.

2 License Registration

Registering

After you have installed the OverDrive software, you will need to register it. Until the software is registered, you can use it in demonstration mode for 14 days. At the end of the 14-day demonstration period, the program will shut down if it has not been registered.

Register your installation from the **License Registration Screen**. To open the screen, click the OverDrive icon in the **Start / Programs / Mettler Toledo** menu.



1. In the first list box, place a check mark next to the software modules that you have purchased. If you do not check any boxes, you will be registered for the basic software package.
2. The second box lists the languages that are included in the OverDrive software package.

3. Click the **Save As** button to create an electronic copy of your registration form.
    - When the **Select File** window opens, select a storage location in the **Save In** combo box.
    - Enter a file name (in *.txt format) in the **File Name** data field.
    - Click the **Save** button on the window.
4. Provide the registration form information to your local Mettler Toledo customer service representative.
5. Mettler Toledo will send you license keys for your system. Enter those keys in the appropriate **License Keys** data fields on the **License Registration Screen** (enter key #1 in the first field and key #2 in the second field).
6. Click the **Register** button. You will then be prompted to restart the application in order to complete the registration process.

After you have registered your software, the **License Registration Screen** will no longer open automatically when you log in to the system. If you install an add-on module later, you will need to register the software again. To display the **License Registration Screen**, start the program and select **Register** in the **Help** menu.

License Registration Screen

Add-On Modules

The first list box on the screen is used to select the add-on modules that you have purchased:

- OverDrive Module
- Unattended Module
- Invoicing Module

Product Codes

The product codes listed in the two data fields on the **License Registration Screen** are for the computer on which the software is installed. The license keys that you receive will be linked to those product codes. To register a system, you must enter the license keys that are linked to the product codes shown on the screen.

License Keys

There are two **License Keys** data fields. When you receive your license keys, enter them in the data fields in order to register your system.

Push Buttons

Demo: Click the **Demo** button to start the OverDrive program in demonstration mode. Demo mode allows you to try out the software, giving you access to all functions and all available languages. At the end of the 14-day demonstration period, the program will shut down if it has not been registered.

Help: Click the **Help** button to open the program's help files to the page that describes the **License Registration Screen**.

Print: Click the **Print** button to print a text file of your registration form. The form will list your product code numbers and will indicate which modules you have selected.

Save As: Click the **Save As** button to save your registration form as an electronic file. A window will appear, in which you will need to enter a file name and specify a directory location for storing the file. Save the registration form as a text file (*.txt). In other words, enter a name such as **register.txt** in the **File Name** data field. After entering a file name and specifying a directory location, click the **Save** button to complete the procedure and close the window.

Register: Click the **Register** button to register your system. You will need to obtain license keys and enter them in order to register. When you have entered license keys and clicked the button, you will be prompted to restart the application in order to complete the registration process.

Cancel: Click the **Cancel** button to delete any changes and close the **License Registration Screen**.

3 Startup

How to Start the Program

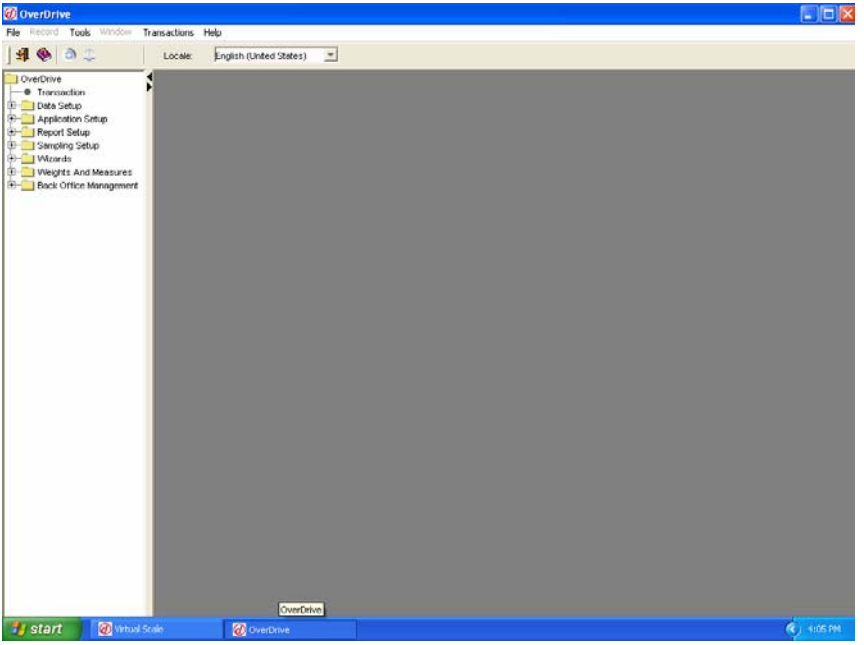
When the OverDrive software is installed, an OverDrive icon will be created in the computer's **Start / Programs / Mettler Toledo** menu.

1. Select the OverDrive icon and press the ENTER key (or double-click on it). The **OverDrive Login** screen will open.

2. Type your user name in the **User Name** field.
3. Move the cursor to the **Password** field and type your password. The password will not be shown in the field; each character will appear as an asterisk.

   NOTE: Passwords are case sensitive.
4. Click the **Login** button or press the ENTER key to start the program (click the **Cancel** button to exit).

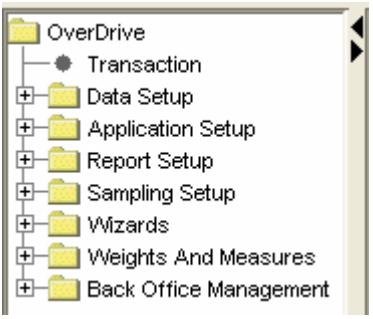
If you typed your user name and password correctly, the main OverDrive screen (shown below) will open.



This screen provides access to all OverDrive screens, tables, and functions. The rest of this chapter describes the basic features of the screen and how to use them.

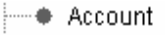
Side Tree

A data structure tree is located at the left-hand side of the screen. It organizes the OverDrive screens in a system of folders, making it easy to locate and open any screen. The contents of the side tree depend on the permissions assigned to the person who is logged in to the program. If a person does not have permission to use a screen, the screen will not be listed in the side tree.



To open a folder, click on the plus sign to the left of it. When a folder is open, the plus sign changes to a minus sign. You can also double-click on the folder icon or folder name.

To close a folder, click on the minus sign to the left of it. You can also double-click on the folder icon or folder name.



To open a screen, click on the name of the screen.

To close a screen, click the **Close** button in the upper right-hand corner of the screen. Or click the control menu icon in the upper left-hand corner of the screen, and then click **Close** in the control menu.

There are left and right arrows in the border along the right edge of the side tree. Clicking on the left arrow closes the side tree. Clicking on the right arrow opens the side tree.

You can resize the area in which the tree is displayed. Position the cursor on the border until a double-headed arrow appears. Then hold down the mouse button and drag the border to the left or right.

Tool Bar

The tool bar at the top of the screen provides easy access to several commonly used functions.

Exit

This button closes the program.

Help

This button opens the program's help files.

Open Transaction Screen

This button opens the **Transaction** screen.

Open Virtual Scale

This button opens the virtual scale indicator or brings it to the front if it is behind the main screen.

Capture Vehicle Tare

This button opens a window that is used to record tare weights. A vehicle must be selected on the **Transaction** screen before you can capture a tare. The tare weight will be stored in the **Vehicle** table.

Enable Traffic Lights

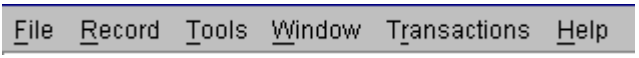
This button displays the panel used to control traffic lights manually.

Locale

This combo box can be used to switch between the languages that you have installed. To display text correctly, it might be necessary to change a computer's regional settings to match the language selected (**Start / Settings / Control Panel / Regional Settings**). You can also use the GUI Editor to adjust the amount of space allowed for text.

Menu Bar

The menu bar at the top of the screen provides six pull-down menus. Those menus and the items in them are explained below. The keyboard shortcut for opening a menu is Alt + the letter that is underlined in the menu name.



File Menu

- **Exit:** This item closes the program.

Record Menu

The **Record** menu is used for working with database records and is active only when a data setup table is open.

- **Query:** This item searches a database table for one or more records. If all data fields on a table's **Form View** tab are empty, clicking **Query** will retrieve all records in the table. If you enter information in a data field, clicking **Query** will retrieve only those records that match the information. For example, entering a Carrier ID on the **Vehicle** form will limit a search to the vehicles that are operated by that carrier.
- **New:** This item clears all records that are displayed on a form or table so you can begin a new query or create a new record.
- **Save:** This item saves a new database record or saves changes made to an existing database record.
- **Delete:** This item deletes a record from the database. To delete a record, display it on the table's **Form View** tab or highlight it on the **Table View** tab and then click the **Delete** button.
- **First:** Click this item to return to the first record in a query.
- **Previous:** Click this item to return to the previous record.
- **Next:** Click this item to go forward to the next record.
- **Last:** Click this item to go forward to the last record in a query.

Tools Menu

- **GUI Editor:** This item opens the Graphical User Interface (GUI) editor, which is used to change the way your system's screens and windows look.

Window Menu

The **Window** menu is active only when a window is open.

- **Cascade:** This item arranges all open windows one in front of another so that only the top and left edges of the windows in back are visible.
- **Tile Horizontal:** This item arranges all open windows one above another.
- **Tile Vertical:** This item arranges all open windows side by side.
- **Minimize All Windows:** This item minimizes all open windows. The minimized windows will be located at the bottom of the area where the windows are normally displayed, so you might have to scroll down to locate them.
- **Windows:** All open windows are listed at the bottom of the menu. If more than one window is open, clicking on the name of a window will bring it to the front of the other windows.

Transactions Menu

- **Load Numbers:** This item opens the **Load Numbers** window, which shows the load number and load counter for any transaction currently being run. A load number is assigned to an individual company and stored in the **Company** table record. The load counter tracks how many transactions have been processed for a load number.
- **Transaction Browser:** This item opens the **Transaction Browser** window so that you can view a table that lists all open transactions. Open transactions are two-pass and multi-pass transactions that have not been completed. When a vehicle returns for its second (or next) pass over the scale, the operator can open the transaction browser to find the record for the open transaction. Clicking on the record in the browser's table will display the transaction information on the **Transaction** screen.
- **Print Last Ticket:** This item reprints a new copy of the ticket for the most recent transaction processed on a scale.
- **Zero Scale:** This item adjusts the weight reading for an empty scale to zero. This command is used to compensate for minor changes in the weight reading caused when material such as snow or ice builds up on a scale. The command affects only the scale tab that is currently displayed on the **Transaction** screen. The scale must be empty when you zero it.
- **Refresh Combo Data:** This item refreshes the data in the combo boxes on the **Transaction** screen. This command is used to update the options listed in the combo boxes to reflect any recent changes to the database records. For example, you might have to create a record for a new account to complete a

transaction. After creating the account record, refresh the combo data so that the new Account ID will appear in the **Account** combo box.

- **Capture Vehicle Tare:** This item opens a window that is used to record tare weights. A vehicle must be selected on the **Transaction** screen before you can capture a tare. The tare weight will be stored in the **Vehicle** table.
- **Enable Traffic Lights:** This item displays the panel used to control traffic lights manually.

Help Menu

- **Help Topics:** This item opens the program's help files.
- **Register:** This item opens the **License Registration** screen.
- **About:** This item displays information about the version of OverDrive software you are using.

Keyboard Shortcuts

F1 (Help): Opens the program's help files. Place the cursor in a data field and press the F1 key to open the help file for that data field.

F2 (Refresh Combo Data): Refreshes the data in the combo boxes on the **Transaction** screen to reflect recent changes in the database.

F3 (Search): Searches specific ID data fields to help locate database records.

F4 (Scale Tab): Switches to the next scale tab on the **Transaction** screen.

F5 (Product Detail Tab): Switches to the **Product Detail** tab on the **Transaction** screen.

F6 (Product List Tab): Switches to the **Product List** tab on the **Transaction** screen.

F7 (Tax Tab): Switches to the **Taxes and Surcharges** tab on the **Transaction** screen.

F8 (Get Weight): Reads the weight from a scale or opens the **Manual Weight** window so that you can enter a weight manually.

F9 (Accept): Records partial transaction data, such as the first weighing of a two-pass transaction or all except the final weighing of a multi-pass transaction.

F10 (File): Selects the **File** menu so that you can exit the program. Use the down arrow key to open the menu.

F11 (Complete): Completes a transaction by recording a one-pass transaction or recording the final weighing of a two-pass or multi-pass transaction.

F11 (Short Code Toggle): When the Unattended Touch Screen is in use, this command enables/disables the data field where you can enter a short code.

F12 (Transaction Browser): Opens the transaction browser.

Ctrl-End (Unattended Administration Toggle): When the Unattended Touch Screen is in use, this command displays the **Shutdown** button for closing the Touch Screen.

Ctrl-F (Query): Searches for records in a database table.

Ctrl-E (Notes): Opens the **Transaction Notes** window to allow you to enter notes.

Ctrl-N (New): Clears all records that are displayed on a form or table so that you can begin a new query or create a new record.

Ctrl-S (Save): Saves a new database record or saves changes made to an existing database record.

Ctrl-Delete (Delete): Deletes the database record that is currently displayed on a form.

Ctrl-Up Arrow (First): Returns to the first record in a table.

Ctrl-Left Arrow (Previous): Returns to the previous record.

Ctrl-Right Arrow (Next): Goes forward to the next record.

Ctrl-Down Arrow (Last): Goes forward to the last record in a table.

Ctrl-A (Add Detail Record): Adds a row to the table on the **Transaction** screen's **Product List** tab or **Product Detail** tab.

Ctrl-D (Delete Detail Record): Deletes a row from the table on the **Transaction** screen's **Product List** tab or **Product Detail** tab.

Ctrl-C (Cancel Transaction): Clears the data fields on the **Transaction** screen.

Ctrl-L (Clear Last Detail Record): Clears the most recent entry on the **Transaction** screen's **Product List** tab or **Product Detail** tab.

Ctrl-P (Print Last Ticket): Prints the ticket for the most recent transaction.

Alt-F4 (Close): Closes the program.

How to Close the Program

There are several ways to close the OverDrive program:

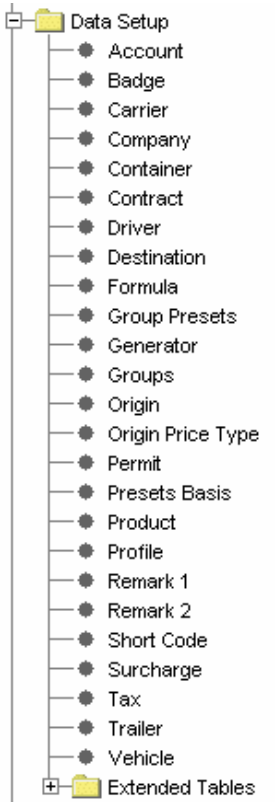
- Click the **Close** button in the upper right-hand corner of the screen.
- Select **Exit** from the **File** menu.
- Click the **Control Menu** icon in the upper left-hand corner of the screen, and then select **Close** from the menu.
- Type Alt+F4 on your computer keyboard.

4 Creating Database Records

Data Setup Tables

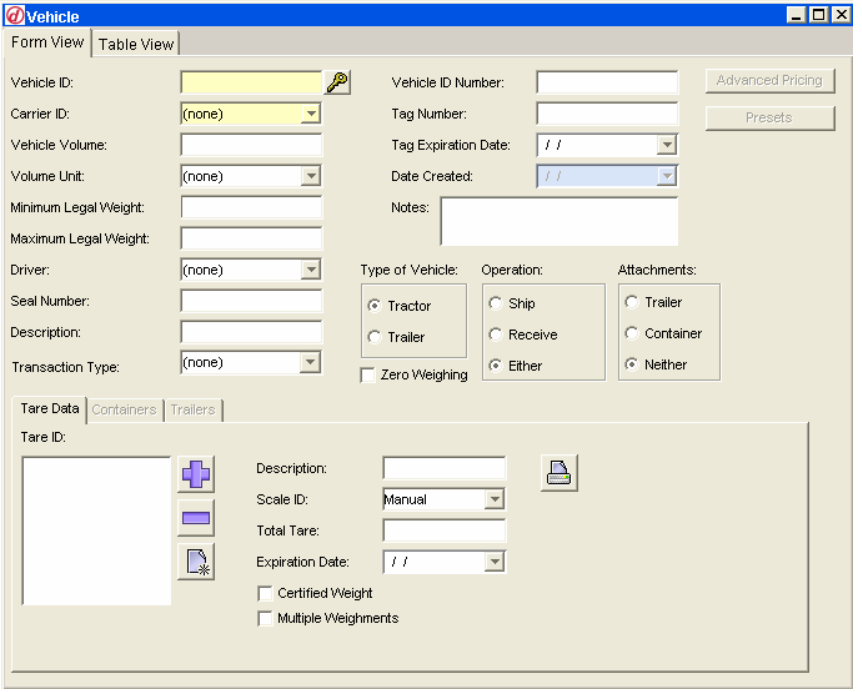
Before you can use the OverDrive system to process transactions, you must create database records. For example, you should create a record for each of the products that you handle and for each vehicle that transports those products. That information will be stored in the tables described in this chapter. The only limit to the number of records that you can store in your database is the amount of hard disk space available on the computer.

To view a table, open the **Data Setup** folder in the side tree and click on one of the tables listed below:



Forms

When you select a table from the **Data Setup** folder, the first thing you will see is the **Form View** tab. It is used to display an individual record from the table. A sample form for the **Vehicle** table is shown below.

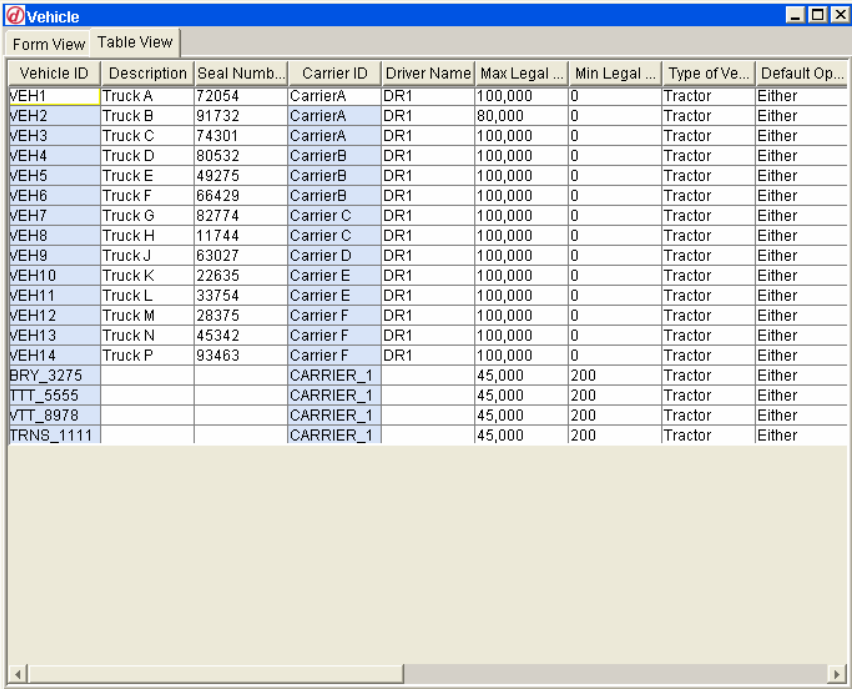


Each form contains data fields, which are used to enter, view, and edit information for a record.

- When you create a new record, you must enter a unique ID in the ID data field on the form. You can type an alphanumeric ID in the data field or click the **Get System Generated Key** button to have the system assign an ID and place it in the data field. By default the system assigns a numeric ID, but you can use the **Options** screen to configure it to generate alphanumeric IDs (see Chapter 8).
- The other data fields are optional. You can leave these fields blank when creating a record, but we suggest that you enter as much information as possible.

Tables

The **Table View** tab is used to display all the records or selected records stored in a table. A sample **Vehicle** table is shown below.



Vehicle ID	Description	Seal Numb...	Carrier ID	Driver Name	Max Legal ...	Min Legal ...	Type of Ve...	Default Op...
VEH1	Truck A	72054	CarrierA	DR1	100,000	0	Tractor	Either
VEH2	Truck B	91732	CarrierA	DR1	80,000	0	Tractor	Either
VEH3	Truck C	74301	CarrierA	DR1	100,000	0	Tractor	Either
VEH4	Truck D	80532	CarrierB	DR1	100,000	0	Tractor	Either
VEH5	Truck E	49275	CarrierB	DR1	100,000	0	Tractor	Either
VEH6	Truck F	66429	CarrierB	DR1	100,000	0	Tractor	Either
VEH7	Truck G	82774	Carrier C	DR1	100,000	0	Tractor	Either
VEH8	Truck H	11744	Carrier C	DR1	100,000	0	Tractor	Either
VEH9	Truck J	63027	Carrier D	DR1	100,000	0	Tractor	Either
VEH10	Truck K	22635	Carrier E	DR1	100,000	0	Tractor	Either
VEH11	Truck L	33754	Carrier E	DR1	100,000	0	Tractor	Either
VEH12	Truck M	28375	Carrier F	DR1	100,000	0	Tractor	Either
VEH13	Truck N	45342	Carrier F	DR1	100,000	0	Tractor	Either
VEH14	Truck P	93463	Carrier F	DR1	100,000	0	Tractor	Either
BRY_3275			CARRIER_1		45,000	200	Tractor	Either
TTT_5555			CARRIER_1		45,000	200	Tractor	Either
VTT_8978			CARRIER_1		45,000	200	Tractor	Either
TRNS_1111			CARRIER_1		45,000	200	Tractor	Either

- Use the scroll bar at the bottom of the table to view all the data in the table.
- It is usually more convenient to view an individual record on the **Form View** tab. Locate the desired record on the **Table View** tab, click on it to select it, and then switch to the **Form View** tab.

Tool Bar

When you open a database table, a tool bar will appear on screen. The default location is below the menu bar in the upper left-hand corner of the screen, but you can move the tool bar to whatever location is most convenient. The push buttons on the tool bar are used to view or edit records in the database tables. You can use the buttons from both the **Form View** and **Table View** tabs.

Query: Searches for records in a database table. The keyboard shortcut for this command is Ctrl-F.

New: Clears all records that are displayed on a form or table. This lets you begin a new query or begin entering data to create a new record. The keyboard shortcut for this command is Ctrl-N.

Save: Saves a new database record or saves changes made to an existing database record. The keyboard shortcut for this command is Ctrl-S.

Delete: Deletes the database record that is currently displayed on a form. The keyboard shortcut for this command is Ctrl-Delete.

First: Returns to the first record in a table. The keyboard shortcut for this command is Ctrl-Up Arrow.

Previous: Returns to the previous record. The keyboard shortcut for this command is Ctrl-Left Arrow.

Next: Goes forward to the next record. The keyboard shortcut for this command is Ctrl-Right Arrow.

Last: Goes forward to the last record in a table. The keyboard shortcut for this command is Ctrl-Down Arrow.

Query Procedure

You can use the **Query** button (or Ctrl-F key) to search for records in a database table.

- To retrieve all records in a table, clear all data fields on the form and click the **Query** button.
- To retrieve an individual record, enter its ID in the ID data field on the form and click the **Query** button.
- To retrieve a set of records, enter data as a filter in one or more data fields and then click the **Query** button.

A filter is data used to limit a search. For example, entering a Carrier ID on the **Vehicle** form will limit the search to those vehicles operated by the carrier. You can enter partial data as a filter by using a percent sign as a wildcard. For example, you can enter v% or %6 to search for Vehicle6.

You can query for all records from either the **Form View** tab or the **Table View** tab. If your query includes filters, perform it from the **Form View** tab. The arrow buttons on the tool bar allow you to scroll through the records that you retrieve.

Modifying Tables

You can modify a table by sorting rows and columns and by changing column widths.

To sort rows, click on one of the column headings. The rows will be sorted so that the items under the heading that you clicked on are in alphanumerical order.

To rearrange columns, position the cursor on the heading of the column you want to move. Then hold down the mouse button and drag the column to a new location.

To change the width of a column, position the cursor on the right-hand border of a column heading until a double-headed arrow appears. Then hold down the mouse button and drag the column border to the desired width.

Editing Table Entries

You can create new records in a table, delete existing records, and edit existing records.

Creating a New Record

Open the **Data Setup** folder in the side tree and select the table to which you want to add a record. The form for that table will appear.

1. Fill in as many data fields as possible. The ID data field is yellow, indicating that it must be filled in when you create a database record. You can type in an ID or have the system assign an ID by clicking the **Get System Generated Key** button to the right of the ID data field.

   If you do not enter an ID or if you enter an ID that is currently used for another record, an error message will appear when you try to save the new record.

2. When you have entered all the information, click the **Save** button. This will enter the new record in the table.

Deleting an Existing Record

Open the **Data Setup** folder in the side tree and select the table from which you want to delete a record. The form for that table will appear.

1. Display the record you want to delete by entering its ID in the ID data field and then clicking the **Query** button.

   If you do not know the ID, click the **Query** button to retrieve all records in the table. Then select the record you want to delete. You can use the arrow buttons to scroll through the records or switch to the **Table View** tab to locate a record.

2. Click the **Delete** button to delete the record displayed on the form (or selected on the **Table View** tab). You will then be prompted to confirm the deletion.

Editing an Existing Record

Open the **Data Setup** folder in the side tree and select the table you want to edit. The form for that table will appear.

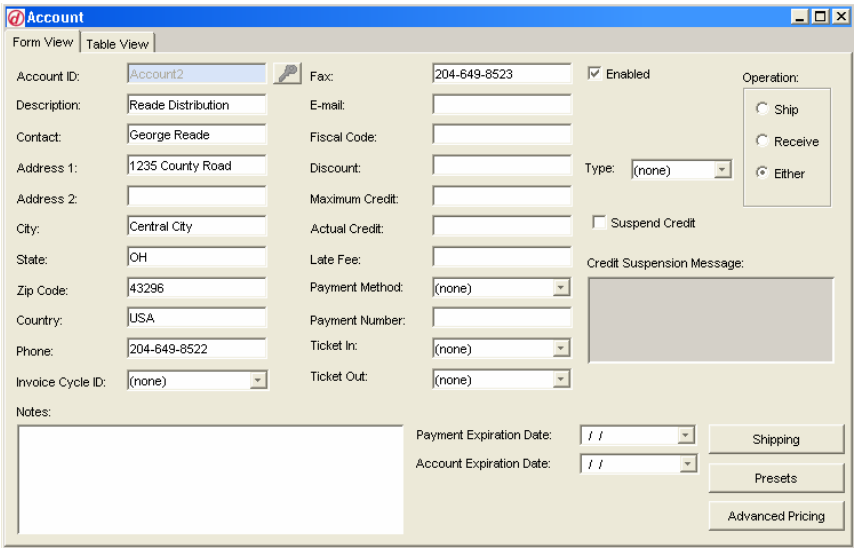
1. Display the record you want to edit by entering its ID in the ID data field and then clicking the **Query** button.

   If you do not know the ID, click the **Query** button to retrieve all records in the table. Then select the record you want to edit. You can use the arrow buttons to scroll through the records or switch to the **Table View** tab to locate a record. Click on the desired record in the table, and then return to the **Form View** tab. The record that you selected will be displayed on the form.

2. Type your changes in the data fields on the form. If a data field (such as the ID field) is gray, it cannot be edited.
3. When you have finished editing the record, click the **Save** button to update the existing record.

Account

This form lets you add, edit, and delete information about accounts (customers or suppliers). The **Enabled** box is checked by default; it must be checked in order to process transactions for the account.



Data Fields

Account ID:	The identifier for the account.
Description:	A description of the account.
Contact:	The contact person for the account.
Address 1:	The address for the account.
Address 2:	A second address line (if needed).
City:	The city where the account is located.
State:	The state where the account is located.
Zip Code:	The zip code for the account.
Country:	The country where the account is located.
Phone:	The telephone number for the account.
Invoice Cycle ID:	Select an invoice cycle if you want to assign the account to a group used for invoicing. This field is available only if the Invoicing Module is installed.
Fax:	The fax number for the account.
E-mail:	The E-mail address for the account.
Fiscal Code:	A tax identification number for the account.

Discount: A discount (flat fee or percentage) allowed for the account. The price of the transaction will be reduced by this amount. To use a discount, you must enter a number in this data field and select **Flat** or **Percent** in the **Type** combo box.

Maximum Credit: The maximum amount of credit for the account. NOTE: There is also a **Maximum Credit** field in the **Contract** table. When you create contracts for an account, the sum of the maximum credit limits for those contracts cannot exceed the maximum credit specified for the account.

Actual Credit: The amount of credit used for the account. This field updates automatically as credit is used.

Late Fee: A fee charged for late payment.

Payment Method: Select **Purchase Order**, **Credit Account**, **Check**, **Cash**, **Credit Card**, **Debit Card**, or **Pre Pay**.

Payment Number: A number assigned for payment (for example, a purchase order number or a credit card number).

Ticket In: Choose from a selection of predefined tickets to print when a vehicle enters your facility. If no inbound ticket will be printed, select **(none)**.

Ticket Out: Choose from a selection of predefined tickets to print when a vehicle exits your facility. If no outbound ticket will be printed, select **(none)**.

Enabled: Check this box to enable the account. If the box is not checked, you will not be able to process transactions for the account.

Type: Select the type of discount (**Flat** or **Percent**).

Operation: Select **Ship**, **Receive**, or **Either**. If you select **Either**, then both shipping and receiving transactions will be allowed for the account.

Notes: Additional information about the account.

Payment Expiration Date: The date when the payment method expires.

Account Expiration Date: The date when the account expires.

Suspend Credit: Check this box to prevent the account from using credit for transactions. When the box is checked, the account must use another payment method.

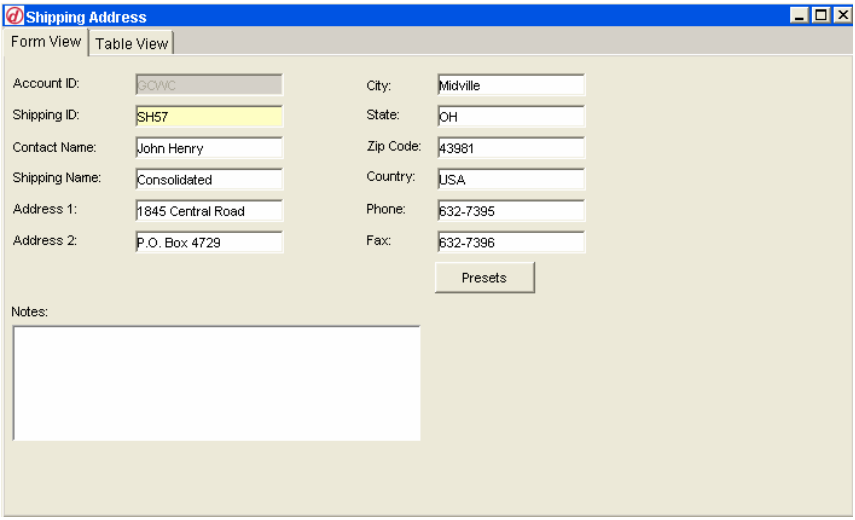
Credit Suspension Message: Enter a message to be displayed when an account with suspended credit tries to use credit for a transaction. If nothing is entered here, the system will use a default message.

Push Buttons

Advanced Pricing:	This button opens the **Advanced Pricing** screen, which can be used to create complex pricing structures for an account (see Chapter 7).
Presets:	This button opens the **Presets** screen, which can be used to link an account to other database records (see Chapter 6).
Shipping:	This button opens the **Shipping Address** form.

Shipping Address

This form is used to enter additional addresses for an account.



Data Fields

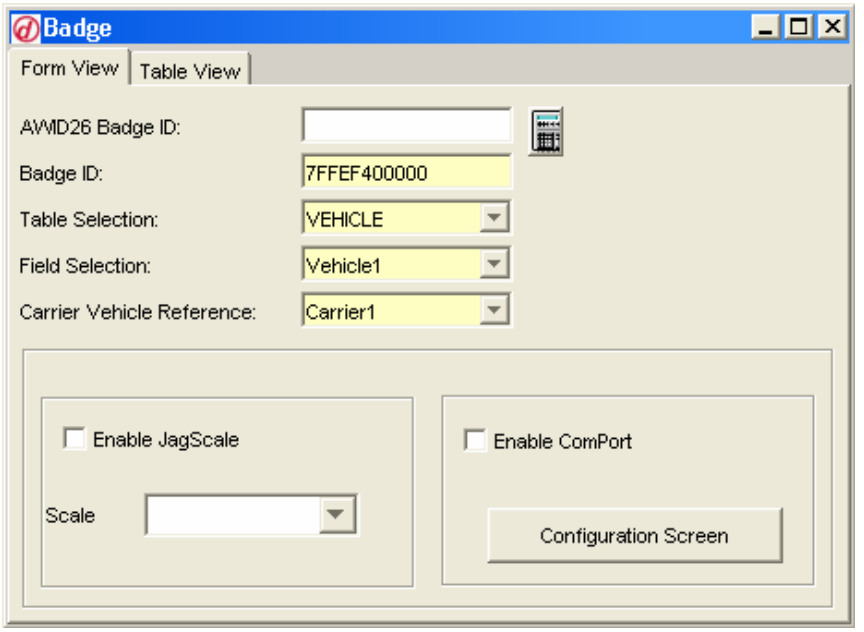
Account ID:	The identifier for the account.
Shipping ID:	The identifier for the **Shipping Address** record.
Contact Name:	The name of the contact person at the facility.
Shipping Name:	The facility located at the shipping address.
Address 1:	The address of the facility.
Address 2:	A second address line (if needed).
City:	The city where the facility is located.
State:	The state where the facility is located.
Zip Code:	The zip code for the facility.
Country:	The country where the facility is located.
Phone:	The telephone number for the facility.
Fax:	The fax number for the facility.
Notes:	Additional information about the address.

Push Buttons

Presets:	This button opens the **Presets** screen, which is used to link a shipping address to other database records (see Chapter 6).

Badge

This form lets you add, edit, and delete information about badges used to identify drivers at unattended weighing stations. Each badge should be linked to a record in one of the database tables.



Data Fields

AWID26 Badge ID: The number printed on an AWID26 badge.

Badge ID: The badge number or identifier.

Table Selection: Select the table that contains the record to which the badge will be linked (Account, Carrier, Company, Container, Contract, Product, Trailer, or Vehicle).

Field Selection: Select the database record to which the badge will be linked. The combo box lists all records from the table selected above.

Carrier Vehicle Reference: If a vehicle is entered as the field selection, this combo box will display the carrier linked to the vehicle. If a carrier is entered as the field selection, this combo box will list the vehicles linked to the carrier.

Enable Jag Scale: Check this box to enable a badge reader that is connected to an unattended station.

Scale: Select the scale to which the badge reader is connected.

Enable Com Port: Check this box to enable a badge reader that is connected to a communication port.

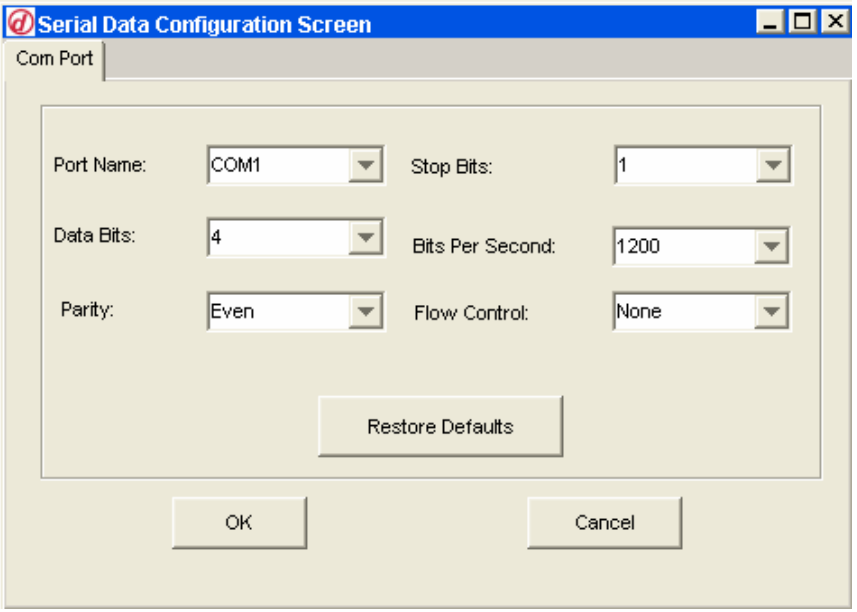
Push Buttons

Convert AWID26 Badge ID: Click this button to convert the number that is typed in the **AWID26 Badge ID** data field.

Configuration Screen: Click this button to open the Serial Data Configuration Screen.

Serial Data Configuration

If you have enabled a serial communication port for data entry through a badge reader, use this screen to configure the port.



Combo Boxes

Port Name: Select the communication port.

Data Bits:	Select the number of data bits (4, 5, 6, 7, or 8).
Parity:	Select the parity (Even, Mark, None, Odd, or Space).
Stop Bits:	Select the number of stop bits (1, 1.5, or 2).
Bits Per Second:	Select the baud rate (1200, 2400, 4800, 9600, or 14,400).
Flow Control:	Select the flow control for input to the port (None, Xon/Xoff, RTS, or RTSXon/Xoff).

Push Buttons

Restore Defaults:	Restore the default settings for the communication port.
OK:	Save the communication port settings that are selected in the combo boxes.
Cancel:	Cancel any changes made to the communication port settings.

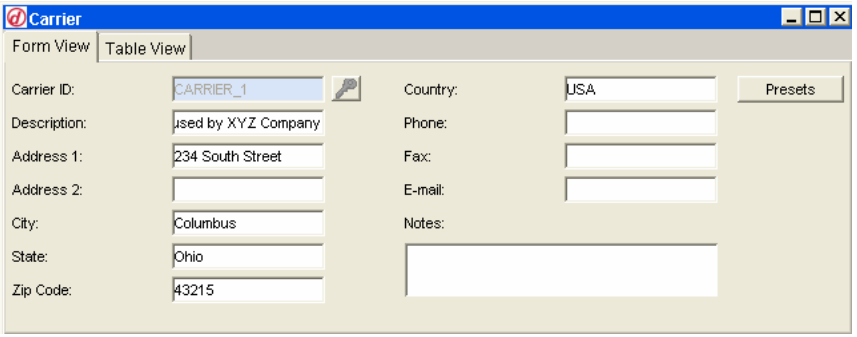
AWID26 Badges

Use the following procedure to enter an AWID26 badge number into the database so that the badge can be used at an unattended weighing station:

1. Type the number that is printed on the badge in the **AWID26 Badge ID** data field.
2. Click the **Convert AWID26 Badge ID** button. The badge number will be entered into the system, and the actual badge code will appear in the **Badge ID** data field.
3. Use the **Table Selection** and **Field Selection** combo boxes to link the badge to a database record, such as a Vehicle ID.
4. Click the **Save** button to save the Badge ID record in the database.

Carrier

This form lets you add, edit, and delete information about carriers whose vehicles transport products to or from your facility. A carrier can transport products for more than one account, and each account can use more than one carrier.



Data Fields

Carrier ID:	The identifier for the carrier.
Description:	A description of the carrier.
Address 1:	The address for the carrier.
Address 2:	A second address line (if needed).
City:	The city where the carrier is located.
State:	The state where the carrier is located.
Zip Code:	The zip code for the carrier.
Country:	The country where the carrier is located.
Phone:	The telephone number for the carrier.
Fax:	The fax number for the carrier.
E-mail:	The E-mail address for the carrier.
Notes:	Additional information about the carrier.

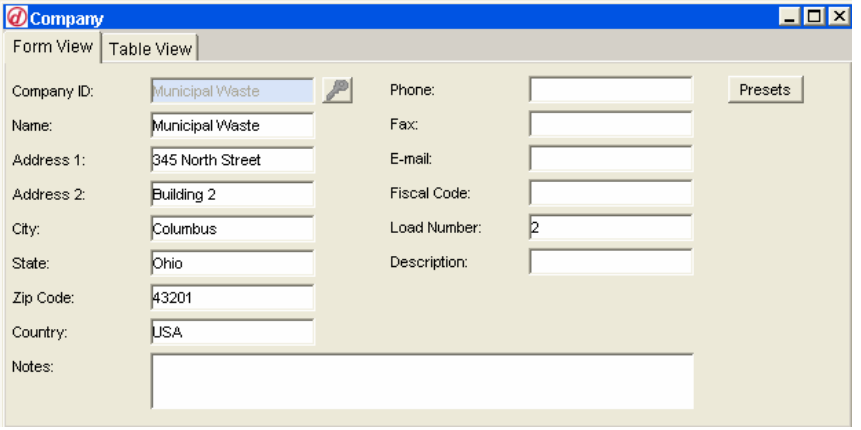
Push Buttons

Presets:	This button opens the **Presets** screen, which can be used to link a carrier to other database records (see Chapter 6).

Company

This form lets you add, edit, and delete information about the company that operates the scale(s) connected to the OverDrive system. If several companies share a scale, create a company record for each.

NOTE: Records for suppliers and customers of these companies are entered in the **Account** table.



Data Fields

Company ID:	The identifier for the company.
Name:	The name of the company.
Address 1:	The address of the company.
Address 2:	A second address line (if needed).
City:	The city where the company is located.
State:	The state where the company is located.
Zip Code:	The zip code for the company.
Country:	The country where the company is located.
Phone:	The telephone number for the company.
Fax:	The fax number for the company.
E-mail:	The E-mail address for the company.
Fiscal Code:	A tax identification number for the company.
Load Number:	If several companies use the scale(s), you can assign a load number for each company to track the transactions processed for each. The number of transactions processed for a company will be shown by the **Load Counter**.

Description: A description of the company.

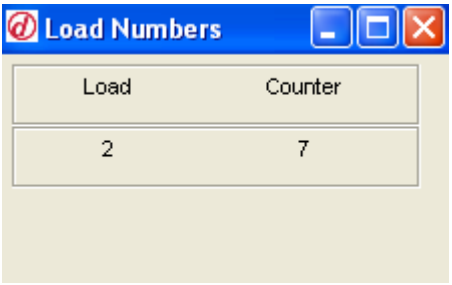
Notes: Additional information about the company.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a company to other database records (see Chapter 6).

Load Numbers

Load numbers are used to track the transactions processed by a company. To open the **Load Numbers** window, open the **Transaction** menu and click on the **Load Numbers** menu item.

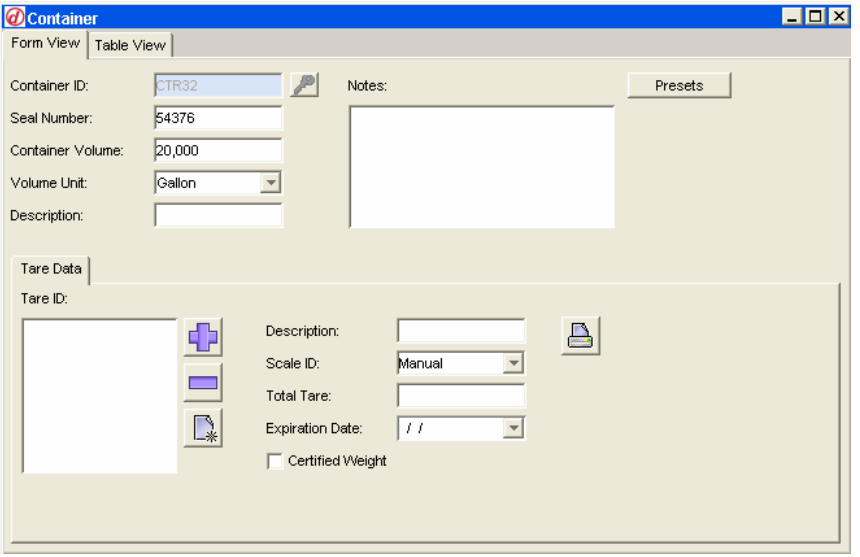


Load: This ID number is assigned to a company so that the system can track transactions processed for the company.

Counter: This counter tracks the number of transactions processed for an individual company (load number). The number is generated by the system.

Container

This form lets you add, edit, and delete information about containers. A container is an object that is placed on a vehicle to hold a product.



Data Fields

Container ID: The identifier for the container.

Seal Number: A number used for sealing the loaded container.

Container Volume: The amount of product the container can hold.

Volume Unit: The unit in which the container volume is measured (Cubic Meters, Cubic Yards, Gallons, Liters).

Description: A description of the container.

Notes: Additional information about the container.

Tare Data Tab

A container vehicle can have separate tare weights for the vehicle and the container. Use these data fields to assign a tare weight for the container.

Tare ID: The identifier for the container tare.

Description: A description of the tare.

Scale ID: The scale on which the container is being weighed.

Total Tare: The tare weight of the container.

Expiration Date: The date that the tare expires.

Certified Weight: Check this box if the tare weight is certified.

Entering a Tare

In order to process a transaction using a container, you must assign a tare weight for the container. Use the following procedure to enter a single tare weight.

1. Type a description of the tare in the **Description** data field.
2. Select the scale on which the vehicle is being weighed from the **Scale ID** combo box. The weight reading from the scale will be shown in the **Total Tare** data field. If you selected a manual scale, type the tare weight in the data field.
3. If applicable, enter an expiration date and check the **Certified Weight** box.
4. Click the **Add** button. The system will record this data and enter a Tare ID for it in the list box.

You can enter more than one tare. Click the **New** button to clear the data fields. Then repeat the tare entry procedure. If you enter several tares, you will be able to select from among them when you process a one-pass transaction.

You cannot delete a Tare ID, but you can set it as expired. Highlight the Tare ID in the list box and click the **Remove** button. That will set the current date as an expiration date, so that the tare cannot be used unless you reset the expiration date. This allows you to keep a record of each expired tare.

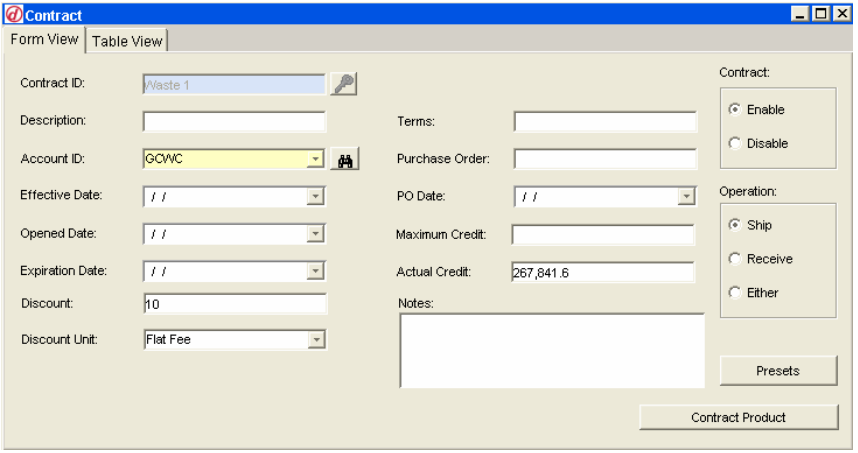
Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a container to other database records (see Chapter 6).

Print: This button prints a Container Tare Ticket. If the **Certified Weight** box is checked, it prints a Certified Container Tare Ticket.

Contract

This form lets you add, edit, and delete contract information for an account. Each account can have more than one contract. The **Enable** radio button is selected by default; it must be selected in order to process transactions using the contract.



Data Fields

Contract ID: The identifier for the contract.

Description: A description of the contract.

Account ID: Use the combo box to choose from a list of enabled accounts. The account's record must already exist in the **Account** table.

Effective Date: The date when the contract goes into effect.

Opened Date: The date when the contract was entered.

Expiration Date: The date when the contract expires.

Discount: A discount (flat fee or percentage) that is applied when this contract is used. The price of the transaction will be reduced by this amount. To use a discount, enter a number in this data field and select **Percentage** or **Flat Fee** in the **Discount Unit** combo box.

Discount Unit: Select the type of discount (**Percentage** or **Flat Fee**).

Terms: The payment terms for the contract (for example, payment can be required in 30 or 60 days).

Purchase Order: The purchase order number used for the contract.

PO Date: The date on which the purchase order was issued.

Maximum Credit: The maximum amount of credit for the account. NOTE: There is also a **Maximum Credit** field in the **Account** table. When you create contracts for an account, the sum of the maximum credit limits for those contracts cannot exceed the maximum credit specified for the account.

Actual Credit: The amount of credit that has been used for the account. As the account uses credit, this field will update automatically. When the account makes a payment, this field must be edited manually.

Notes: Additional information about the contract.

Contract: Select **Enable** to activate the contract. If the contract is disabled, it cannot be used for transactions.

Operation: Select **Ship**, **Receive**, or **Either**. If you select **Either**, then both shipping and receiving transactions will be allowed for the contract.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a contract to other database records (see Chapter 6).

Contract Product: This button opens the **Contract Product** table, which is described on the next page.

Search

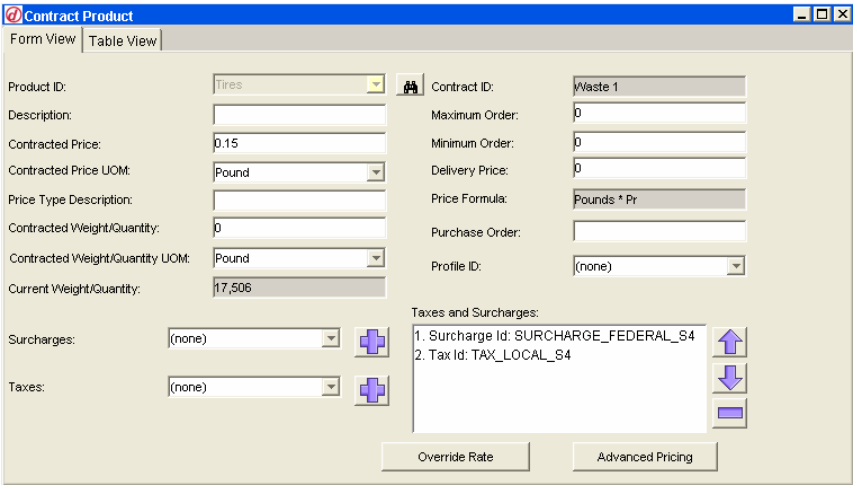
A search function is provided for the **Account ID** data field on the **Contract** table to help you locate records more quickly.

1. Place the cursor in the data field, and then click the **Search** button or press the F3 key to display the **Search** window.
2. Select the data field that you want to search in the **Field Name** combo box.
3. Enter the record that you want to find in the **Criteria** data field. Use a percent sign as a wildcard if you enter partial data. For example, enter "a%" or "%6" to search for Account6.
4. Click the **Search** button. The system will retrieve the records and display them in the **Results** table.
5. Highlight the desired record in the table, and then click the **OK** button. This will place the record in the **Account ID** data field.

If you click the **Search** button without selecting a field name, the system will retrieve the entire list of records for the data field.

Contract Product

This form is used to provide specific information about the contract and the product(s) covered by it.



Data Fields

Product ID: The identifier for the product that will be shipped or received under this contract. A record for the product must already exist in the **Product** table.

Description: A description of the contract product.

Contracted Price: The price used under this contract.

Contracted Price UOM: The unit of measure for the contracted price (Pound, Kilogram, Ton, Tonne, Cubic Yard, Cubic Meter, Liter, Gallon, Piece, Load).

Price Type Description: A description of the contracted price.

Contracted Weight/Quantity: The total amount of the product that can be processed under this contract.

Contracted Weight/Quantity UOM: The unit of measure for the contracted weight or quantity (Pound, Kilogram, Ton, Tonne, Cubic Yard, Cubic Meter, Liter, Gallon, Piece, Load).

Current Weight/Quantity: The total amount of the product that has been processed. As transactions are processed, this

amount will update automatically. If the current weight/quantity exceeds the contracted weight/ quantity, an error message will be displayed.

Contract ID: The identifier for this contract.

Maximum Order: The maximum amount of the product that can be processed for a load.

Minimum Order: The minimum amount of the product that can be processed for a load.

Delivery Price: The price of the delivered product (includes delivery costs).

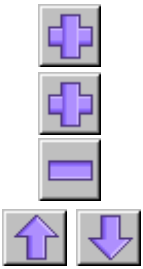
Price Formula: The formula used to determine the price of the product. The default is net weight times unit price (Pounds * Pr).

Purchase Order: The purchase order number used for the contract product. If a purchase order is entered here, it will override the purchase order entered in the contract record. Both can be overridden manually during a transaction.

Profile ID: An ID assigned by the US EPA for certain waste materials.

Taxes and Surcharges

The **Taxes and Surcharges** list box displays the taxes and surcharges that will be applied to the price of the product.



- To add a surcharge, select it in the **Surcharges** combo box and then click the **Add** button.
- To add a tax, select it in the **Taxes** combo box and then click the **Add** button.
- To delete a tax or surcharge, highlight it in the list box and then click the **Remove** button.
- To change the position of an item in the list box, highlight it and use the up and down arrow buttons.

Push Buttons

Override Rate: This button opens the **Contract Product Override Rate** screen, which can be used to create pricing based on the origin of a product (see Chapter 7).

Advanced Pricing: This button opens the **Advanced Pricing** screen, which can be used to create complex pricing structures for a contract product (see Chapter 7).

Search

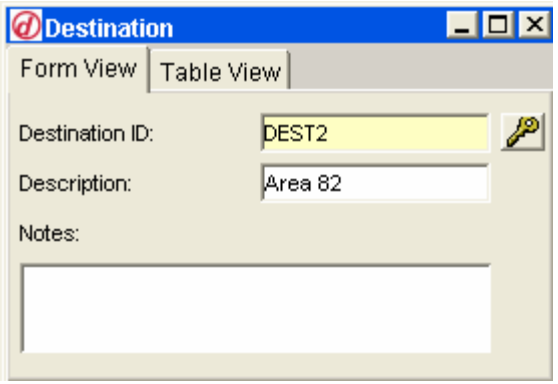
A search function is provided for the **Product ID** data field on the **Contract Product** table to help you locate records more quickly.

1. Place the cursor in the data field, and then click the **Search** button or press the F3 key to display the **Search** window.
2. Select the data field that you want to search in the **Field Name** combo box.
3. Enter the record that you want to find in the **Criteria** data field. Use a percent sign as a wildcard if you enter partial data. For example, enter "p%" or "%6" to search for Product6.
4. Click the **Search** button. The system will retrieve the records and display them in the **Results** table.
5. Highlight the desired record in the table, and then click the **OK** button. This will place the record in the **Product ID** data field.

If you click the **Search** button without selecting a field name, the system will retrieve the entire list of records for the data field.

Destination

This form lets you add, edit, and delete information about the destination to which a product is being shipped.

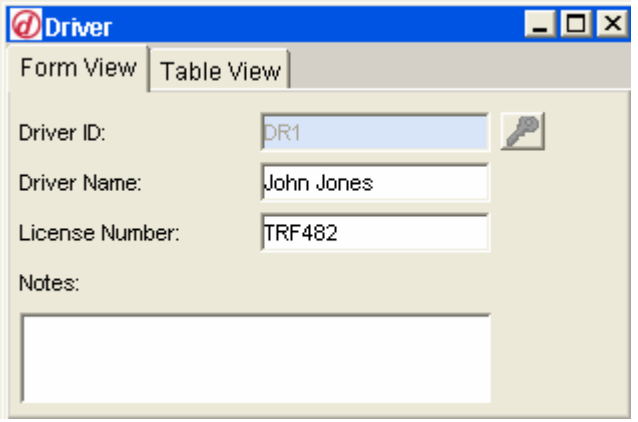


Data Fields

Destination ID:	The identifier for the destination.
Description:	A description of the destination to which the product is being shipped.
Notes:	Additional information about the destination.

Driver

This form lets you add, edit, and delete information about the person who drives a vehicle.

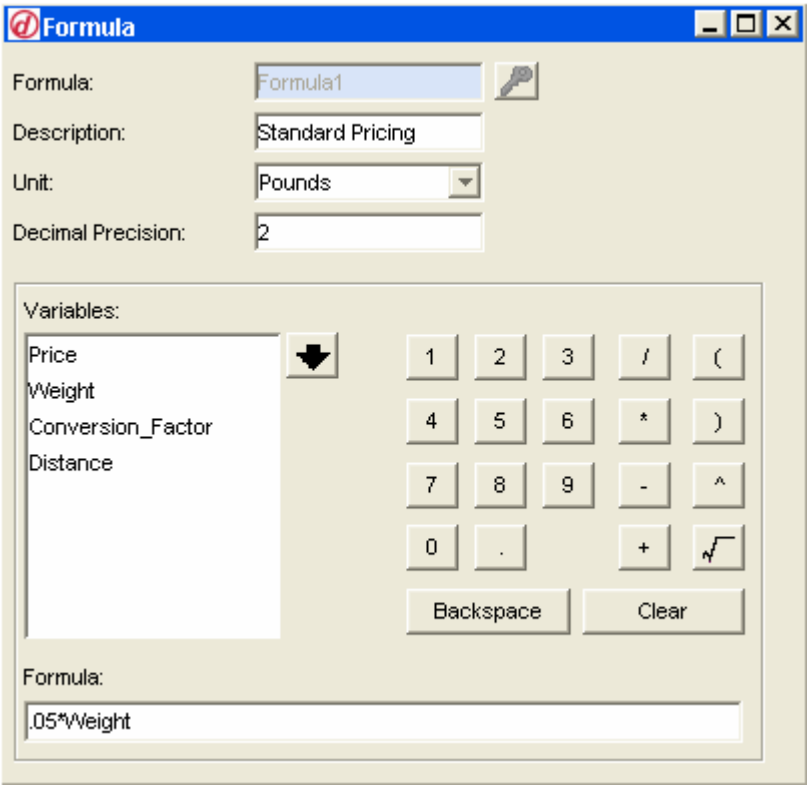


Data Fields

Driver ID:	The identifier for the driver.
Driver Name:	The name of the driver.
License Number:	The driver's license number.
Notes:	Additional information about the driver.

Formula

This form lets you add, edit, and delete pricing formulas. See Chapter 7 for an explanation of how to use pricing formulas.

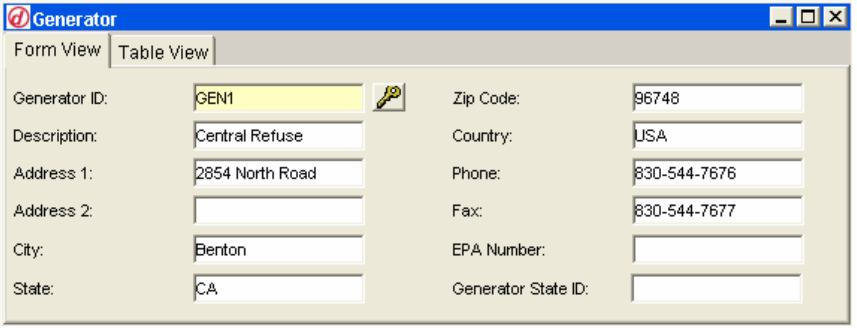


Data Fields

Formula ID:	The identifier for the pricing formula.
Description:	A description of the pricing formula.
Unit:	Use the combo box to select the unit of weight or volume that will be used for pricing.
Decimal Precision:	Enter the number of decimal places to which the price should be calculated. For example, 0 = X, 1 = X.X, 2 = X.XX.

Generator

This form lets you add, edit, and delete information about facilities or localities that generate waste material.

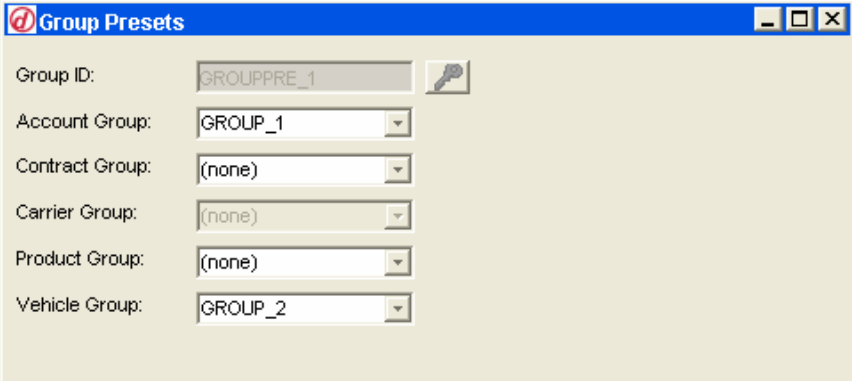


Data Fields

Generator ID:	The identifier for the generator.
Description:	A description of the generator.
Address 1:	The address for the generator.
Address 2:	A second address line (if needed).
City:	The city where the generator is located.
State:	The state where the generator is located.
Zip Code:	The zip code for the generator.
Country:	The country where the generator is located.
Phone:	The telephone number for the generator.
Fax:	The fax number for the generator.
EPA Number:	The EPA number assigned to the generator.
Generator State ID:	The State ID assigned to the generator.

Group Presets

This form lets you create group presets by linking groups from two or more tables. See Chapter 6 for an explanation of how to create and use group presets.

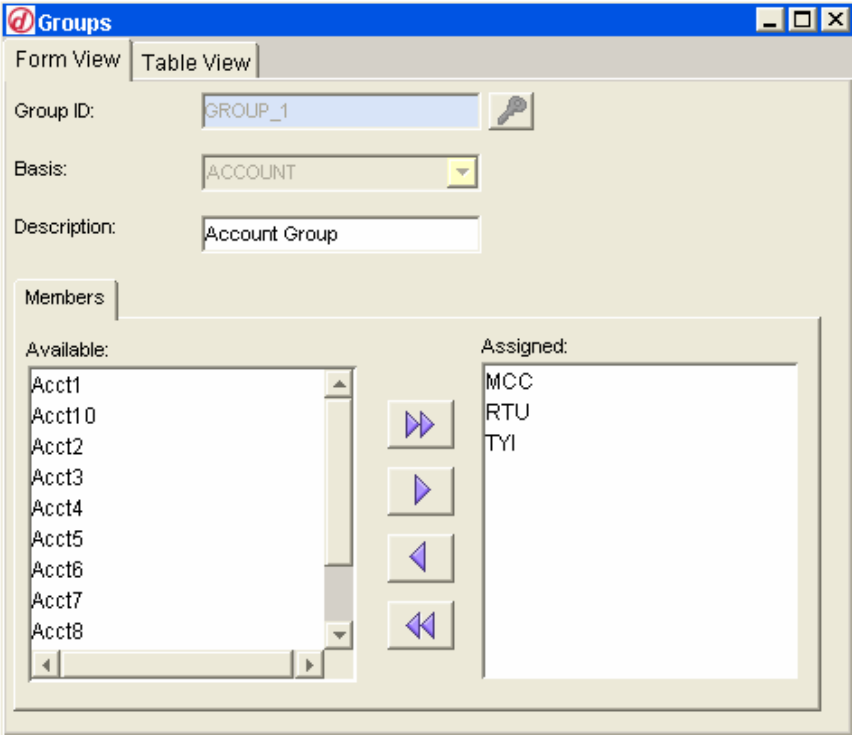


Data Fields

Group ID:	The identifier for the group.
Account Group:	A list of account groups.
Contract Group:	A list of contract groups.
Carrier Group:	A list of carrier groups.
Product Group:	A list of product groups.
Vehicle Group:	A list of vehicle groups.

Groups

This form lets you create groups. See Chapter 6 for an explanation of how to create and use groups.



Data Fields

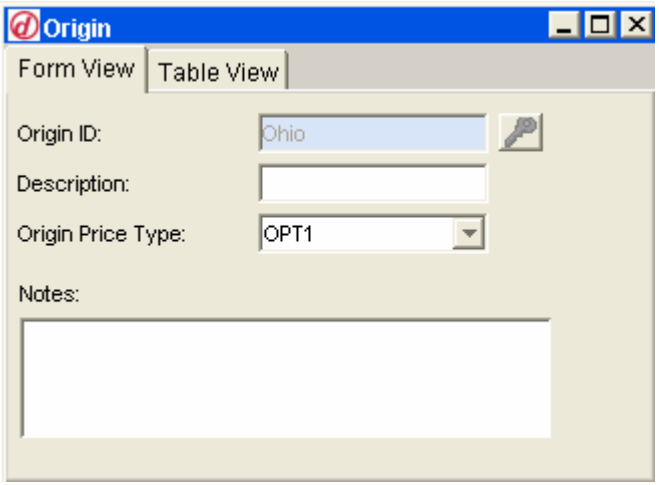
Group ID:	The identifier for the group.
Basis:	The table that will be used as the starting point for the group.
Description:	Additional information about the group.

Members Tab

The list boxes show the database records that are available to be assigned as members of the group and those that have been assigned to the group. Use the arrow buttons to move records from one list box to the other.

Origin

This form lets you add, edit, and delete information about the facility or location at which a product originated.



Data Fields

Origin ID: The identifier for the origin.

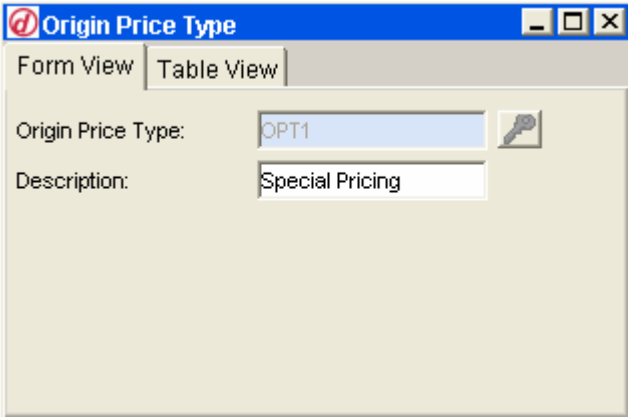
Description: A description of the origin.

Origin Price Type: Select from a list of existing Origin Price Type IDs. This selection makes it possible to link an origin to an override rate in the **Product**, **Contract Product**, or **Tax** table.

Notes: Additional information about the origin.

Origin Price Type

This form lets you add, edit, and delete information about pricing based on the origin of a product or material. For example, you can use one price when the origin is within a state (or region) and another price when the origin is outside a state (or region). Prices are stored as override rates in the **Product**, **Contract Product**, and **Tax** tables. They can be applied by selecting an origin during a transaction.



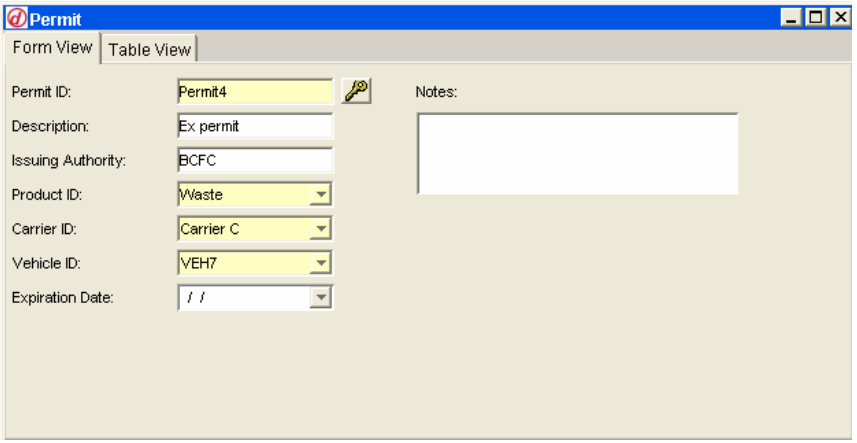
Data Fields

Origin Price Type: The identifier for the origin price type.

Description: A description of the origin price type.

Permit

This form lets you add, edit, and delete information about permits needed to transport a specific type of product (for example, a permit to transport hazardous material).

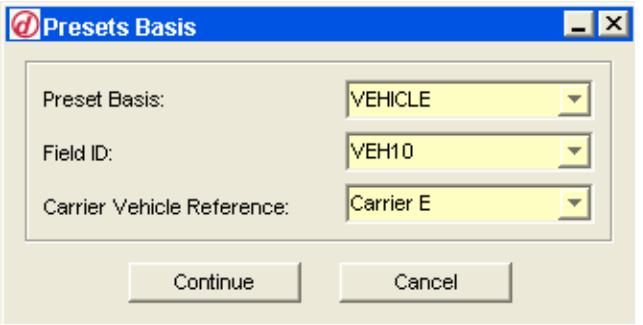


Data Fields

Permit ID:	The identifier for the permit.
Description:	A description of the permit.
Issuing Authority:	The organization that issued the permit.
Product ID:	The product covered by the permit. Select from a list of existing Product IDs.
Carrier ID:	The carrier covered by the permit. Select from a list of existing Carrier IDs.
Vehicle ID:	The vehicle covered by the permit. Select from a list of existing Vehicle IDs.
Expiration Date:	The date that the permit expires.
Notes:	Additional information about the permit.

Presets Basis

This form provides a shortcut to the **Presets** screen, which is used to create, view, and edit presets. See Chapter 6 for an explanation of how to create and use presets.

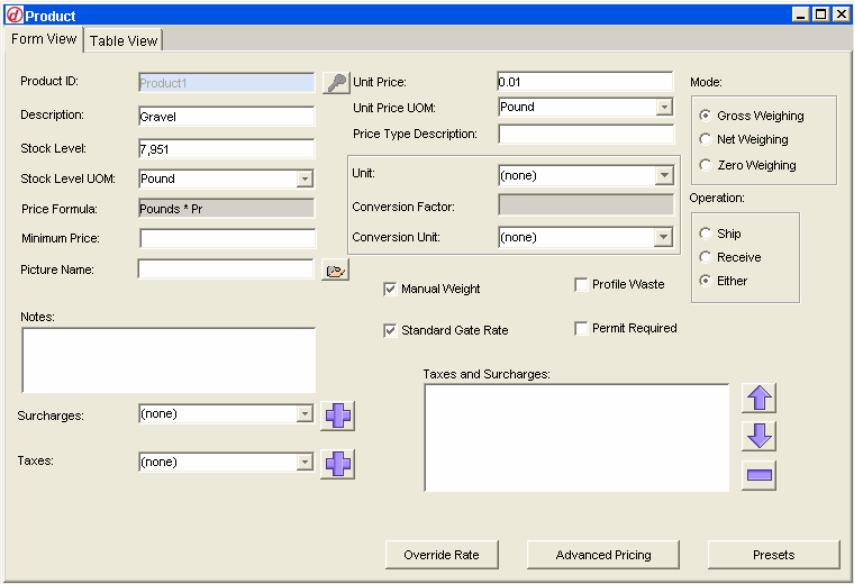


Data Fields

Preset Basis:	The table that contains the database record being used as the basis for the preset.
Field ID:	The specific database record that is used as the basis for the preset.
Carrier Vehicle Reference:	If a vehicle record is selected as the basis for the preset, the carrier linked to the vehicle will be shown in this data field.

Product

This form lets you add, edit, and delete information about the products that you will be weighing.



Data Fields

Product ID: The identifier for the product.

Description: A description of the product.

Stock Level: The amount of the product currently in stock. As the product is received or shipped, this value will be updated automatically.

Stock Level UOM: The unit of measure used for the stock level.

Price Formula: The formula used to determine the price of the product. The default is net weight times unit price (Pounds * Pr).

Minimum Price: You can set a minimum price for a product. This price will be used whenever the calculated price is lower than the minimum price.

Picture Name: You can display a picture of the product on the unattended touch screen. Click the **Open** button to search for a graphics file. Select a file and then click the **Open** button on the **Search** window.

Notes: Additional information about the product.

Unit Price: The price of the product. This price is applied per the unit of measure selected in the **Unit Price UOM** field. The unit price is stored as Pr and used in the price formula.

Unit Price UOM: The unit of measure used for the unit price.

Price Type Description: A description of the unit price.

Unit: The primary unit used for weighing the product (Pounds, Kilograms, Tons, Tonnes, Gallons, Liters, Cubic Yards, Cubic Meters).

Conversion Factor: A multiplier used to convert the primary unit to a secondary or conversion unit. The system will calculate the conversion factor for weight-to-weight or volume-to-volume conversions.

Examples:

Primary Unit	Conv. Factor	Conv. Unit
kg	2.2046	lb
lb	0.4536	kg

Conversion Unit: A secondary weight unit. The system will multiply the primary weight unit by the conversion factor to measure the product in the conversion unit.

Mode: Select **Gross Weighing**, **Net Weighing**, or **Zero Weighing**. Gross weighing is weighing a loaded vehicle and subtracting a tare weight to determine the weight of the product. Net weighing is weighing an object once to determine its weight. Zero weighing is a means of processing a transaction without recording a weight.

Operation: Select **Ship**, **Receive**, or **Either**. If you select **Either**, the product can be both shipped and received.

Manual Weight: Check this box if you want to be able to enter the weight of this product manually (it will still be possible to weigh the product on a scale).

Profile Waste: Check this box to require a profile to be selected when the product is used for a transaction.

Standard Gate Rate: This check box lets you control whether or not a product must be used with a contract. Before you can use a product with a contract, you must link

the product to the contract in the **Contract Product** table. When you select a contract for a transaction, the **Product** combo box will list only those products that are linked to the contract.

- If the box is checked, the product can be used with or without a contract. When no contract is selected for a transaction, the system will use the standard gate rate (the price assigned in the product record). When a contract is selected, the system will use the price assigned in the contract product record.
- If the box is not checked, the product can be used only if a contract is selected for the transaction. The system will use the price assigned in the contract product record.

Permit Required: Check this box to require a permit to be selected when processing a transaction for the product.

Taxes and Surcharges

The **Taxes and Surcharges** list box displays the taxes and surcharges that will be applied to the price of the product.

- To add a surcharge, select it in the **Surcharges** combo box and then click the **Add** button.
- To add a tax, select it in the **Taxes** combo box and then click the **Add** button.
- To delete a tax or surcharge, highlight it in the list box and then click the **Remove** button.
- To change the position of an item in the list box, highlight it and use the up and down arrow buttons.

Push Buttons

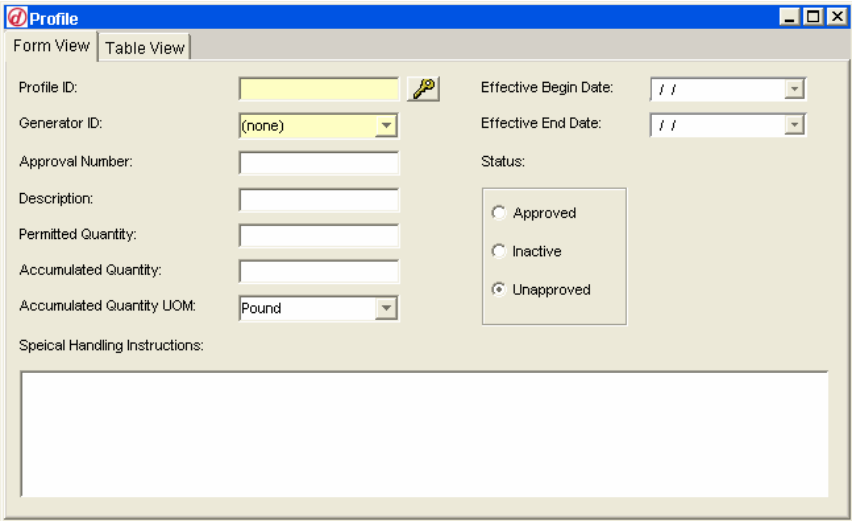
Override Rate: This button opens the **Product Override Rate** screen, which can be used to create pricing based on the origin of a product (see Chapter 7).

Advanced Pricing: This button opens the **Advanced Pricing** screen, which can be used to create complex pricing structures for a product (see Chapter 7).

Presets: This button opens the **Presets** screen, which can be used to link a product record to other database records (see Chapter 6).

Profile

This form lets you add, edit, and delete information about waste profiles. A waste profile is a comprehensive description of a waste stream. It is provided by a waste generator to the facility receiving the waste material.



Data Fields

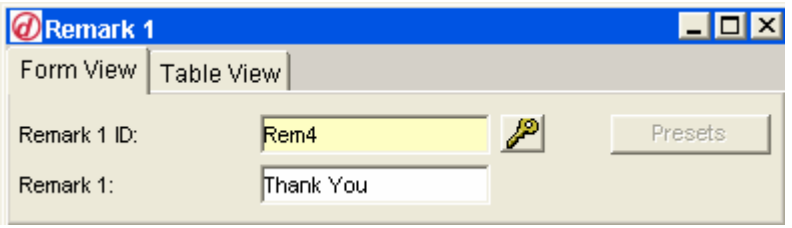
Profile ID:	The identifier for the waste profile.
Generator ID:	The identifier for the waste generator.
Approval Number:	An approval number for the waste profile.
Description:	A description of the waste profile.
Permitted Quantity:	The amount of the profiled waste that the facility is permitted to receive.
Accumulated Quantity:	The amount of the profiled waste that has been received.
Accumulated Quantity UOM:	The unit of measure for the permitted quantity and accumulated quantity.
Special Handling Instructions:	Enter any special instructions for handling the profiled waste.

Effective Begin Date:	The date when the waste profile becomes active. Transactions cannot be processed before this date.
Effective End Date:	The date when the waste profile expires. Transactions cannot be processed after this date.
Status:	Select **Approved**, **Inactive**, or **Unapproved**. Transactions can be processed for a profiled waste only if **Approved** is selected.

In order to use a profile when processing a transaction for a waste product, you must (1) check the **Profile Waste** box in the product record and (2) select the profile in the contract product record.

Remark 1

This form lets you add, edit, and delete a remark to be attached to a transaction or printed on a ticket.



Data Fields

Remark 1 ID: The identifier for the remark.

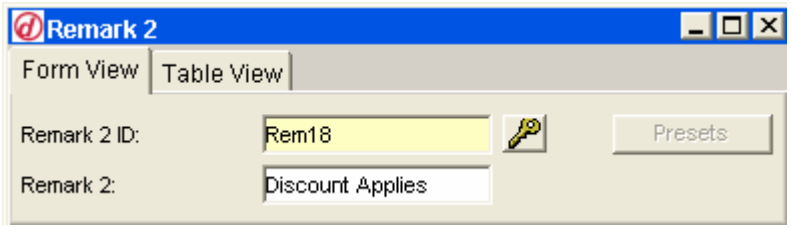
Remark 1: Enter the remark that you want to add to the transaction.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a remark record to other database records (see Chapter 6).

Remark 2

This form lets you add, edit, and delete a second remark to be attached to a transaction or printed on a ticket.



Data Fields

Remark 2 ID: The identifier for the remark.

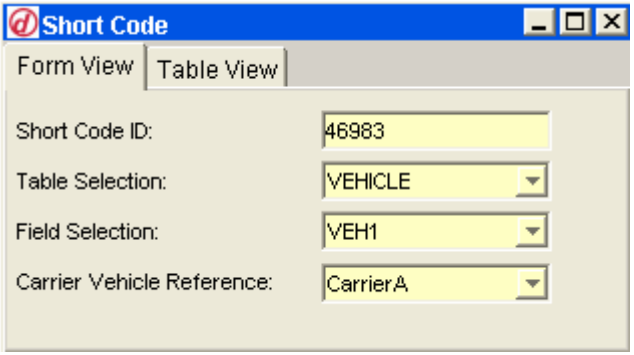
Remark 2: Enter the remark that you want to add to the transaction.

Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a remark record to other database records (see Chapter 6).

Short Code

This form lets you add, edit, and delete information about short codes used to identify drivers at unattended weighing stations. Each short code should be linked to a record in one of the database tables.



Data Fields

Short Code ID: The short code number or identifier.

Table Selection: Select the table that contains the record to which the short code will be linked (Account, Carrier, Company, Container, Contract, Product, Trailer, or Vehicle).

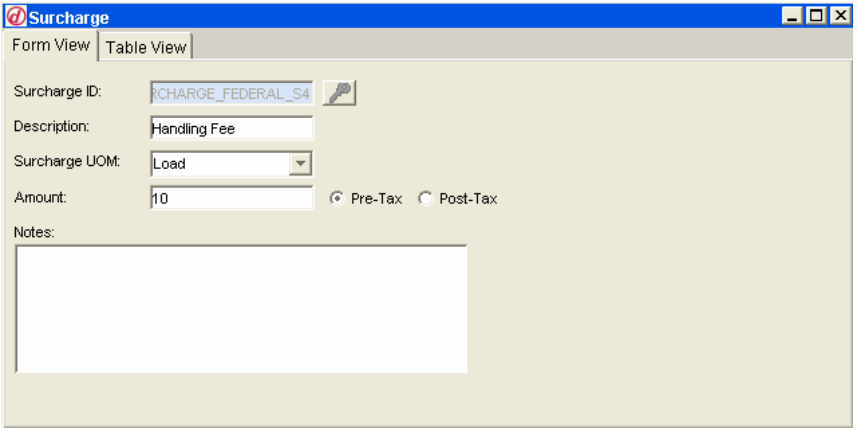
Field Selection: Select the database record to which the short code will be linked. The combo box lists all records from the table selected above.

Carrier Vehicle Reference: If a vehicle is entered as the field selection, this combo box will display the carrier linked to the vehicle. If a carrier is entered as the field selection, this combo box will list the vehicles linked to the carrier.

NOTE: When you create a short code record, you must fill in the first three data fields. If you are linking the short code to a carrier or vehicle, you must fill in all four data fields.

Surcharge

This form lets you add, edit, and delete information about surcharges that are applied to transactions. A surcharge is an additional fee added to the price of a product.



Data Fields

Surcharge ID: The identifier for the surcharge.

Description: A description of the surcharge.

Surcharge UOM: The unit of measure for the surcharge amount. Surcharges can be applied per unit of weight or volume, per piece, per load, or by percentage of price.

Amount: The amount of the surcharge applied to the transaction. This number is applied based on the unit selected in the **Surcharge UOM** field.

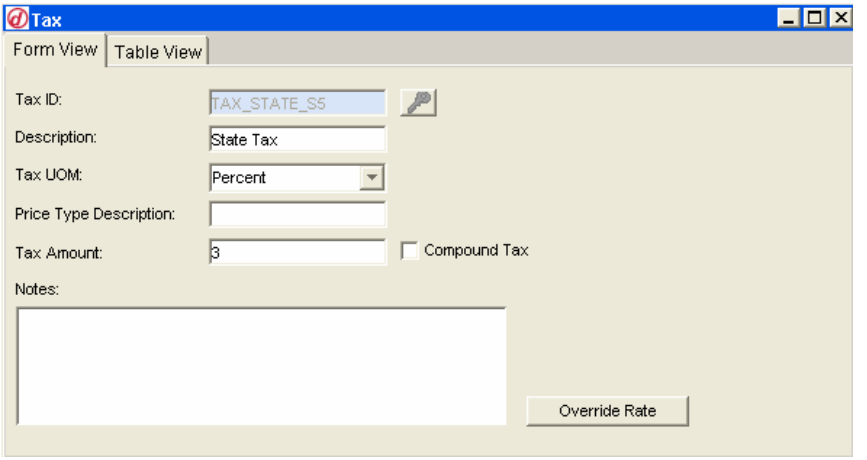
Pre-Tax: Select this radio button to apply the surcharge before taxes. If the surcharge is applied before taxes, it will be taxed at the same rate as the product.

Post-Tax: Select this radio button to apply the surcharge after taxes. If the surcharge is applied after taxes, it will not be taxed.

Notes: Additional information about the surcharge.

Tax

This form lets you add, edit, and delete information about taxes that are applied to transactions.



Data Fields

Tax ID: The identifier for the tax.

Description: A description of the tax.

Tax UOM: The unit of measure for the tax amount. Taxes can be applied per unit of weight or volume, per piece, per load, or by percentage of price.

Price Type Description: A description of the price type.

Tax Amount: The amount of the tax applied to the transaction. This number is applied based on the unit selected in the **Tax UOM** field.

Compound Tax: Check this box if the tax is to be compounded. A compound tax can be used when more than one tax will be applied to transactions. If you check the box, the tax will be applied to the cost of the entire transaction, including other taxes. If you do not check the box, the tax will be applied to the price of the product but not to other taxes.

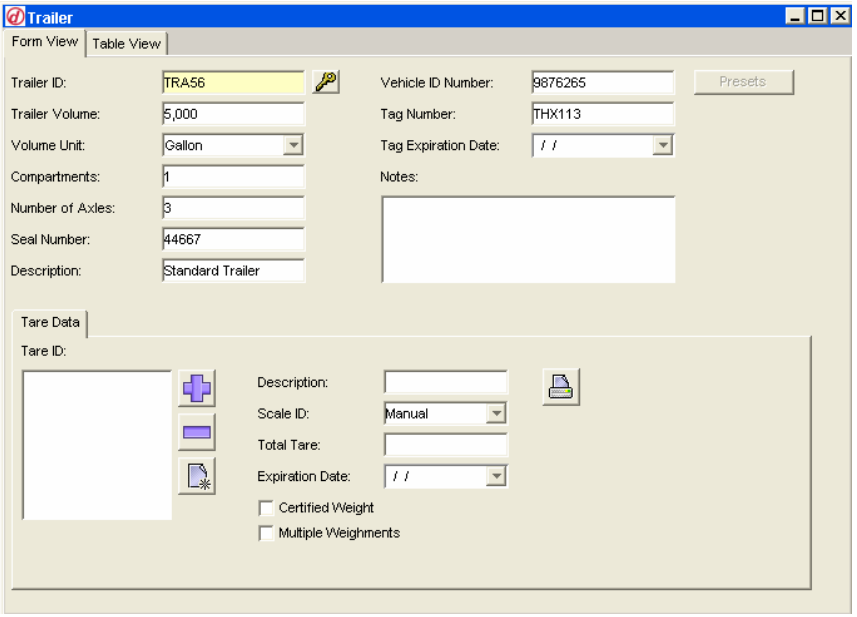
Notes: Additional information about the tax.

Push Buttons

Override Rate: This button opens the **Tax Override Rate** screen, which can be used to create a tax rate based on the origin of a product (see Chapter 7).

Trailer

This form lets you add, edit, and delete information about trailers that are attached to vehicles.



Data Fields

Trailer ID:	The identifier for the trailer.
Trailer Volume:	The amount of product the trailer can hold.
Volume Unit:	The unit in which the trailer volume is measured (Cubic Meters, Cubic Yards, Gallons, Liters).
Compartments:	The number of compartments in the trailer.
Number of Axles:	The number of axles on the trailer.
Seal Number:	A number used for sealing the loaded trailer.
Description:	A description of the trailer.
Vehicle ID Number:	A vehicle identification number for the trailer.
Tag Number:	The license plate number of the trailer.
Tag Expiration Date:	The date that the tag expires.
Notes:	Additional information about the trailer.

Tare Data Tab

You can assign a tare weight for a trailer and a tare weight for each of the trailer's axles. The sum of the axle tare weights should equal the tare weight of the trailer.

Tare ID:	The identifier for the trailer tare.
Description:	A description of the tare.
Scale ID:	The scale on which the trailer is being weighed.
Total Tare:	The total tare weight of the trailer.
Expiration Date:	The date that the tare expires.
Certified Weight:	Check this box if the tare weight is certified.
Multiple Weighments:	Check this box to create a multiple-weighment tare. This type of tare can be used when a trailer's axles are weighed separately and the weights are added together to calculate a total trailer weight. Checking the box will display the **Weighment Tare** and **Weighment ID** fields.

Entering a Tare

In order to process a transaction using a trailer, you must assign a tare weight for the trailer. Use the following procedure to enter a single tare weight.

1. Type a description of the tare in the **Description** data field.
2. Select the scale on which the vehicle is being weighed from the **Scale ID** combo box. The weight reading from the scale will be shown in the **Total Tare** data field. If you selected a manual scale, type the tare weight in the data field.
3. If applicable, enter an expiration date and check the **Certified Weight** box.

4. Click the **Add** button. The system will record this data and enter a Tare ID for it in the list box.

You can enter more than one tare. Click the **New** button to clear the data fields. Then repeat the tare entry procedure. If you enter several tares, you will be able to select from among them when you process a one-pass transaction.

You cannot delete a Tare ID, but you can set it as expired. Highlight the Tare ID in the list box and click the **Remove** button. That will set the current date as an expiration date, so that the tare cannot be used unless you reset the expiration date. This allows you to keep a record of each expired tare.

Multiple Weighments

You can enter separate tare weights that will be added together to calculate a total tare weight for a vehicle. The following procedure

explains how to enter separate tare weights for individual axles on a vehicle.

1. Type a description of the tare in the **Description** data field.
2. Select the scale on which the first axle is being weighed from the **Scale ID** combo box.
3. Check the **Multiple Weighments** box to display the **Weighment Tare** and **Weighment ID** fields.

4. The weight reading from the scale will be shown in the **Weighment Tare** data field. If you selected a manual scale, type the tare weight in the data field.

5. Click the **Add** button next to the **Weighment ID** list box. The system will record the weight and enter an ID for it in the list box. The system will also enter a separate ID in the **Tare ID** list box. This second ID represents the total tare weight, which will be displayed in the **Total Tare** data field.

6. Click the **New** button next to the **Weighment ID** box to clear the **Weighment Tare** data field.
7. Move the vehicle so that the next axle is positioned on the scale. The tare weight will appear in the **Weighment Tare** data field (enter it if you are using a manual scale).

8. Click the **Add** button to record the tare weight and add an ID for it to the **Weighment ID** list box. The weight in the **Total Tare** data field will be updated. It represents the sum of the tare weights of the individual axles.
9. Repeat Steps 6 to 8 to add any additional weights required for the multiple-weighment tare.

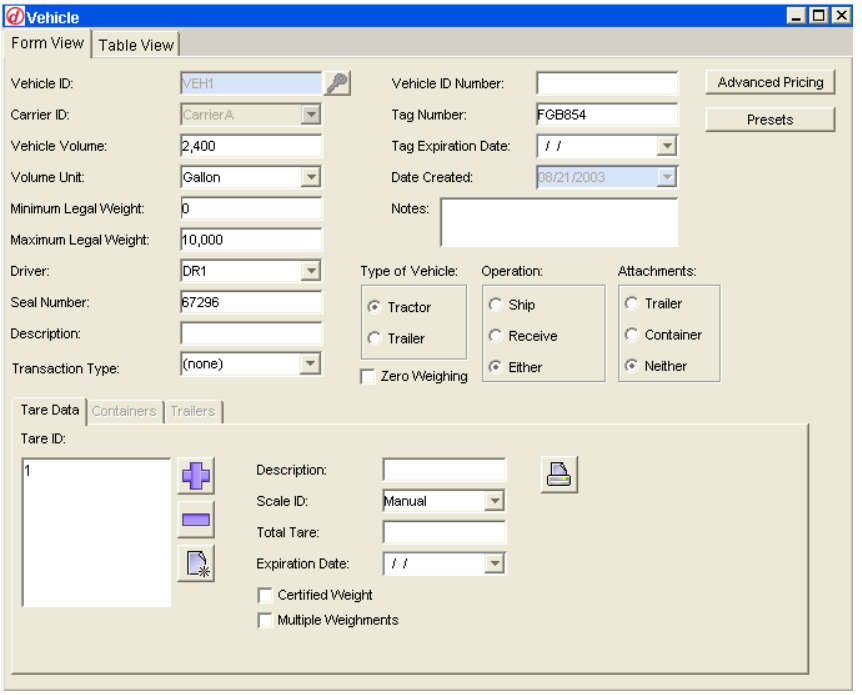
Push Buttons

Presets: This button opens the **Presets** screen, which can be used to link a trailer record to other database records (see Chapter 6).

Print: This button prints a Trailer Tare Ticket. If the **Certified Weight** box is checked, it prints a Certified Trailer Tare Ticket.

Vehicle

This form lets you add, edit, and delete information about vehicles that are weighed on your scales.



Data Fields

Vehicle ID: The identifier for the vehicle. Each vehicle must be assigned to a carrier, and each vehicle/carrier combination is a unique record. You can duplicate Vehicle IDs if they are assigned to different carriers (for example, Veh1/CarrierA and Veh1/CarrierB).

Carrier ID: The identifier for the carrier that owns the vehicle. This ID must already exist in the **Carrier** table.

Vehicle Volume: The amount of product the vehicle can hold. The volume is measured in the unit selected in the **Volume Unit** data field. The vehicle volume can be changed manually during a transaction. A vehicle volume will override a product volume (created by conversion factor) but will be overridden by a container or trailer volume).

Volume Unit:	The unit in which the volume is measured (Cubic Meters, Cubic Yards, Gallons, Liters).
Minimum Legal Weight:	The minimum legal weight of an empty vehicle.
Maximum Legal Weight:	The maximum legal weight of a full vehicle.
Driver:	The name of the vehicle's driver.
Seal Number:	A number used for sealing the loaded vehicle.
Description:	A description of the vehicle.
Transaction Type:	If you select a transaction type (One Pass, Two Pass, Multi Pass, Net Weighing, or Zero Weighing), it will be used as the default transaction type for the vehicle. This transaction type will be selected automatically when you select the vehicle for a transaction; however, you can override the transaction type manually.
Vehicle ID Number:	A vehicle identification number. This is not the ID used by the system to identify the record.
Tag Number:	The license plate number for the vehicle.
Tag Expiration Date:	The date that the tag expires.
Date Created:	The date that the vehicle record was created.
Notes:	Additional information about the vehicle.
Type of Vehicle:	Select **Tractor** or **Trailer**.
Zero Weighing:	Check this box to enable the vehicle for zero weighing. Zero weighing processes a transaction without recording a weight. It is used primarily to control access to a facility.
Operation:	Select **Ship**, **Receive**, or **Either**. If you select **Either**, the vehicle can be used for both shipping and receiving.
Attachments:	Select **Trailer**, **Container**, or **Neither**. If you select **Trailer**, the **Trailer** tab will be enabled and the system will expect the vehicle to be weighed with a trailer attached. If you select **Container**, the **Container** tab will be enabled and the system will expect the vehicle to be weighed with a container attached. If you select **Neither**, you will not be able to use a vehicle attachment.

Tare Data Tab

This tab lets you assign a tare weight for a vehicle so that the vehicle can be used for one-pass transactions. You can also

assign a tare weight using the **Capture Vehicle Tare** command in the **Transactions** menu.

Tare ID:	The identifier for the vehicle tare.
Description:	A description of the vehicle tare.
Scale ID:	The scale on which the vehicle is being weighed.
Total Tare:	The total tare weight of the vehicle.
Expiration Date:	The date that the tare expires.
Certified Weight:	Check this box if the tare weight is certified.
Multiple Weighments:	Check this box to create a multiple-weighment tare. This type of tare can be used when a vehicle's axles are weighed separately and the weights are added together to calculate a total vehicle weight. Checking the box will display the **Weighment Tare** and **Weighment ID** fields.

Entering a Tare

Use the following procedure to enter a single tare weight.

1. Type a description of the tare in the **Description** data field.
2. Select the scale on which the vehicle is being weighed from the **Scale ID** combo box. The weight reading from the scale will be shown in the **Total Tare** data field. If you selected a manual scale, type the tare weight in the data field.
3. If applicable, enter an expiration date and check the **Certified Weight** box.

4. Click the **Add** button. The system will record this data and enter a Tare ID for it in the list box.

You can enter more than one tare. Click the **New** button to clear the data fields. Then repeat the tare entry procedure. If you enter several tares, you will be able to select from among them when you process a one-pass transaction.

You cannot delete a Tare ID, but you can set it as expired. Highlight the Tare ID in the list box and click the **Remove** button. That will set the current date as an expiration date, so that the tare cannot be used unless you reset the expiration date. This allows you to keep a record of each expired tare.

Multiple Weighments

You can enter separate tare weights that will be added together to calculate a total tare weight for a vehicle. The following procedure explains how to enter separate tare weights for individual axles on a vehicle.

1. Type a description of the tare in the **Description** data field.

2. Select the scale on which the first axle is being weighed from the **Scale ID** combo box.
3. Check the **Multiple Weighments** box to display the **Weighment Tare** and **Weighment ID** fields.

4. The weight reading from the scale will be shown in the **Weighment Tare** data field. If you selected a manual scale, type the tare weight in the data field.

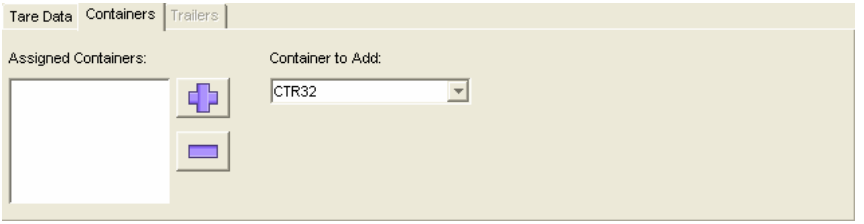
5. Click the **Add** button next to the **Weighment ID** list box. The system will record the weight and enter an ID for it in the list box. The system will also enter a separate ID in the **Tare ID** list box. This second ID represents the total tare weight, which will be displayed in the **Total Tare** data field.

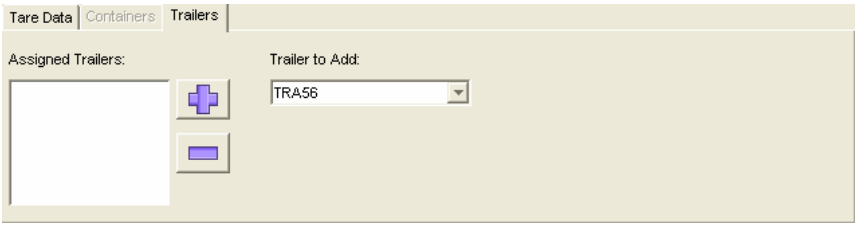
6. Click the **New** button next to the **Weighment ID** box to clear the **Weighment Tare** data field.
7. Move the vehicle so that the next axle is positioned on the scale. The tare weight will appear in the **Weighment Tare** data field (enter it if you are using a manual scale).

8. Click the **Add** button to record the tare weight and add an ID for it to the **Weighment ID** list box. The weight in the **Total Tare** data field will be updated. It represents the sum of the tare weights of the individual axles.
9. Repeat Steps 6 to 8 to add any additional weights required for the multiple-weighment tare.

Containers and Trailers Tabs

These tabs are available only if you select the **Container** or **Trailer** radio button. They let you assign containers and trailers for use with a vehicle. You must create a record for a container (or trailer) in the **Container** (or **Trailer**) table before you can assign it to a vehicle.





1. Select the **Container** or **Trailer** radio button to activate the appropriate tab.
2. Select a container (or trailer) from the **Container to Add** (or **Trailer to Add**) combo box on the tab.

3. Click the **Add** button on the tab. The Container ID (or Trailer ID) will appear in the **Assigned Containers** (**or Assigned Trailers**) list box. You can assign more than one container (or trailer) to a vehicle.

When you process a transaction for a container (or trailer) vehicle, you will need to select a Container ID (or Trailer ID) or check the **Truck Only** box on the **Transaction** screen. If you have assigned containers (or trailers) to a vehicle, you will be limited to selecting from the assigned containers (or trailers). Otherwise, you will be able to select from a list of all existing containers (or Trailers).

To delete an assigned container (or trailer), highlight it in the list box and click the **Remove** button.

Push Buttons

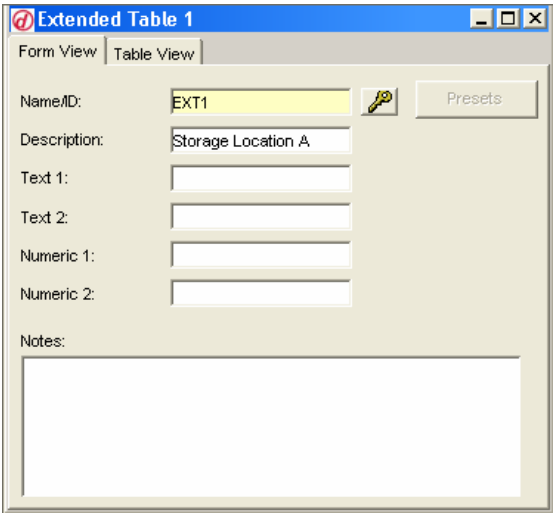
Advanced Pricing: This button opens the **Advanced Pricing** screen, which can be used to create complex pricing structures for a vehicle (see Chapter 7).

Presets: This button opens the **Presets** screen, which can be used to link a vehicle record to other database records (see Chapter 6).

Print: This button prints a Vehicle Tare Ticket. If the **Certified Weight** box is checked, it prints a Certified Vehicle Tare Ticket.

Extended Tables

There are 25 extended tables, which are additional tables that can be used to store information not found in the program's standard tables. They enable you to customize a system by creating tables for information specific to your operation. Tables 1-15 can be used on the main area of the **Transaction** screen, and tables 16-25 can be used on the **Product Detail** tab. The default form for an extended table is shown below.



Data Fields

Name/ID:	The identifier for the record.
Description:	A description of the record.
Text 1:	This field can be used for alphanumeric data.
Text 2:	This field can be used for alphanumeric data.
Numeric 1:	This field can be used for numeric data.
Numeric 2:	This field can be used for numeric data.
Notes:	Additional information about the record.

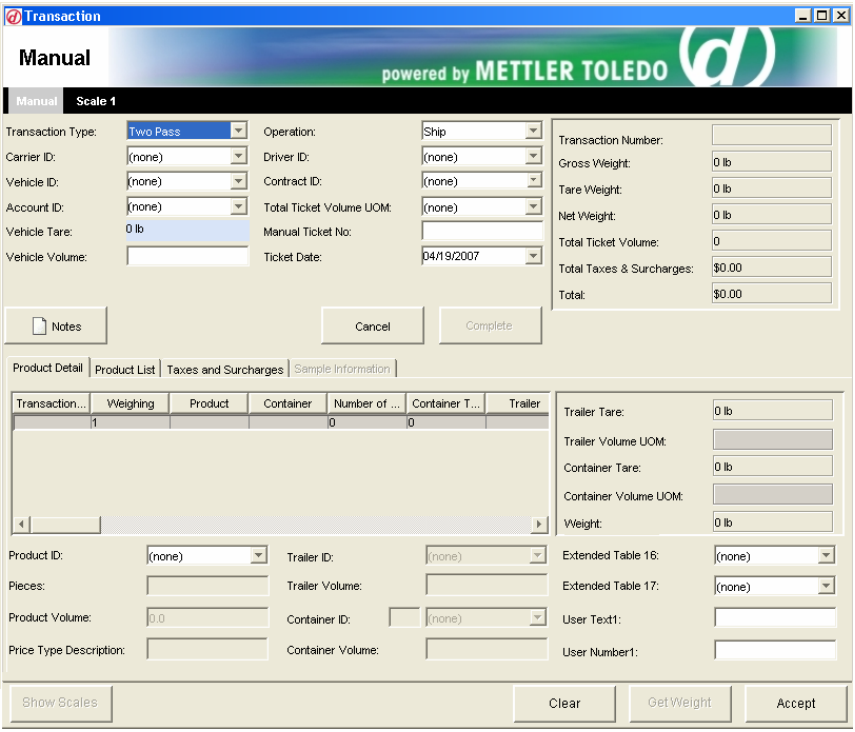
Push Buttons

Presets:	This button opens the **Presets** screen, which can be used to link an extended table record to other database records (see Chapter 6).

5 Processing Transactions

Transaction Screen

The OverDrive **Transaction** screen is used to process vehicle scale transactions. You can open the screen by clicking on **Transaction** in the side tree or clicking the **Open Transaction Screen** button. The demo version of the **Transaction** screen is shown below. Since OverDrive software can be configured for individual applications, the features on this screen might differ from those on your system's **Transaction** screen. Fields that are hidden on your screen can be displayed by using the GUI editor.



Scale Tabs

The system can be connected to as many as six scales. Each scale corresponds to a scale tab on the **Transaction** screen.

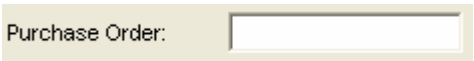
When you process a transaction, you must select the tab for the scale on which the vehicle is being weighed. The **Manual** tab is not connected to a scale; it allows you to enter a weight manually. To select a scale tab, click on the tab or press the F4 key.

Combo Boxes

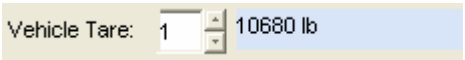
Most of the information that you will enter during a transaction is retrieved from existing database records. For example, you can select a vehicle from the records that you created in the **Vehicle** table. Simply click on the **Vehicle ID** combo box's down arrow to display a list of Vehicle IDs, and then click on the ID that you want.

Other Data Fields

In addition to the combo boxes, there are data fields for data that must be entered manually or data that cannot be edited. An example of data to be entered manually is a purchase order number that would be different for each transaction. Simply place the cursor in the data field and type the entry.



Data that cannot be edited is read from a database record or a scale. For example, the vehicle tare is retrieved from the database record for the vehicle selected in the combo box. The only way to change it would be to change the database record.



A vehicle can have more than one tare weight (for example, when individual axles are weighed separately). When that is the case, a list box will appear next to the **Vehicle Tare** data field. Use the list box to select the desired Tare ID for a weighing.

Manual Ticket Number: Use this field to enter a manual ticket number when a weight is entered manually during a transaction.

The field is visible only when the Manual scale is selected. The system will require you to enter a number for each manual transaction if the **Manual Ticket Number Required** feature is enabled on the **Options** screen's **Transaction** tab.

Ticket Date: Use the calendar in this combo box to backdate a ticket for a manual weighing transaction. The date that is selected cannot be later than the current date and cannot be earlier than 60 days before the current date. It must also agree with other system requirements. For example, if a profiled waste is selected for a transaction, the ticket date must fall within the period when the profile is in effect. The **Ticket Date** field is visible only when the Manual scale is selected.

Manifest: The manifest is a document that identifies the type of waste being shipped. You will be required to enter a Manifest ID when processing a transaction for a profiled waste.

Check Boxes

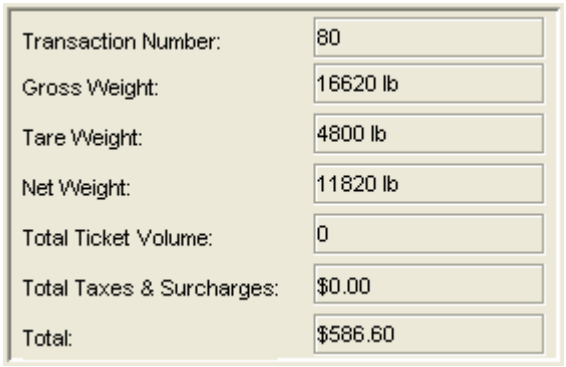
Truck Only: Check this box when weighing a container (or trailer) vehicle that does not have a container (or trailer) attached to it.

Split Weighing: Check this box when taking several weight readings that will be added together to determine the weight of a vehicle. Split weighing is used for vehicles that are too large to fit on a scale.

Multi Axle: Check this box when weighing individual axles of a vehicle separately.

Transaction Data Group

This group of data fields tracks basic information about the current transaction.



Transaction Number: This system-generated number keeps track of the total number of transactions processed by the system.

Gross Weight: This field shows the gross weight of the loaded vehicle that is being weighed on the scale.

Tare Weight: This field shows the tare weight of the loaded vehicle that is being weighed on the scale.

Net Weight: This field shows the net weight of the product that is being weighed on the scale.

Total Ticket Volume: This field shows the total volume of the vehicle that is being weighed on the scale.

Total Taxes & Surcharges: This field shows the total amount of taxes and surcharges applied to the current transaction.

Total: This field shows the total cost of the current transaction.

Push Buttons

Complete: This button completes a transaction. Use the **Complete** button to record a one-pass transaction or to record the final weighing of a two-pass or multi-pass transaction. The keyboard shortcut for this command is F11.

Cancel: This button clears the data fields on the **Transaction** screen so that you can start a new transaction. The keyboard shortcut for this command is Ctrl-C.

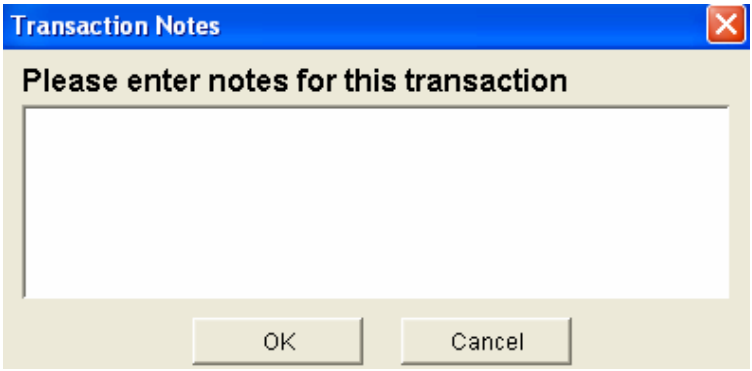
Clear: This button clears the data fields on the tab that is currently displayed.

Accept: This button accepts partial transaction data. Use the **Accept** button to record the first weighing of a two-pass transaction or all weighings except the final weighing of a multi-pass transaction. To record the final weighing of a two-pass or multi-pass transaction, use the **Complete** button. The keyboard shortcut for this command is F9.

Get Weight: This button reads the weight from a scale. The system will read the weight from the scale that corresponds to the scale tab that is selected. If the **Manual** scale tab is selected, you will be prompted to enter a weight manually. The keyboard shortcut for this command is F8.

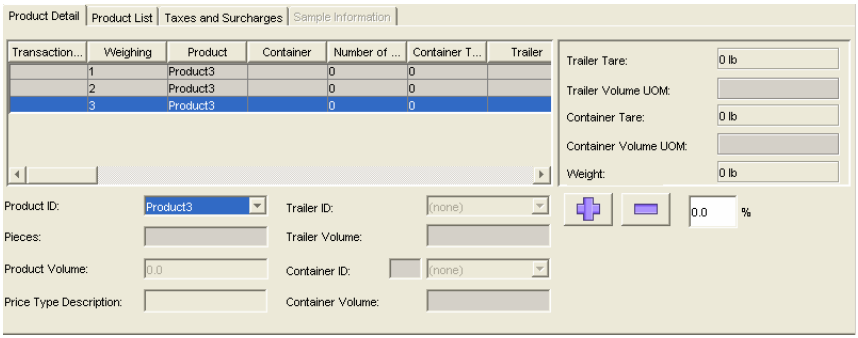
Show Scales: This button opens a window that lets you select a scale to continue a transaction. It is used if a truck makes its first pass on one scale and makes a subsequent pass on a different scale. The button is active only when you are continuing or completing an open transaction.

Notes: This button opens a window that can be used to enter notes about the current transaction. The keyboard shortcut for this command is Ctrl-E.



Product Detail Tab

Use the **Product** combo box to select a product for the transaction. The tab also displays weight data for any trailer or container used for the transaction.



An **Add** button, **Remove** button, and **Load Percent** data field are available for this tab (use the GUI Editor to make them visible). They allow you to select more than one product during a one-pass or two-pass transaction.

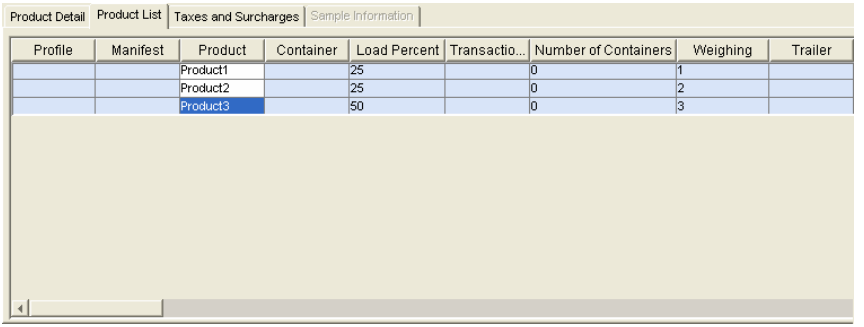
1. Select a product in the **Product** field.
2. Type a percentage in the **Load Percent** field.
3. Click the **Add** button to add a new line to the list of products, and repeat Steps 1 and 2 for the next product.
4. Repeat Step 3 for each additional product. The load percents of the products must add up to 100.

To delete a line, highlight it in the list and click the **Remove** button.

Product List Tab

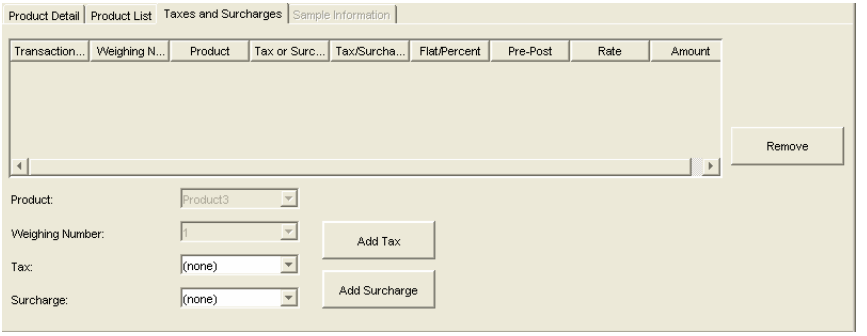
This tab shows a list of the products being weighed for the current transaction. You can add an additional row by clicking the **Add**

button or delete a row by clicking the **Remove** button (hidden by default).



Taxes and Surcharges Tab

Use this tab to apply taxes and surcharges to a transaction. The table on the tab shows the tax and surcharge data for the current transaction.



Add Tax: This button adds a tax to the cost of the product being weighed. Select a tax in the **Tax** combo box, and then click the **Add Tax** button. The tax will be listed in the table on the tab.

Add Surcharge: This button adds a surcharge to the cost of the product being weighed. Select a surcharge in the **Surcharge** combo box, and then click the **Add Surcharge** button. The surcharge will be listed in the table on the tab.

Remove: This button deletes taxes and surcharges that have been applied to a transaction. Highlight the tax or surcharge in the table on the tab, and then click the **Remove** button.

Sample Information Tab

See Chapter 9 for information about sampling.

Additional Data Fields

The **Transaction** screen has 12 user-defined data fields for storing transaction information that is specific to an application. Three user text fields are available for the main area of the screen and three for the **Product Detail** tab (they accept alphanumeric data). Three user number fields are available for the main area of the screen and three for the **Product Detail** tab (they accept numeric data). The data fields and labels are hidden by default. Use the GUI Editor to make them visible, reposition them, and change the text for the label.

Types of Transactions

The OverDrive system can process transactions for one-pass, two-pass, and multi-pass weighing. It also provides options for net weighing and zero weighing. Choose the desired method from the **Transaction Type** data field on the **Transaction** screen.

- **One-pass weighing:** Weigh a loaded vehicle and use a stored tare or manually entered tare to determine the net weight of the product being shipped or received.
- **Two-pass weighing:** Weigh a vehicle once when it is empty and once when it is loaded to determine the net weight of the product being shipped or received.
- **Multi-pass weighing:** This method is used to weigh a vehicle that has several compartments or containers. It allows you to record a separate weight for each compartment. The vehicle would be weighed after each compartment is loaded or unloaded.
- **Net weighing:** Weigh an object once to determine its net weight. This method is used to weigh a vehicle in order to obtain a certified tare weight for the vehicle.
- **Zero weighing:** This option processes a transaction without recording a weight. Zero weighing is typically used to control access to a facility. To use zero weighing, create a product record with **Zero Weighing** as the mode. When you process a transaction, select the zero-weighing product. That will enable you to complete the transaction without entering a weight.

One-Pass Weighing

1. When a vehicle drives onto the scale, the virtual indicator will display the weight reading from the scale.
2. Open the **Transaction** screen and select the tab for the scale on which the vehicle is being weighed. If you will be entering the weight manually, select the **Manual** tab.
3. Select **One Pass** from the combo box in the **Transaction Type** data field.
4. Use the **Carrier** combo box to select the carrier linked to the vehicle that is being weighed.
5. Use the **Vehicle** combo box to select the vehicle that is being weighed.
6. Use the other combo boxes to select an account and any other data that you need to record for the transaction. If presets exist, some of the data will be entered automatically.
7. Select the **Product Detail** tab, and use the **Product** combo box to select a product.
8. Click the **Get Weight** button. The gross weight will be read from the scale and displayed in the **Gross Weight** data field. If the vehicle record includes a tare weight, it will be shown in the **Tare Weight** data field. If the vehicle record does not include a tare weight, you will be prompted to enter one manually.
9. If taxes or surcharges are required, select the **Taxes and Surcharges** tab. Use the combo boxes to enter the correct product, tax, and surcharge. Click the **Add Tax** button to apply the tax. Then click the **Add Surcharge** button to apply the surcharge. The tax and surcharge information will be displayed in the table on the tab.
10. If the information for the transaction is correct, click the **Complete** button. A record of the transaction will be saved to the database, and a ticket will be printed or stored.

Two-Pass Weighing

For a two-pass transaction, you must enter the Vehicle ID during the first pass over the scale. You can enter other data during either pass. Entering data during the second pass is often preferable for outbound transactions, since the product is not loaded onto the vehicle until after the first pass. To enter account or contract data during the second pass, you must enable those options in **Application Setup** (see Chapter 8).

1. When a vehicle drives onto the scale, the virtual indicator will display the weight reading from the scale.
2. Open the **Transaction** screen and select the tab for the scale on which the vehicle is being weighed. If you will be entering the weight manually, select the **Manual** tab.
3. Select **Two Pass** from the combo box in the **Transaction Type** data field.
4. Use the **Carrier** combo box to select the carrier linked to the vehicle that is being weighed.
5. Use the **Vehicle** combo box to select the vehicle that is being weighed.
6. Use the other combo boxes to select an account and any other data that you need to record for the transaction. In some cases, this data can be entered during the second pass. If presets exist, some of the data will be entered automatically.
7. Select the **Product Detail** tab and use the **Product** combo box to select a product. This data can also be entered during the second pass.
8. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field. If you are using a manual scale, you will be prompted to enter a weight.
9. Click the **Accept** button to record the first part of the transaction and store it as an open transaction. If the program is set up to print inbound tickets, a ticket for the first pass over the scale will be printed now.
10. The vehicle can now leave the scale. If this is a receive transaction, the driver will now have the vehicle unloaded. If this is a ship transaction, the driver will now have the vehicle loaded.
11. When the vehicle returns to the scale for the second pass, retrieve the record for the open transaction. To do that, select the carrier from the **Carrier** combo box and the vehicle from the **Vehicle** combo box. You can also retrieve the record by opening the **Transactions** menu and clicking on **Transaction**

Browser. This will display a **Transaction Browser** table that lists all open transactions. Locate the transaction you want, and click on it to display the data from the first pass on the **Transaction** screen.

12. Make sure the weight information displayed on the screen is correct.
13. If product, account, or other data need to be entered during the second pass, enter it now.
14. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field for a ship transaction or in the **Tare Weight** data field for a receive transaction. If you are using a manual scale, you will be prompted to enter a weight.
15. If taxes or surcharges are required, select the **Taxes and Surcharges** tab. Use the combo boxes to enter the correct product, tax, and surcharge. Click the **Add Tax** button to apply the tax. Then click the **Add Surcharge** button to apply the surcharge. The tax and surcharge information will be displayed in the table on the tab.
16. If the information for the transaction is correct, click the **Complete** button. A record of the transaction will be saved to the database, and a ticket will be printed or stored.

Multi-Pass Weighing

For a multi-pass transaction, you must enter the Vehicle ID during the first pass over the scale. The Product ID cannot be entered during the first pass. It must be entered during each subsequent pass, allowing you to weigh a separate product for each pass. To enter account or contract data during a later pass, you must enable those options in **Application Setup** (see Chapter 8).

1. When a vehicle drives onto the scale, the virtual indicator will display the weight reading from the scale.
2. Open the **Transaction** screen and select the tab for the scale on which the vehicle is being weighed. If you will be entering the weight manually, select the **Manual** tab.
3. Select **Multi Pass** from the combo box in the **Transaction Type** data field.
4. Use the **Carrier** combo box to select the carrier linked to the vehicle that is being weighed.
5. Use the **Vehicle** combo box to select the vehicle that is being weighed.
6. Use the other combo boxes to select an account and any other data that you need to record for the transaction. In some cases, you can enter this data during a later pass. If presets exist, some of the data will be entered automatically.
7. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field. If you are using a manual scale, you will be prompted to enter a weight.
8. Click the **Accept** button to record the first part of the transaction and store it as an open transaction. If the program is set up to print inbound tickets, a ticket for the first pass over the scale will be printed now.
9. The vehicle can now leave the scale. If this is a receive transaction, the driver will now have the first part of the load removed from the vehicle. If this is a ship transaction, the driver will now have the first part of the load placed on the vehicle.
10. When the vehicle returns to the scale for the next pass, retrieve the record for the open transaction. To do that, select the carrier from the **Carrier** combo box and the vehicle from the **Vehicle** combo box. You can also retrieve the record by opening the **Transactions** menu and clicking on **Transaction Browser**. This will display a **Transaction Browser** table that lists all open transactions. Locate the transaction you want,

and click on it to display the data from the first pass on the **Transaction** screen.

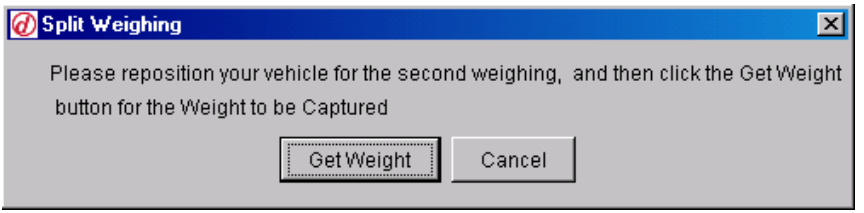
11. Make sure the weight information displayed on the screen is correct.
12. Select the product and any other data that needs to be entered during this pass.
13. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field for a ship transaction or in the **Tare Weight** data field for a receive transaction. If you are using a manual scale, you will be prompted to enter a weight.
14. Click the **Accept** button to add this weighing to the open transaction.
15. Repeat steps 10 to 14 for each weighing except the final one. Follow steps 16 to 21 for the final weighing.
16. When the vehicle returns to the scale for the final pass, retrieve the record for the open transaction.
17. Make sure the weight information displayed on the screen is correct.
18. Select the product and any other data that needs to be entered during this pass.
19. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field for a ship transaction or in the **Tare Weight** data field for a receive transaction. If you are using a manual scale, you will be prompted to enter a weight.
20. If taxes or surcharges are required, select the **Taxes and Surcharges** tab. Use the combo boxes to enter the correct product, tax, and surcharge. Click the **Add Tax** button to apply the tax. Then click the **Add Surcharge** button to apply the surcharge. The tax and surcharge information will be displayed in the table on the tab.

    NOTE: If more than one product is being weighed, you will need to add the appropriate taxes/surcharges for each product. You can do that during the final pass or add taxes/surcharges for the product being weighed during each individual pass.
21. If the information for the transaction is correct, click the **Complete** button. A record of the transaction will be saved to the database, and a ticket will be printed or stored.

Split Weighing

Split weighing involves weighing individual sections of a vehicle separately and summing the weights to determine a total vehicle weight. It can be used to process transactions for vehicles that are too large to weigh on a scale. The procedure for a one-pass transaction is described below.

1. Position the first section of the vehicle on the scale.
2. Enter the required data on the **Transaction** screen, and place a check mark in the **Split Weighing** box.
3. Click the **Get Weight** button to record the weight of the first section of the vehicle. The **Split Weighing** window will open.



4. Move the vehicle to position the second section of it on the scale.
5. Click the **Get Weight** button on the **Split Weighing** window to record the weight of the second section of the vehicle.
6. Click the **Complete** button on the **Transaction** screen to complete the transaction.

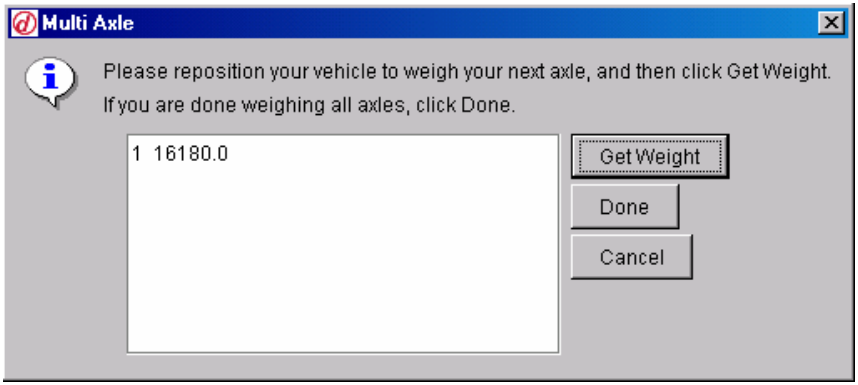
You can also use split weighing for two-pass transactions. Follow the procedure described above for both passes, using the **Accept** button at the end of the first pass and the **Complete** button at the end of the second pass.

NOTE: You cannot use the manual scale to process a split weighing transaction.

Multi-Axle Weighing

Multi-axle weighing involves weighing individual axles separately and summing the weights to determine a total vehicle weight. The procedure for a one-pass transaction is described below.

1. Position the first axle on the scale.
2. Enter the required data on the **Transaction** screen, and place a check mark in the **Multi Axle** box.
3. Click the **Get Weight** button to display the **Multi Axle** window.



4. Click the **Get Weight** button on the window. The first weight will appear in the window's list box.
5. Move the vehicle to position the next axle on the scale.
6. Click the **Get Weight** button on the window. The next weight will be added to the window's list box.
7. Repeat Steps 5 and 6 for each additional axle that needs to be weighed.
8. Click the **Done** button on the **Multi Axle** window.
9. Click the **Complete** button on the **Transaction** screen to complete the transaction.

If the vehicle does not have a multiple-weighment tare, the system will prompt you to enter one when you process the transaction.

You can also use multi-axle weighing for two-pass transactions. Follow the procedure described above for both passes, using the **Accept** button at the end of the first pass and the **Complete** button at the end of the second pass.

NOTE: You cannot use the manual scale to process a transaction with multi-axle weighing.

Net Weighing

Before you can process a net-weighing transaction, you must create a product record that is enabled for net weighing.

1. When a vehicle drives onto the scale, open the **Transaction** screen and select the tab for that scale.
2. Select **Net Weighing** from the combo box in the **Transaction Type** data field.
3. Use the **Carrier** combo box to select the carrier linked to the vehicle that is being weighed.
4. Use the **Vehicle** combo box to select the vehicle that is being weighed.
5. Use the **Product** combo box to select a product that is enabled for net weighing.
6. Use the **Account** combo box to select an account.
7. Click the **Get Weight** button. The weight will be read from the scale and displayed in the **Gross Weight** data field.
8. Click the **Complete** button. A record of the transaction will be saved to the database, and a ticket will be printed or stored.

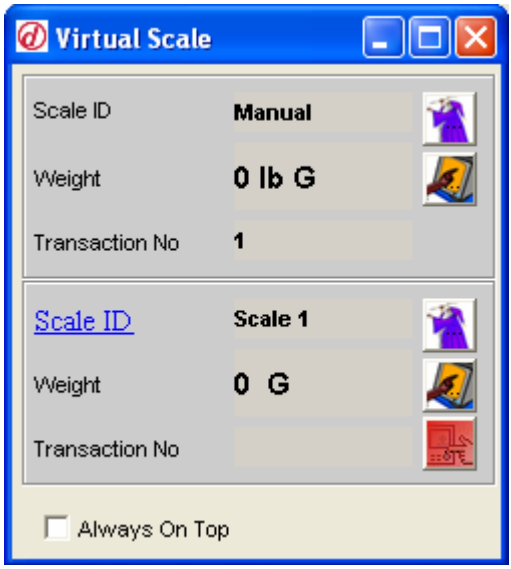
Zero Weighing

Before you can process a zero-weighing transaction, you must create a product record that is enabled for zero weighing and enable the vehicle for zero weighing.

1. When a vehicle drives onto the scale, open the **Transaction** screen and select the tab for that scale.
2. Select **Zero Weighing** from the combo box in the **Transaction Type** data field.
3. Use the **Carrier** combo box to select the carrier linked to the vehicle that is being weighed.
4. Use the **Vehicle** combo box to select the vehicle that is being weighed.
5. Use the **Product** combo box to select a product that is enabled for zero weighing.
6. Use the **Account** combo box to select an account.
7. Click the **Complete** button. A record of the transaction will be saved to the database, and a ticket will be printed or stored.

Virtual Scale Indicator

The virtual scale indicator displays current information from each of the scales connected to the system. It allows the system operator to view the activity on all scales simultaneously while processing transactions. When you log in to the system, the virtual scale indicator opens automatically. You can resize the indicator, reposition it, and check the **Always on Top** box so that it will be displayed over top of other screens that are open.



Data Fields

Scale ID: This identifies the scale from which the weight and transaction information is being read. If you are using a JAGXTREME terminal, you can click on the **Scale ID** hyperlink to open a JAGXTREME web page that provides scale calibration and diagnostics procedures.

Weight: This data field shows the current weight reading from the scale. The weight will be the same as that displayed on the actual scale indicator.

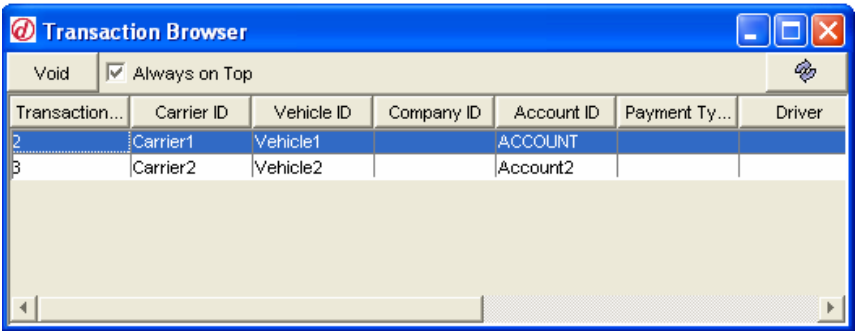
Transaction Number: If a transaction is in progress, this data field will show the transaction number.

Push Buttons

Transaction Wizard:	Click this button to open the transaction wizard.
Touch Screen:	Click this button to open the touch screen display.
UADT:	Click this button to view the unattended data terminal (UADT).

Transaction Browser

Two-pass and multi-pass transactions require weighing a vehicle more than once. Usually the vehicle will leave the scale to be loaded or unloaded between weighings. When the vehicle returns to the scale to continue a transaction, the quickest way to retrieve the open transaction record is to use the transaction browser. To open the transaction browser, open the **Transactions** menu and click on the **Transaction Browser** menu item.

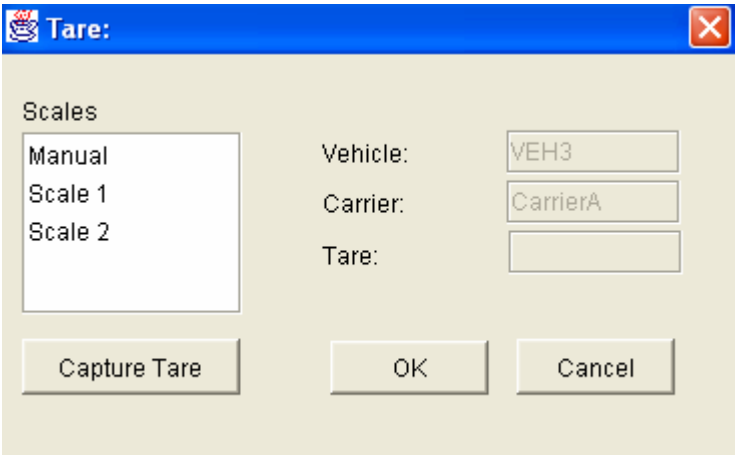


The transaction browser is a table that lists all open transactions. When a vehicle returns to a scale, double click on its record in the transaction browser to display the record on the **Transaction** screen. The transaction browser can be set to close automatically when you double click on a record. It is often convenient to leave the transaction browser open so that it is always visible when you are processing transactions. You can resize the browser, reposition it, and check the **Always on Top** box so that it will be displayed over top of other screens that are open. The transaction browser includes a **Refresh** button that is used to update the data listed in the browser. You will need to use this button if you leave the transaction browser open. It also includes a **Void** button that can be used to void an open transaction and remove it from the transaction browser.

Capturing a Tare Weight

Use the **Capture Vehicle Tare** command to record a tare weight for a vehicle.

1. Select a vehicle in the **Vehicle** data field on the **Transaction** screen.
2. Use the **Carrier** data field to select the carrier linked to the vehicle.
3. Display the **Tare** window by clicking the **Capture Vehicle Tare** button on the tool bar or by selecting **Capture Vehicle Tare** in the **Transactions** menu. The vehicle and carrier will be displayed in the window.



4. In the **Scales** list box, highlight the scale on which the vehicle is being weighed.
5. If you are weighing the vehicle on a scale, click the **Capture Tare** button. The weight from the scale will be displayed in the **Tare** data field. If you select the **Manual** scale, type the weight in the **Tare** data field and then click the **Capture Tare** button.
6. Click the **OK** button to accept the tare weight, or click the **Cancel** button to close the **Tare** window without accepting a tare weight. If you accept a tare weight, it will be stored in the **Vehicle** table record.

Transient Vehicles

You can process transactions for transient vehicles. These are vehicles for which there is no database record in the **Vehicle** table. When you begin the transaction, you will have the option of creating a vehicle record or completing the transaction without adding the vehicle to the database.

1. When the vehicle arrives at the scale, highlight **(none)** in the **Vehicle** combo box on the **Transaction** screen. Type an ID or description of the vehicle so that it overwrites **(none)**.
2. If the carrier requirement is enabled, you will need to select a carrier.
3. When you move the cursor to the next data field, **the Transient Vehicle** window will open, displaying the following prompt: "This is a transient vehicle. Would you like to add it to database?" Respond by clicking one of the following buttons on the window:
   - **Yes**—This opens the **Vehicle** table. Enter information about the vehicle and save the new vehicle record. Then continue with the transaction.
   - **No**—This allows you to continue with the transaction.
   - **Cancel**—This cancels the transaction.

If you are processing a one-pass transaction for a transient vehicle, you will be prompted to enter a manual tare weight after the system has read the vehicle weight from the scale.

NOTE: To process transactions for transient vehicles, you must first check the **Disable Controls on Vehicle** box on the **Options** screen's **Transaction** tab (see Chapter 8). That tab also includes an option to disable the transient vehicle dialog box (the prompt described in Step 3).

Transient Accounts

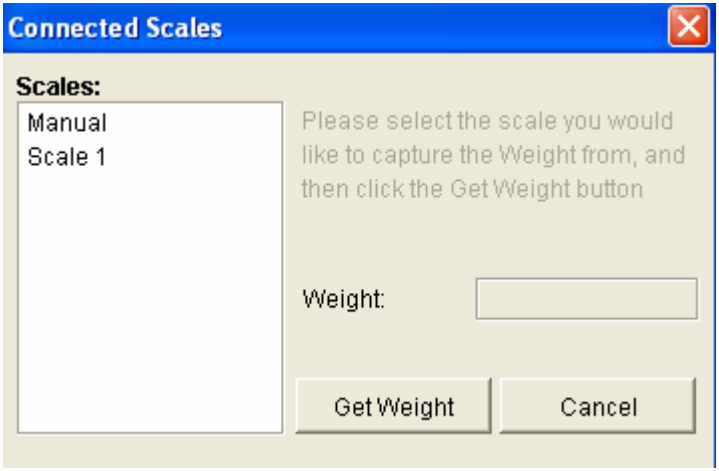
You can also process transactions for accounts that do not exist in the database. Highlight **(none)** in the **Account** combo box on the **Transaction** screen. Type an ID or description of the account so that it overwrites **(none)**. You will not be prompted to add the account to the database.

NOTE: To do this, you must first check the **Disable Controls on Account** box on the **Options** screen's **Transaction** tab (see Chapter 8).

Switching Scales

You can process the first pass of a transaction on one scale and the second pass on another scale. If a truck pulls onto a scale to continue a transaction that was begun on a different scale, use the **Connected Scales** window to enter the weight.

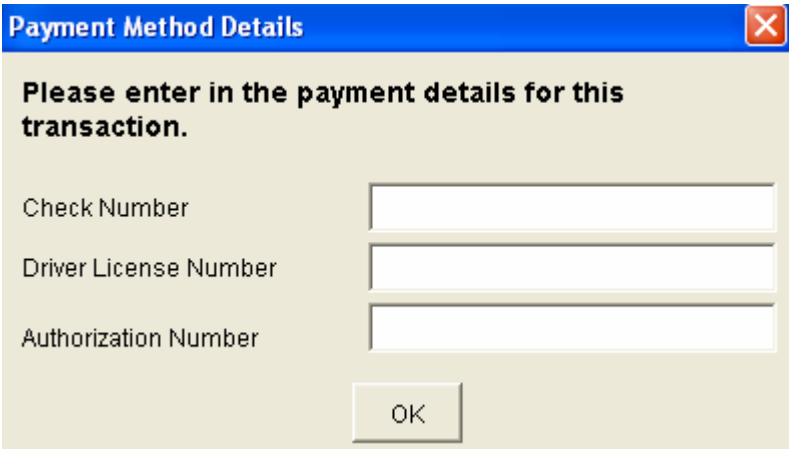
1. Click the **Show Scales** button on the **Transaction** screen to open the **Connected Scales** window.



2. Select the scale that the truck is currently on in the **Scales** List box.
3. The weight from the scale will be displayed in the **Weight** data field.
4. Click the **Get Weight** button to enter the weight for the transaction.

Payment Method

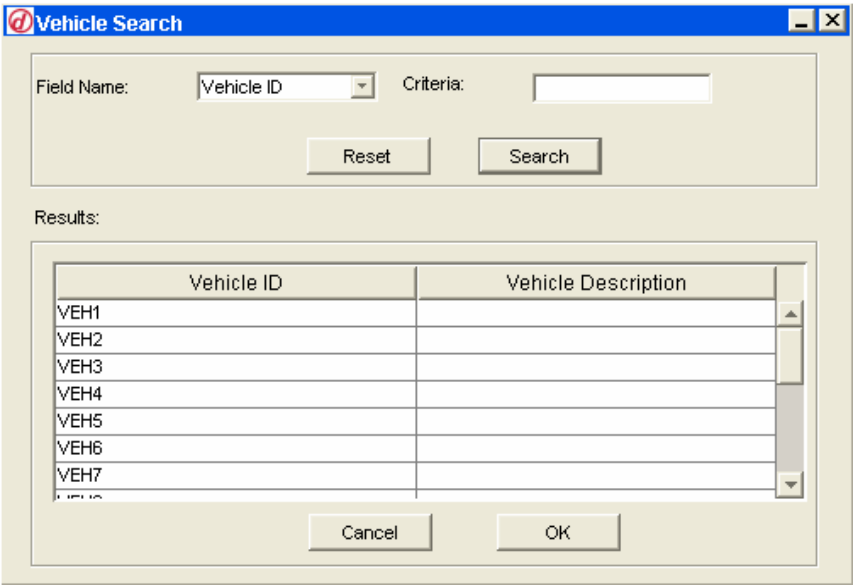
The program can prompt you to enter payment information for a transaction. To enable this function, check the **Show Capture Payment Method Details** box on the **Options** screen's **Transaction** tab (see Chapter 8). If the function is enabled, the **Payment Method Details** window will open when you complete a transaction for which check, credit card, or debit card is selected as the payment type. Enter the appropriate payment details in the window, and then click the **OK** button to complete the transaction.



Search Function

The **Transaction** screen has a search function to help you locate database records more quickly. It allows you to search for records in the following combo boxes: Account, Carrier, Company, Container, Contract, Destination, Driver, Origin, Product, Remark1, Remark2, Trailer, and Vehicle.

1. Place the cursor in the data field that you want to search.
2. Press the F3 key to display the **Search** window.



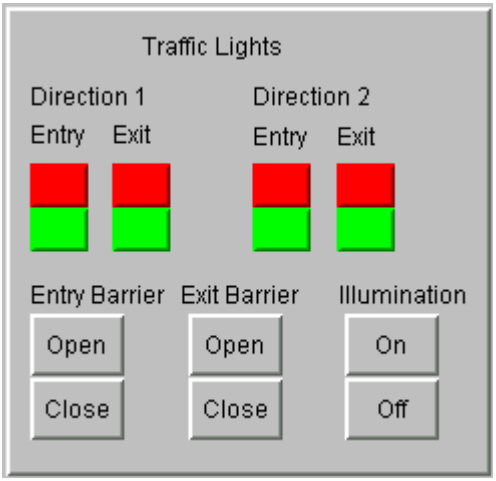
3. Select the data field that you want to search in the **Field Name** combo box.
4. Enter the record that you want to find in the **Criteria** data field. Use a percent sign as a wildcard if you enter partial data. For example, enter "a%" or "%6" to search for Account6.
5. Click the **Search** button. The system will retrieve the records and display them in the **Results** table.
6. Highlight the desired record in the table, and then click the **OK** button. This will place the record in the data field on the **Transaction** screen.

If you click the **Search** button without selecting a field name, the system will retrieve the entire list of records for the data field.

You can also search a combo box by placing the cursor in the data field and typing the first letter(s) of a data record. A time-out feature automatically starts a new search if a set amount of time elapses between keystrokes. To adjust the time-out, use the **Combo Box Search Timeout (seconds)** field on the **Options** screen's **Transaction** tab (see Chapter 8).

Traffic Lights

The **Transaction** screen provides a panel for controlling traffic lights, gates, and lighting manually. If the system is connected to more than one scale, the panel will control lights and gates for whichever scale tab is currently displayed on the screen.



Traffic Lights

The panel can control as many as four traffic lights. Typically, two traffic lights are used if vehicles drive over the scale in one direction. One light is located at the entrance to the scale to signal when it is time for the vehicle to drive onto the scale. A second light is located at the opposite end of the scale to signal when it is time for the vehicle to exit the scale. If vehicles drive over the scale in both directions, you will need an entry and exit light at each end of the scale.

The panel includes a red and green button for each set of traffic lights. Click on the green button to switch a light to green. Click on the red button to switch a light to red.

Barriers

The panel can control two barriers (or gates). Typically, you would install an entry barrier at one end of the scale and an exit barrier at the other end. If vehicles drive over the scale in two directions, the entry barrier for one direction can serve as the exit barrier for the other direction.

The panel includes an **Open** and **Close** button for each barrier. Click on the desired button to open or close a barrier.

Illumination

The panel includes **On** and **Off** buttons to control lights used to illuminate the scale and surrounding area. Click the desired button to turn the lights on or off.

Locating the Panel

The panel will not be visible when the OverDrive software is first installed. As a default, it is hidden at the far right of the **Transaction** screen. To locate the panel, extend the right-hand border of the **Transaction** screen.

1. Position the cursor on the blue title bar at the top of the **Transaction** screen. Then hold down the mouse button and drag the screen to the left.
2. Position the cursor on the right-hand border of the **Transaction** screen. Then hold down the mouse button and drag the border to the right to enlarge the width of the screen. You will need to enlarge the screen to several times its standard width.

3. Click the **Enable Traffic Lights** button on the tool bar to make the panel visible. The panel is visible when the button appears to be pushed in.

You might need to use the GUI Editor to make the panel visible in order to locate it. You can use the GUI Editor to reposition the panel to a location that is convenient for your operators.

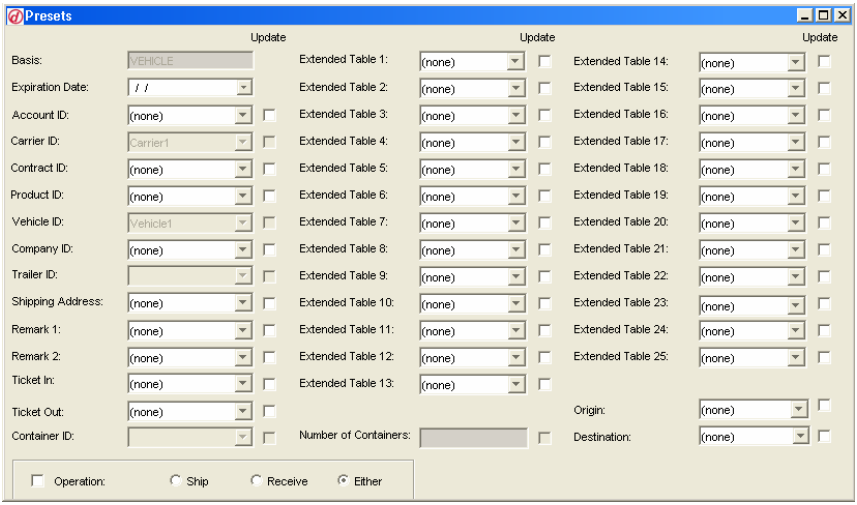
6 Presets and Groups

Presets

Presets are used to speed up transactions by reducing repetitive, manual data entry. Suppose a vehicle always carries the same product for the same account. You can create a preset that links the vehicle to the account and product. Then when you select the vehicle for a transaction, the system will automatically enter the account and product information.

To create a preset, choose a database record as the starting point. A **Vehicle** table record is usually the best choice. But you can use a record from any of the following tables: Account, Carrier, Company, Container, Contract, Product, Remark 1, Remark 2, Shipping Address, Trailer, Vehicle, and Extended tables.

1. Decide which record you want to use as a starting point, and open the table where the record is stored. For example, if you want to use a vehicle record as the starting point, open the **Vehicle** table.
2. Display the desired record on the table's **Form View** tab.
3. Click the **Presets** button to open the **Presets** screen.
    - The ID for the record that you chose as a starting point will appear in the appropriate data field.
    - The name of the table where the record is stored will appear in the **Basis** data field.

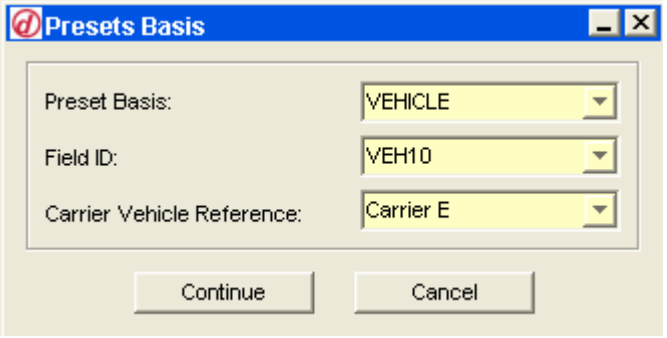


4. Use the combo boxes to select the records that you want to include in the preset.
5. Click the **Save** button to save the presets record.

NOTE: All records that you are including in the preset must already exist in the database.

The **Presets** screen for the **Vehicle** table includes an **Update** check box for each data field. Checking the box enables you to change the preset by overriding it manually during a transaction. For example, suppose you are processing a transaction and select a vehicle for which you have assigned a preset product. The preset product will be entered automatically, but you can override it manually by selecting another product on the **Transaction** screen. If the **Update** box is checked, the product that was selected manually will become the new preset and will be used for subsequent transactions. If the box is not checked, the product that was selected manually will be used only for the current transaction.

The **Presets Basis** form provides a shortcut to the **Presets** screen. To open the form, click on **Presets Basis** in the **Data Setup** folder in the side tree.



1. Use the **Presets Basis** combo box to select the database table that contains the record being used as the basis for the preset.
2. Use the **Field ID** combo box to select the specific record being used as the basis for the preset. If a vehicle record is selected, the carrier linked to it will be shown in the **Carrier Vehicle Reference** field.
3. Click the **Continue** button to open the **Presets** screen.

Using Presets

Before you can use a preset, you must enable it on the **Presets & Groups** tab of the **Options** screen. For example, if you used a vehicle record as the starting point for a preset, you must check the **Enable Presets** box and the **Enable Vehicle Preset** box on the tab. Both boxes must be checked in order to enable the preset.

1. Open the **Transaction** screen to begin processing a transaction.
2. In the appropriate combo box, select the record that was used as the starting point for the preset.
3. The preset information will be entered automatically in the data fields on the **Transaction** screen. You can override the presets manually.

If a vehicle record is the basis for the preset, you will need to select the vehicle and carrier before the presets will be entered.

Groups and Group Presets

The OverDrive system helps you manage your weighing operations more efficiently by enabling you to create groups and group presets. You can define groups and group presets for records in the **Account**, **Carrier**, **Contract**, **Product**, and **Vehicle** tables.

- A **Group** is a set of records in a table that are linked together because they are all related to a record or records in another table. For example, you might create a group of vehicles that are used only by a particular account.
- A **Group Preset** is a link between two or more groups. For example, a group of vehicles can be linked to a group containing one or more accounts that use those vehicles.

How are groups and group presets useful? If you have a large database, your operators will need to search through long lists of records when entering data for transactions. Groups and group presets can speed up transactions by limiting the number of choices available to an operator. For example, if a particular vehicle is used by only three accounts, the operator will not need to search through a list of all accounts in your database when that vehicle arrives to begin a transaction. Instead, the operator can simply choose from a list of the three accounts linked to the vehicle.

This chapter contains an example that shows how to create groups and group presets. The procedure involves three steps:

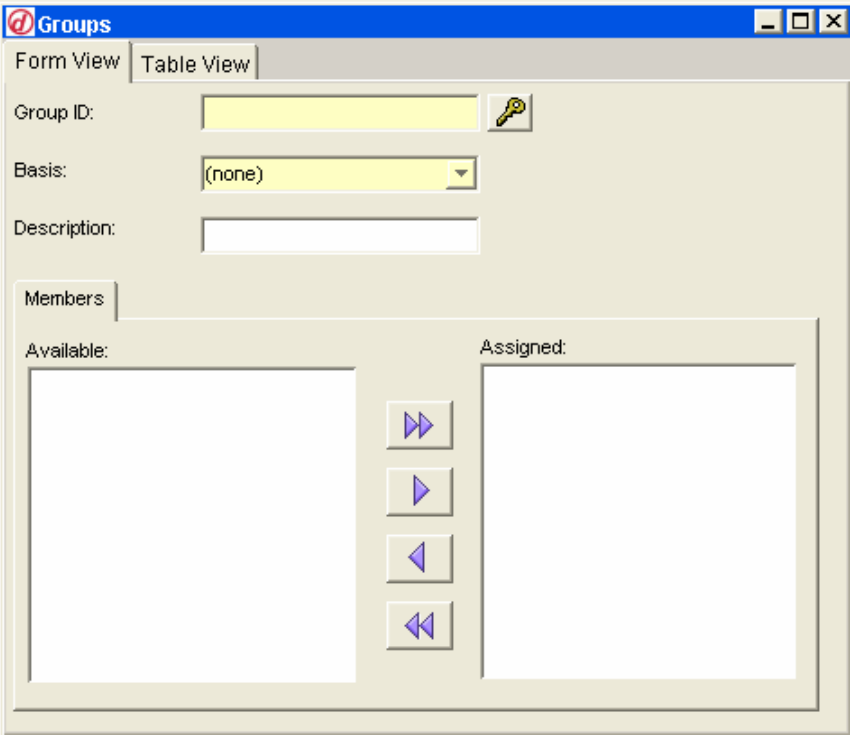
1. Create two or more groups.
2. Add records to the groups.
3. Link the groups.

Creating a Group

Suppose Roberts Construction owns five vehicles and has three subsidiary contractors that use the five vehicles to haul gravel from your quarry. You want to be able to bill the three contractors separately while allowing them to share the five vehicles.

Start by creating an account group for the three contractors.

1. Open the **Data Setup** folder in the side tree and click **Groups** to open the **Groups** form.



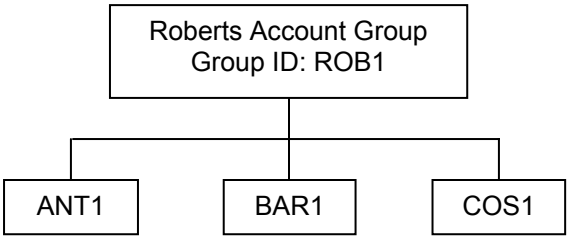
2. Type a Group ID (ROB1) in the **Group ID** field. If you want the system to assign a Group ID, click the **Get System Generated Key** button.
3. Select **Account** from the **Basis** combo box to define the type of group you are creating.
4. In the **Description** data field, enter a description of the group.

Next, add the three subsidiaries of Roberts Construction to the group that you created. Records for these three contractors must

exist in the **Account** table before you can add them to the group. All existing accounts will be shown in the **Available** list box on the **Members** tab. If you have already created the three accounts to be added to the group, proceed to Step 5. If you have not created the accounts, you will need to do so before continuing.

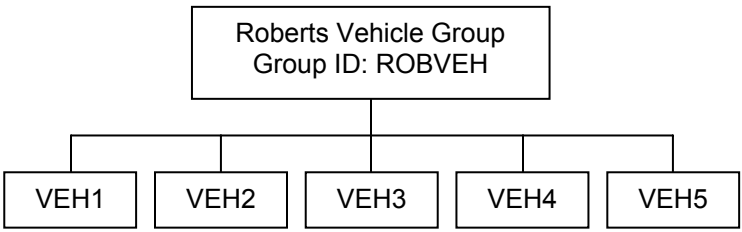
5. In the **Available** list box, select the accounts that you want to add to the group. Then click the right arrow button to move them to the **Assigned** list box.
6. Click the **Save** button to create account group ROB1.

When you are finished, you should have created an account group with three members (as shown in the diagram below).



Create a Vehicle Group

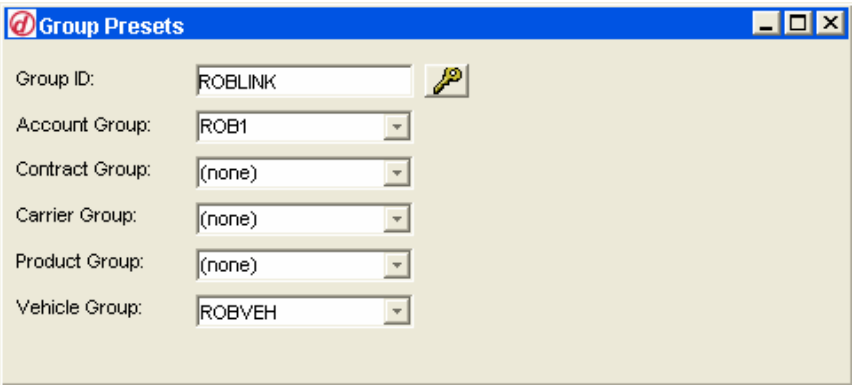
Once you have completed the account group, create a vehicle group (ROBVEH) and add Roberts Construction's five vehicles to it. Follow the same procedure that you used to create the account group and add records to it. The completed vehicle group is shown in the diagram below.



Linking Groups

Once you have created the two groups, you can link them so that they can be used as presets.

1. Open the **Data Setup** folder in the side tree and click **Group Presets** to open the **Group Presets** form.
2. Type a Group ID (ROBLINK) in the **Group ID** field. If you want the system to assign a Group ID, click the **Get System Generated Key** button.
3. Select the first group to be linked from the appropriate combo box. For this example, select ROB1 from the **Account Group** combo box.
4. Select the second group to be linked from the appropriate combo box. For this example, select ROBVEH from the **Vehicle Group** combo box.



NOTE: You can link as many as five groups, one from each combo box.

5. Click the **Save** button to link the groups.

Using Group Presets

Before you can use the group presets that you created, you must enable them. To do that, check the **Enable Groups** box on the **Options** screen's **Presets & Groups** tab (see Chapter 8). Checking this box will enable all group presets that you create.

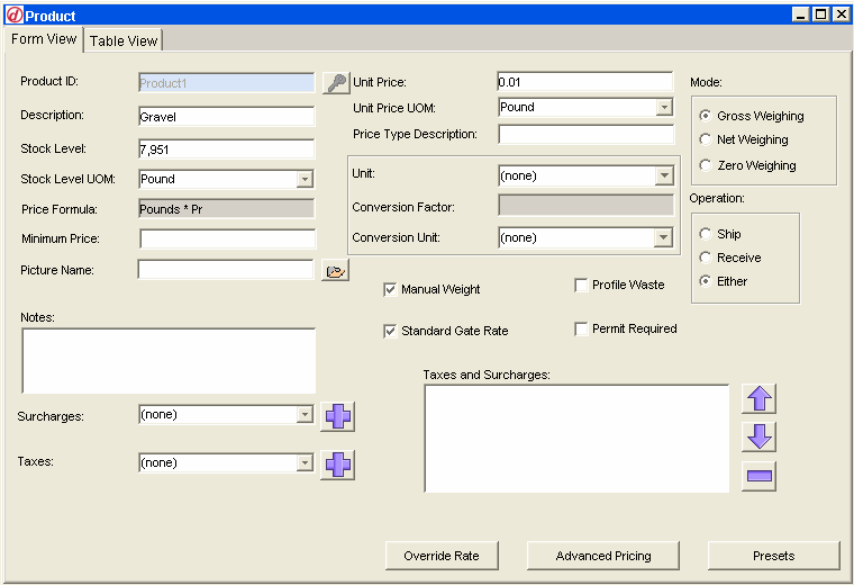
NOTE: Be careful when creating both presets and group presets for a database record. If both types of presets are enabled, the presets will override the group presets when you process a transaction.

1. To begin a transaction for one of the Roberts Construction vehicles, select its ID from the **Vehicle** combo box on the **Transaction** screen.
2. Select the carrier linked to the vehicle in the **Carrier** combo box.
3. When you open the **Account** combo box to select an account, you will notice that the three Roberts Construction subsidiaries are the only accounts listed. Normally, you would have to scroll through a list of all the accounts in the database to find the correct one. Group presets speed up transactions by limiting your choices to the records that you have linked together.

7 Pricing

Basic Pricing

The OverDrive system can calculate a price when it processes a transaction. The simplest way to do that is to use the basic pricing formula that is available for each product. You can specify a price when you create a record in the **Product** table.

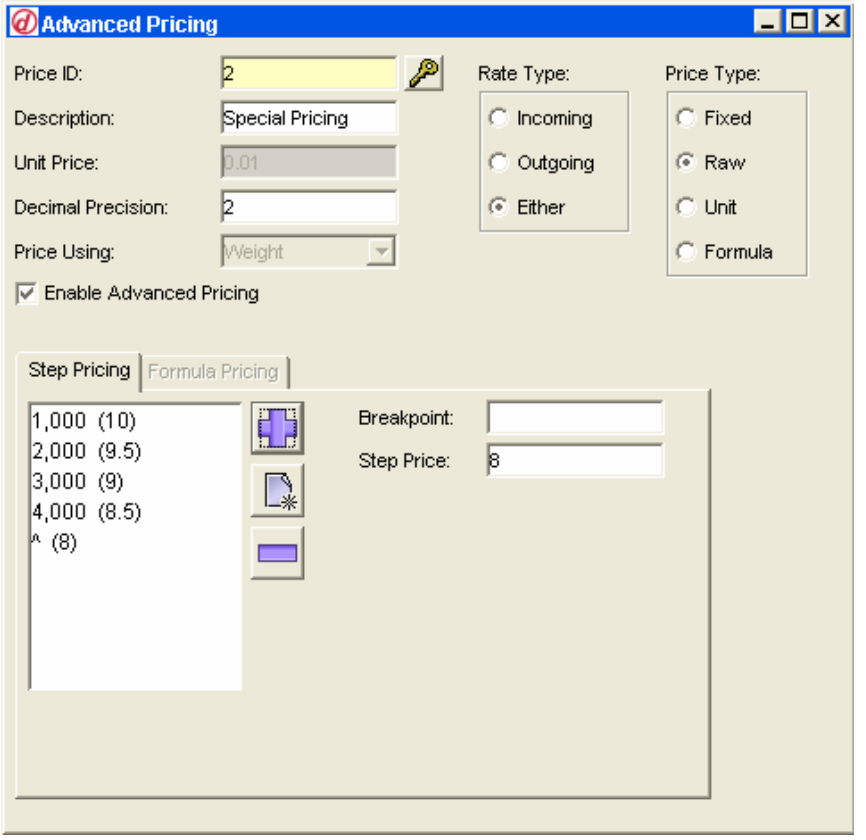


1. Enter a price in the **Unit Price** data field.
2. Select a unit of measure in the **Unit Price UOM** combo box. This unit indicates how the price will be applied: per weight unit, per volume unit, per piece, or per load.
3. The **Price Formula** data field will show the basic price formula for the product (for example, Pounds * Pr).

You can also specify basic pricing for a contract, using the **Contract Product** table. If you create a contract for a product, the price specified in the product record cannot be used unless the **Standard Gate Rate** box is checked. See the description of the standard gate rate in the **Product** table section of Chapter 4.

Advanced Pricing

The **Advanced Pricing** form lets you set up complex pricing structures. For example, you can set up a structure that charges lower rates when larger amounts of a product are purchased. You can access this form by clicking the **Advanced Pricing** button on the **Product** form, **Account** form, **Vehicle** form, or **Contract Product** form. Depending on which table you use, you can define an advanced pricing structure for an individual product, account, vehicle, or contract product.



Data Fields

Price ID: The identifier for the advanced pricing structure.

Description: A description of the advanced pricing structure.

Unit Price: Price per unit of product. If you reached **Advanced Pricing** from the **Product** or **Contract Product** table, the unit price will be read from the **Product** or **Contract Product** record. If you reached **Advanced Pricing** from the **Account** or **Vehicle** table, the unit price will be listed as zero.

Decimal Precision: Enter the number of decimal places to which the price should be calculated. For example, 0 = X, 1 = X.X, 2 = X.XX.

Price Using: Use the combo box to select the type of unit that will be used for pricing. Pricing structures can be set up according to weight or distance.

Enable Advanced Pricing: Check this box to enable the advanced pricing structure. If the box is checked, the advanced pricing structure will override the basic pricing for the product.

Rate Type: Use the radio buttons to select the operation for which the pricing structure will be in effect:

Incoming (shipments entering the facility)

Outgoing (shipments exiting the facility)

Either (both incoming and outgoing shipments)

Price Type: Use the radio buttons to select the type of pricing structure you want to set up:

Fixed pricing sets a price per load. It can be used when you process transactions for loads of standard sizes. For example, you could set a fixed price for a standard-sized load based on delivery distance: $500 for a load delivered up to 100 miles and $550 for a load delivered from 100 to 200 miles.

Raw pricing sets a different price per unit for portions of a load. For example, suppose you set a price of $10 per pound for loads up to 1,000 pounds and $9 per pound for loads up to 2,000 pounds. With raw pricing, a 2,000-pound load would be priced at $10 per pound for the first 1,000 pounds and $9 per pound for the second 1,000 pounds.

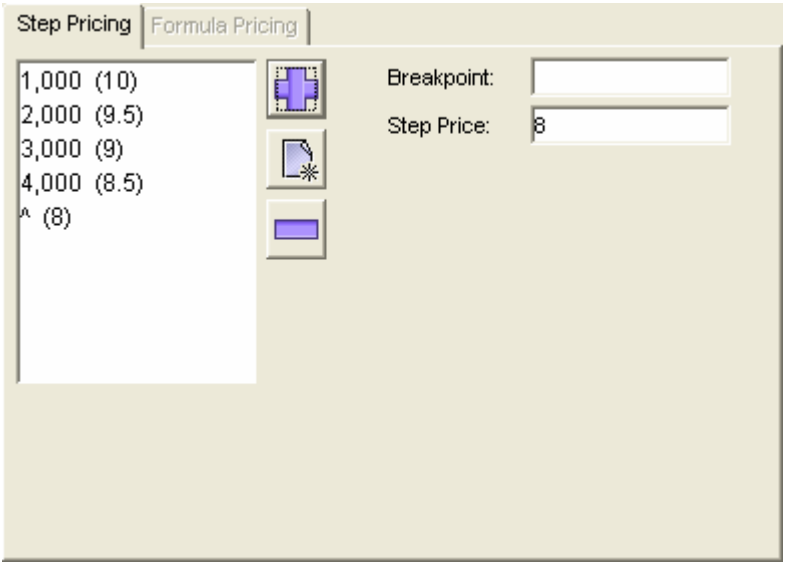
Unit pricing sets a single price per unit for the entire load. For example, suppose you set a price of $10 per pound for loads up to 1,000 pounds and $9 per pound for loads up to 2,000 pounds.

With unit pricing, a 2,000-pound load would be priced at $9 per pound for the entire load.

Formula pricing lets you define a formula that will be used to calculate the price for each transaction. The simplest pricing formula is one that multiplies the price of a product by the net weight.

Step Pricing

Use the **Step Pricing** tab to create a fixed, raw, or unit pricing structure. It allows you to set a different price per unit for different ranges of weight (or distance). For each step in the pricing structure, you will need to specify a breakpoint and a step price. A breakpoint is the maximum weight (or distance) for which the step price will be used. A step price is the price per unit for the step. A step is the range from the breakpoint to the next lower breakpoint (or to zero if there is no lower breakpoint).



The sample step pricing structure shown above lists the price per pound for loads up to 1,000, 2,000, 3,000, and 4,000 pounds, plus a step for loads greater than 4,000 pounds. To enter a greater than symbol, leave the **Breakpoint** field blank.

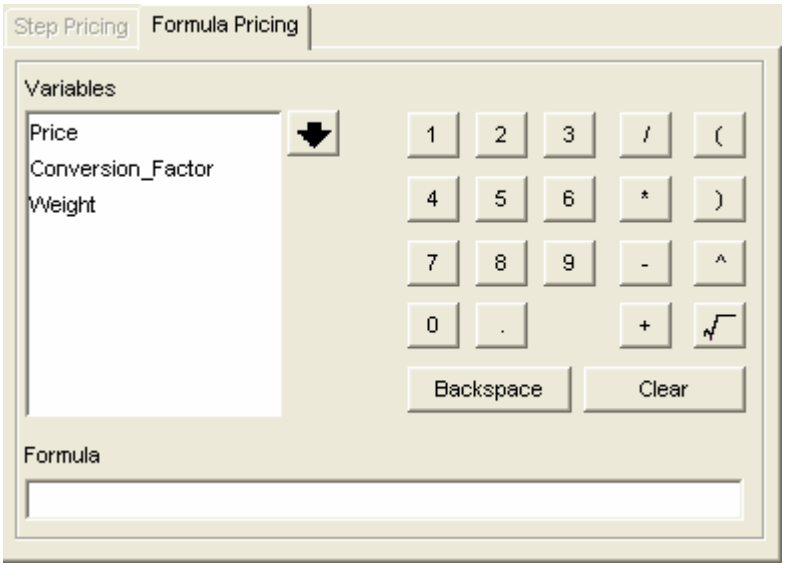
1. In the **Breakpoint** data field, enter the maximum weight (or distance) for the first step.
2. In the **Step Price** data field, enter the price per unit for the first step.

3. Click the **Add** button to add the step to the list box.
4. Click the **New** button to clear the **Breakpoint** and **Step Price** fields. Then repeat Steps 1 to 3 for each additional step in the structure. Save the pricing structure when it is completed.

To delete a step, highlight it in the list box and then click the **Remove** button.

Formula Pricing

Use the **Formula Pricing** tab to create a pricing formula. The formula will appear in the **Formula** data field as you create it.



Variables: Variables are numbers that can change from transaction to transaction. The list box contains the variables that can be used in pricing formulas: Price, Conversion Factor, Contracted Price, and Vehicle Volume. To insert a variable in a formula, highlight the variable in the list box and then click the down arrow button. The variable will appear at the end of the formula in the **Formula** data field.

Numerals: Use the numeric buttons (0 to 9) and the decimal button to insert numbers in a formula. When you click a numeric button, the number will be added to the end of the formula.

Symbols: Use the symbol buttons to insert mathematical elements in a formula. When you click a button,

the symbol will be added to the end of the formula.

/ = division

* = multiplication

- = subtraction

+ = addition

(= left parenthesis

) = right parenthesis

^ = exponent (x^2 = x squared)

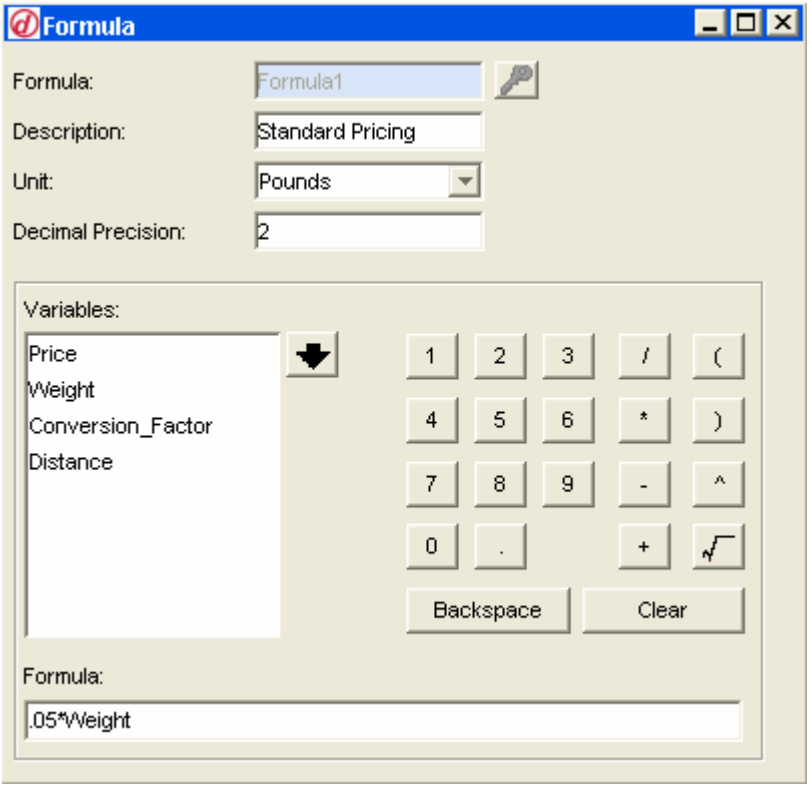
√ = square root (x√2 = square root of x)

Backspace: Click the **Backspace** button to delete the last character in the **Formula** data field.

Clear: Click the **Clear** button to delete the entire formula.

Formula Table

The **Formula** table in the **Data Setup** folder is used to create pricing formulas that are not linked to a specific product or other database record. Each pricing formula that you create in this table will appear in the **Formula** combo box on the **Transaction** screen. If you select a formula from the combo box during a transaction, it will override any basic pricing or advanced pricing structures. To create a formula record, assign a Formula ID and enter data in the other fields. Then use the buttons to create a pricing formula in the **Formula** data field.



Data Fields

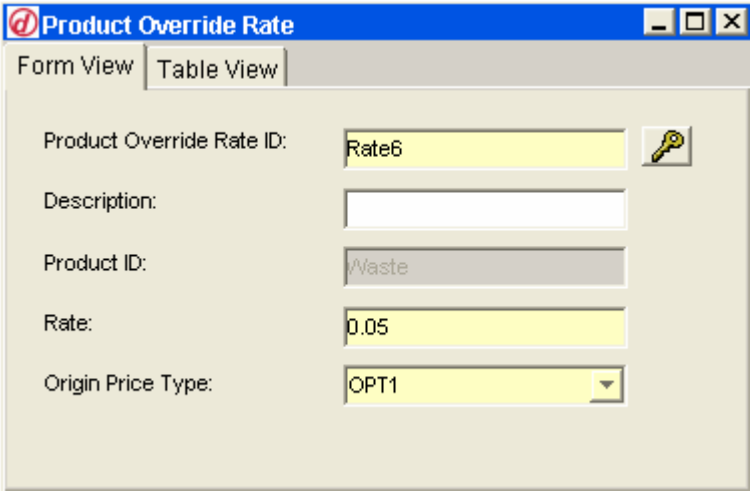
Formula ID: The identifier for the pricing formula.

Description: A description of the pricing formula.

Unit:	Use the combo box to select a weight unit or volume unit.
Decimal Precision:	Enter the number of decimal places to which the price should be calculated. For example, 0 = X, 1 = X.X, 2 = X.XX.
Variables:	Variables are numbers that can change from transaction to transaction. The list box contains the variables that can be used in pricing formulas: Price, Weight, Conversion Factor, and Distance. To insert a variable in a formula, highlight the variable in the list box and then click the down arrow button. The variable will appear at the end of the formula in the **Formula** data field.
Numerals:	Use the numeric buttons (0 to 9) and the decimal button to insert numbers in a formula. When you click a numeric button, the number will be added to the end of the formula.
Symbols:	Use the symbol buttons to insert mathematical elements in a formula. When you click a button, the symbol will be added to the end of the formula. / = division * = multiplication - = subtraction + = addition (= left parenthesis) = right parenthesis ^ = exponent (x^2 = x squared) √ = square root (x√2 = square root of x)
Backspace:	Click the **Backspace** button to delete the last character in the **Formula** data field.
Clear:	Click the **Clear** button to delete the entire formula.

Override Rates

Override rates are used to create pricing or tax rates based on the origin of a product. You can open the **Override Rate** form by clicking the **Override Rate** button on the **Product**, **Contract Product**, or **Tax** form.



Data Fields

Product Override Rate ID: The identifier for the override rate.

Description: A description of the override rate.

Product ID: The product for which the rate is used.

Rate: The amount charged per unit. The product override rate will override the unit price specified in the product record. The contract product override rate will override the unit price specified in the contract product record. The tax override rate will override the unit price specified in the tax record.

Origin Price Type: Select from a list of origin price types.

On the **Contract Product Override Rate** form, there is an additional data field for the Contract ID. On the **Tax Override Rate** form, the Product ID data field is replaced by a Tax ID data field.

Using Override Rates

Before you can use an override rate, you must create records in the **Origin** table and **Origin Price Type** table. For example, you can create two origin price types, one for shipments of waste that originate within the state where your facility is located and one for shipments that originate outside the state. Then you can create an origin record for each state from which shipments will originate. When you create an override rate record, link it to the appropriate origin price type.

To use an override rate, select an origin when you process a transaction. If an override rate and an origin price type exist for the origin, the system will use the override price or tax rate instead of the basic rate.

- A product override rate will override basic product pricing. It will not override advanced product pricing or pricing formulas created with the **Formula** table.
- A contract product override rate will override basic contract product pricing. It will not override advanced contract product pricing or formulas created with the **Formula** table.
- A tax override rate will override a basic tax rate.

8 Application Setup Options

Options Screen

The **Options** screen in the **Application Setup** folder contains tabs that are used to set system defaults. When you change any settings on these tabs, you must restart the program for the changes to take effect. The following buttons are available at the bottom of each tab (except the **Load Numbers / Key Table** tab, which uses only the **OK**, **Cancel**, and **Apply** buttons).

OK

Accepts all changes made to the default settings and closes the **Options** screen. You must restart the program for the changes to take effect.

Cancel

Cancels all changes made to the default settings.

Apply

Applies all changes made to the default settings. You will be able to view the changes, but they will not take effect unless you click the **OK** button.

Set Tab Check Boxes

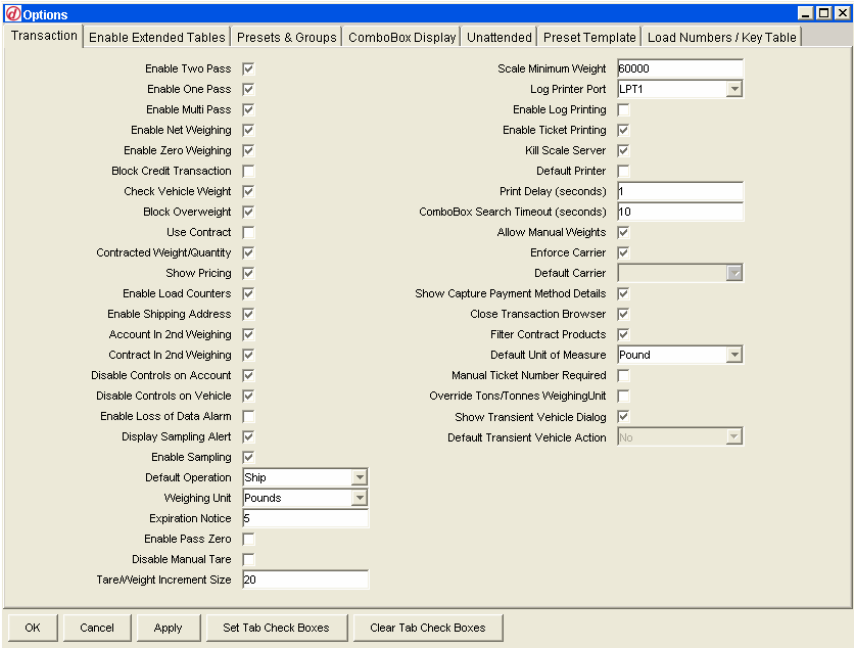
Enters check marks in all boxes on the tab that is currently shown.

Clear Tab Check Boxes

Clears check marks from all boxes on the tab that is currently shown.

Transaction

The **Transaction** tab is used to set defaults that change the way the system functions. When you change settings, you must restart the program for the changes to take effect.



Enable Two Pass

Check this box to enable the system to process two-pass transactions. Two-pass weighing is weighing a vehicle once when it is empty and once when it is loaded to determine the net weight of a product.

Enable One Pass

Check this box to enable the system to process one-pass transactions. One-pass weighing is weighing a loaded vehicle and then entering a tare or using a stored tare to determine the net weight of a product.

Enable Multi Pass

Check this box to enable the system to process multi-pass transactions. Multi-pass weighing is weighing a vehicle with several compartments after each compartment is loaded or unloaded to determine the net weight of the product in each compartment.

Enable Net Weighing

Check this box to enable the system to process net-weighing transactions. Net weighing is weighing an object once (without a tare) to determine its net weight.

Enable Zero Weighing

Check this box to enable the system to process zero-weighing transactions. Zero weighing is a type of transaction that is processed without recording a weight. It is typically used to control access to a facility.

Block Credit Transaction

Check this box to prevent the system from processing a transaction for an account that does not have enough credit to pay for the transaction. The transaction will be blocked when the actual credit exceeds the maximum credit in the **Account** table record.

Check Vehicle Weight

Check this box to enable the system to check the maximum and minimum vehicle weights stored in the **Vehicle** table. If the vehicle being weighed is over or under weight, a message will appear on the computer screen to alert the operator.

Block Overweight

Check this box to prevent the system from processing a transaction when the vehicle is over weight. The maximum vehicle weight is stored in the **Vehicle** table.

Use Contract

Check this box to require a contract to be used for every transaction. If this feature is enabled, the system will not complete a transaction unless a Contract ID is selected.

Contracted Weight/Quantity

Check this box to enable the system to verify that the load is within the size range specified by the contract. A message will appear on the computer screen to alert the operator if the net weight for the transaction does not match the range specified by the **Minimum Order** and **Maximum Order** data fields in the **Contract Product** table.

Show Pricing

Check this box to enable the system to show price data on the **Transaction** screen.

Enable Load Counters

Check this box to enable the system to track the number of transactions processed for each company to which you have assigned a load number. Load numbers are assigned in the **Company** table, and the load counter (number of transactions) is shown on the **Load Numbers** window.

Enable Shipping Address

Check this box to enable the use of shipping addresses for accounts. The addresses are stored in the **Shipping Address** table, which can be opened from the **Account** table.

Account in 2nd Weighing

By default, the Account ID for a two-pass or multi-pass transaction must be entered when the vehicle makes its first pass over the scale. Check this box to allow the Account ID to be entered during the second pass.

Contract in 2nd Weighing

By default, if a Contract ID is required for a two-pass or multi-pass transaction, it must be entered when the vehicle makes its first pass over the scale. Check this box to allow the Contract ID to be entered during the second pass.

Disable Controls on Account

Check this box to disable database validation for the Account ID. This allows you to enter account data manually during a transaction. You must check this box to be able to process transactions for transient accounts.

Disable Controls on Vehicle

Check this box to disable database validation for the Vehicle ID. This allows you to enter vehicle data manually during a transaction. You must check this box to be able to process transactions for transient vehicles.

Enable Loss of Data Alarm

Check this box to enable the alarm that signals a loss of data from the scale terminal.

Display Sampling Alert

Check this box to enable the system to display a message that alerts the operator when a product sample is required.

Enable Sampling

This check box provides a global command for enabling/disabling all active product sampling schedules. Individual sampling schedules are set up and enabled from the **Sampling Setup** screen. To enable a sampling schedule, you must check the **Enable Sampling** box on this screen and check the **Enable Sampling** box for the individual sampling record on the **Sampling Setup** screen.

Default Operation

Use the combo box to select a default operation: **Ship**, **Receive**, or **Either**. If you select **Either**, you will be able to set the operation manually for each transaction.

Weighing Unit

Use the combo box to select the unit of measure that will be used for weighing: Pounds, Kilograms, Metric Tons, or Tons. This must match the weighing unit of the scale terminal.

Expiration Notice

If you want the system to alert you a certain number of days before a permit is due to expire, enter the number of days in this data field. On the day specified, the system will automatically print a ticket warning that the permit will expire in X days.

Enable Pass Zero

Check this box to require the scale to return to zero before the next vehicle can be weighed. If the box is not checked, the scale will be required to return to the weight entered in the **Scale Minimum Weight** data field.

Disable Manual Tare

Check this box to prevent the operator from entering a tare weight manually. If the box is checked, tare weights must be read from a scale.

Tare/Weight Increment Size

Enter the increment size for all weights that are entered manually. The number that you enter will correspond to the unit selected in the **Weighing Unit** field on this tab. For example, if you enter 20 and the weighing unit is pounds, then all weights that are entered manually must be in increments of 20 pounds (20, 40, 60, etc.). You must enter an increment size to be able to enter weights manually.

Scale Minimum Weight

Enter a minimum weight. If the **Enable Pass Zero** box is not checked, the weight on the scale will need to go below this minimum weight before the next vehicle can be weighed. This setting is used only in attended weighing mode when no hardware connection has been configured on the **Hardware Setup** screen.

Log Printer Port

Use the combo box to select the parallel port that you want to use for log printing (if applicable).

Enable Log Printing

Check this box to enable log printing. When log printing is enabled, the weight captured by the scale will be sent to the printer connected to the log printer port every time the **Accept** or **Complete** button is clicked.

Enable Ticket Printing

Check this box to enable the system to print tickets. In order to print tickets, you must also select a **Ticket In** and/or **Ticket Out** format in the **Account** table.

Kill Scale Server

Check this box to shut down the scale server (MT-Connections) every time you close the OverDrive program.

Default Printer

Check this box to use the Windows default printer for printing reports or tickets when a destination is not assigned. If the box is not checked, the print preview will be used when a destination is not assigned.

Print Delay (seconds)

Enter the length of time (in seconds) that the program will pause between print requests when more than one copy of a report or ticket is being printed.

Combo Box Search Timeout (seconds)

Enter the length of time (in seconds) that must elapse between keystrokes for the program to start a new search. This option affects searches in the combo boxes on the **Transaction** screen. For example, suppose you type the letters "ve" to search for a record in the **Vehicle** combo box. If the time between keystrokes is less than the time-out, the program will search for records beginning with the letters "ve". If the time between keystrokes is greater than the time-out, the program will search for records beginning with "v" and then start a new search for records beginning with the letter "e".

Allow Manual Weights

Check this box to enable the operator to enter weights manually. If the box is not checked, all weights must be read from a scale.

Enforce Carrier

Check this box to require a carrier to be selected for every transaction. You will also need to assign a carrier every time you create a record in the **Vehicle** table.

Default Carrier

This combo box allows you to select a default carrier that will be used for all transactions. To activate the combo box, remove the check mark from the **Enforce Carrier** box on this tab. You must create a default carrier record in the **Carrier** table before you can select it here. This option is designed for operations that use only one carrier or do not use carriers.

Show Capture Payment Method Details

Check this box to prompt the operator to enter payment information for a transaction. It causes the **Payment Method Details** window to open at the completion of transactions for which one of the following payment methods is selected: Check, Credit Card, and Debit Card.

Close Transaction Browser

Check this box if you want the transaction browser to close automatically each time you select an open transaction from the browser.

Filter Contract Products

Check this box to enable the system to filter contract products. When you select a contract for a transaction, the filter will limit the list of available products to those linked to the contract. If the box is not checked, all products will be listed as available.

Default Unit of Measure

Use the combo box to select a default unit of measure. When you create a new record in the product table, this unit will be selected automatically for pricing and stock level. The default can be overridden manually.

Manual Ticket Number Required

Check this box to require the operator to enter a number in the **Manual Ticket No.** data field when a weight is entered manually during a transaction.

Override Tons/Tonnes Weighing Unit

Check this box to enable the system to use "T" for metric tonnes. When the box is not checked, "T" is used for tons.

Show Transient Vehicle Dialog

Check this box to display a dialog box when the operator enters a transient vehicle during a transaction. A transient vehicle is a vehicle for which there is no database record in the **Vehicle** table. The dialog box prompts the operator to do one of the following: create a database record for the transient vehicle and continue with the transaction, continue with the transaction without creating a record, or cancel the transaction.

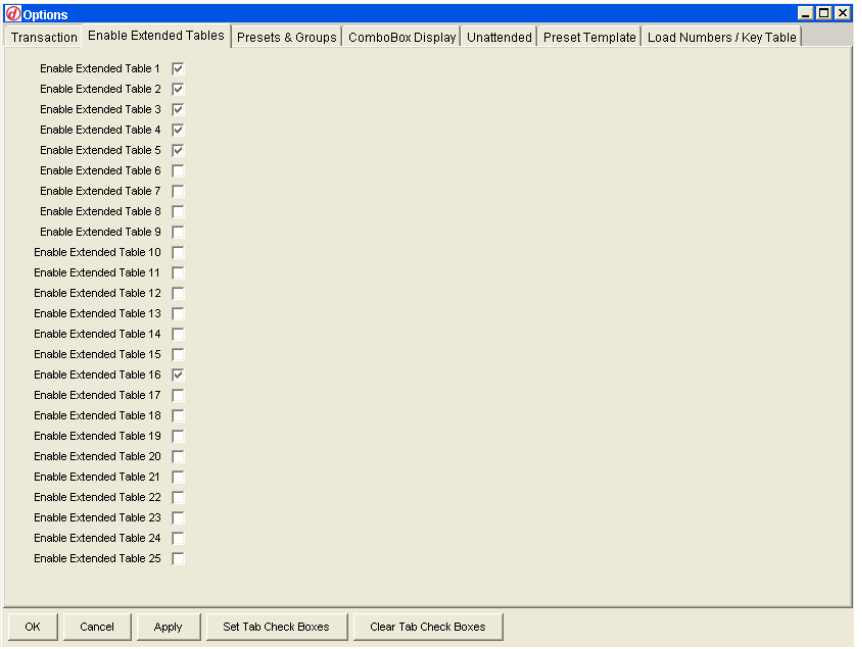
Default Transient Vehicle Action

This combo box is activated when the **Show Transient Vehicle Dialog** box is not checked. If you select "Yes" in the combo box, then the **Vehicle** table will open during a transaction involving a transient vehicle to allow the operator to create a record for the vehicle. If you select "No", then the **Vehicle** table will not open automatically.

Enable Extended Tables

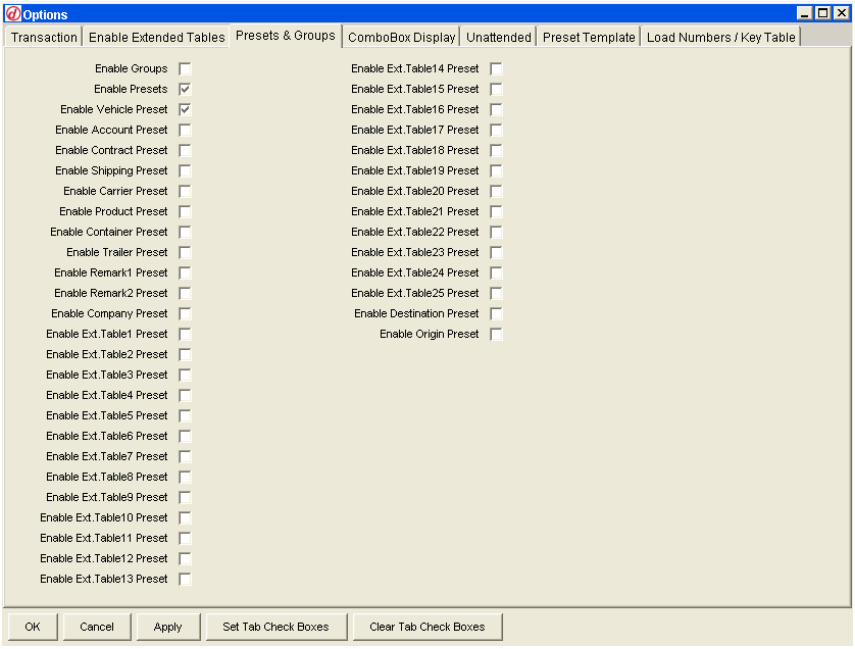
The program provides 25 extended tables, which can be used to store information not found in the standard database tables. With the extended tables, you can customize a system by creating tables for information specific to your operation. To use an extended table, you must enable it by checking the box for it on the **Enable Extended Tables** tab.

NOTE: You will need to use the GUI Editor to make an extended table's data field and label visible and to position them on the **Transaction** screen.



Presets and Groups

The **Presets & Groups** tab lets you enable or disable groups and presets. It gives you a convenient way to temporarily disable presets without having to delete them and then recreate them from scratch when you want to use them again. Place a check mark in the box next to each item that you want to enable. The system will not use any groups or presets that you create unless they are enabled on this tab.



Enable Groups

Check this box to enable the system to use any groups and group presets that you have created. Groups are created and stored in the **Groups** table.

NOTE: Be careful when creating both presets and group presets for a database record. If both types of presets are enabled, the presets will override the group presets when you process a transaction.

Enable Presets

Check this box to enable the system to use the presets function.

NOTE: In order to use presets, you must check both this box and the box that enables presets for an individual table. The purpose of this box is to allow you to enable/disable all presets with a single check box. If you enable presets for individual tables and you want to temporarily disable them, remove the check mark from this box. When you want to enable the presets again, simply check this box.

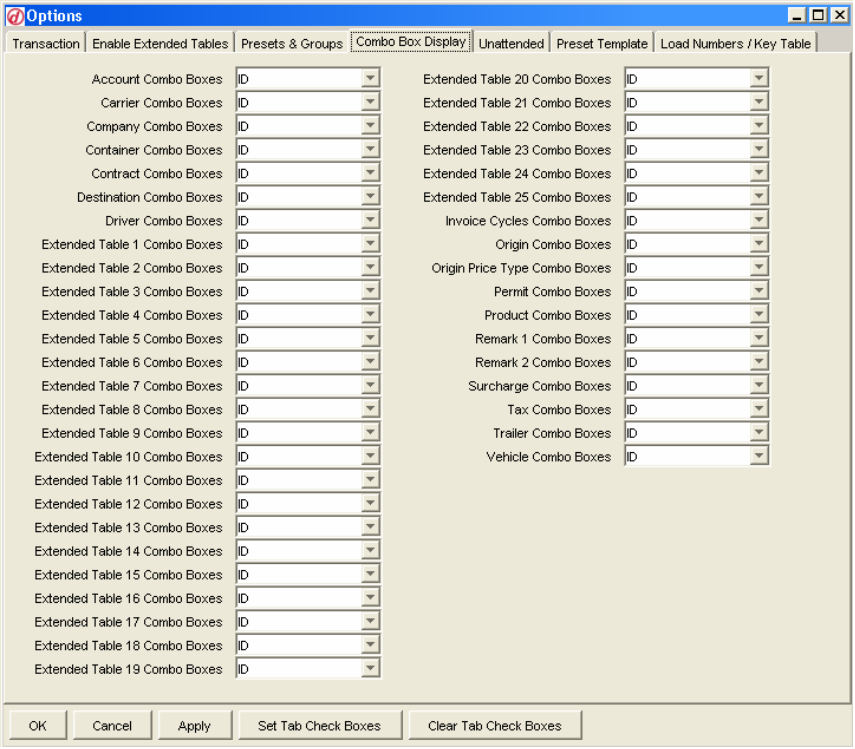
Enable Presets for Individual Tables

To create a preset, you must use an individual database record (such as a vehicle record) as the basis or starting point for the preset. Use the check boxes on this tab to enable or disable presets. For example, checking the **Enable Vehicle Preset** box enables all presets for which a **Vehicle** table record is the basis.

NOTE: In order to use presets, you must also check the **Enable Presets** box.

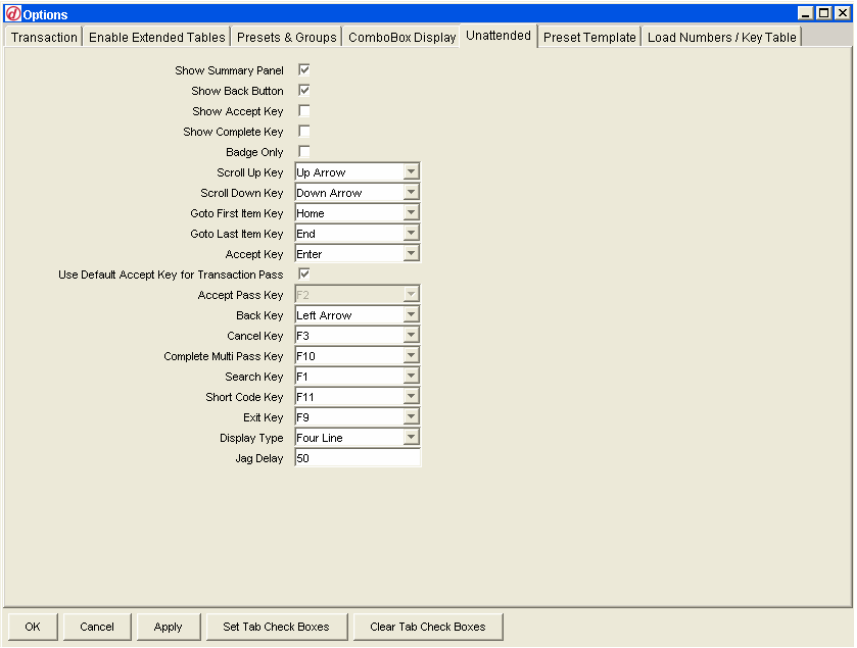
Combo Box Display

The **Combo Box Display** tab controls the format of the listings that are displayed in the combo boxes on the **Transaction** screen. Each of those listings represents a database record, and each database record has a unique ID assigned to it. You can list records by their IDs or by descriptions entered in the **Data Setup** tables. Select one of the following formats for the listings: **ID**, **Description**, or **Both** (ID and description).



Unattended

The **Unattended** tab lets you assign keys on a computer keyboard for processing unattended weighing transactions with a four-line display. The unattended functions are listed on the tab, with a combo box next to each one. To assign a keyboard command to a function, select the desired computer key from the combo box next to the function. For the unattended options that are enabled with check boxes, refer to the following descriptions to find out which displays they affect.



Show Summary Panel

Check this box to enable a summary panel on the unattended transaction screen. When an unattended transaction is being processed, this panel will display the total weight and pricing data for the transaction (touch screen and four-line display).

Show Back Button

Check this box to enable the **Back** button on the unattended transaction screen. This button allows the driver processing the transaction to go back to the previous step in the transaction. If the box is not checked, the button will appear on the screen but will be inactive (touch screen only).

Show Accept Key

Check this box to enable the **Accept** key on the unattended transaction screen. This key allows the driver to accept a weight for all but the final pass of a transaction (four-line display only).

Show Complete Key

Check this box to enable the **Complete** key on the unattended transaction screen. This key allows the driver to accept a weight for the final pass of a transaction (four-line display only).

Badge Only

Check this box to require drivers to use a badge to start an unattended transaction (touch screen and four-line display).

Scroll Up Key

This key is used to scroll up through a list of selections (four-line display only).

Scroll Down Key

This key is used to scroll down through a list of selections (four-line display only).

Go to First Item Key

This key is used to go to the first item in a list of selections (four-line display only).

Go to Last Item Key

This key is used to go to the last item in a list of selections (four-line display only).

Accept Key

This key is used to accept data displayed on an unattended screen. When the system prompts you to select an item (such as a Vehicle ID), display the item on the screen and then use this key to accept it. You will also use this key to complete a one-pass transaction, complete both passes of a two-pass transaction, and complete all but the final pass of a multi-pass transaction.

Use Default Accept Key for Transaction Pass

This check box gives you the option of using the **Accept** key to complete a pass over the scale or assigning an **Accept Pass** key to perform that function. If you check the box, then the **Accept** key will be used. If you do not check the box, then the **Accept Pass** key will be enabled. This feature allows you to use the **Accept** key only to accept data (such as a Vehicle ID) and to use the **Accept Pass** key to complete a pass over the scale. If the **Accept Pass** key is not enabled, then the **Accept** key will be used for both functions. Assigning an **Accept Pass** key will prevent a driver from unintentionally completing a pass by holding down the **Accept** key when accepting data.

Accept Pass Key

This combo box is activated when the **Use Default Accept Key for Transaction Pass** box is not checked. It is used to assign a key for completing any pass over a scale except the final pass of a multi-pass transaction.

Back Key

This key is used to go back to the previous step in an unattended transaction.

Cancel Key

This key is used to cancel an unattended transaction.

Complete Multi Pass Key

This key is used to complete the final pass of a multi-pass transaction.

Search Key

This key is used to search for a data record during an unattended transaction. For example, if the system displays a long list of available products, you can search for the desired product by typing the Product ID or the first character(s) of the ID and then pressing the search key (touch screen and four-line display).

Short Code Key

This key is used to enter a short code. Type the short code, and then press the short code key to enter it (touch screen and four-line display).

Exit Key

This key is used to cancel an unattended transaction and allow the vehicle to exit the scale. It affects the transaction displayed on the unattended weighing station (four-line display only), plus any lights and gates controlled by the program.

Display Type

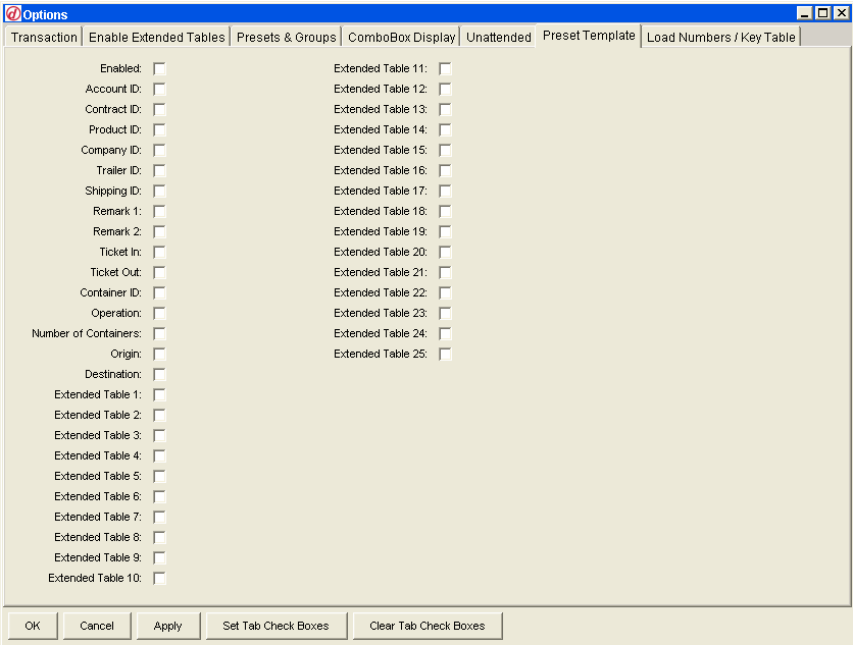
Use the combo box to select the type of display (four-line display only) that will be used to process unattended transactions.

Jag Delay

Enter the maximum number of times (default is 50) that the system will try to send a command to the JAGXTREME terminal. This option is used to compensate for the communication speeds of different systems. The terminal will not accept a new command until it has finished processing the previous command. A slow system might cycle through all 50 attempts before the terminal is ready to accept a new command. To solve the problem, you can increase the number of communication attempts by entering a larger number in the **Jag Delay** data field (touch screen and four-line display).

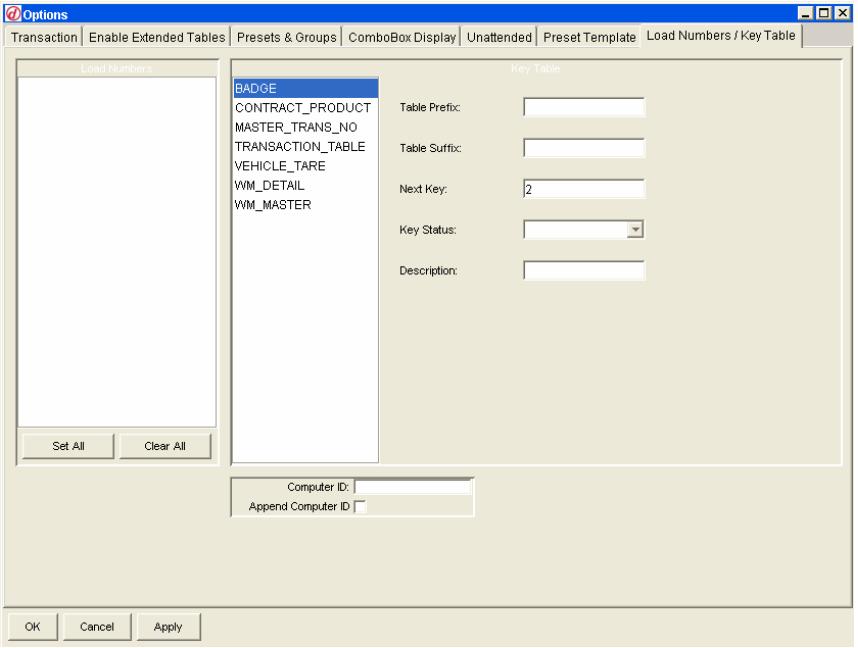
Preset Template

The **Preset Template** tab lets you enable the system to create vehicle presets automatically. To enable this function, check the **Enabled** box on the tab. Then check the boxes for the data fields to be included in the presets. When you process a transaction for a vehicle that does not have presets, the program will use the data selected for the transaction to create a preset automatically. This function will not create a preset if a preset already exists for the vehicle.



Load Numbers and Key Table

The **Load Numbers / Key Table** tab is used to reset the load number counter and to customize the system-generated keys that are assigned as transaction numbers and as IDs for database records.



Load Numbers

This list box displays all load numbers that are currently enabled. A load number is assigned to an individual company and stored in the **Company** table record. The load counter tracks the number of transactions processed for each load number. You can use this tab to reset the load counters to zero.

1. Select (highlight) the load numbers that you want to reset:
   - Click an individual load number to select it.
   - Click the **Set All** button to select all load numbers in the list box.
   - Click the **Clear All** button to deselect the load numbers so that they will not be reset.

2. Then click the **OK** button to reset the load counters that are selected to zero.

Key Table

The **Key Table** lets you customize the formats of system-generated keys. A key is a number assigned to each transaction or an ID assigned to each database record. Transaction numbers are generated by the system, but IDs for database records can be entered manually or generated by the system. When the system generates a key, it uses a simple numbering scheme (1, 2, 3…). You can customize the key by adding an alphanumeric prefix or suffix to the number.

All of the tables that use keys are displayed in the list box. When you highlight a table in the list box, the formatting for the key will be shown in the data fields to the right of the box. Edit the information in the data fields to customize the formatting. Each table is numbered and formatted independently.

Table Prefix

Enter up to three alphanumeric characters to be used as a prefix for the key. For example, if you enter TRX as a prefix, the system-generated keys will be TRX1, TRX2, TRX3, etc. You can include both a prefix and suffix in a key format.

Table Suffix

Enter up to three alphanumeric characters to be used as a suffix for the key. For example, if you enter SSC as a suffix, the system-generated keys will be 1SSC, 2SSC, 3SSC, etc. You can include both a prefix and suffix in a key format.

Next Key

This data field shows the number that will be assigned as a key for the next transaction or database record.

Key Status

Select one of the options in the combo box: **Supported** or **Unsupported**. This will determine what happens when you try to save a new database record without assigning an ID for it. If **Supported** is selected, the system will automatically generate a key for the record. If **Unsupported** is selected, the system will prompt the operator to enter a key.

Description

Enter a description for the key format.

Computer ID

If the system is running on more than one computer, you can use the same set of keys for all computers or generate keys independently on each computer. To set up a computer

independently, assign a Computer ID for it and enter the ID in this data field.

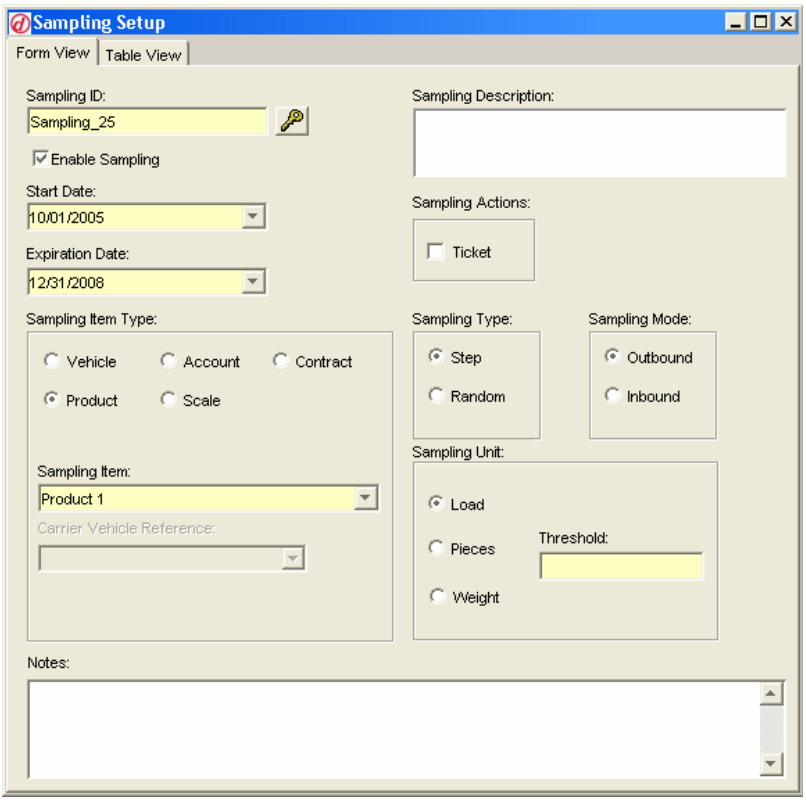
Append Computer ID

Check this box to include the Computer ID at the beginning of the system-generated key.

9 Sampling

Sampling Setup

Sampling is used to monitor product quality. With the OverDrive program, you can set up sampling schedules, receive a prompt when a sample is required, and record sampling results. To create a sampling schedule, open the **Sampling Setup** screen in the **Sampling Setup** folder. Use the same procedure that you would use to create a record in a data setup table. When you create a sampling setup record, you are defining when a product sample should be taken. Based on the settings that you select, the system will prompt the operator when it is time to sample a product.



Data Fields

Sampling ID: The identifier for the sampling setup record.

Enable Sampling: Check this box to enable the sampling setup record. If a record is enabled, the system will prompt the operator when sampling is required.

Start Date: Use the calendar in the **Start Date** combo box to select a date for the sampling schedule to take effect. If no start date is selected, the sampling schedule will take effect immediately.

Expiration Date: Use the calendar in the **Expiration Date** combo box to select an ending date for the sampling schedule. The system will alert the operator when the time period expires. If no expiration date is selected, the sampling schedule will not expire.

Sampling Item Type: Use the radio buttons to select the item type for the sampling setup record. When you select an item type (for example, **Account**), all records from that table will be listed in the **Sampling Item** combo box. To create a sampling record, specify an interval at which sampling is required (for example, every 50 loads) and an item to which the interval applies (for example, an Account ID). The system will then require a product sample for every 50th load processed for the account that is selected as the sampling item.

Sampling Item: Use the combo box to select a sampling item (for example, an Account ID).

Carrier Vehicle Reference: This data field is active only when **Vehicle** is selected as the sampling item type. If a vehicle is selected as the sampling item, the carrier linked to the vehicle will be shown in this data field. If a carrier is selected in this data field, only the vehicles linked to that carrier will be available in the **Sampling Item** combo box.

Sampling Description: A description of the sampling schedule.

Sampling Actions: Check the **Ticket** box to print a ticket containing the sampling data when the transaction is completed.

Sampling Type: Select the **Step** radio button if a sample is to be taken at the end of a specified interval. For

example, if the interval is 200 loads, the sample will be taken when you process the 200th load.

Select the **Random** radio button if a sample is to be taken at a randomly chosen point within a specified interval. For example, if the interval is 200 loads, the sample will be taken during a transaction randomly chosen from among the 200 loads.

Sampling Mode: Use the radio buttons to indicate whether the sample will be taken from an **Outbound** vehicle (ship) or an **Inbound** vehicle (receive). Outbound sampling is based on net weight; inbound sampling is based on gross weight. Inbound sampling is active only for the following sampling item types: Product and Scale.

Sampling Unit: Define the interval at which sampling will be required. Use the radio buttons to select a unit (**Load**, **Pieces**, or **Weight**). Then enter a number in the **Threshold** data field to specify how many of the units are in an interval. For example, if you select **Load** and enter a threshold of 200, then sampling will be required at intervals of 200 loads.

Notes: Use this data field to enter additional information about the sampling record.

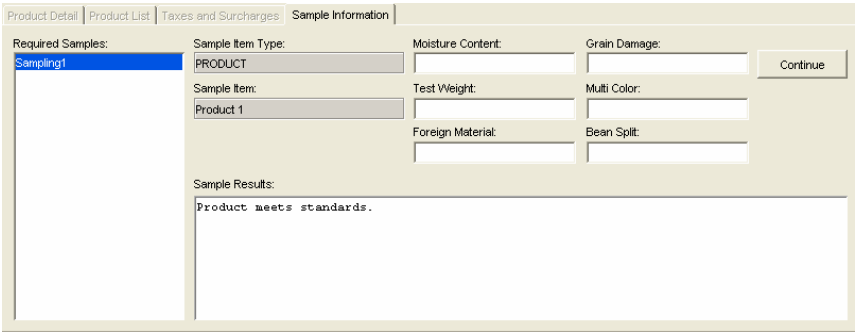
NOTE: To use a sampling setup record, you must enable it by checking the **Enable Sampling** box on this screen. You must also check the **Enable Sampling** box on the **Options** screen's **Transaction** tab.

Sampling

Once a sampling schedule has been created and enabled, the system will prompt you when a product sample is required. If a sample is required for a transaction, the prompt will appear when you click the **Accept** button (for inbound sampling) or the **Complete** button (for outbound sampling).

It is possible for more than one sample to be required during a transaction. That can happen if you set up sampling schedules based on different item types. For example, you could set up a schedule to sample a product at regular intervals and set up another schedule to sample shipments to a specific account at regular intervals.

1. When a sample is required, the system will alert the operator by displaying a message window. Acknowledge the message by clicking the **OK** button on the message window.
2. The **Sampling Information** tab will be displayed on the **Transaction** screen. The sample(s) that must be taken will be shown in the **Required Samples** list box.

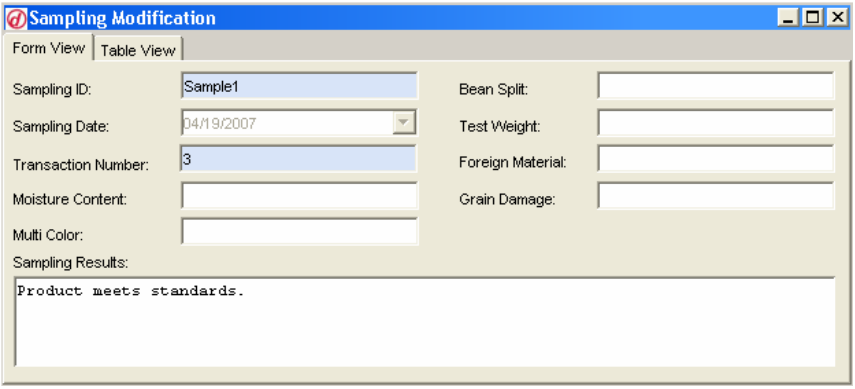


3. Highlight the first sample in the list box. The **Sample Item Type** data field will show the database table used to set up the sampling schedule, and the **Sample Item** data field will show the individual record from that table.
4. Test a sample of the product and enter the results in the **Sample Results** data field.
5. If more than one sample is required, highlight each additional sample in the **Required Samples** list box and enter the results.
6. When you have completed entering results for all required samples, click the **Continue** button to record the sampling information and continue with the transaction.

Sampling Modification

The **Sampling Modification** screen is used to view records of sampling results and make changes to them. To retrieve records, use the standard query procedure:

- To retrieve all sampling records, make sure all data fields are empty and then click the **Query** button.
- To retrieve specific sampling records, enter data as a filter and then click the **Query** button. The **Sampling ID**, **Sampling Date**, and **Transaction Number** data fields can be used as filters.
- If you retrieve more than one record, use the arrow buttons on the tool bar to scroll through the records.



Data Fields

Sampling ID: This data field shows the ID for the sampling setup record, which defines a sampling schedule. It cannot be modified. Sampling setup records are created with the **Sampling Setup** screen.

Sampling Date: This data field shows the date when the sample was taken. It cannot be modified. You can search for samples taken on a specific date by using the calendar in the combo box to select a date when you perform a query.

Transaction Number: This data field shows the transaction number for which the sample was required. It cannot be modified.

Sampling Results: This data field shows the results entered for a specific sample. It can be modified.

Additional data fields are provided for specific sampling results: moisture content, test weight, foreign material, grain damage, multi-color, and bean split.

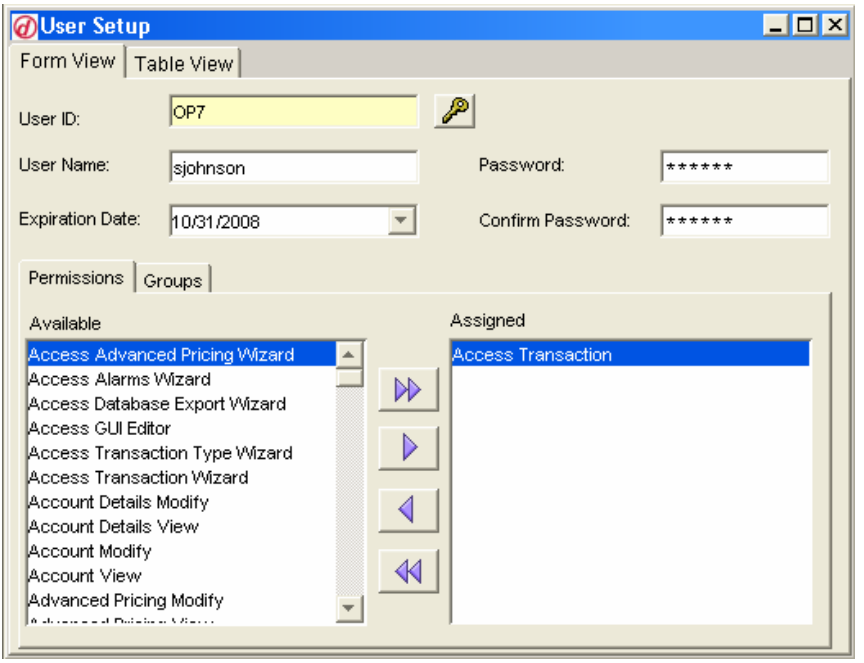
10 Setting Up Users

Security Setup

Each person who uses the OverDrive system will need to enter a user name and password to log in. To provide additional security, you can assign various levels of access for users. For example, one person can be set up as a system administrator with complete access to all system functions. Others can be set up as operators and given the limited access needed for the day-to-day job of processing transactions. There is a screen for setting up users and a screen for creating user groups.

User Setup

From the **User Setup** screen, you can set up users, assign passwords for them, and specify which functions they will be authorized to use. To open the **User Setup** screen, click on **User Setup** in the **Application Setup** folder. To set up a user, fill in the data fields, specify permissions and/or groups, and then click the **Save** button.



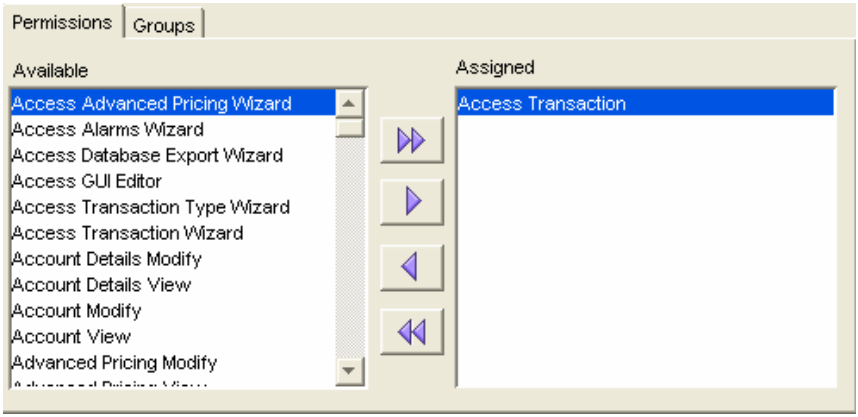
Data Fields

User ID:	Enter an ID for the user.
User Name:	Enter a name for the user. The user will need to enter this name exactly as it is spelled here when logging in to the system.
Expiration Date:	Use the calendar in the combo box if you want to select a date when the user's authorization to log in to the system will expire.
Password:	Enter the password that the user will need to enter when logging in to the system.
Confirm Password:	Enter the password that was typed in the **Password** data field.

NOTE: Passwords are case sensitive.

Permissions Tab

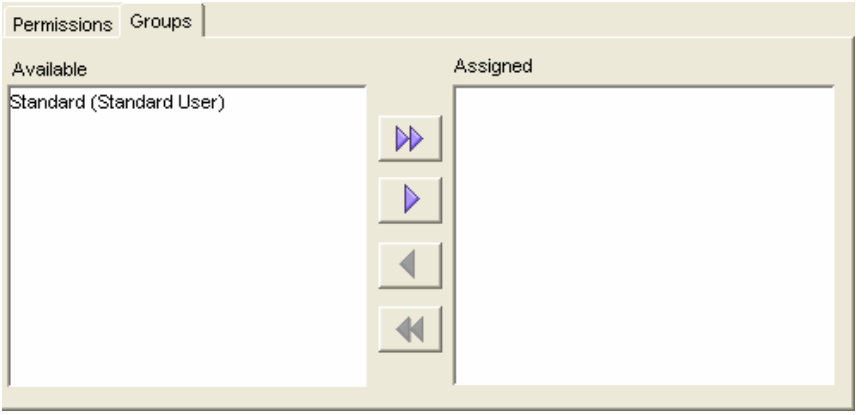
You can assign permission to individual system functions for a user. The **Available** list box contains all existing permissions that have not been assigned.



- To assign a permission to a user, highlight the permission in the **Available** list box and then click the right arrow button to move it to the **Assigned** list box.
- To remove a permission from the **Assigned** list box, highlight the permission in the list box and then click the left arrow button.
- The double arrow buttons are used to move all permissions from one list box to the other.

Groups Tab

You can assign a user to one or more groups for which access to system functions has been predefined. The **Available** list box contains all existing user's groups (user's groups are created on the **Group Setup** screen) that have not been assigned.

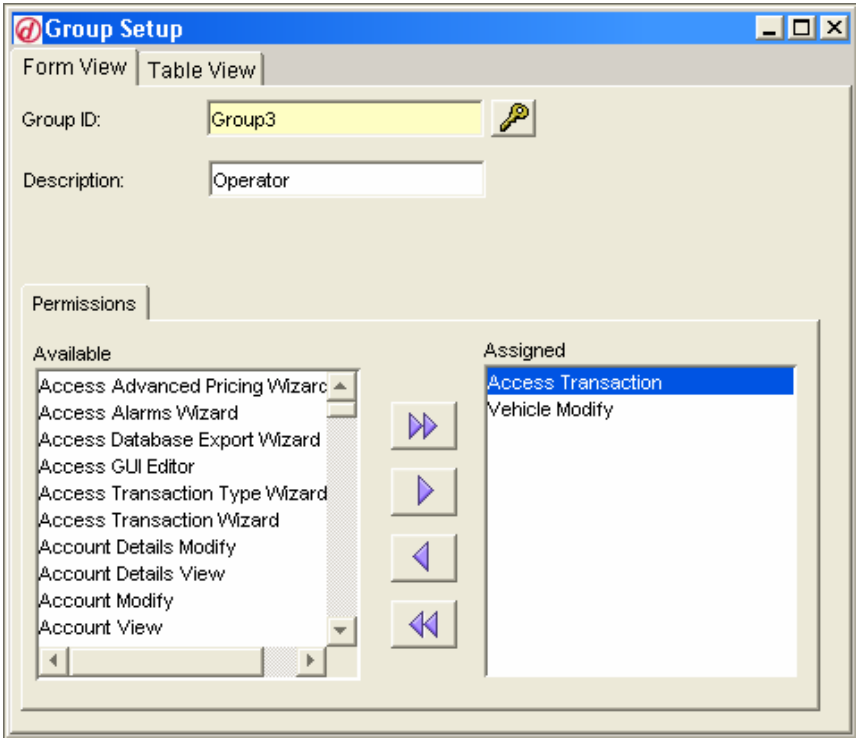


- To assign a user to a group, highlight the group in the **Available** list box and then click the right arrow button to move the group to the **Assigned** list box.
- To remove a group from the **Assigned** list box, highlight the group in the list box and then click the left arrow button.
- The double arrow buttons are used to move all groups from one list box to the other.
- When you select the "Standard User" group, you limit a user's access to security setup functions. A standard user can create other standard users but cannot perform security functions such as assigning permissions and groups, performing queries, and deleting user records.

NOTE: You can assign any combination of groups and permissions for a user. For example, you can assign a user to a group and then assign additional permissions that are not available to the group.

Group Setup

The **Group Setup** screen is used to create authorization groups with different levels of access to the system. By creating a group for each type of user, you can make it easier to set up individual users. For example, you can create an operator group and define the functions an operator is authorized to use. When you set up an individual operator, simply assign the operator to this group and he/she will automatically be authorized to use all the operator group functions. To open the **Group Setup** screen, click on **Group Setup** in the **Application Setup** folder.



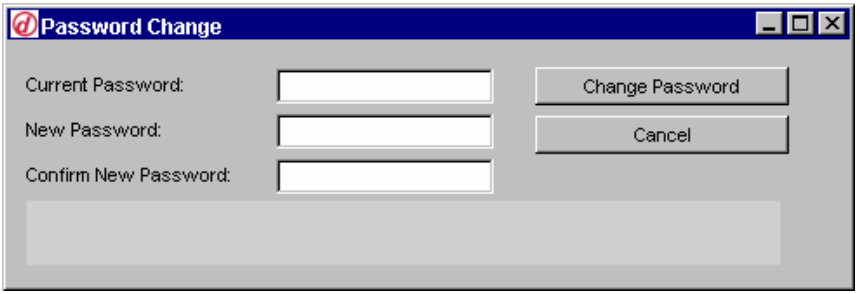
1. Enter an ID or name for the group in the **Group ID** data field.
2. Enter a description of the group in the **Description** data field.
3. Specify the system functions that will be available to the group by adding permissions to the **Assigned** list box:
   - To add a permission to the list box, highlight the permission in the **Available** list box and then click the right arrow button.

- To remove a permission from the **Assigned** list box, highlight the permission in the list box and then click the left arrow button.

4. When you have finished creating or editing a group record, save the record. The Group ID will be listed in the **Available** list box on the **User Setup** screen's **Groups** tab.

Changing Passwords

Once a password has been assigned for a user, the user can change it at any time from the **Password Change** screen. To open the **Password Change** screen, click on **Password Change** in the **Application Setup** folder.



1. Enter the current password in the **Current Password** data field.
2. Enter the new password in the **New Password** data field.
3. Enter the new password in the **Confirm New Password** data field.
4. Click the **Change Password** button to change the password, or click the **Cancel** button to cancel the password change.

11 Managing Transaction Records

Transaction Maintenance

The OverDrive system automatically creates a record of each transaction that you process. Using the **Transaction Maintenance** screen, you can search the database for transaction records to view them or to modify the information stored in them. To open the **Transaction Maintenance** screen, click on **Transaction Maintenance** in the **Back Office Management** folder.

The current status of each transaction is indicated by the following status codes:

C Completed transactions

I Incomplete transactions: Two-pass or multi-pass transactions for which the final pass has not been completed.

M Modified transactions

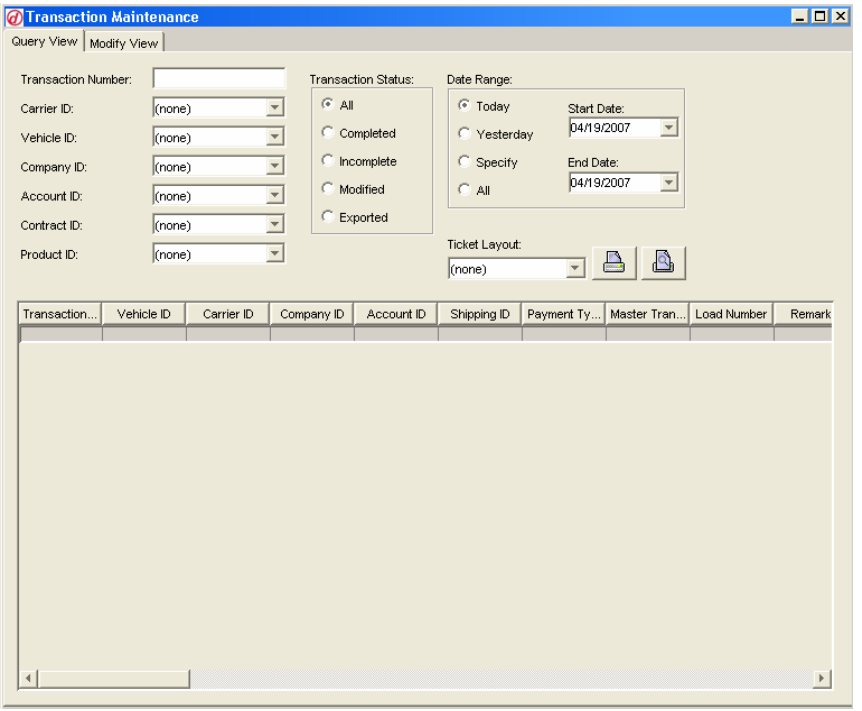
V Voided transactions

X Exported transactions

To view the status code for a transaction, display the transaction record on the **Query View** tab. The table where the records are displayed includes a **Status** column.

Query View

Use the **Query View** tab to search the database for transaction records. The data fields, radio buttons, and check boxes on the tab function as filters. If you set filters, a query will retrieve only those transactions that meet the specifications of the filters. To retrieve all transactions, make sure that no filters are set and make sure the **Transaction Status** and **Date Range** radio buttons are set to **All**.



A query involves the following steps:

1. Select filters to define the query.
2. Click the **Query** button.
3. The transactions that match the query specifications will be displayed in the table at the bottom of the **Query View** tab.

The filters interact with one another, so make sure that all filters are set correctly. If you perform a query and do not get the results that you expected, check the filter settings and try again. Note that the default date range setting is **Today**. To search for earlier transactions, you will need to change the setting.

Transaction Number

To search for a specific transaction number, enter it in the **Transaction Number** data field. Make sure that none of the other filter settings exclude the transaction number, and then click the **Query** button to retrieve the record.

ID Combo Boxes

You can search for transactions processed for a specific vehicle, carrier, company, account, contract, or product. Select the desired ID from one of the five combo boxes. You can specify more than one type of ID. For example, you can select an Account ID and a Product ID to search for transactions in which a specific account bought/sold a specific product.

Transaction Status

Use the **Transaction Status** radio buttons to search for transactions that belong to one of the following status groups:

- **All** – All transactions.
- **Completed** – Completed transactions only.
- **Incomplete** – Incomplete transactions only.
- **Modified** – Modified transactions only.
- **Exported** – Exported transactions only.

Date Range

Use the **Date Range** radio buttons to search for transactions processed during a specific time period:

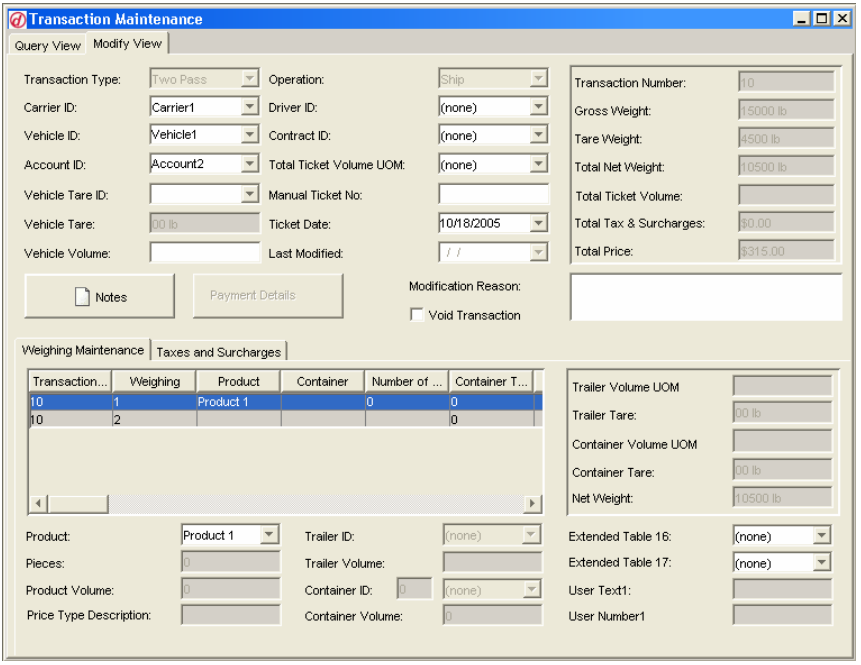
- **Today** – Transactions processed today (this is the default selection).
- **Yesterday** – Transactions processed yesterday.
- **Specify** – Transactions processed during a specified time period. Use the calendar in the **Start Date** combo box to select the starting date for the period. Use the calendar in the **End Date** combo box to select the ending date for the period.
- **All** – All transactions.

Ticket Layout

You can print or view ticket layouts. Select a layout in the **Ticket Layout** combo box, and then click the **Print** button to print a copy of the layout or click the **Print Preview** button to view the layout.

Modify View

The **Modify View** tab is used to view an existing transaction record and make changes to it. You will need to perform a query to locate the record before you can modify it.



1. Use the **Query View** tab to locate a transaction record.
2. Highlight the transaction record in the table on the **Query View** tab.
3. Click the **Modify View** tab. The transaction data will be displayed on the tab.
4. Modify the transaction record by changing selections in the combo boxes and entering new data in the data fields. You can also modify data on the tabs at the bottom of the screen.
5. Enter a reason for the changes in the **Modification Reason** data field. You will not be able to save the changes unless you enter a modification reason. The system will automatically record the name of the operator who was logged in when the record was modified.
6. Click the **Save** button to save the modified transaction to the database.

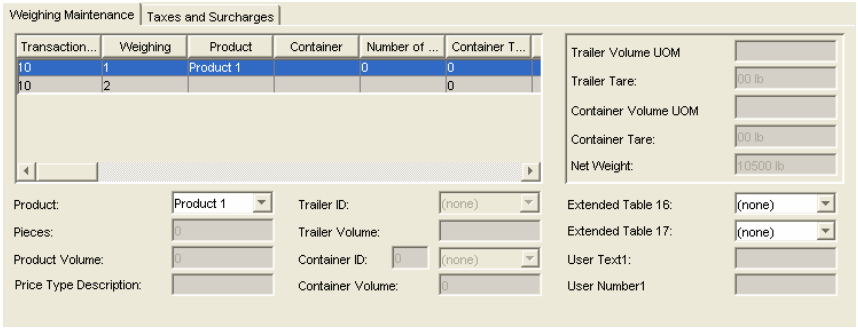
Transaction type data cannot be modified. This includes the **Transaction Type** data field and the **Split Weighing**, **Multi Axle**, and **Truck Only** check boxes.

Some data fields cannot be modified manually, for example, the **Vehicle Tare** field. The data displayed in that field is read from the **Vehicle** table record, so the only way to modify it is to select a new Vehicle ID or change the data stored in the **Vehicle** table record.

To void a transaction, check the **Void Transaction** box. The original transaction record will remain in the database (its status will be changed to **V**). If you change a Vehicle ID, Account ID, Contract ID, or Product ID, the transaction will be voided regardless of whether this box is checked or not. The original transaction record will remain in the database (its status will be changed to **V**), and the system will create a new transaction record (its status will be **M**). It will have a new transaction number but the same master transaction number as the original transaction.

Weighing Maintenance Tab

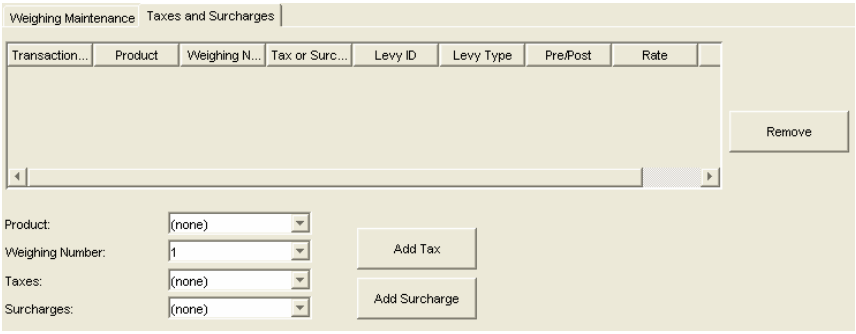
This tab displays data from the **Transaction** screen's **Product Detail** tab. All fields that cannot be modified manually will be disabled.



Two-pass and multi-pass transactions can include separate data entries for each pass. To switch between those entries, click the right or left arrow button on the **Modify View** tab.

Taxes and Surcharges Tab

This tab is used to modify taxes and surcharges applied to a transaction.



Adding a Tax

1. Select a product in the **Product** combo box. If more than one product is involved in a transaction, you will need to apply the appropriate tax to each product. If more than one weighing is involved, apply the tax to each weighing.
2. Select the tax in the **Taxes** combo box.
3. Click the **Add Tax** button.
4. The tax information will be listed in the table on the **Taxes and Surcharges** tab.

Adding a Surcharge

1. Select a product in the **Product** combo box. If more than one product is involved in a transaction, you will need to apply the appropriate surcharge to each product. If more than one surcharge is involved, apply the surcharge to each weighing.
2. Select the surcharge in the **Surcharges** combo box.
3. Click the **Add Surcharge** button.
4. The surcharge information will be listed in the table on the **Taxes and Surcharges** tab.

Deleting Taxes and Surcharges

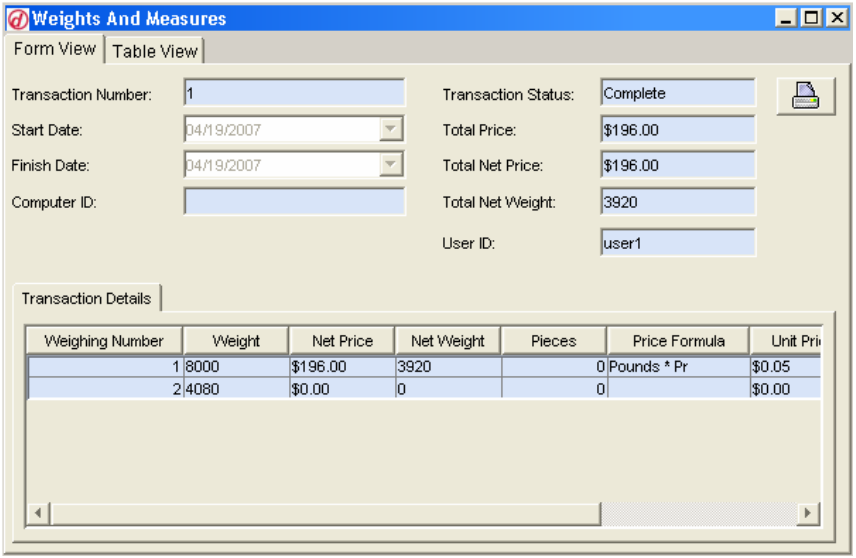
1. Highlight the tax or surcharge that you want to delete in the table on the **Taxes and Surcharges** tab
2. Click the **Remove** button.

Weights and Measures

The Weights and Measures log file stores a record of every transaction. These records are intended for Weights and Measures certification, so they are permanent records that cannot be changed or deleted. To view the file, open the **Weights and Measures** screen from the side tree.

Form View

Use the **Form View** tab to search the database for transaction records. The data fields on the tab function as filters. If you enter a filter, a query will retrieve only those transactions that meet the specifications of the filter. To retrieve all transactions, make sure that all data fields are empty.



A query involves the following steps:

1. Enter filters to define the query.
2. Click the **Query** button.
3. The first transaction that matches the query specifications will be displayed on the **Form View** tab. To view all transactions retrieved by the query, select the **Table View** tab.

The filters interact with one another, so make sure that all filters are set correctly. If you perform a query and do not get the results that you expected, check the filter settings and try again. Note that the filters are case sensitive.

Data Fields

Transaction Number: This data field shows the transaction number that is assigned when a transaction is processed. When you perform a query, you can retrieve a specific transaction record by entering the transaction number as a filter.

Start Date and Finish Date: When a transaction record is displayed, the **Start Date** data field shows the date on which the transaction was started and the **Finish Date** data field shows the date on which the transaction was completed. You can also use the calendars in the combo boxes to select a start date and a finish date as filters for a query:

- When you select a start date only, the query will retrieve transactions that were started on that date.
- When you select a finish date only, the query will retrieve transactions that were completed on that date.
- When you select both a start date and a finish date, the query will retrieve all transactions processed between the two dates.

Computer ID: This data field shows the ID for the computer on which the transaction was processed. The Computer ID is stored in the **Key Table** tab on the **Options** screen. You can enter a Computer ID as a filter for a query.

User ID: This data field shows the ID for the user who processed the transaction. The User ID is stored in the **Security Setup** screen. You can enter a User ID as a filter for a query.

Transaction Status: This data field shows the status of the transaction. You can enter a transaction status as a filter for a query.

Total Price: This data field shows the total price for the transaction, including taxes and surcharges. You can enter a total price as a filter for a query.

Total Net Price: This data field shows the total net price for the transaction. You can enter a total net price as a filter for a query.

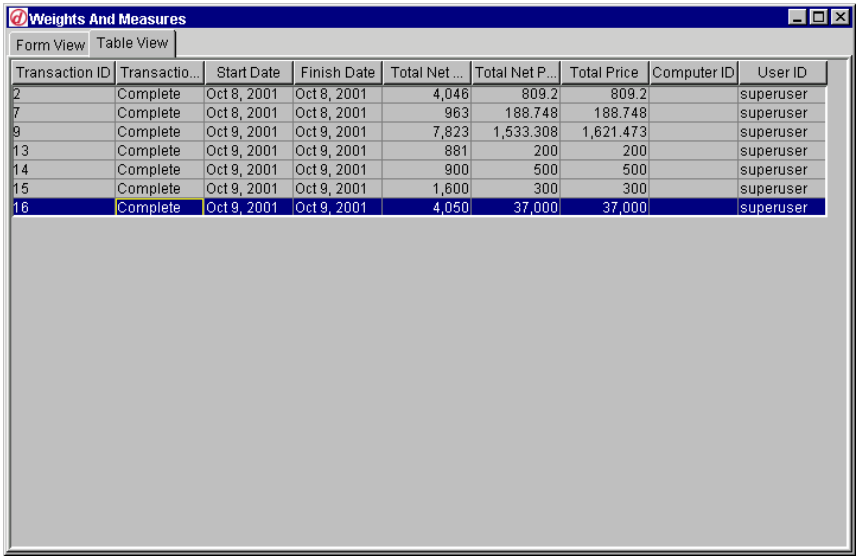
Total Net Weight: This data field shows the total net weight for the transaction. You can enter a total net weight as a filter for a query.

The **Transaction Details** table at the bottom of the **Form View** tab displays the data recorded for each weighing of a transaction. For example, when you retrieve the record for a two-pass transaction, the data for each pass will be shown on a separate line.

You can print a copy of a transaction record that is displayed on the **Form View** tab by clicking the **Print** button.

Table View

This tab displays all the transaction records that are retrieved when you perform a query. Highlighting one of the transactions in the table will display the transaction record on the **Form View** tab.



12 Reports and Tickets

Introduction

The system includes a selection of standard report and ticket formats. A report compiles information from the database. A ticket prints information about an individual transaction. If you want to customize reports and tickets within the OverDrive program, you will need to install compatible report software such as Crystal Reports.

Printing Tickets

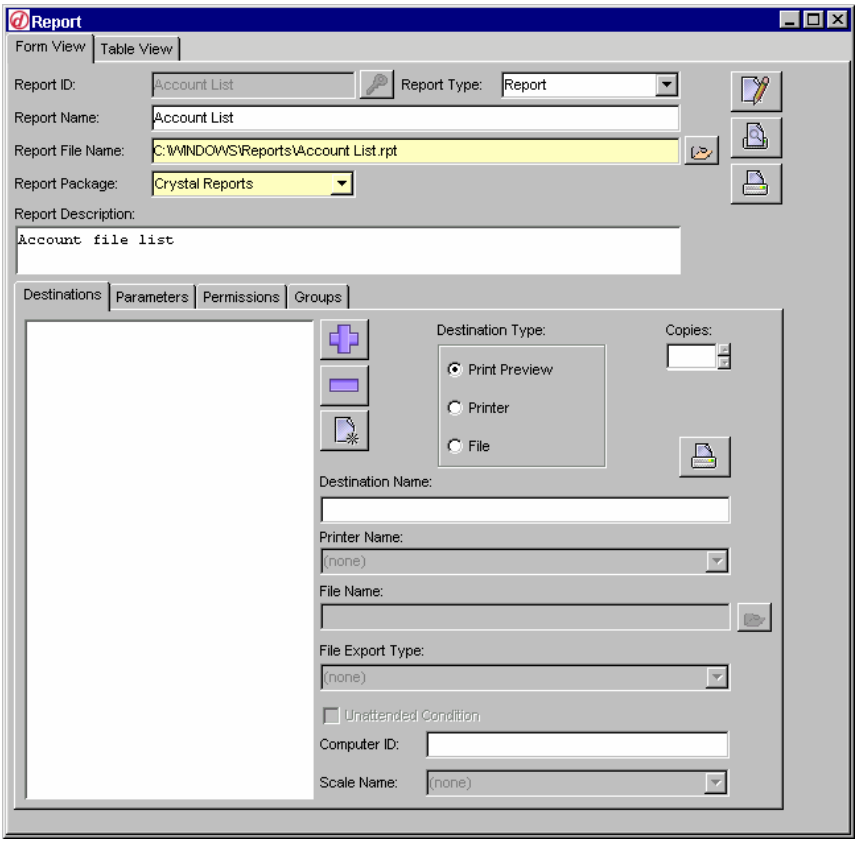
The system can print a ticket automatically for each transaction. In order to do that, you will need to select a ticket format and enable ticket printing:

- To select a ticket format, open the **Account** table. On the **Form View** tab, you will see a **Ticket In** combo box for selecting an inbound ticket format and a **Ticket Out** combo box for selecting an outbound ticket format. You can select formats for either or both combo boxes. If you do not wish to print a ticket, select **(none)**. When you specify a ticket format for an account, you are instructing the system to print tickets for that account. If you want to print tickets for all accounts, you will need to specify a ticket format for each account record.
- To enable ticket printing, open the **Options** screen. On the **Transaction** tab, check the **Enable Ticket Printing** box.

Report Screen

The **Report** screen is used to view an existing report/ticket or to create a new report/ticket format.

- To retrieve existing reports and tickets, select **Report** or **Ticket** in the **Report Type** combo box and then click the **Query** button. Data entered in any of the fields will act as a filter. All records that are retrieved will be listed on the **Table View** tab.
- To create a new report or ticket format, you must install compatible report software such as Crystal Reports. Enter information about the report or ticket in the data fields and then click the **Save** button. Click the **Edit/Open** button to open the format in Crystal Reports.



Data Fields

Report ID: Each report or ticket must have a unique alphanumeric identifier. To create a new record, type an ID in the data field or click the **Get System Generated Key** button to have the system assign an ID.

Report Type: Use the combo box to select the type of document: **Report** or **Ticket**.

Report Name: A name assigned to the report or ticket.

Report File Name: The file name and directory location for the report or ticket. When creating a report or ticket, click the **Browse** button to open a window that will allow you to enter a file name and select a location.

Report Package: The software package used to create the report or ticket. The standard software is Crystal Reports.

Report Description: A description of the report or ticket.

The buttons on the right-hand side of the screen are used to open, view, and print reports and tickets:

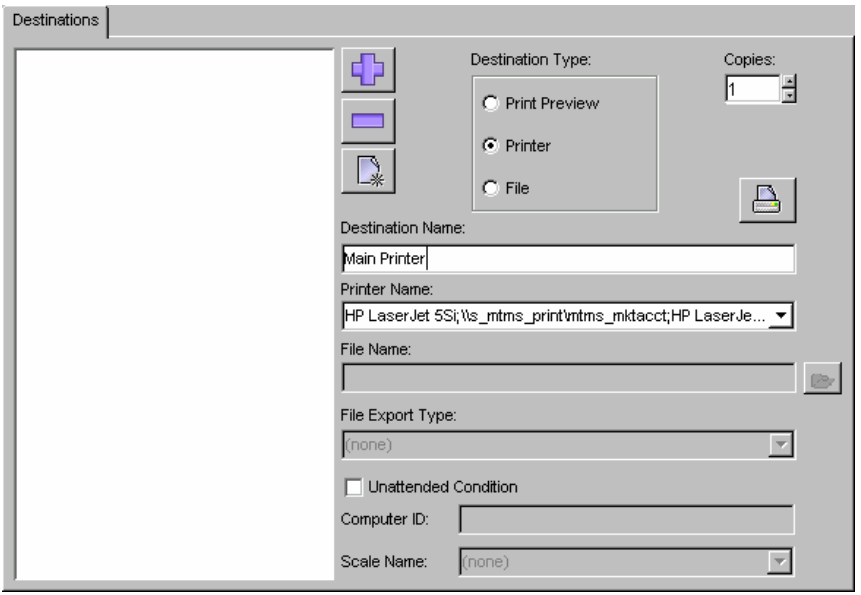
- The **Edit/Open** button opens a report or ticket so that you can edit it. Before you can open a report or ticket, you must install compatible report software such as Crystal Reports.

- The **Print Preview** button opens a window that displays a preview of the report or ticket.

- The **Print** button prints a copy of the report or ticket.

Destinations

The **Destinations** tab lets you specify destinations for printing a report/ticket or for creating a file.



1. Display the report or ticket in the **Report ID** data field at the top of the **Report** screen.

2. Fill in the data fields to specify a destination, and then click the **Add** button to add the destination to the list box. You can add more than one destination. Simply click the **Clear** button to clear the data fields and then specify another destination.
3. Click the **Save** button on the tool bar.

To delete an item from the list box, highlight it and then click the **Remove** button.

Data Fields

Destination Type: Use the radio buttons to select how you want to output the report/ticket: **Print Preview**, **Printer**, or **File**. **Print Preview** displays the report/ticket on the computer screen, **Printer** sends a print command to a Windows-compatible printer, and **File** creates an electronic file.

Copies: Enter the number of copies that you want to print. This field is used only if **Printer** is selected as the destination type.

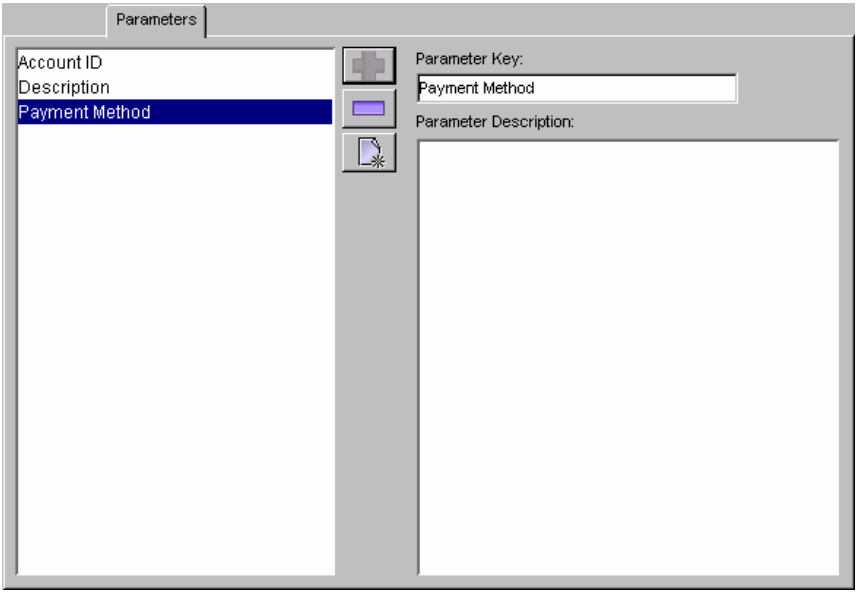
Destination Name:	Enter a name for the destination record that you are creating.
Printer Name:	If the destination type is **Printer**, select the printer to which you want to send the document. You can select a local or network printer.
File Name:	If the destination type is **File**, click the **Browse** button to select a directory location for the file that will be created.
File Export Type:	If the destination type is **File**, select the type of file that you want to create.
Unattended Condition:	When this box is checked, the system will verify that the destination matches the Computer ID and Scale Name listed on the tab. If they match, a ticket will be printed. If they do not match, a ticket will not be printed. This function is useful when a system includes more than one scale or when a printer is located at each end of a scale.
Computer ID:	This data field shows the ID of the computer that is processing the transaction for which the ticket will be printed.
Scale Name:	This data field shows the name of the scale that is weighing the vehicle for which the ticket will be printed. If a computer controls more than one scale, a ticket will be printed for each scale. By specifying an individual scale, you can have the system print only one ticket.

After you have defined a destination for a report/ticket, you can use the **Print** button to send the report/ticket to the destination. Highlight the destination name in the list box, use the radio buttons to select a destination type, and then click the **Print** button. If a destination is not selected, clicking the button will display a print preview.

Parameters

The **Parameters** tab lets you specify the parameters to be included in the report or ticket. Parameters correspond to the data fields on the **Transaction** screen and **Data Setup** tables (for example, **Transaction Number** and **Product ID**).

CAUTION: Do not change the parameters unless you are familiar with Crystal Reports and how to use it to set parameters.



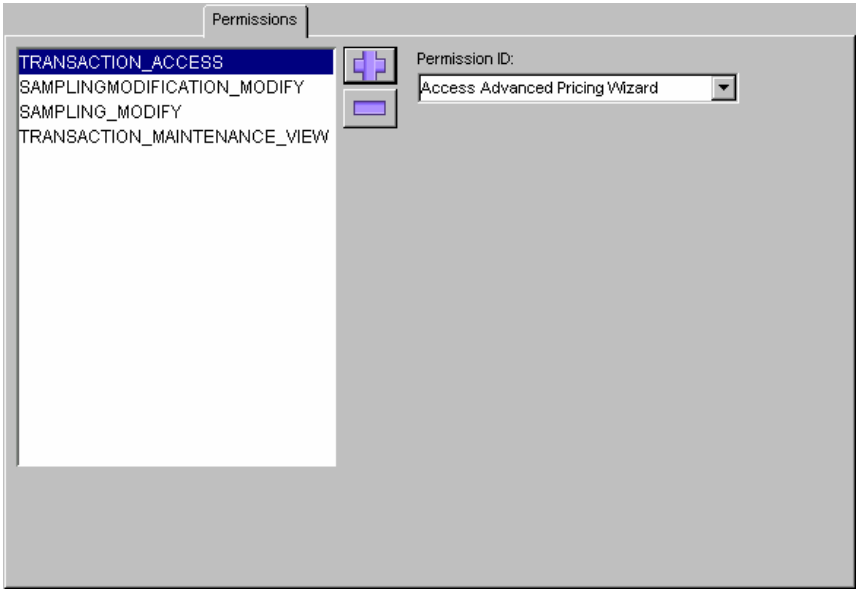
1. Display the report or ticket in the **Report ID** data field at the top of the **Report** screen.
2. Enter the name of the parameter (for example, **Transaction Number** or **Product ID**) in the **Parameter Key** data field.
3. Enter a description of the parameter in the **Parameter Description** data field.

4. Click the **Add** button to add the parameter to the list box. You can add more than one parameter. Simply click the **Clear** button to clear the data fields and then specify another parameter.
5. Click the **Save** button on the tool bar.

To delete an item from the list box, highlight it and then click the **Remove** button.

Permissions

The **Permissions** tab lets you limit access to a report or ticket by linking it to the user's permissions specified on the **Security Setup** screen. When you select a permission from the **Permission ID** combo box, you limit access to the report/ticket to users who have that Permission ID assigned to them.



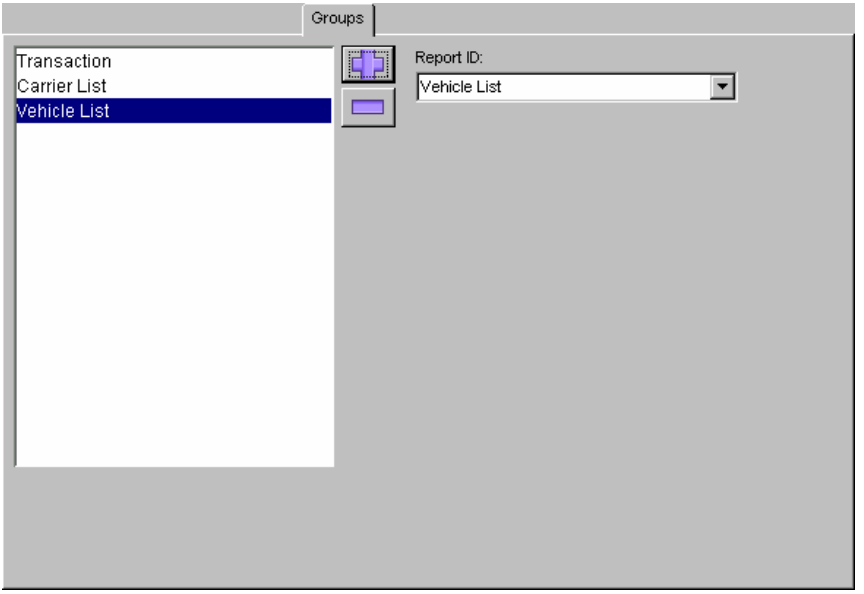
1. Display the report or ticket in the **Report ID** data field at the top of the **Report** screen.
2. Add permissions to the list box on the **Permissions** tab. Select a permission from the **Permission ID** combo box, and then click the **Add** button to add it to the list box. You can add more than one permission to the list box.

3. Click the **Save** button on the tool bar.

To delete an item from the list box, highlight it and then click the **Remove** button.

Groups

The **Groups** tab lets you can create a group of reports/tickets that will act as a subset of another report or ticket. When you print a copy of the main report or ticket, the reports/tickets in the subset will automatically be printed along with it.



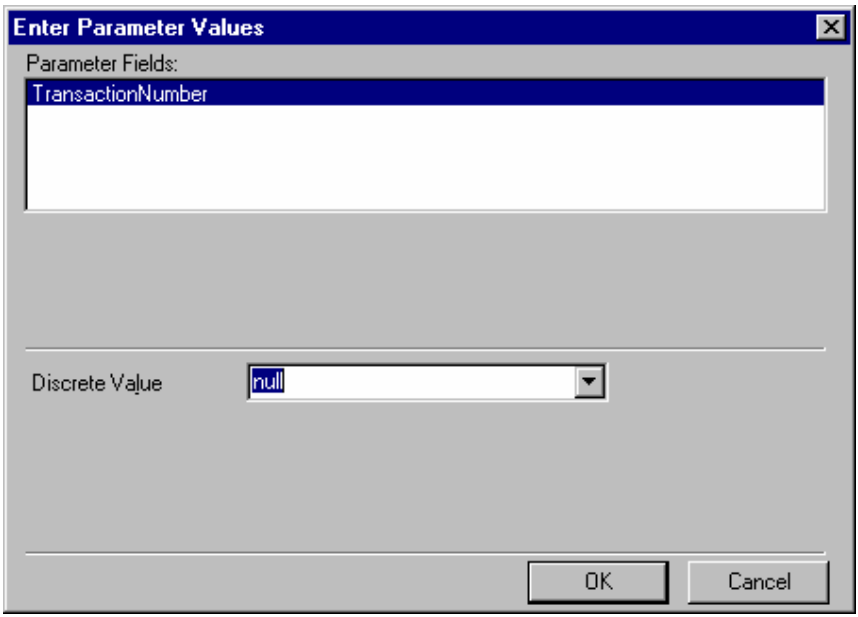
1. Display the main report or ticket in the **Report ID** data field at the top of the **Report** screen.
2. Add the members of the subset group to the list box on the **Groups** tab. Select a report from the **Report ID** combo box, and then click the **Add** button to add it to the list box. You can add more than one report to the list box.
3. Click the **Save** button on the tool bar.

To delete an item from the list box, highlight it and then click the **Remove** button.

Printing

You can print reports and tickets from the **Report** screen.

1. Select **Report** or **Ticket** in the **Report Type** data field.
2. Click the **Query** button to retrieve a list of reports or tickets.
3. Select the report or ticket that you want to print. You can use the arrow buttons on the tool bar to scroll through a list or switch to the **Table View** tab and highlight the desired item.
4. Click the **Print** button (or click the **Print Preview** button to view the report/ticket on the computer screen).
5. If a parameter is required, the **Enter Parameter Values** window will open. Enter a parameter in the **Discrete Value** data field (or enter a date range), and then click the **OK** button.
    - **Reports:** Some reports do not require parameters. You must enter a transaction number for the Weights and Measures report. You must enter a date for the other reports that require parameters.
    - **Tickets:** You must enter a transaction number for transaction tickets. You must enter a Sampling ID for sampling tickets. You must enter a Tare Detail ID or Tare Master ID for tare tickets.



Standard Reports

Report Name	Fields Included
Account List	Account, Description, Contact, Phone, Credit Limit, Credit Balance
Account Summary	Account, Description, Load #, Load %, Wt., Wt. %, Volume, Volume %, Cost, Cost %
Account Summary by Product	Account, Product, Loads, Wt., Units, Total Cost
Account Transaction Complete Date	Account, Date, Total Net Wt., Total Net Price
Badge List	Badge, Description
Carrier List	Carrier, Description, Address, City, State, Zip
Cash Report	Transaction #, Account, Product, Payment Method, Date, Payment Amount
Company List	Company, Description, Address, City, State, Zip
Completed Transactions	Transaction #, Vehicle, Status, Account, Product, Start Date, End Date
Container List	Container, Description, Volume, Volume Unit, Tare Wt.
Contract Information	Contract, Description, Discount, Product, Price, Contract Wt., Current Wt., Account
Contract Product Pricing	Contract, Product, Unit Price
Credit Report by Account	Account, Enabled, Expiration Date, Actual Credit, Maximum Credit, Discount, Discount Unit
Customer Product	Product, Account, Transaction #, Date, Wt., Fees, Taxes, Total Price
Daily Ticket Report	Date, Ticket #, Account, Carrier, Vehicle, Product, Time In, Time Out, Wt., Units, UOM, Revenue
Detailed Transactions	Transaction #, Vehicle, Account, Contract, Start Date, End Date, Net Wt., Net Price, Surcharges, Taxes, Total Price, Product, Unit, Status
Driver List	Driver ID, Name, License #
Formula List	Formula ID, Description, Unit, Formula
Group Members List	Group, Member, Basis

Invoice by Date	Ticket #, Date, Carrier, Vehicle, Company, Net Wt., Unit Price, Net Price, Tax/Fees, Total Price, Product, Subtotal, Invoice Total
Invoice by Number	Ticket #, Date, Carrier, Vehicle, Company, Net Wt., Unit Price, Net Price, Tax/Fees, Total Price, Product, Subtotal, Invoice Total
Invoice by Unlocked	Ticket #, Date, Carrier, Vehicle, Company, Net Wt., Unit Price, Net Price, Tax/Fees, Total Price, Product, Subtotal, Invoice Total
Invoice Summary by Date Locked	Invoice #, Date Invoiced, Account, Tickets, Net Wt., Net Price, Taxes, Surcharges, Total Price, Subtotals, Grand Totals
Invoice Summary by Unlocked	Invoice #, Date Invoiced, Account, Tickets, Net Wt., Net Price, Taxes, Surcharges, Total Price, Subtotals, Grand Totals
Invoice Summary by Date	Invoice #, Date Invoiced, Account, Tickets, Net Wt., Net Price, Taxes, Surcharges, Total Price, Subtotals, Grand Totals
Invoice Summary by Number	Invoice #, Date Invoiced, Account, Tickets, Net Wt., Net Price, Taxes, Surcharges, Total Price, Subtotals, Grand Totals
Invoice Summary Report	Invoice #, Date Invoiced, Account, Tickets, Net Wt., Net Price, Taxes, Surcharges, Total Price, Subtotals, Grand Totals
Open Transactions	Transaction #, Status, Vehicle, Vehicle Description, Account, Account Description, Start Date
Peak Graph Report	Hourly traffic by loads and weight
Permit List	Permit, Description, Issuing Authority, Product, Expiration Date
Price Report	Account, Product, Product Net Price, Total Net Price, Surcharges, Taxes, Total Price
Product Customer	Product, Account, Transaction #, Date, Wt., Unit Price, Net Price
Product List	Product, Description, Stock Level, Unit Price, Minimum Price
Product Summary	Product, Description, Load #, Load %, Wt., Wt. %, Volume, Volume %, Cost, Cost %
Product Taxes/ Surcharges	Product, Description, Tax, Tax Amount, Surcharge, Surcharge Amount
Product/ Transaction Detail Date	Product, Net Wt., Net Price, Unit Price
Short Code List	Short Code, Description
Surcharge List	Surcharge, Description, Type, Amount, Level Type
Tare Expiration Report	Carrier, Vehicle, Tare Date, Expiration Date, Tare Wt., Scale ID
Tax List	Tax, Description, Type, Amount, Compound Tax
Trailer List	Trailer, Description, Volume, VIN, Tag #, Expiration Date
Transaction Accounts	Date, Account, Transaction #, Product, Product Description, Net Wt., Total Price, Surcharges, Taxes, Net Price
Transaction Products	Date, Product, Transaction #, Account, Account Description, Net

	Wt., Total Price, Surcharges, Taxes, Net Price
Transaction – Tax/Surcharge	Transaction #, Product, Levy ID, Levy Type, Pre/Post, Rate, Amount, Taxes, Surcharges
Transaction Type Wizard Settings	Transaction Type ID, Transaction Type, Normal Weighing, Multi-Axle Weighing, Split Weighing, Prompt Order, Field Name, Required, Transaction Pass
Transaction Vehicles	Vehicle, Transaction #, Account, Gross Wt., Net Wt., Tare Wt., Product, Total Wt.
Transaction Weights	Transaction #, Vehicle, Gross Wt., Net Wt., Tare Wt., Status, Start Date, End Date
Vehicle Detail Report	Vehicle, Tare, Container, Trailer, Expiration Date, Maximum Wt., Tare Wt., Tractor/Trailer
Vehicle List	Vehicle, Description, Carrier, Volume, Minimum Wt., Maximum Wt., Tag #, Tag Expiration Date
Vehicle Tare	Carrier, Vehicle, Tare Date, Expiration Date, Tare Wt., Scale ID
Vehicle Transaction	Vehicle, Transaction Complete Date, Net Wt., Net Price
Void Ticket Report	Transaction #, Date/Time Out, Wt., Cost, Reason/User
Voided Transaction List	Transaction #, Vehicle, Status, Account, Product, Start Date, End Date, Reason/User
Weights and Measures	Transaction #, Start Date, Complete Date, Computer ID, User ID, Status, Net Price, Net Wt., Total Price

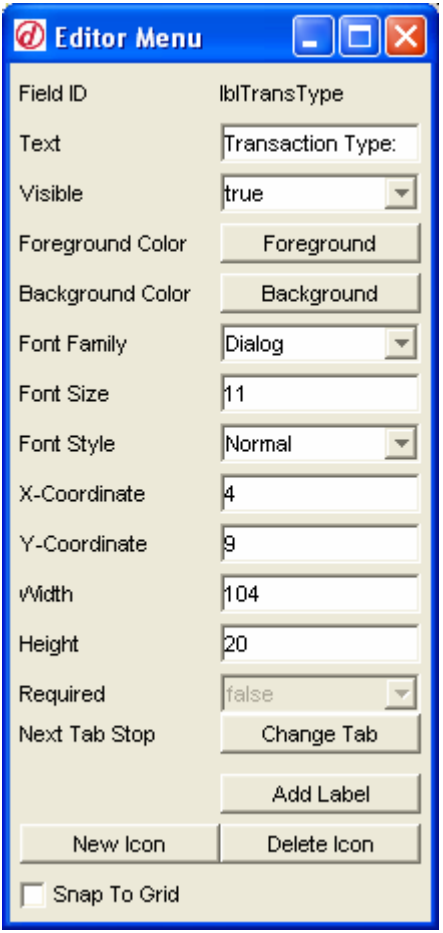
Standard Tickets

Ticket Name	Fields Included
Certified Container	Container, Tare ID, Tare Wt., Expiration Date, Scale, (Signature)
Certified Trailer	Trailer, Tare ID, Tare Wt., Scale, Expiration Date, (Signature)
Certified Vehicle	Vehicle, Description, Carrier, VIN, Tag Number, Tare ID, Tare Wt., Expiration Date, Scale, (Signature)
Container Tare Ticket	Container, Tare ID, Tare Wt., Expiration Date, Scale
Multi-weigh Ticket	Transaction #, Date, Scale, Vehicle, Account, Discount, Pieces, Container, Product, Weight Unit, Sample, Operation, Wt., Net Price, Taxes, Total Price
Sampling Ticket	Transaction #, Date, Vehicle, Account, Product, Sampling ID, Sampling Date, Sample Data Results
Standard Ticket	Transaction #, Scale ID, Date, Time In, Time Out, Gross Wt., Tare Wt., Net Wt., Account, Carrier, Trailer, Container, PO#, Product, Quantity, Measure, Rate, Amount, Taxes, Fees
Trailer Tare Ticket	Trailer, Tare ID, Tare Wt., Scale, Expiration Date
Tsample	Transaction #, Account, Vehicle, Product, Date, In Wt.
Tsample2	Transaction #, Start Date, End Date, Payment Type, Vehicle, Account, Carrier, Company, Remark1, Remark2, Pass, Scale, Product, Container, Wt., Net Wt., Tax/Surcharge, Net Price
Tsample3	Transaction #, Start Date, End Date, Payment Type, Vehicle, Account, Carrier, Contract, Remark1, Remark2, Pass, Scale, Product, Container, Wt., Net Wt., Tax/Surcharge, Net Price
Unattended Ticket	Transaction #, Vehicle, Account, Total Net Wt., Total Net Price, Total Price
Vehicle Tare Ticket	Vehicle, Description, Carrier, VIN, Tag #, Tare ID, Tare Wt., Expiration Date, Scale

13 Using the GUI Editor

Introduction

The Graphical User Interface (GUI) Editor is used to change the appearance of OverDrive screens. It enables you to customize screens to meet the specific needs of your application.



With the GUI Editor, you can do the following:

- Edit text on a screen

- Hide objects that are not needed
- Change the size and appearance of objects
- Reposition objects on a screen
- Set the tab order for data fields
- Add text and graphics to a screen

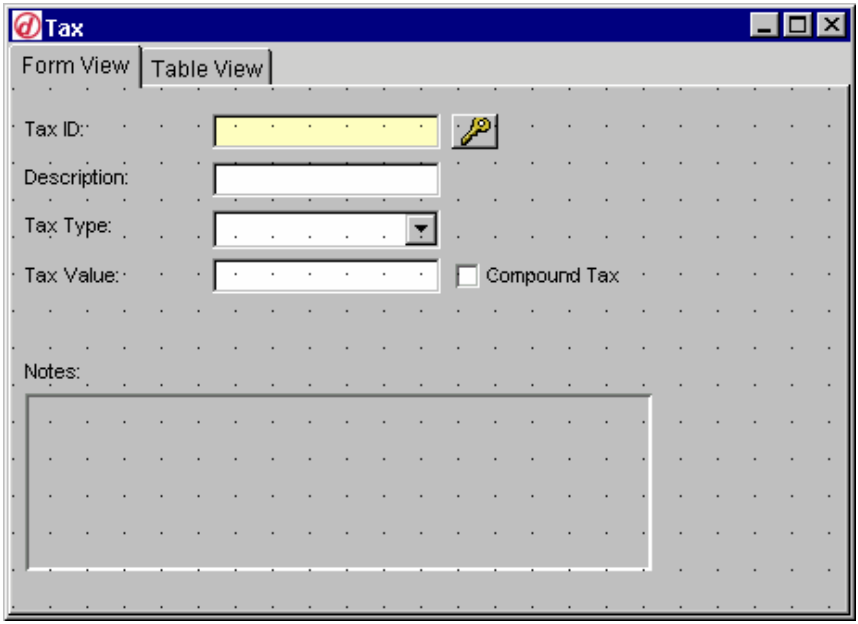
Opening the GUI Editor

To open the GUI Editor, click the **GUI Editor** menu item in the **Tools** menu.

The GUI Editor is available only when an editable screen is open.

Editing Screens

When you open the GUI Editor, the screen that you are editing will change slightly. A dotted grid will appear on the screen. If the snap-to-grid feature is enabled, you can use this grid to align objects horizontally and vertically. A red dotted line will appear around objects that are hidden.



To edit an object, click on the object to select it. Sizing handles will appear at the corners of the object. The name of the object will be displayed as the Field ID on the GUI Editor window.

Saving Changes

To save changes that you have made with the GUI Editor, open the **Tools** menu and click the **GUI Editor** menu item. If you close the GUI Editor without clicking the **GUI Editor** menu item, your changes will not be saved.

Editing Text

Each item of text that appears on a screen is contained in an object called a label. When you click on a label to select it, the text will appear in the GUI Editor's **Text** data field.

Edit the text in the data field, not on the screen. Then click outside the data field to display the new text on the screen.

Hiding Objects

Use the **Visible** combo box to make an object visible or invisible.

You cannot delete data fields or labels from a screen, but you can hide them so that they are not visible to the operators. When you are using the GUI Editor, both visible and invisible objects will appear on the screen. Invisible objects are outlined with a red dotted line. When you select an object on the screen, the combo box will display "true" if the object is visible and "false" if the object is invisible. Change the status in the combo box to hide an object or make it visible.

Changing Appearance

Foreground Color Button

This tool lets you change the color of an object or text on a screen. Select an object and then click the button to open the **Color Selector** window. Select a color and then click the window's **OK** button.

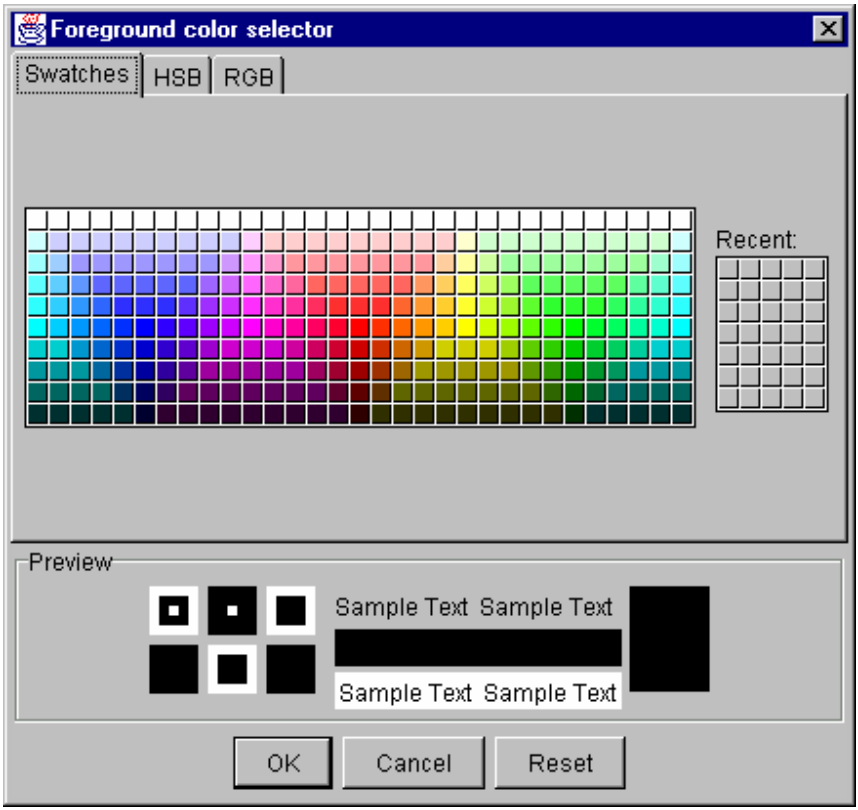
Background Color Button

This tool lets you change the color of the background behind an object on a screen. Select an object and then click the button to open the **Color Selector** window. Select a color and then click the window's **OK** button.

Color Selector

When you click either of the color buttons, the **Color Selector** window will open. Use one of the color selector tabs to change the foreground or background color for an item. The bottom part of the window will display a preview of the color. Click the **OK** button to select the color. If you have previewed a new color but have not yet clicked the **OK** button, you can use the **Reset** button to restore the last color that was selected.

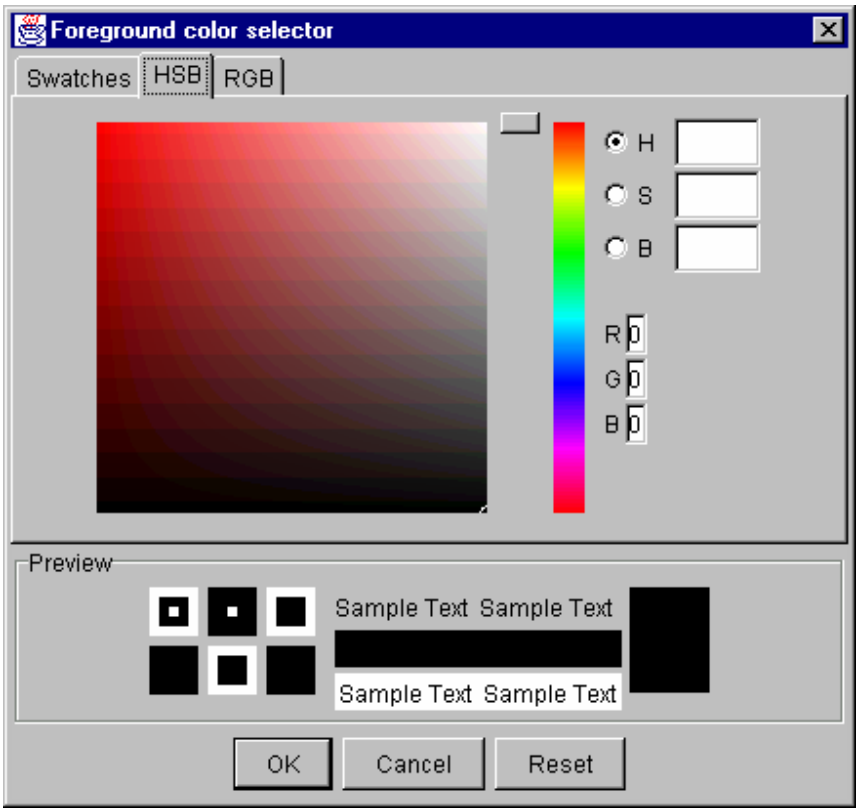
Swatches Tab: This tab contains a palette full of color swatches. Click on one of the color swatches to preview the color. When you position the cursor over a color swatch, the color's RGB settings will be displayed briefly. To restore the default gray color, select one of the gray swatches in the **Recent** palette.



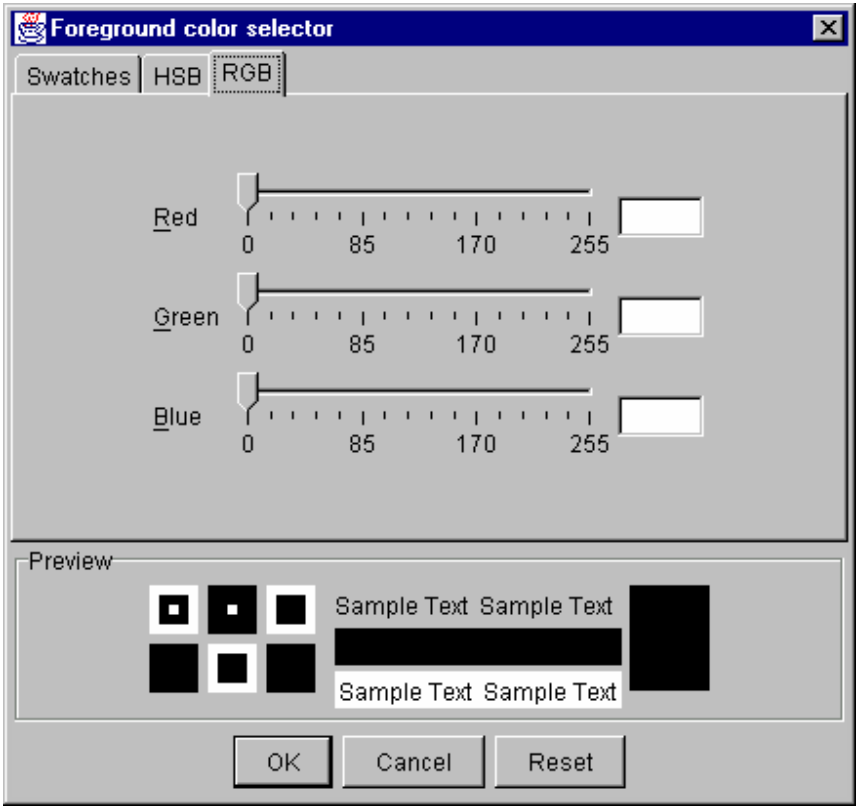
HSB Tab: HSB refers to the hue, saturation, and brightness of a color. You can change a color by adjusting the level of each of those characteristics. Use the radio buttons to select the characteristic you want to change: Hue, Saturation, or Brightness. Then adjust the level of the characteristic by moving the button along the sliding scale or typing a number in the data field.

- Hue: The sliding scale moves along the color spectrum from 0 to 360.
- Saturation: The sliding scale adjusts the saturation from 0 (white) to 100 (fully saturated).
- Brightness: The sliding scale adjusts the brightness from 0 (black) to 100 (bright).

The RGB settings for the color are displayed in the fields in the lower right-hand corner of the tab.



RGB Tab: RGB refers to the three primary colors used to create a full range of colors: red, green, and blue. You can change a color by adjusting the amount of each primary color it contains. Move the pointers along the Red, Green, and Blue sliding scales or type a number in the data field to the right of each scale.



Font Family Combo Box

This tool lets you change the font of text on a screen. When you select a label that contains text, the font will appear in this data field. Use the combo box to select a new font.

Font Size Data Field

This tool lets you change the size of text on a screen. When you select a label that contains text, the font size will appear in this data field. Type a new font size in the data field. When you click outside the data field, the size of the text on the screen will change.

Font Style Combo Box

This tool lets you change the style of text on a screen. When you select a label that contains text, the font style will appear in this data field. Use the combo box to select a new style: Normal, Bold, Italics, or Bold+Italics.

Moving Objects

The drag-and-drop method is the easiest way to move objects. Click on an object to select it. Then hold down the mouse button and drag the object to reposition it. You can also enter X and Y coordinates to move an object to a precise location on the screen.

NOTE: If the **Snap to Grid** box is checked, you will not be able to position objects between the dotted lines of the grid.

X-Coordinate Data Field

This tool lets you reposition an object along the screen's horizontal axis. When you select an object on the screen, a number will appear in the data field. That number represents the position of the left side of the object. The numbering system begins at the left edge of the screen (0). Each dot on the screen's grid equals 10 pixels. For example, when you enter 35 in the data field, you are positioning the left side of the object midway between the third and fourth dots from the left edge of the screen.

Y-Coordinate Data Field

This tool lets you reposition an object along the screen's vertical axis. When you select an object on the screen, a number will appear in the data field. That number represents the position of the top side of the object. The numbering system begins at the top edge of the screen (0). Each dot on the screen's grid equals 10 pixels. For example, when you enter 35 in the data field, you are positioning the top side of the object midway between the third and fourth dots from the top edge of the screen.

Snap to Grid Check Box

The snap-to-grid feature can help you align objects on a screen. Place a check mark in the box to enable this feature. When it is enabled, any object that you reposition will automatically be aligned with the nearest horizontal and vertical grid lines. Those lines appear as a series of dots on the screen. Objects that are already positioned will not be affected. If you want greater freedom in positioning objects, disable the snap-to-grid feature.

Resizing Objects

When you select an object, sizing handles will appear at the corners of the object.

Use these handles to resize the object manually:

- To adjust the width of an object, position the cursor on the right-hand or left-hand border of the object between the sizing handles. When the double-headed arrow appears, hold down the mouse button and drag the border to the desired position.
- To adjust the height of an object, position the cursor on the upper or lower border of the object between the sizing handles. When the double-headed arrow appears, hold down the mouse button and drag the border to the desired position.
- To adjust both the width and height simultaneously, position the cursor on one of the sizing handles. When the double-headed arrow appears, hold down the mouse button and drag the handle to the desired position.

You can also resize an object by specifying a size in the **Width** and **Height** data fields.

Width Data Field

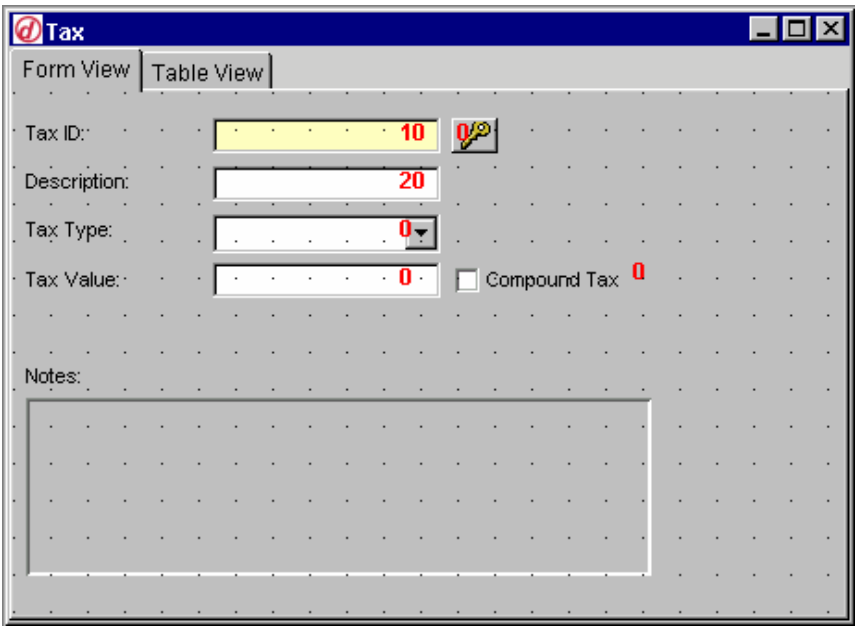
This tool lets you change the width of an object on the screen. When you select an object on the screen, a number will appear in the data field. That number represents the width of the object in pixels. To change the width, type a new number in the data field. When you click outside the data field, the width of the object will change.

Height Data Field

This tool lets you change the height of an object on the screen. When you select an object on the screen, a number will appear in the data field. That number represents the height of the object in pixels. To change the height, type a new number in the data field. When you click outside the data field, the height of the object will change.

Setting Tab Order

The data entry screens are designed so that an operator can press the TAB key to move the cursor from data field to data field on a screen. The **Change Tab** button lets you change the order in which the tab moves from field to field. When you click the **Change Tab** button, a red number will appear on each data field. If no tab has been set for a field, the number will be zero (0). To set the tab order, change these numbers. Enter the number 1 in the field where you want the cursor to appear when you open a screen. Number each field in succession to indicate the tab order. When you are finished numbering the fields, click the **Change Tab** button to complete the task.



Setting Required Fields

The **Required** combo box is used to specify which data fields on the Transaction screen are required (must be filled in to complete a transaction). When you select a data field, the combo box will display "true" if the field is required and "false" if the field is optional.

Change the status in the combo box to make a field required or optional. Some fields are always required or always optional, and the settings cannot be changed. Settings can be changed only for the following user-defined required fields: Company, Destination, Driver, Extended Table fields, Formula, Origin, Payment Type, Permit, Purchase Order, Remark 1, Remark 2, Shipping, User Text fields, and User Number fields.

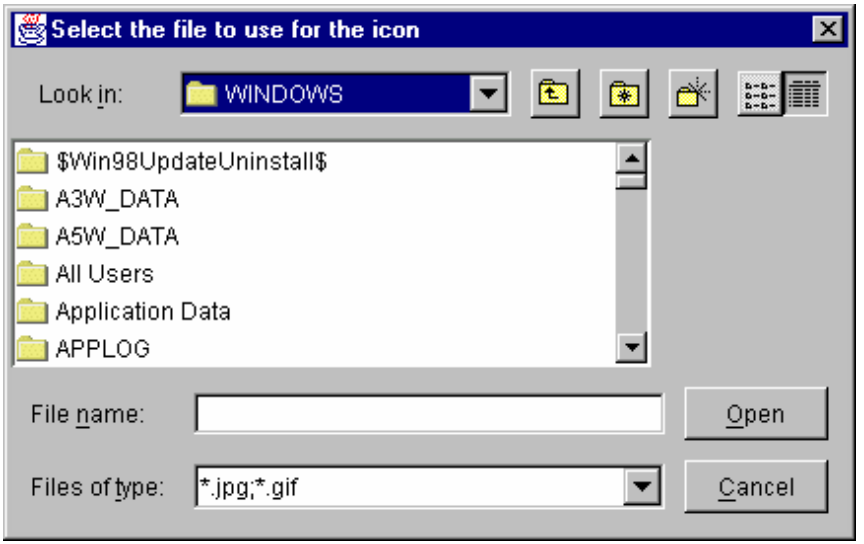
Adding Text and Graphics

Add Label Button

This button lets you add a label in which you can display text or a picture. Click the **Add Label** button, and then double-click the area of the screen where you want to place the label. A text box containing the words "New Label" will appear on the screen. Edit the text the same way you would edit the text in an existing label.

New Icon Button

This button lets you add a graphic to a screen. You will need to insert the graphic in a label. You can use the **Add Label** button to create a label for this purpose. Select a label and then click the **New Icon** button. When the file selection window appears, browse for the graphic file that you want to insert. Select the file and click the **Open** button to insert it in the label.



Delete Icon Button

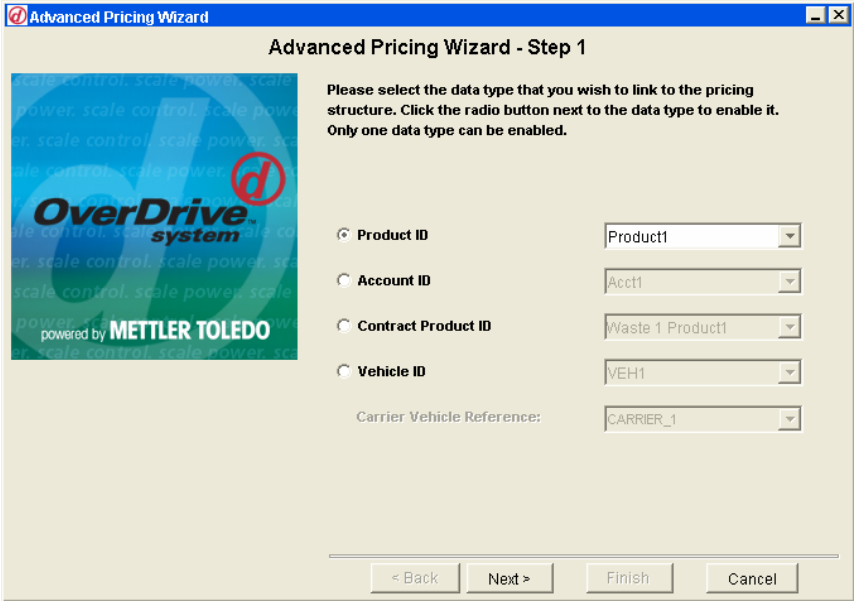
This button lets you delete a graphic from a screen. Select the graphic and then click the **Delete Icon** button to remove the graphic.

14 Advanced Pricing Wizard

Introduction

The Advanced Pricing Wizard is a step-by-step guide for setting up and editing complex pricing structures. For example, you can set up a structure that charges lower rates when larger amounts of a product are purchased. To begin, select **Advanced Pricing Wizard** from the **Wizards** folder in the side tree.

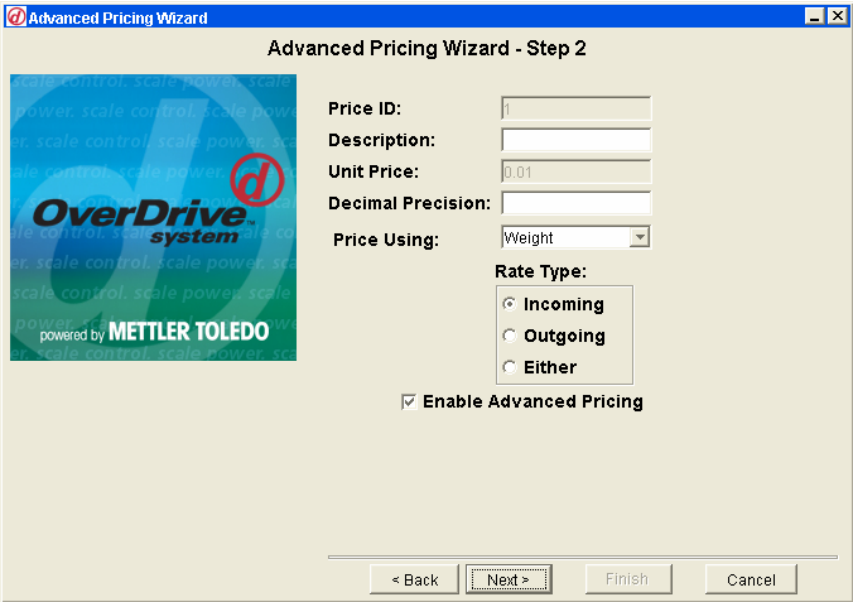
Step 1



Link the advanced pricing structure that you are going to create to a specific database record.

1. Use the radio buttons to select the type of ID: **Product ID**, **Account ID**, **Contract Product ID**, or **Vehicle ID**.
2. Select a database record from the combo box next to the ID that you chose.
3. Click the **Next** button.

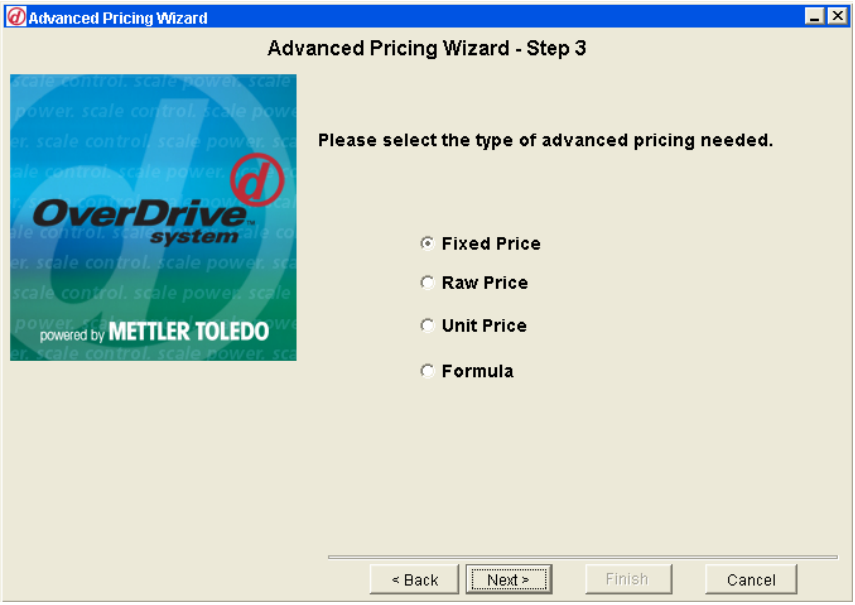
Step 2



Set up the advanced pricing record.

1. The system will generate a key (the unique alphanumeric ID) for the advanced pricing structure in the **Price ID** data field.
2. Enter a description of the advanced pricing structure in the **Description** data field.
3. The **Unit Price** data field shows the price per unit of product. For **Product** and **Contract Product** records, the unit price will be read from the individual database record. For **Account** and **Vehicle** records, the **Unit Price** data field will be disabled.
4. Enter the number of decimal places to which the price should be calculated in the **Decimal Precision** data field. For example, 0 = X, 1 = X.X, 2 = X.XX.
5. Select a criterion for pricing (Weight or Distance).
6. Use the **Rate Type** radio buttons to select the type of operation for which the pricing structure will be in effect: **Incoming** (shipments entering your facility), **Outgoing** (shipments exiting your facility), or **Either** (both incoming and outgoing shipments).
7. Check the **Enable Advanced Pricing** box to enable the advanced pricing structure (the box is checked by default).
8. Click the **Next** button.

Step 3



Use the **Price Type** radio buttons to select the type of pricing structure you want to set up. Then click the **Next** button.

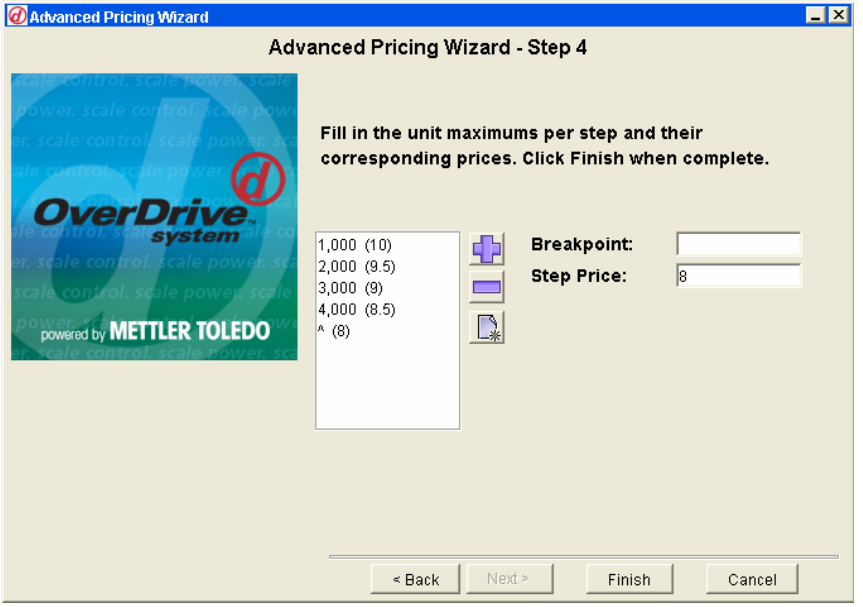
- **Fixed Price:** Fixed pricing sets a price per load. It can be used when you process transactions for loads of standard sizes. For example, you could set a fixed price for a standard-sized load based on delivery distance: $500 for a load delivered up to 100 miles and $550 for a load delivered from 100 to 200 miles.
- **Raw Price:** Raw pricing sets a different price per unit for portions of a load. For example, suppose you set a price of $10 per pound for loads up to 1,000 pounds and $9 per pound for loads up to 2,000 pounds. With raw pricing, a 2,000-pound load would be priced at $10 per pound for the first 1,000 pounds and $9 per pound for the second 1,000 pounds.
- **Unit Price:** Unit pricing sets a single price per unit for the entire load. For example, suppose you set a price of $10 per pound for loads up to 1,000 pounds and $9 per pound for loads up to 2,000 pounds. With unit pricing, a 2,000-pound load would be priced at $9 per pound for the entire load.
- **Formula:** Formula pricing lets you define a formula that will be used to calculate the price for each transaction. The simplest

type of pricing formula is one that multiplies the price of the product by the net weight.

Step 4

Step Pricing

If you selected **Fixed Price**, **Raw Price**, or **Unit Price** in Step 3, specify a step-pricing structure. Step pricing allows you to set a different price per unit for different ranges of weight (or distance).



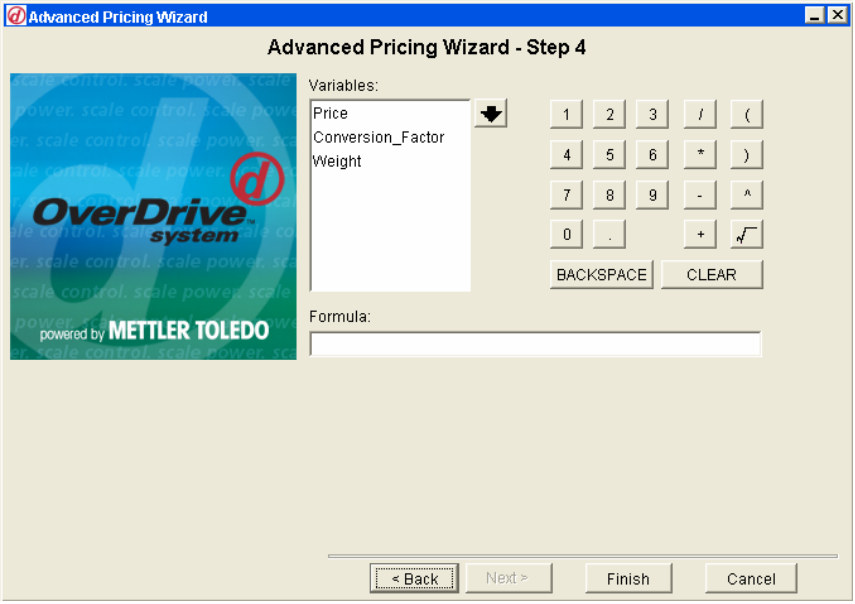
The sample step-pricing structure shown above lists the price per pound for loads up to 1,000, 2,000, 3,000, and 4,000 pounds, plus a step for loads greater than 4,000 pounds. To enter a greater than symbol, leave the **Breakpoint** field blank.

1. Enter the maximum weight (or distance) for the first step in the **Breakpoint** data field.
2. Enter the price per unit for the first step in the **Step Price** data field. A step is the range from the breakpoint to the next lower breakpoint (or zero if there is no lower breakpoint).
3. Click the **Add** button to add the step to the list box.
4. Click the **New** button to clear the data fields, and then repeat Steps 1 to 3 for each step in the pricing structure.
5. Click the **Finish** button when you have completed the pricing structure.

To delete a step, highlight it in the list box and then click the **Remove** button.

Formula Pricing

If you selected **Formula Pricing** in Step 3, use the variables and push buttons to create or edit a pricing formula. The elements of the formula will appear in the **Formula** data field. When you have completed the pricing formula, click the **Finish** button.



Variables: Variables are numbers that can change from transaction to transaction. The list box contains the variables that can be used in pricing formulas: Price, Conversion Factor, Contracted Price, Weight, and Volume. To insert a variable in a formula, highlight the variable in the list box and then click the down arrow button. The variable will appear at the end of the formula in the **Formula** data field.

Numerals: Use the numeric buttons (0 to 9) and the decimal button to insert numbers in a formula. When you click a numeric button, the number will be added to the end of the formula.

Symbols: Use the symbol buttons to insert mathematical elements in a formula. When you click a button,

the symbol will be added to the end of the formula.

/ = division

* = multiplication

- = subtraction

+ = addition

(= left parenthesis

) = right parenthesis

^ = exponent (x^2 = x squared)

√ = square root (x√2 = square root of x)

Backspace: Click the **Backspace** button to delete the last character in the **Formula** data field.

Clear: Click the **Clear** button to delete the entire formula.

Push Buttons

The following push buttons are used to navigate through the wizard:

Back: Goes back to the previous screen.

Next: Goes forward to the next screen.

Finish: Accepts any changes made to the settings and closes the wizard.

Cancel: Closes the wizard without accepting any changes made to the settings.

15 Database Import/Export Wizard

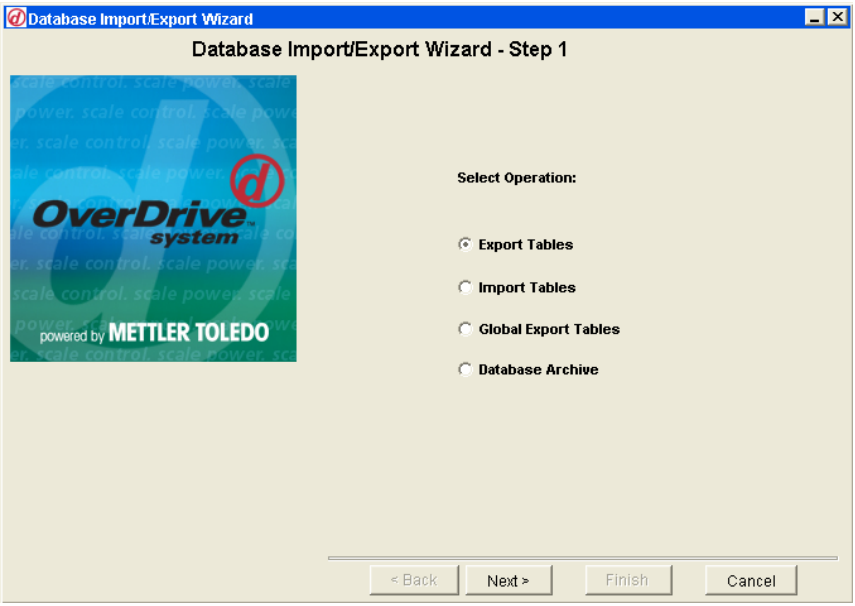
Introduction

The Database Import/Export Wizard is used to import information to or export information from the system's database. You can limit the data to be exported to specific tables, specific columns from each table, and specific data entries (for example, a specific Product ID).

Export

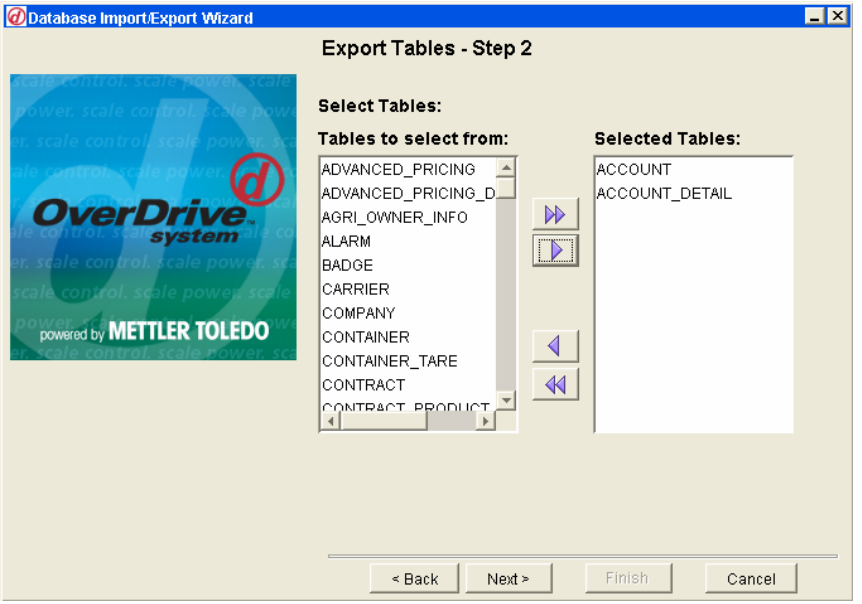
This operation exports individual tables or portions of tables from the database (the data is copied, not removed from the database). To begin the export procedure, select **Database Import/Export Wizard** from the **Wizards** folder in the side tree.

Step 1



1. Select the **Export Tables** radio button from the list of operations.
2. Click the **Next** button.

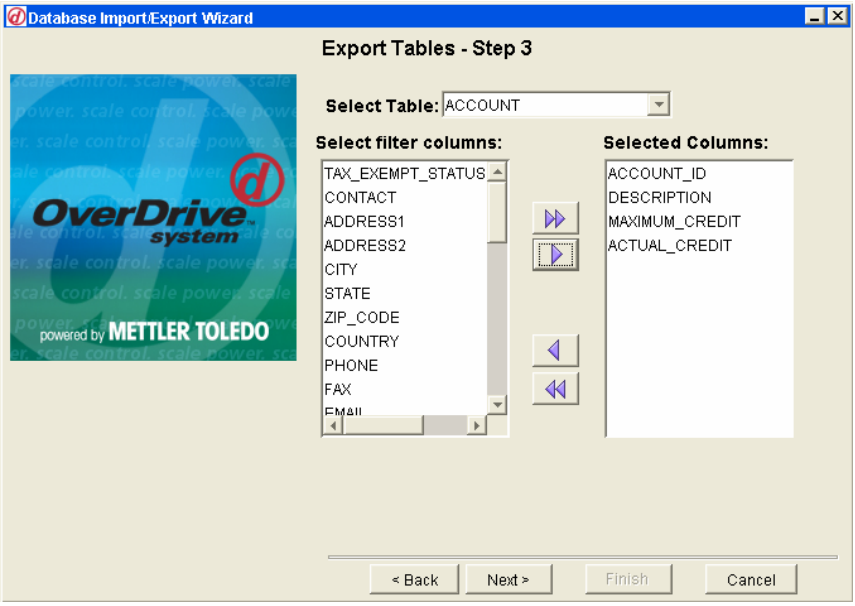
Step 2



Select the tables that you want to export. All of the tables contained in the database are listed in the **Tables to select from** list box on the left.

1. Move the tables that you want to export to the **Selected tables** list box on the right. Use the arrow keys to move tables from one list box to the other.
2. When the tables that you want to export are displayed in the **Selected tables** list box, click the **Next** button.

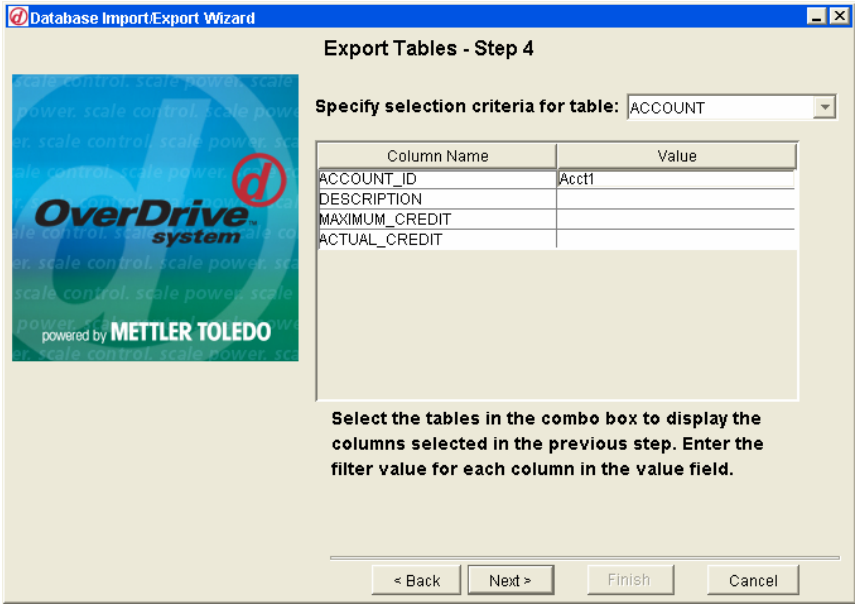
Step 3



The filters in Steps 3 and 4 are used to select data from individual columns (fields). For example, you can export data for accounts located in a specific state. Select only the columns for which you want to specify a filter. Step 5 is used to select the columns that will be exported.

1. Select the first table in the **Select table** combo box. That will display all of the table's columns in the **Select filter columns** list box on the left.
2. If you want to select a filter for a column, move the column to the **Selected columns** list box on the right. Use the arrow keys to move columns from one list box to the other.
3. When you have selected the desired columns for each table in the combo box, click the **Next** button.

Step 4

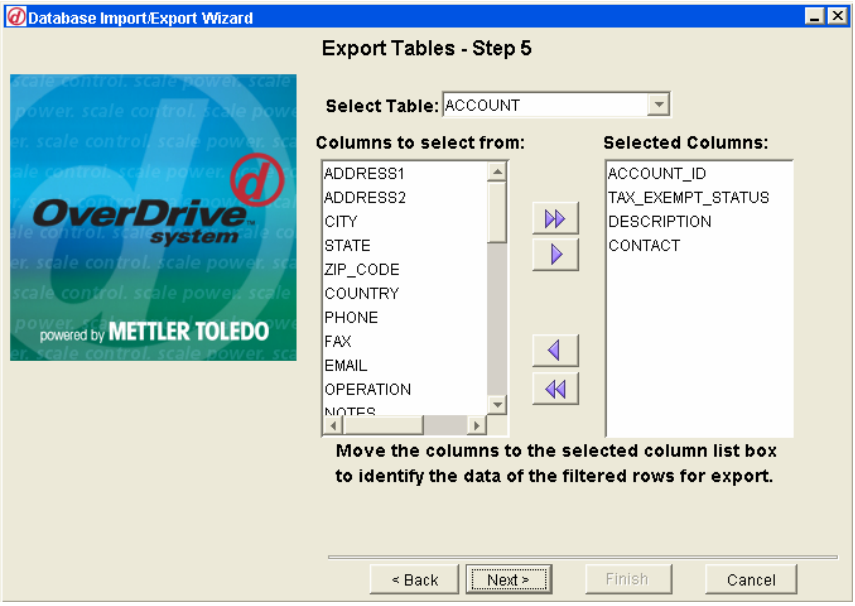


This step allows you to specify a filter for each of the columns selected in the previous step.

1. Select the first table in the **Specify selection criteria for table** combo box. The columns selected in the previous step will be listed in the table below the combo box.
2. For each column name, enter the appropriate data in the **Value** column. For example, if you have selected the Product ID column from the **Product** table, enter a specific Product ID as the value.
3. When you have entered all the values, click the **Next** button.

NOTE: Use the following format for date fields: YYYY-MM-DD. To select all records processed before a given date, use a less-than sign (<YYYY-MM-DD). To select all records processed after a given date, use a greater-than sign (>YYYY-MM-DD).

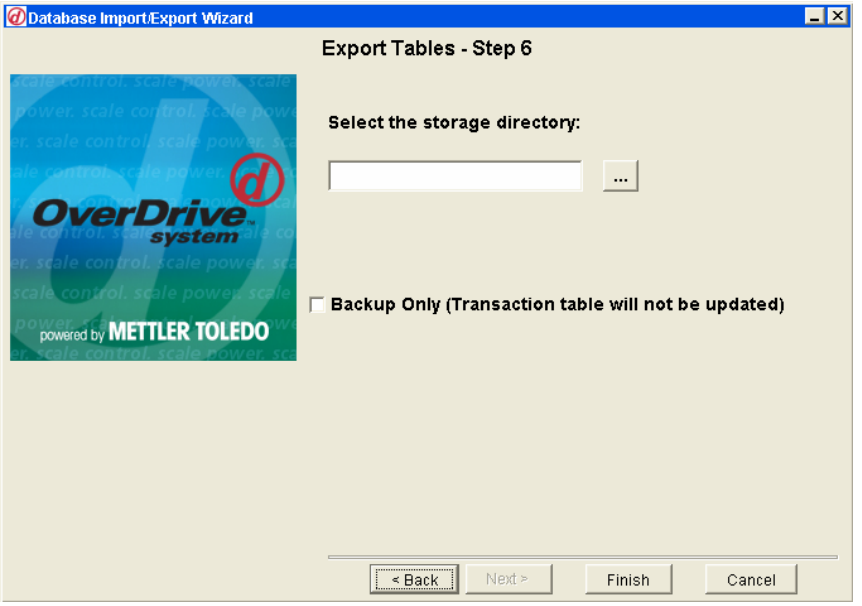
Step 5



Select the columns that you want to export from each table.

1. Select the first table in the **Select table** combo box. That will display all of the table's columns in the **Columns to select from** list box on the left.
2. Move the columns that you want to export to the **Selected columns** list box on the right. Use the arrow keys to move columns from one list box to the other.
3. When you have selected columns for each of the tables in the combo box, click the **Next** button.

Step 6

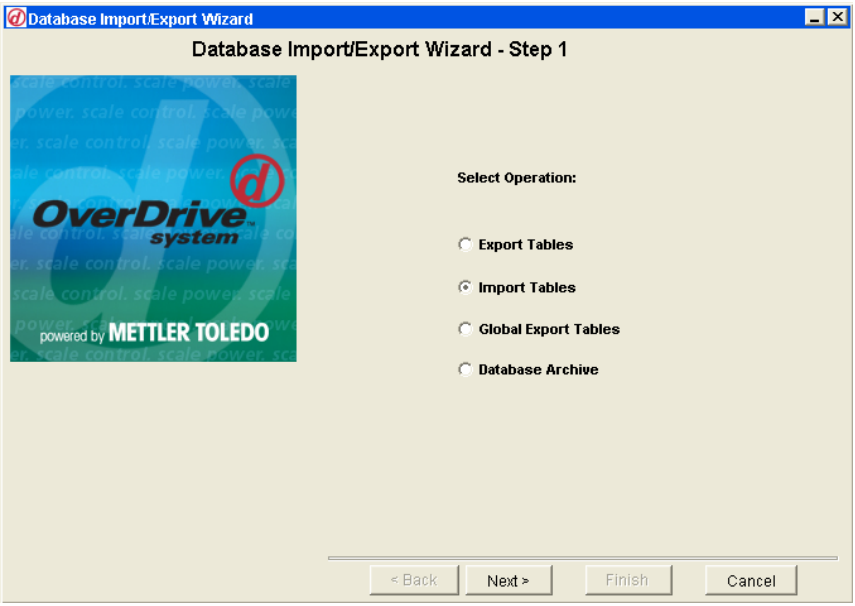


1. Select the directory to which you want to export the database information. Type the directory location in the **Select the storage directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. Check the **Backup Only** box if you are exporting data to back up your system. If the box is not checked, the transaction status will be changed to exported (X).
3. Click the **Finish** button to export the data.

Import

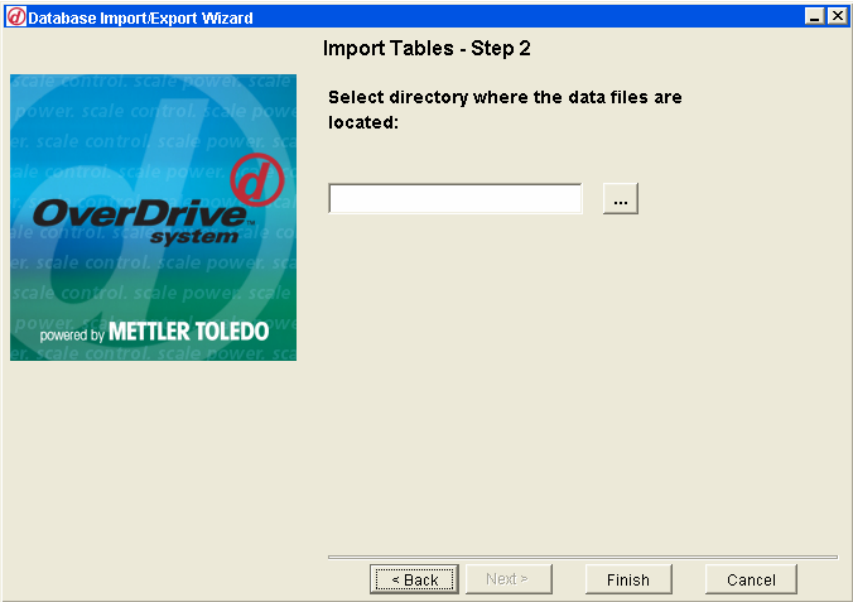
This operation imports information into the database. The data to be imported must be in a *.CSV file, and its format must match that of the OverDrive database. To see an example of how the file should be formatted, open a file that has been exported from the OverDrive database. This procedure should be attempted only by properly trained personnel. To begin the import procedure, select **Database Import/Export Wizard** from the **Wizards** folder in the side tree.

Step 1



1. Select the **Import Tables** radio button from the list of operations.
2. Click the **Next** button.

Step 2

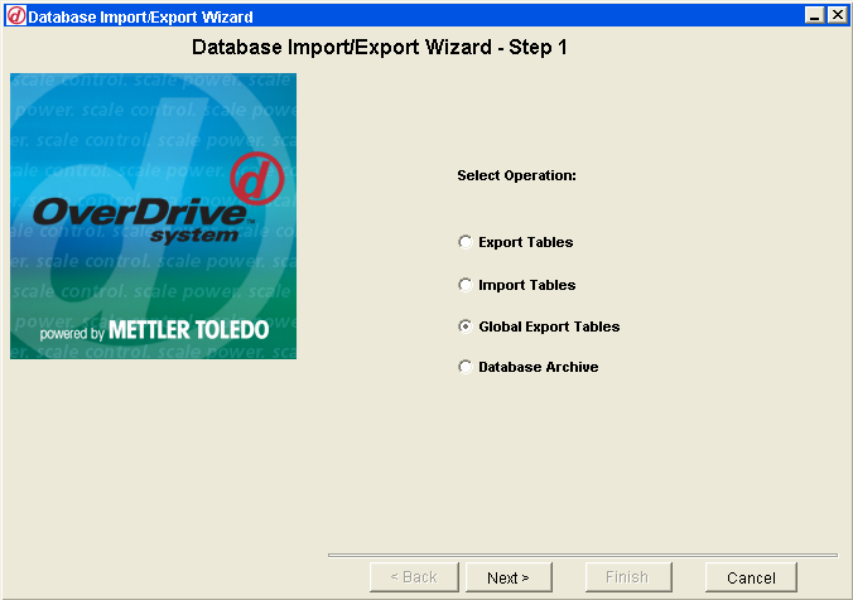


1. Select the directory from which you want to import database information. Type the directory location in the **Select directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. After selecting a storage directory, click the **Finish** button to import the data.

Global Export

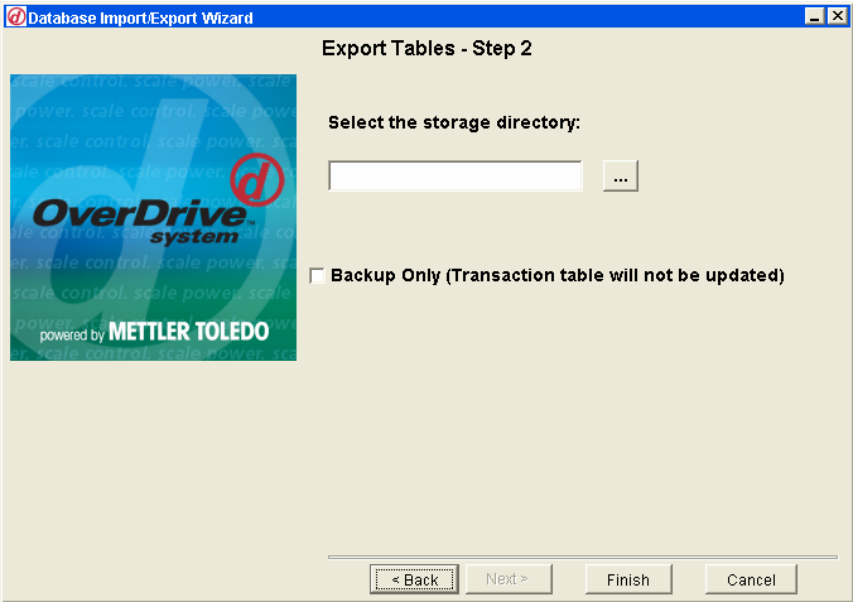
This operation exports all tables in the database. To begin the global export procedure, select **Database Import/Export Wizard** from the **Wizards** folder in the side tree.

Step 1



1. Select the **Global Export Tables** radio button from the list of operations.
2. Click the **Next** button.

Step 2

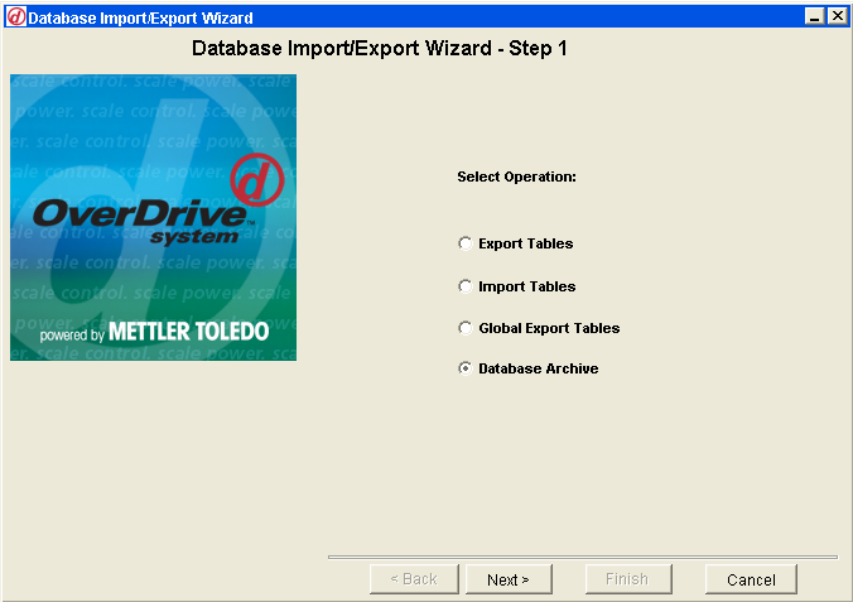


1. Select the directory to which you want to export the database information. Type the directory location in the **Select the storage directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. Check the **Backup Only** box if you are exporting data to back up your system. If the box is not checked, the transaction status will be changed to exported (X).
3. Click the **Finish** button to export the data.

Database Archive

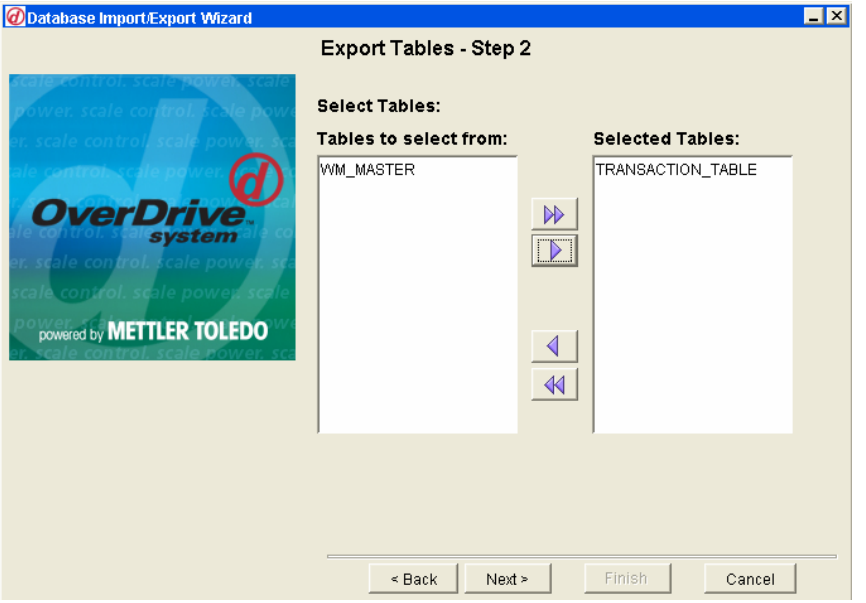
This operation archives data from specific tables. When data is archived, it is deleted from the database. To begin the database archive procedure, select **Database Import/Export Wizard** from the **Wizards** folder in the side tree.

Step 1



1. Select the **Database Archive** radio button from the list of operations.
2. Click the **Next** button.

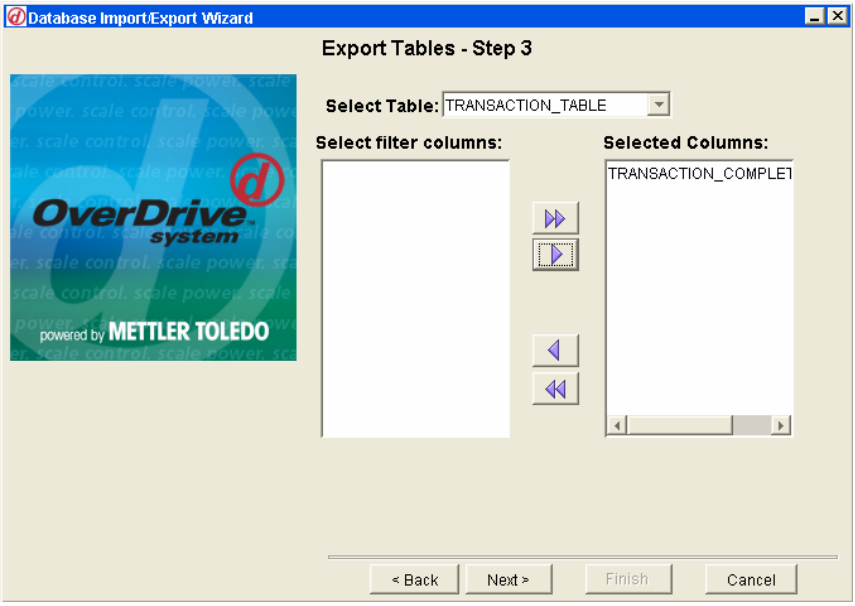
Step 2



Select the tables that you want to archive. You can select the **Transaction** and **Weights and Measures** tables (detail tables are selected automatically). The tables that can be selected are listed in the **Tables to select from** list box on the left.

1. Move the tables that you want to archive to the **Selected tables** list box on the right. Use the arrow keys to move tables from one list box to the other.
2. When the tables that you want to archive are displayed in the **Selected tables** list box, click the **Next** button.

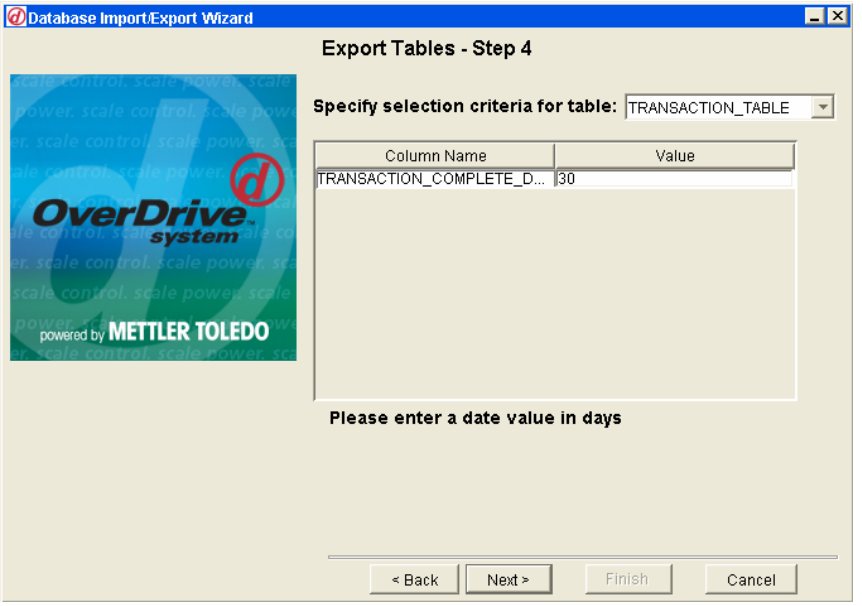
Step 3



After you have selected the tables to be archived, select each table's completion date column as a filter.

1. Select the first table in the **Select table** combo box. That will display the table's completion date column in the **Select filter columns** list box on the left.
2. Move the column to the **Selected columns** list box on the right. Use the arrow keys to move columns from one list box to the other.
3. When you have selected a filter column for each table in the combo box, click the **Next** button.

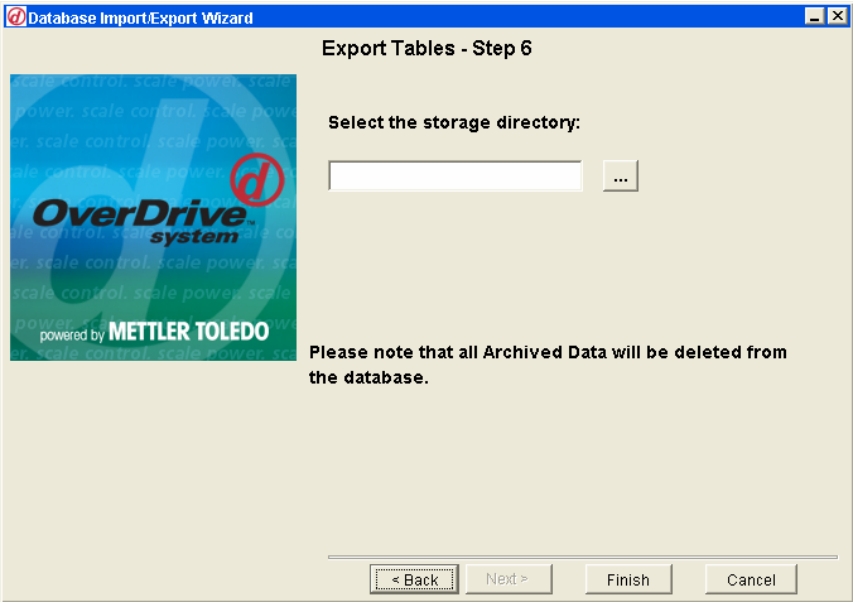
Step 4



You can archive data only if it is more than 90 days old. In the **Value** column, enter the number of days worth of data you want to archive. For example, enter 30 to archive data that was recorded during the 30-day period between 90 days ago and 120 days ago.

1. Select the first table in the **Specify selection criteria for table** combo box. The columns selected in the previous step will be listed in the table below the combo box.
2. For each column name, enter the desired number of days in the **Value** column.
3. When you have entered all the values, click the **Next** button.

Step 5



Select the directory to which you want to archive the database information.

1. Type the directory location in the **Select the storage directory** data field, or use the browse button to locate the directory. If you browse for a directory, highlight the desired directory and then click the **Open** button to enter it in the data field.
2. Click the **Finish** button.

Push Buttons

The following push buttons are used to navigate through the wizard:

Back: Goes back to the previous screen.

Next: Goes forward to the next screen.

Finish: Accepts any changes made to the settings and closes the wizard.

Cancel: Closes the wizard without accepting any changes made to the settings.

16 Transaction Type Wizard

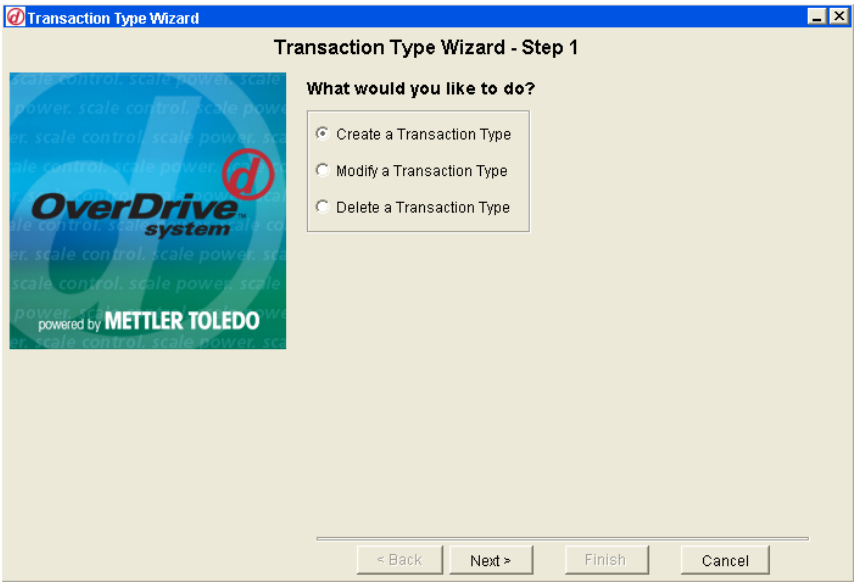
Introduction

The Transaction Type Wizard customizes one-pass, two-pass, and multi-pass transaction types for use with the Transaction Wizard, Touch Screen, or Four-Line Display on an unattended weighing station.

Create

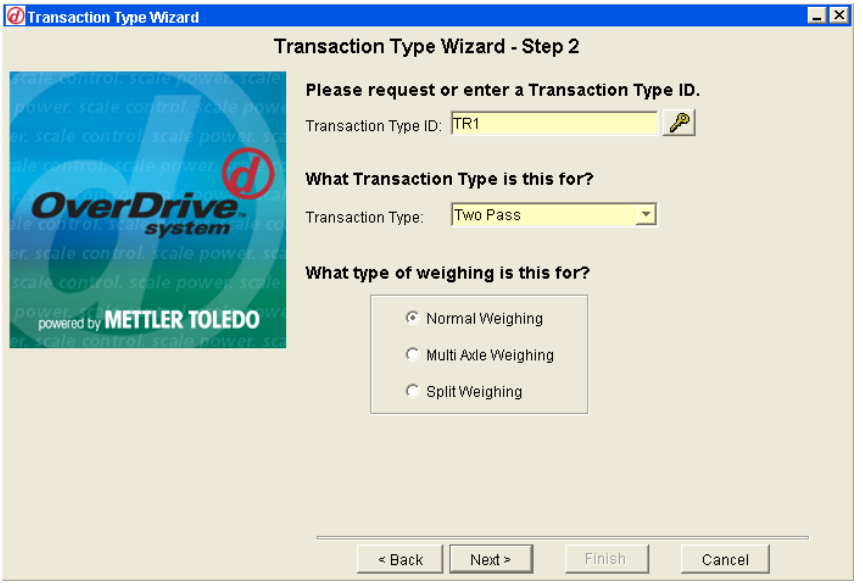
This procedure is used to create a new transaction type. To begin, select **Transaction Type Wizard** from the **Wizards** folder in the side tree.

Step 1



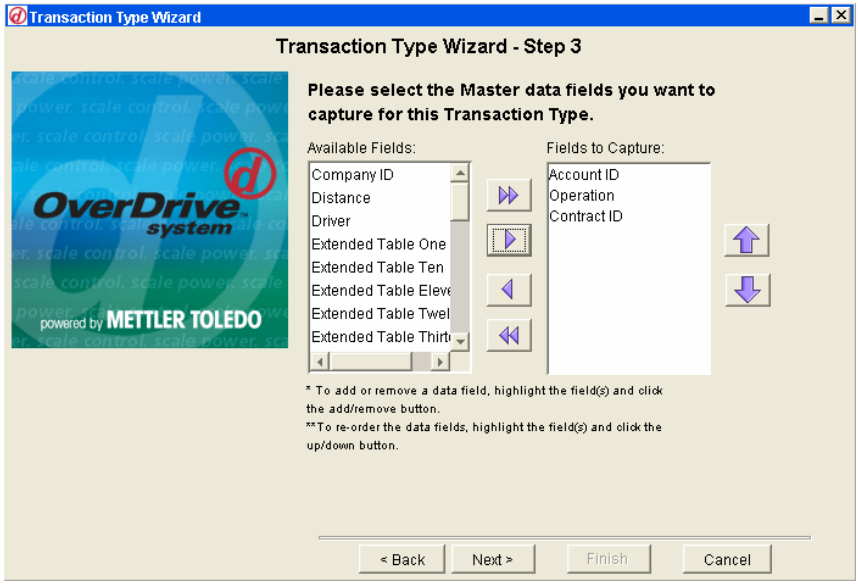
1. Select the **Create a Transaction Type** radio button.
2. Click the **Next** button.

Step 2



1. You must assign a unique alphanumeric ID for each transaction type that you create. Type an ID in the **Transaction Type ID** data field or click the **Get System Generated Key** button to have the system assign an ID.
2. Select a transaction type from the **Transaction Type** combo box: **One Pass**, **Two Pass**, or **Multi Pass**.
3. Use the radio buttons to select a weighing type: **Normal Weighing**, **Multi Axle Weighing**, or **Split Weighing**.
4. Click the **Next** button.

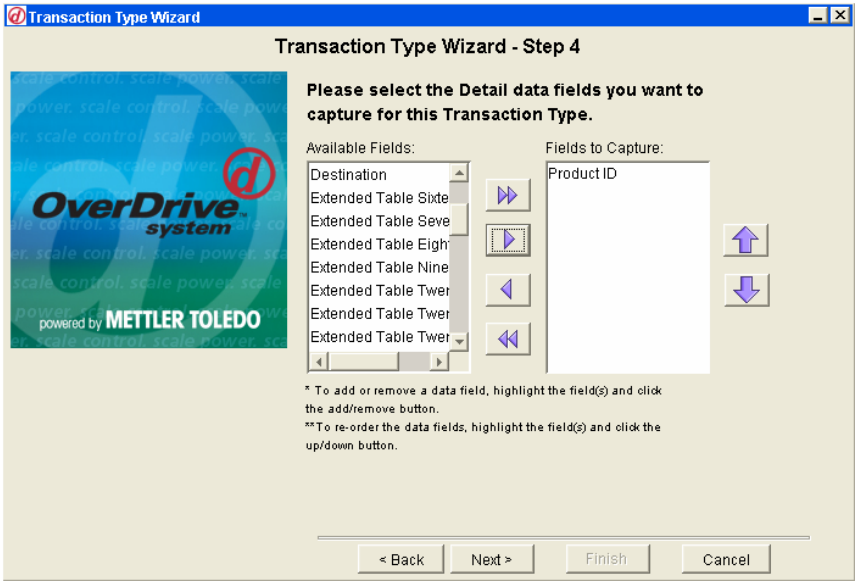
Step 3



Select the master data fields that you want to capture for this transaction type.

1. To select a data field, highlight it in the **Available Fields** list box and use the right arrow button to move it to the **Fields to Capture** list box. The fields will be captured in the order they are listed in the box. You can change the order in which the fields are captured by highlighting them and using the up and down arrow buttons to move them.
2. When you have selected the fields that you want to capture, click the **Next** button.

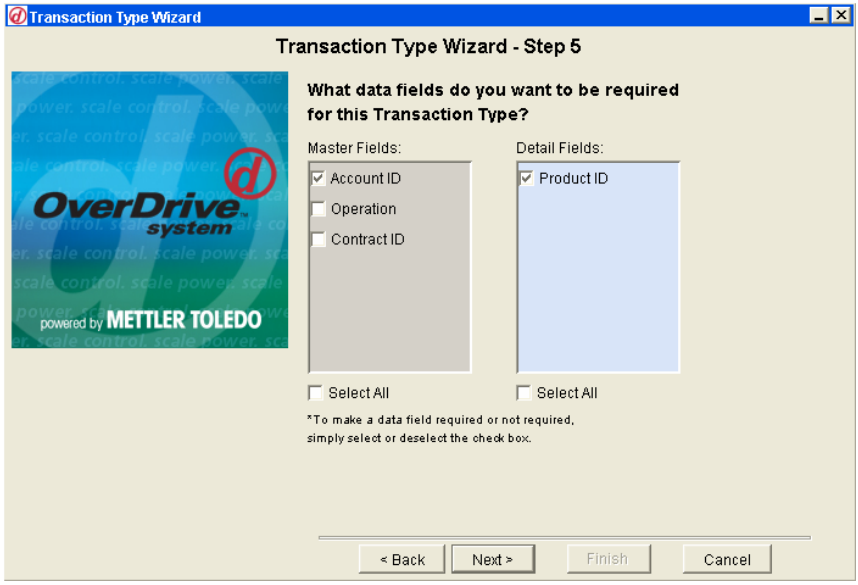
Step 4



Select the detail data fields that you want to capture for this transaction type. Detail fields are fields on a **Transaction** screen tab.

1. To select a data field, highlight it in the **Available Fields** list box and use the right arrow button to move it to the **Fields to Capture** list box. The fields will be captured in the order they are listed in the box. You can change the order in which the fields are captured by highlighting them and using the up and down arrow buttons to move them.
2. When you have selected the fields that you want to capture, click the **Next** button.

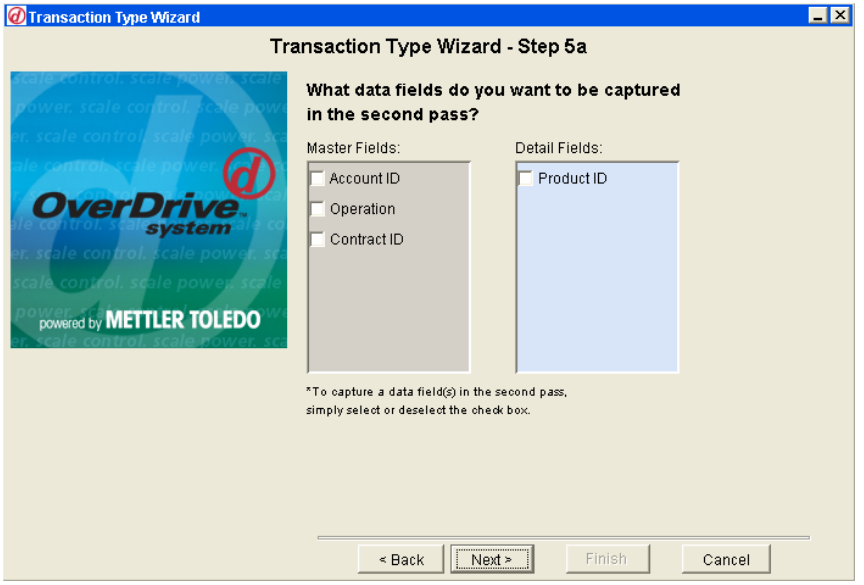
Step 5



The data fields selected in the previous two steps will be listed in the **Master Fields** and **Detail Fields** list boxes.

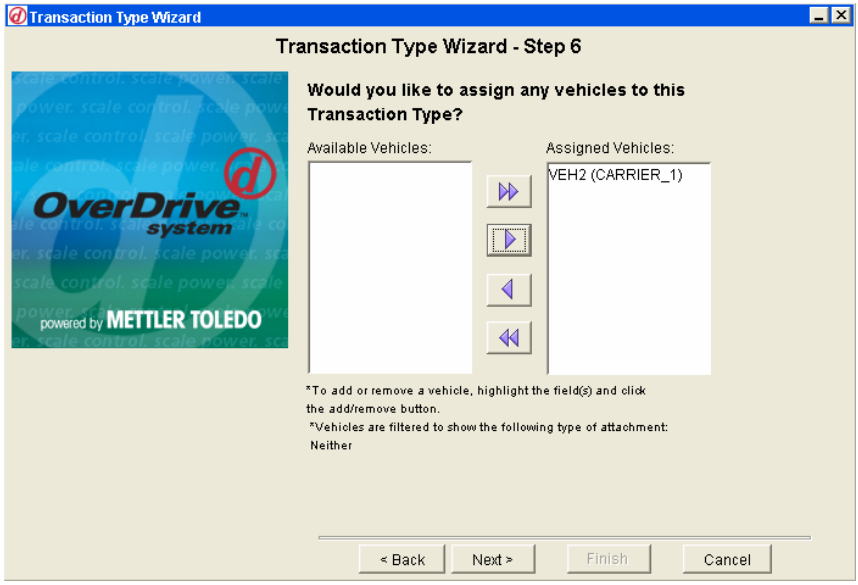
1. Check the box next to each field that should be required for the transaction type. If a field is required, the operator will need to enter data in it to complete a transaction. The **Account** data field must be a required field for any transaction type that you create. Use the **Select All** check box to select or deselect all the fields in the list box above it.
2. Click the **Next** button.

Step 5a



1. Use the check boxes to select the data that will be entered on the second pass over the scale.
2. Click the **Next** button.

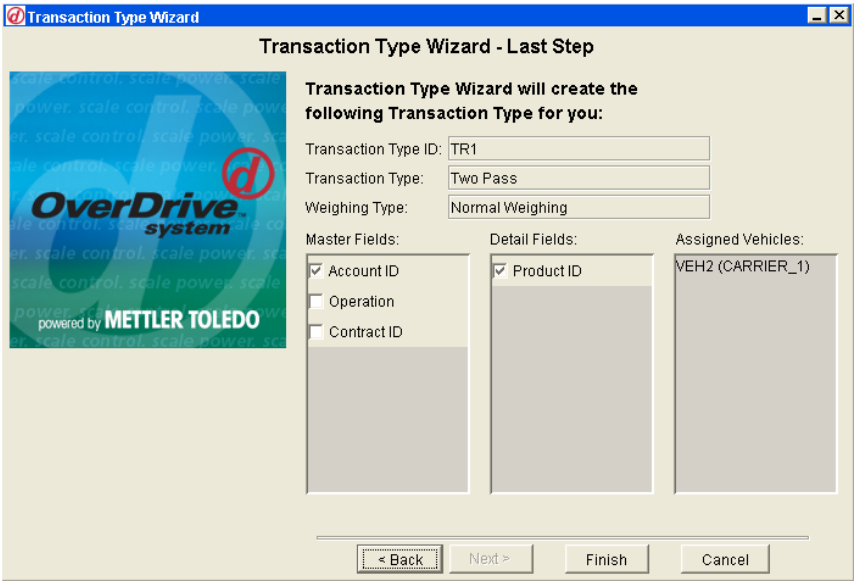
Step 6



Select the vehicles that you want to assign to the transaction type. The **Available Vehicles** list box shows all vehicles in the database.

1. To assign a vehicle, highlight it and use the right arrow button to move it to the **Assigned Vehicles** list box. Before you can process transactions for a vehicle, you must assign the vehicle to the transaction type. You can assign as many vehicles as you want to a transaction type, and you can assign each vehicle to more than one transaction type.
2. Click the **Next** button.

Step 7



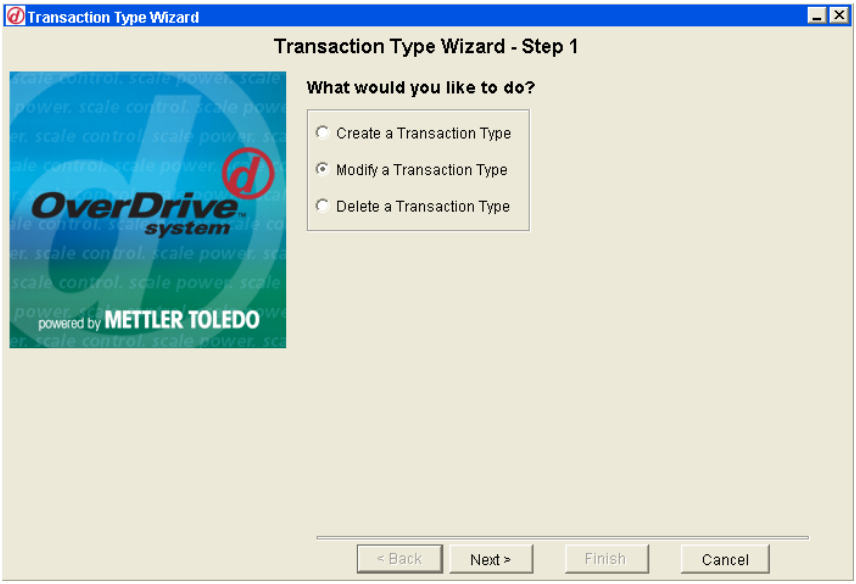
This screen shows the selections that you have made for the transaction type. Make sure that the selections are correct.

1. Click the **Finish** button to create the new transaction type.

Modify

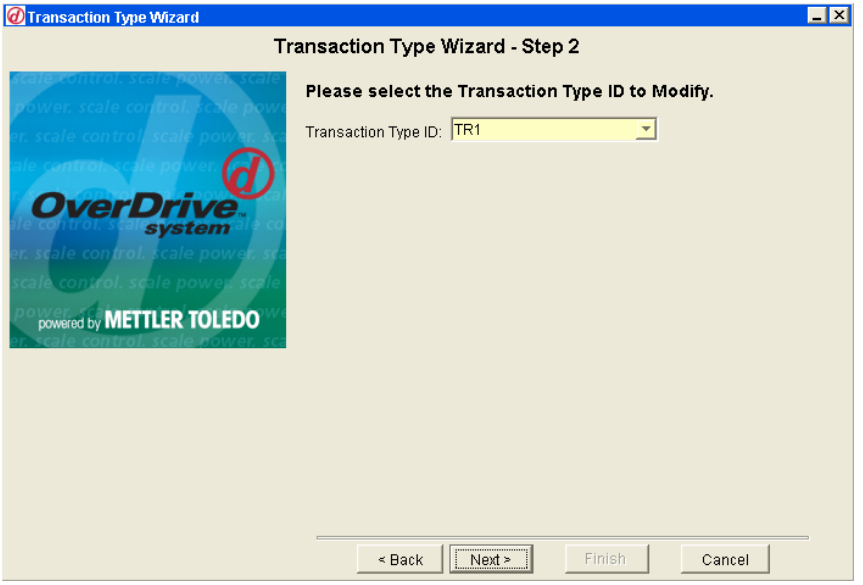
This procedure is used to modify an existing transaction type. To begin, select **Transaction Type Wizard** from the **Wizards** folder in the side tree.

Step 1



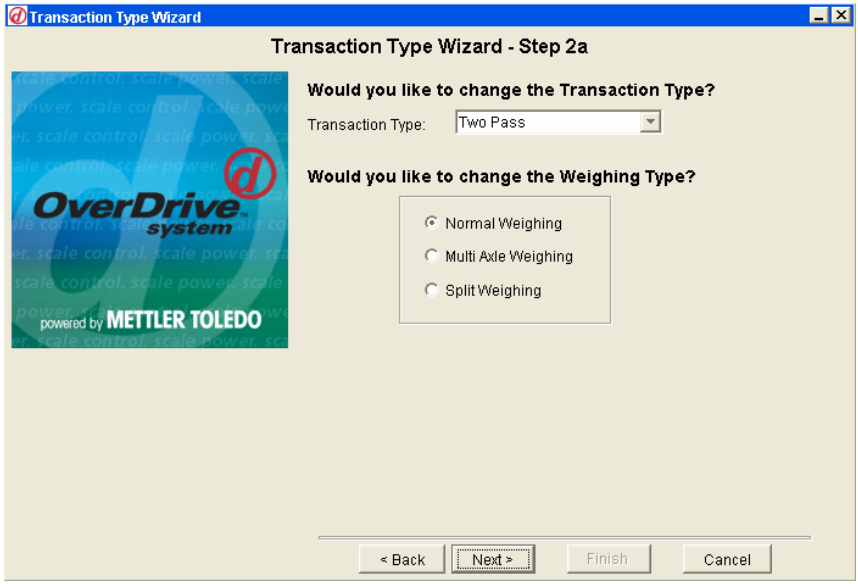
1. Select the **Modify a Transaction Type** radio button.
2. Click the **Next** button.

Step 2



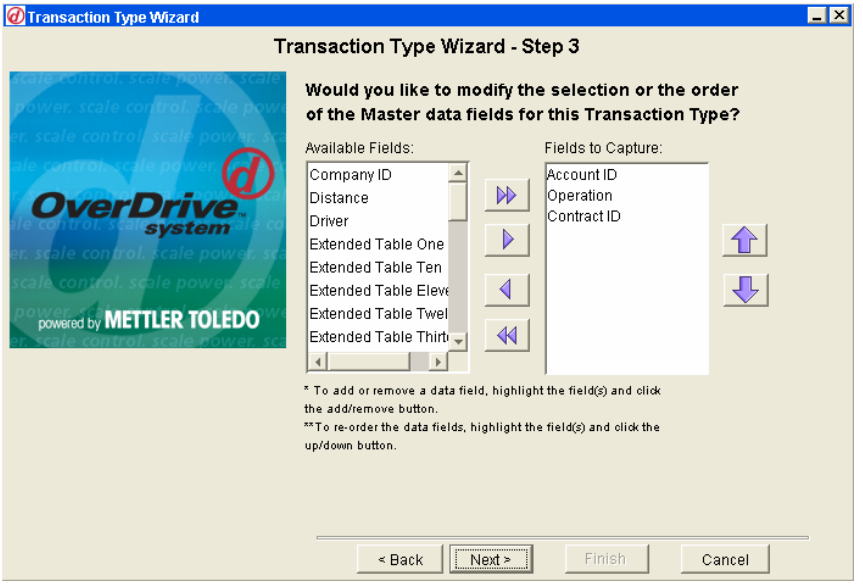
1. Use the **Transaction Type ID** combo box to select the transaction type that you want to modify.
2. Click the **Next** button.

Step 2a



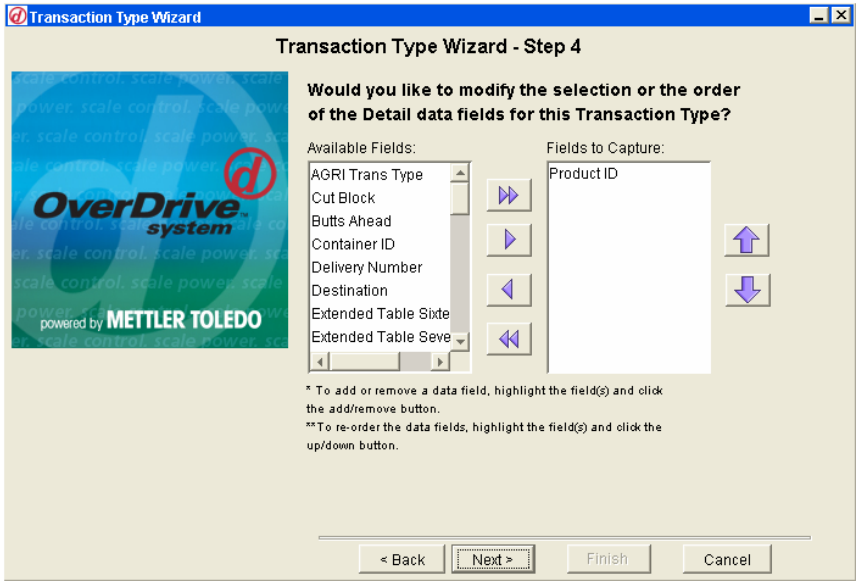
1. The current transaction type is displayed in the **Transaction Type** combo box. You can change it by selecting one of the options in the box: **One Pass**, **Two Pass**, or **Multi Pass**.
2. The radio button that is selected indicates the current weighing type. You can change it by selecting another radio button: **Normal Weighing**, **Multi Axle Weighing**, or **Split Weighing**.
3. Click the **Next** button.

Step 3



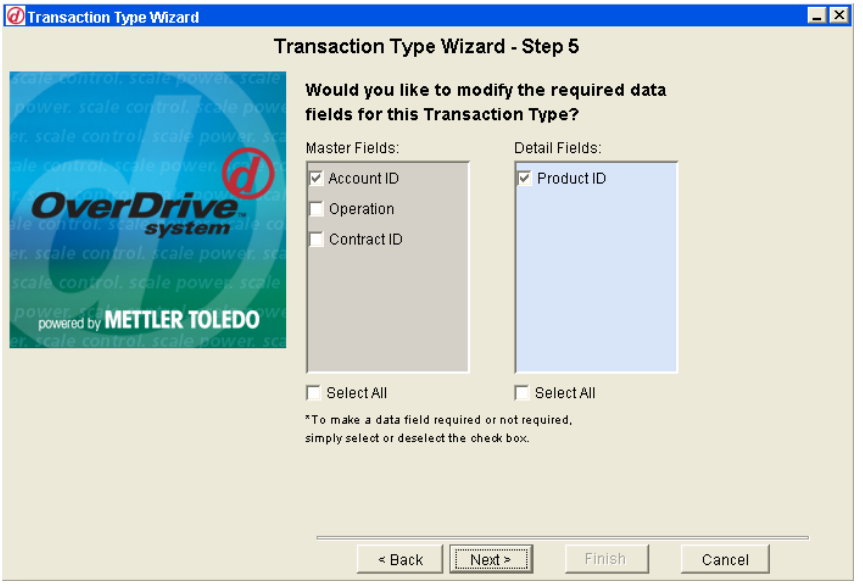
1. The **Fields to Capture** list box shows the master data fields to be captured for this transaction type. You can make changes by using the arrow buttons to move fields between the **Available Fields** and **Fields to Capture** list boxes. The fields will be captured in the order they are listed in the box. You can change the order in which the fields are captured by highlighting them and using the up and down arrow buttons to move them.
2. Click the **Next** button.

Step 4



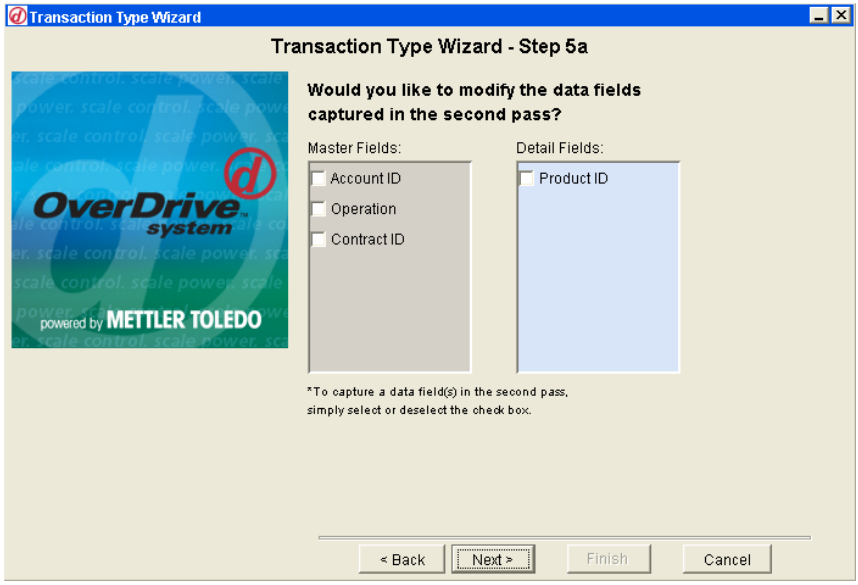
1. The **Fields to Capture** list box shows the detail data fields to be captured for this transaction type. You can make changes by using the arrow buttons to move fields between the **Available Fields** and **Fields to Capture** list boxes. The fields will be captured in the order they are listed in the box. You can change the order in which the fields are captured by highlighting them and using the up and down arrow buttons to move them.
2. Click the **Next** button.

Step 5



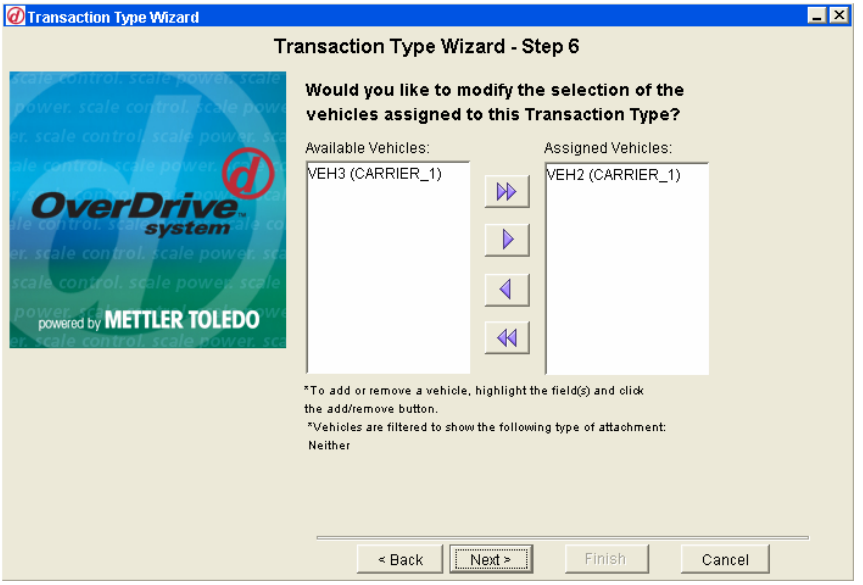
1. The data fields to be included in the transaction type are listed in the **Master Fields** and **Detail Fields** list boxes. A check mark next to a field indicates that it is required for the transaction type. You can make changes by selecting and deselecting the check boxes. The **Account** data field must be a required field for any transaction type that you create. Use the **Select All** check box to select or deselect all the fields in the list box above it.
2. Click the **Next** button.

Step 5a



1. A check mark indicates which data is to be entered on the second pass over the scale. You can make changes by selecting and deselecting the check boxes.
2. Click the **Next** button.

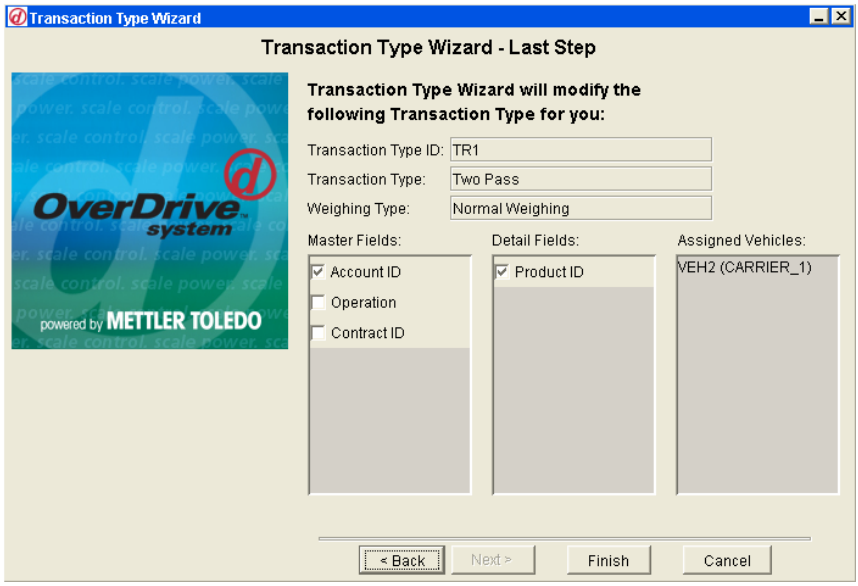
Step 6



Before you can process transactions for a vehicle, you must assign the vehicle to the transaction type. You can assign as many vehicles as you want to a transaction type, and you can assign each vehicle to more than one transaction type.

1. The **Assigned Vehicles** list box shows the vehicles that are assigned to the transaction type. You can make changes by using the arrow buttons to move vehicles between the **Available Vehicles** and **Assigned Vehicles** list boxes.
2. Click the **Next** button.

Step 7



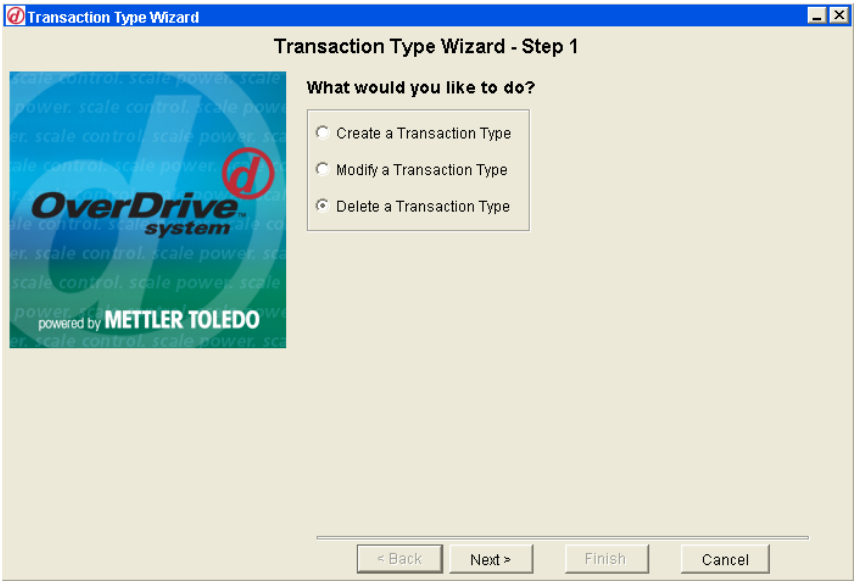
This screen shows the selections that you have made for the transaction type. Make sure that the selections are correct.

1. Click the **Finish** button to modify the transaction type.

Delete

This procedure is used to delete a transaction type. To begin, select **Transaction Type Wizard** from the **Wizards** folder in the side tree.

Step 1

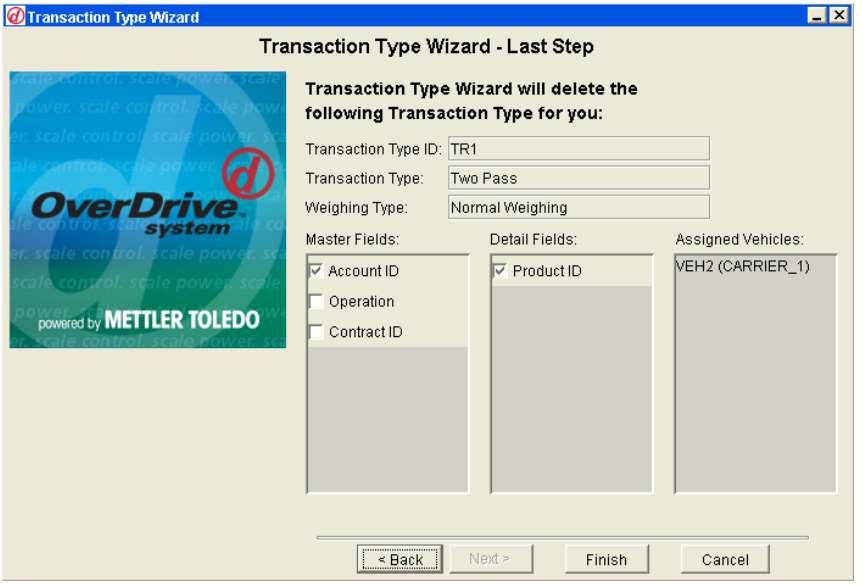


1. Select the **Delete a Transaction Type** radio button.
2. Click the **Next** button.

Step 2

1. Use the **Transaction Type ID** combo box to select the ID for the transaction type that you want to delete.
2. Click the **Next** button.

Step 3



This screen shows the current selections for the transaction type.

1. Click the **Finish** button to delete the transaction type.

Push Buttons

The following push buttons are used to navigate through the wizard:

Back: Goes back to the previous screen.

Next: Goes forward to the next screen.

Finish: Accepts any changes made to the settings and closes the wizard.

Cancel: Closes the wizard without accepting any changes made to the settings.

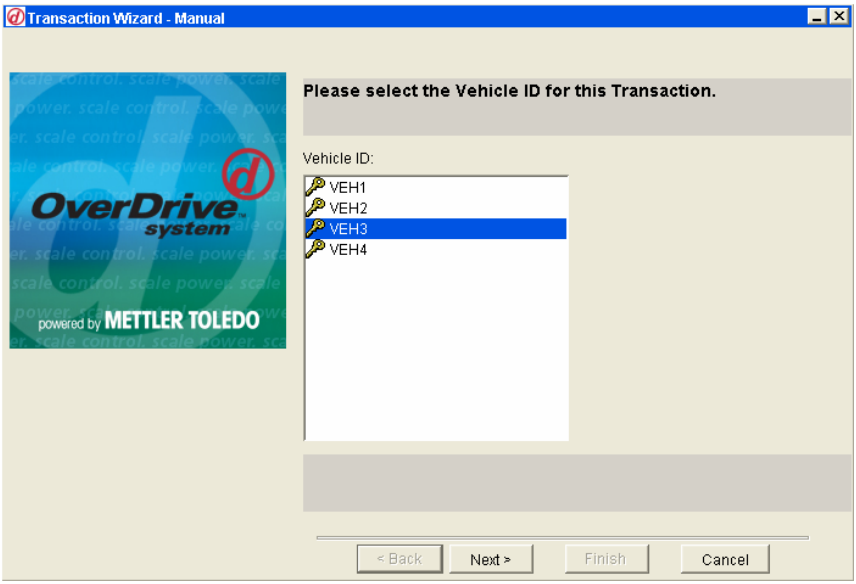
17 Using Transaction Types

Introduction

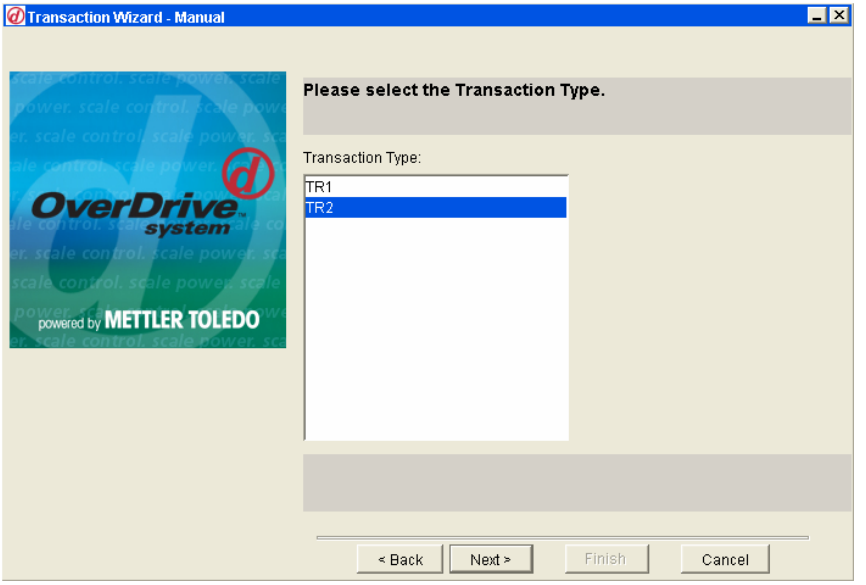
Once you have created a transaction type, you can use it with the Transaction Wizard, Touch Screen, Four-Line Display on an unattended weighing station. The amount of data that must be entered and the order in which it is entered will be determined by how the transaction type was set up. The sample procedures described in this chapter are for a one-pass transaction that requires you to enter only vehicle, account, operation, and product data.

Transaction Wizard

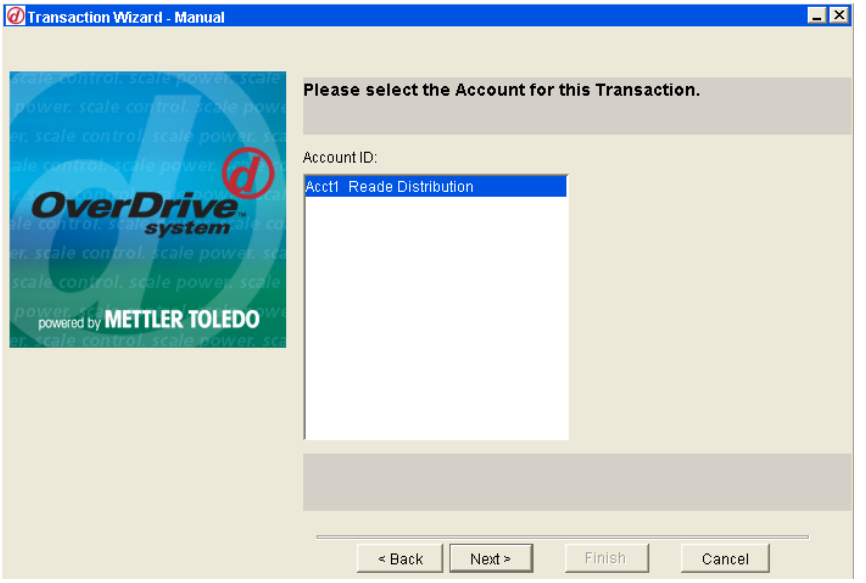
To open the Transaction Wizard, click the **Transaction Wizard** button on the Virtual Scale Indicator. Be sure to use the button that applies to the scale on which the vehicle is being weighed.



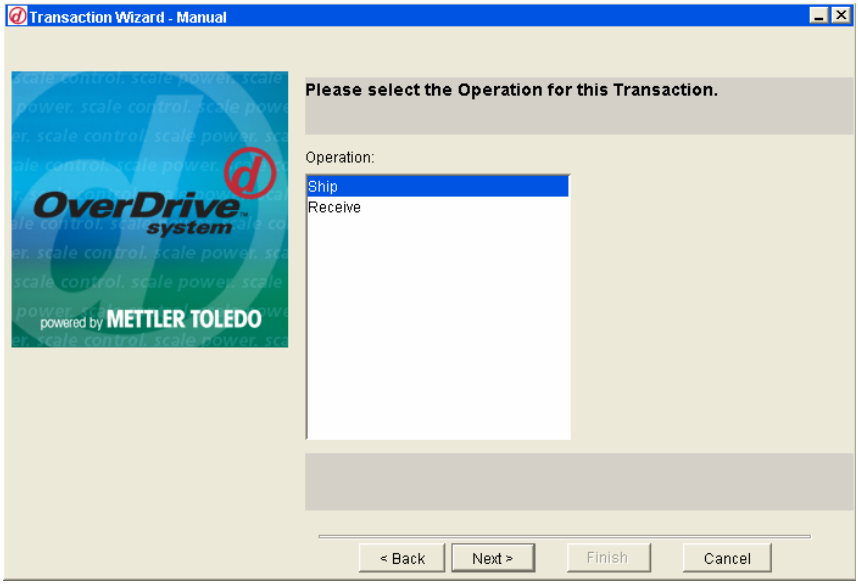
1. Select the Vehicle ID. Then click the **Next** button.



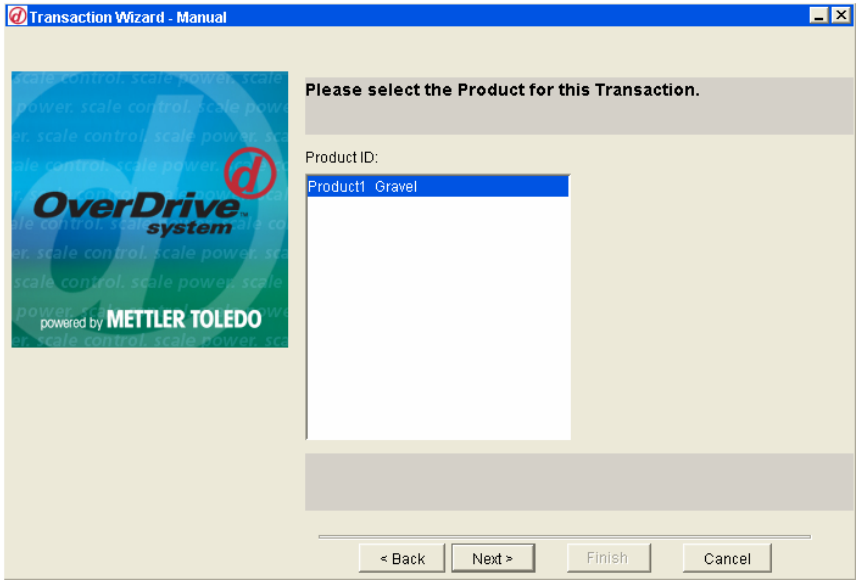
2. Select the transaction type. Then click the **Next** button.



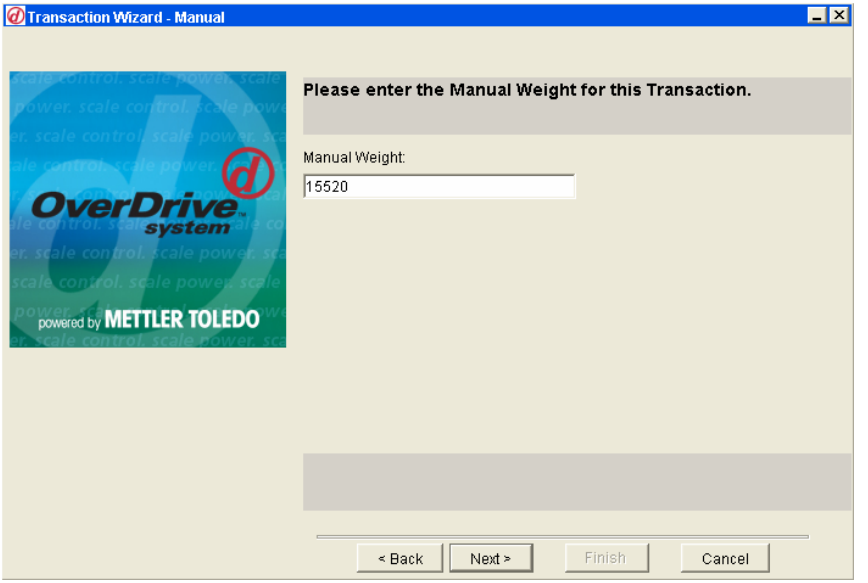
3. Select the Account ID. Then click the **Next** button.



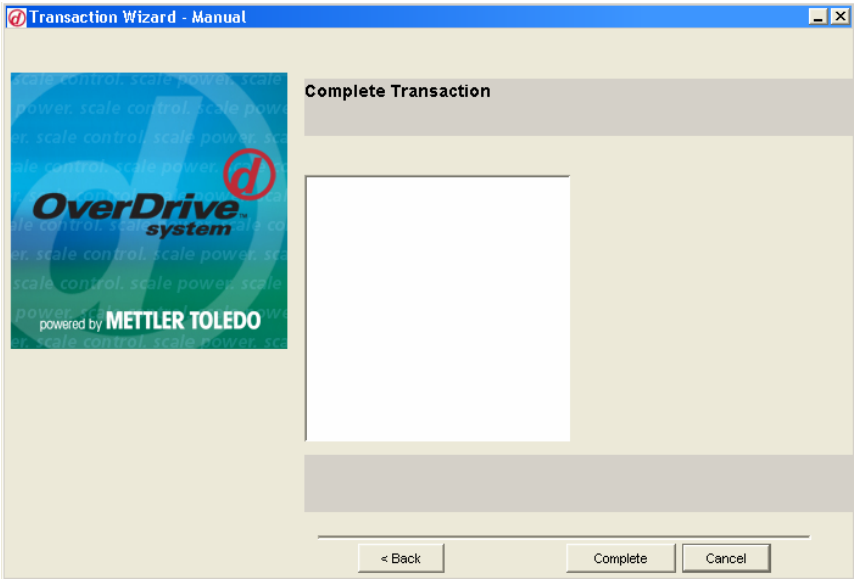
4. Select the Operation. Then click the **Next** button.



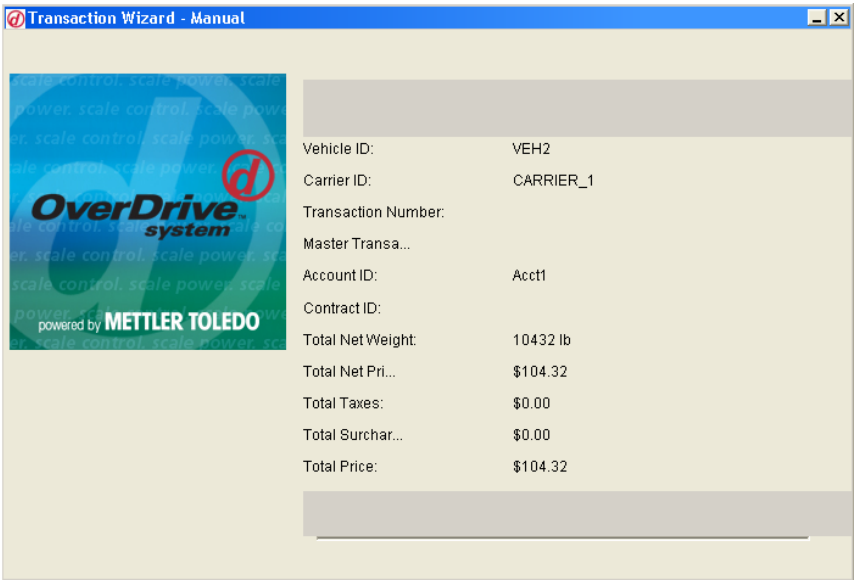
5. Select the Product ID. Then click the **Next** button.



6. If you are using a manual scale, enter a weight and then click the **Next** button. Otherwise, go directly to Step 7.



7. Review the transaction summary information to make sure it is correct. Then click the **Complete** button.

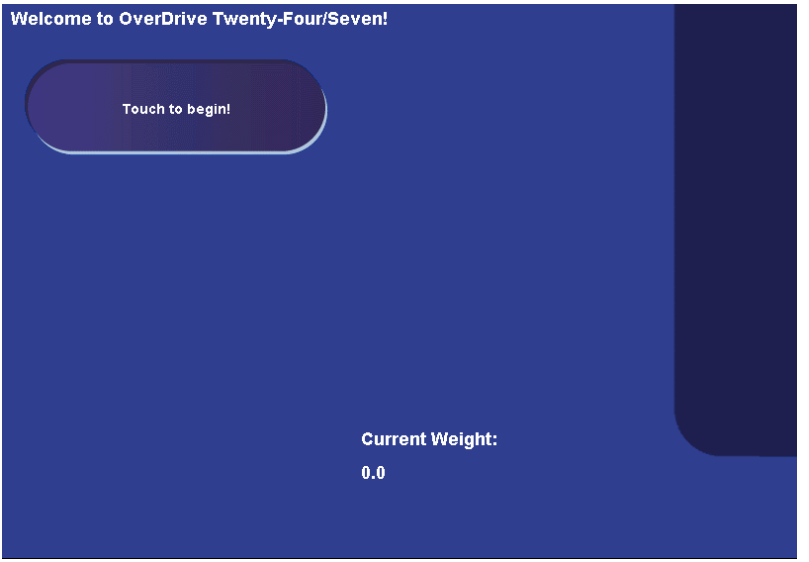


8. The screen shown above will be displayed briefly to indicate that the transaction has been completed.

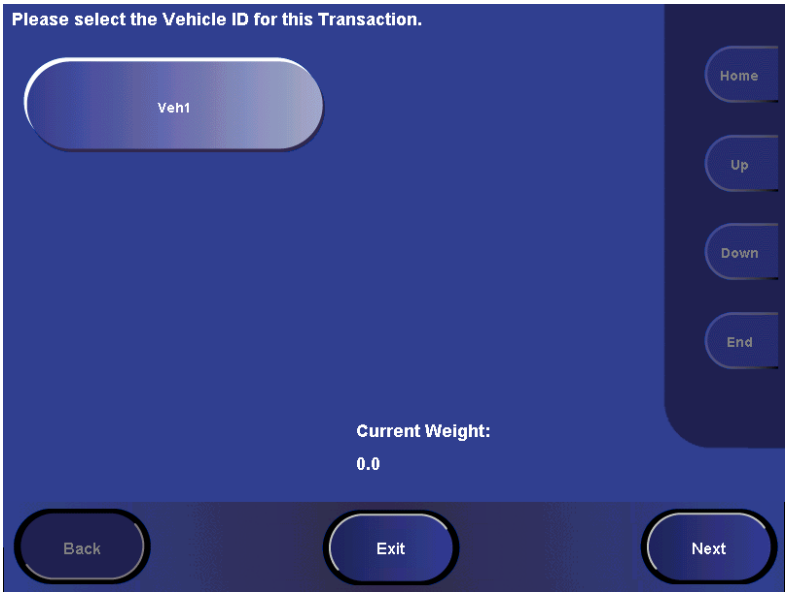
NOTE: For a two-pass transaction type, the screen shown in Step 7 will include an **Accept** button. Use that button to complete the first weighing. When the vehicle returns to the scale for its second weighing, select the Vehicle ID and then click the **Complete** button.

Touch Screen

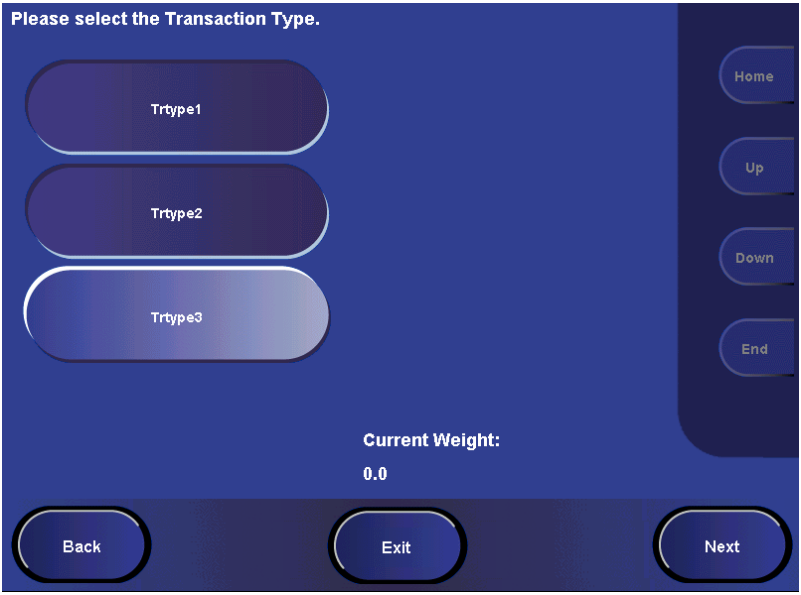
To open the Transaction Touch Screen, click the **Touch Screen** button on the Virtual Scale Indicator. Be sure to use the button that applies to the scale on which the vehicle is being weighed.



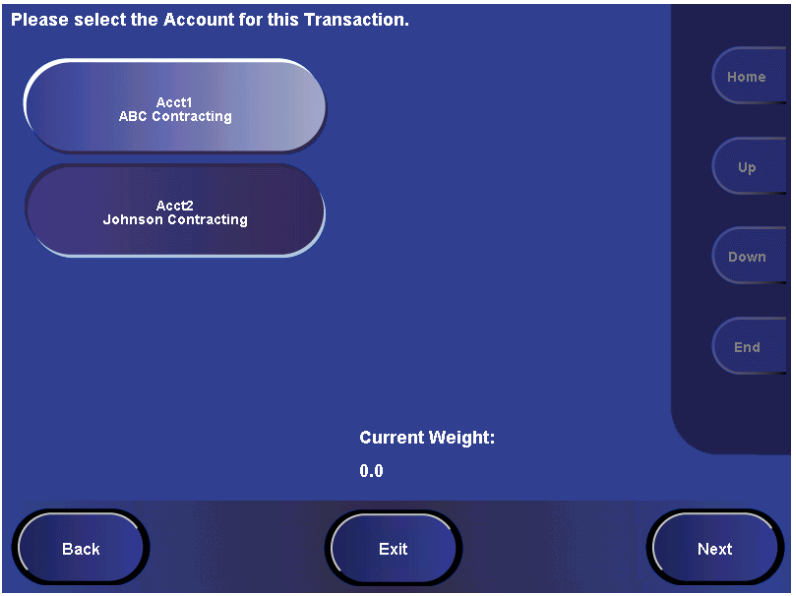
1. Select the **Touch to begin!** button.



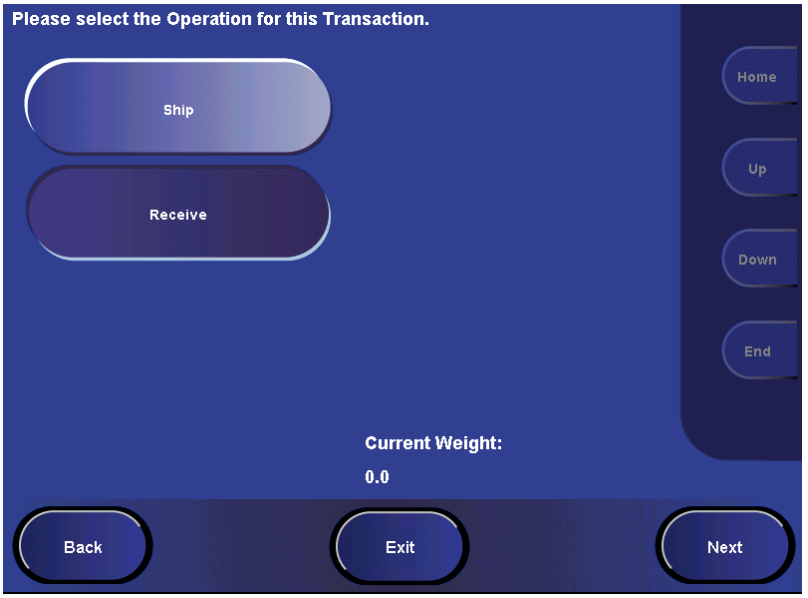
2. Select the vehicle and then the **Next** button.



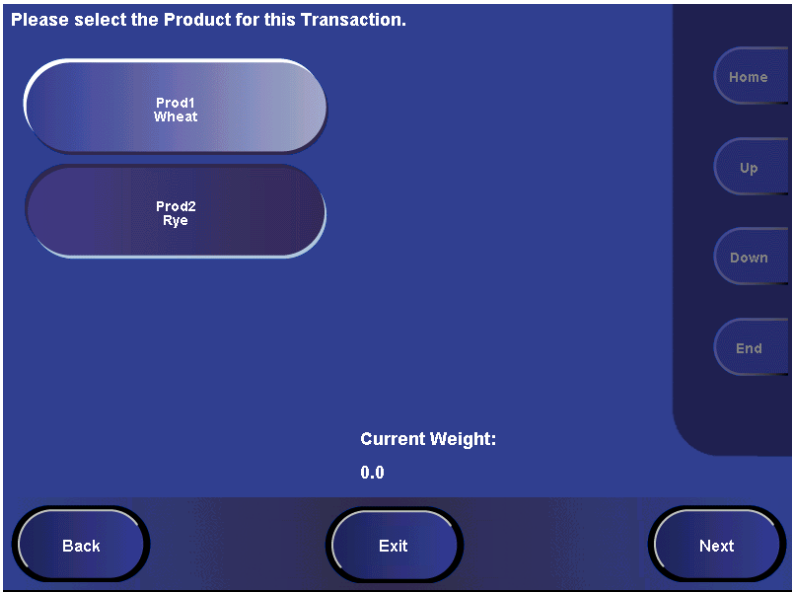
3. Select the transaction type and then the **Next** button.



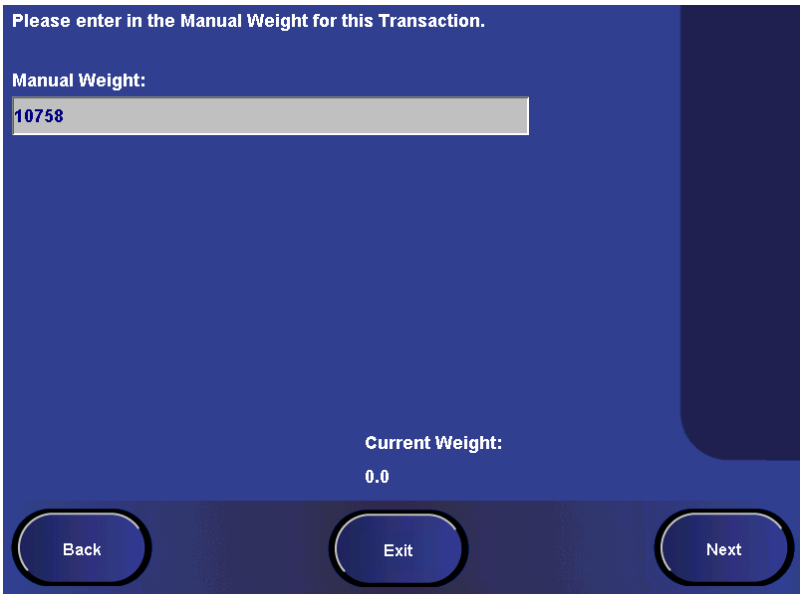
4. Select the account and then the **Next** button.



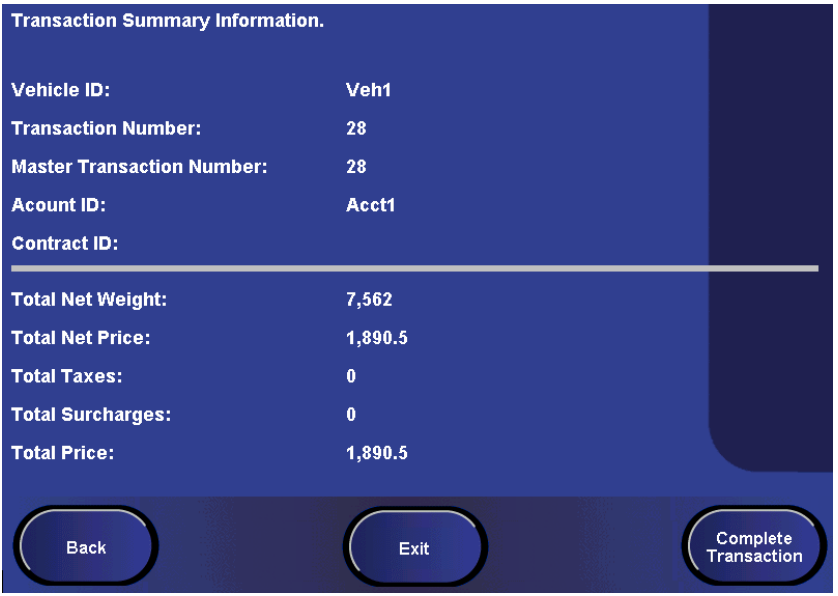
5. Select the operation and then the **Next** button.



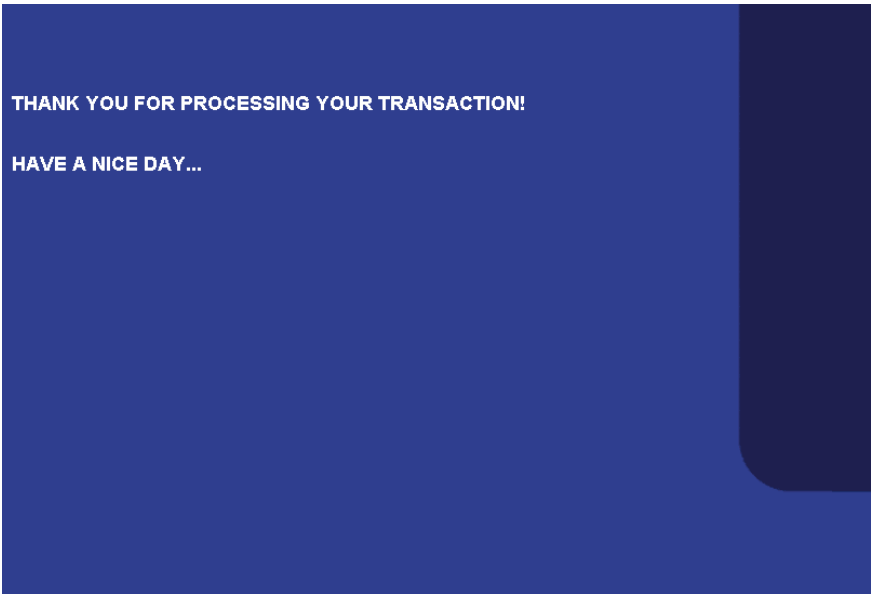
6. Select the product and then the **Next** button.



7. If you are using a manual scale, enter a weight and then select the **Next** button. Otherwise, go directly to Step 8.



8. Review the transaction summary information to make sure it is correct. Then select the **Complete Transaction** button.



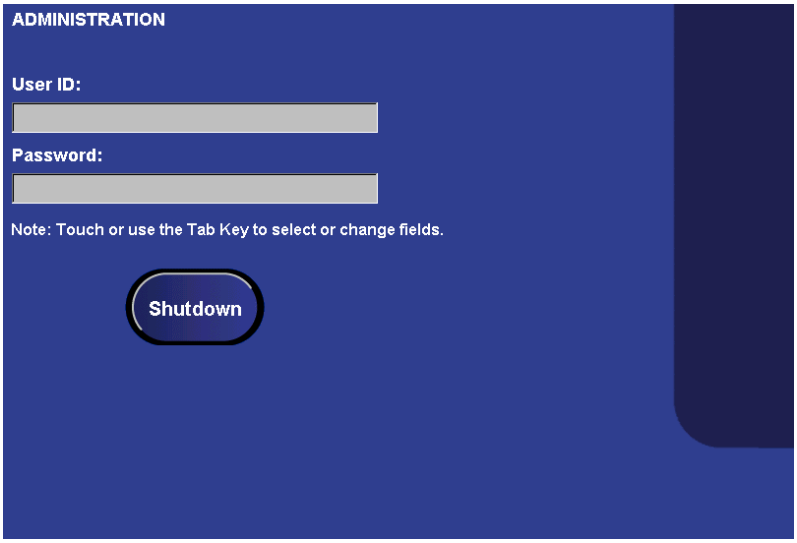
9. The screen shown above will be displayed briefly to indicate that the transaction has been completed.

NOTE: For a two-pass transaction type, the screen shown in Step 8 will include a **Complete Pass** button. Use that button to complete the first weighing. When the vehicle returns to the scale for its second weighing, select the Vehicle ID and then select the **Complete Transaction** button.

Use the **Back**, **Exit**, and **Next** buttons at the bottom of the screen to navigate through the steps. Use the **Home**, **Up**, **Down**, and **End** buttons at the right-hand edge of the screen to navigate through the selections on an individual screen. These buttons will be active only if there are more selections than will fit on the screen.

NOTE: To enter a short code, press the F11 key on the keyboard and then type in the short code.

To exit the touch screen, type Ctrl-End. When the **Administration** screen is displayed, enter your User ID and password. Then select **Shutdown**.



Four-Line Display

The four-line display includes prompts in the first two lines and options in the final two lines. Scroll through the options to find the correct one, and then press the **Accept** key to select it.

1. When the system is ready to process a transaction, it will display the following message: **Welcome to OverDrive**. Press the **Accept** key to start the transaction.
2. At the **Select Vehicle:** prompt, scroll down to display the desired vehicle and then press the **Accept** key.
3. At the **Select Transaction Type:** prompt, scroll down to display the desired transaction type and then press the **Accept** key.
4. At the **Select Account:** prompt, scroll down to display the desired account and then press the **Accept** key.
5. At the **Select Operation:** prompt, scroll down to display the desired operation and then press the **Accept** key.
6. At the **Select Product:** prompt, scroll down to display the desired product and then press the **Accept** key.
7. At the **Complete Transaction** prompt, press the **Accept** key.
8. A "Thank You" message will be displayed briefly, and then the system should be ready to process another transaction.

The system accepts commands to scroll through options, select options, and cancel a transaction. To assign these commands to computer keys, use the **Options** screen's **Unattended** tab in **Application Setup**.

NOTE: For a two-pass transaction, Step 7 will display a **Complete Pass** prompt. Press the **Accept** key to complete the first weighing. When the vehicle returns to the scale for its second weighing, select the Vehicle ID and accept it. Then press the **Accept** key at the **Complete Transaction** prompt.

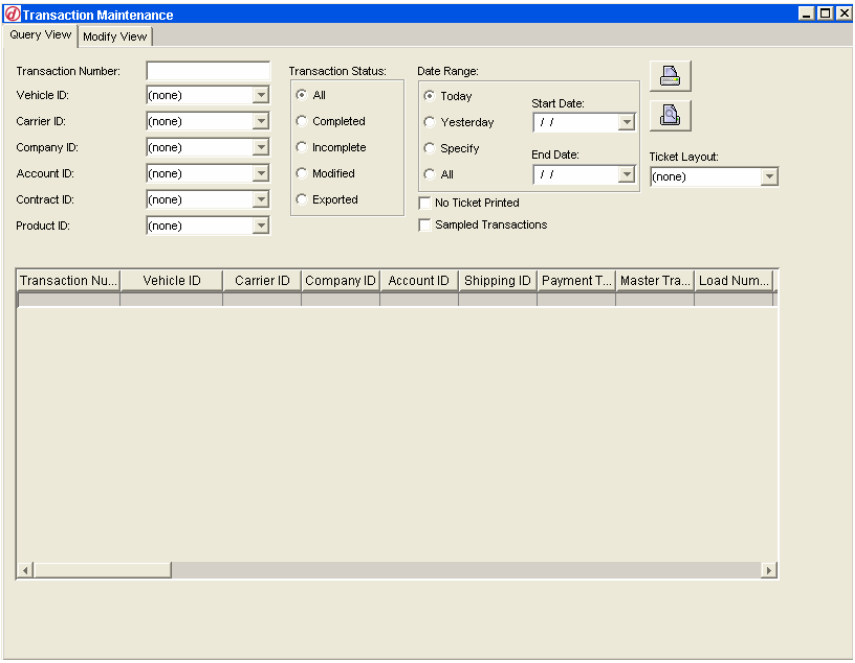
18 Back Office Management

Introduction

This chapter describes the features that are available in the side tree's **Back Office Management** folder: transaction maintenance, ticket re-pricing, and invoicing.

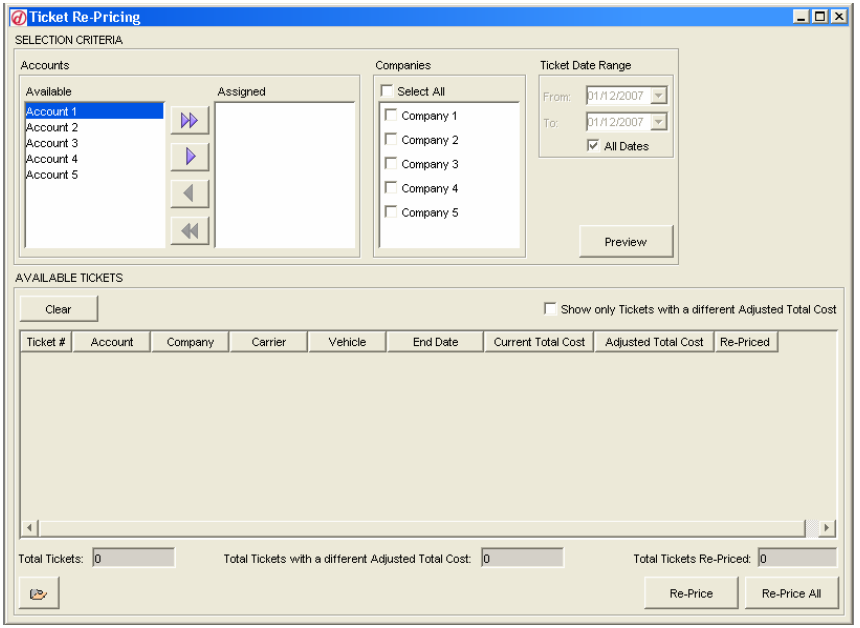
Transaction Maintenance

This form lets you view records of transactions and make changes to them. See Chapter 11 for an explanation of how to manage transaction records.



Ticket Re-pricing

The **Ticket Re-Pricing** table is used to change the pricing on transactions that are stored in the database. The data fields, list boxes, and check boxes on the table function as filters to help you find the tickets that you want to re-price. When you set filters, a query will retrieve only those tickets that meet the specifications of the filters.



1. The **Available** list box will display a list of accounts. Highlight the accounts for which you want to re-price tickets, and then click the right arrow button to move them to the **Assigned** list box.
2. In the **Companies** list box, check the companies for which you want to re-price tickets. You can select individual companies or check the **Select All** box to select all companies.
3. If you are specifying a ticket date range, use the calendar in the **From** field to select a starting date and use the calendar in the **To** field to select an ending date. To include all tickets, check the **All Dates** box.

4. Click the **Preview** button to compile a list of tickets that match the selection criteria.

Available Tickets

The tickets that match the selection criteria will be listed in the **Available Tickets** table. You can limit the tickets in the list to transactions for which the pricing differs from the pricing that is currently in the database. To do that, check the **Show only Tickets with a different Adjusted Total Cost** box.

The data fields at the bottom of the table indicate how many of the tickets listed in the table fit into each of the following three categories:

- Total Tickets – The total number of tickets displayed in the list.
- Total Tickets with a different Adjusted Total Cost – The total number of tickets for which the pricing on the ticket differs from the current pricing.
- Total Tickets Re-Priced – The total number of tickets that have been re-priced.

Use the following procedure to re-price tickets:

1. In the **Available Tickets** table, highlight the ticket that you want to re-price (you can highlight more than one ticket). If you want to re-price all tickets that are listed in the **Available Tickets** table, there is no need to highlight the tickets.
2. If you are re-pricing one or more highlighted tickets, click the **Re-Price** button. If you are re-pricing all of the available tickets, click the **Re-Price All** button.

When you re-price a ticket, the number in the **Total Tickets Re-Priced** field will increase by one. The number in the **Total Tickets with a different Adjusted Total Cost** field will decrease by one because the re-priced ticket should match the pricing currently in the database.

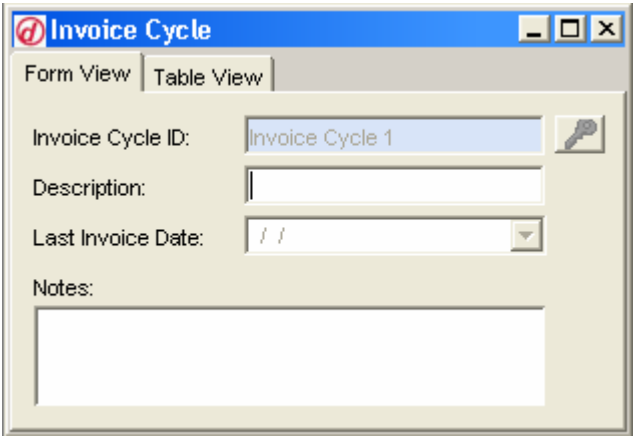
The **Clear** button is provided to allow you to clear the records listed in the **Available Tickets** table so that you can compile a new list of tickets to re-price.

Log File

The database compiles daily log files containing information about all re-priced transactions. To view the files, click the **Log File** button at the bottom of the table.

Invoice Cycle

The **Invoice Cycle** table is used to create invoice cycles, which function like groups. For example, you can create two invoice cycles, one for weekly billing and one for monthly billing. Then you can assign the accounts that you want to bill once a week to the weekly billing cycle and assign the accounts that you want to bill once a month to the monthly billing cycle. NOTE: This table is available only if the Invoicing Module is registered.

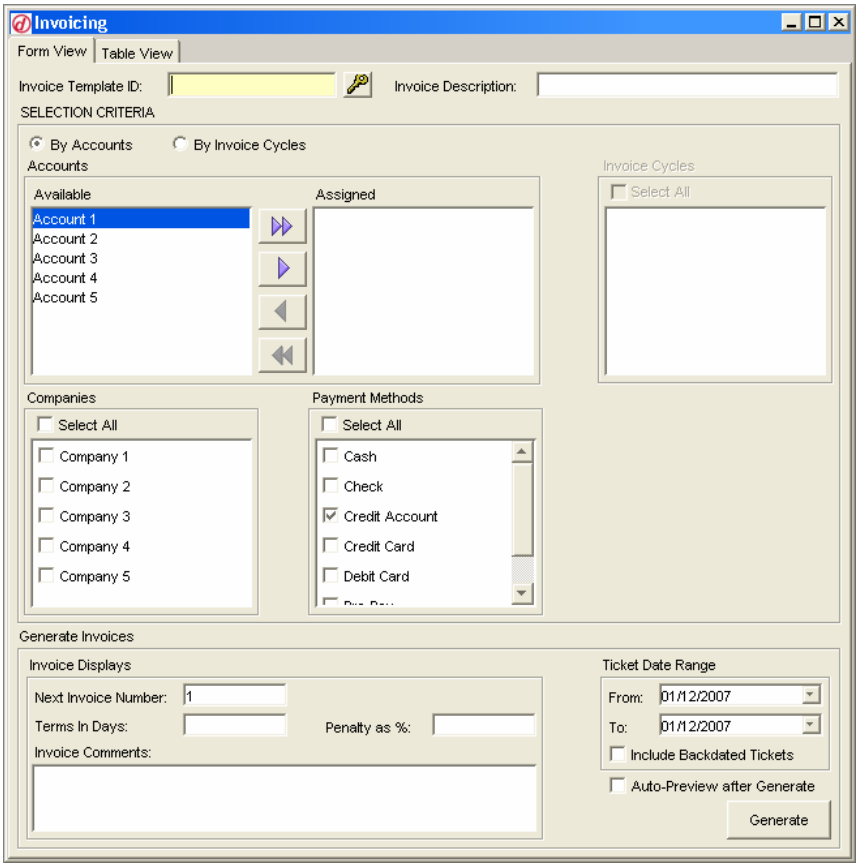


1. Enter an Invoice Cycle ID in the **Invoice Cycle ID** field. If you want the system to assign an Invoice Cycle ID, click the **Get System Generated Key** button.
2. Enter a description of the invoice cycle in the **Description** field.
3. The **Last Invoice Date** field shows the date of the last time that invoices were generated for this invoice cycle.
4. Enter any additional information about the invoice cycle in the **Notes** field.
5. Save the changes.

After you have created an invoice cycle, you will need to assign accounts to the cycle. To assign an account to an invoice cycle, open the **Account** table, select the account record, and then select the invoice cycle from the **Invoice Cycle ID** combo box.

Invoicing

The **Invoicing** table is used to generate invoices for billing accounts. NOTE: This table is available only if the Invoicing Module is registered.



1. Select the radio button for the desired type of invoicing: **By Accounts** or **By Invoice Cycles**.
   - By Accounts – To generate Invoices for all accounts, leave all accounts in the **Available** list box or click the double right arrow button to move them all to the **Assigned** list box. If you want to generate invoices for specific accounts, move those accounts to the **Assigned** list box.

- By Invoice Cycles – To generate Invoices for all invoice cycles, select all of the check boxes or none of the check boxes in the **Invoice Cycle** list box. If you want to generate invoices for specific invoice cycles, check only the boxes for those invoice cycles.

2. You can filter the transactions by company to exclude some companies when you generate invoices. In the **Companies** list box, check the companies that you want to include in the template. You can select individual companies or check the **Select All** box to select all companies. If you do not check any boxes, the system will not filter out any companies.
3. You can filter the transactions by payment method to exclude some payment methods when you generate invoices. In the **Payment Methods** list box, check the payment methods that you want to include in the template. You can select individual payment methods or check the **Select All** box to select all payment methods. If you do not check any boxes, the system will not filter out any payment methods.
4. The next available invoice number will be entered automatically in the **Next Invoice Number** field. The system assigns a number to each invoice, numbering the invoices consecutively starting with the number 1. You can enter a higher invoice number manually, but you cannot duplicate an invoice number or enter a number that is lower than the last number that was used.
5. In the **Terms In Days** field, enter the maximum number of days that you are allowing the customer to pay the invoice. This information will be printed at the bottom of the invoices.
6. In the **Penalty as %** field, enter the penalty (percentage of the invoice amount) that will be charged to customers who pay after the term has expired. This information will be printed at the bottom of the invoices.
7. In the **Invoice Comments** field, enter any additional text that should appear on the invoices.
8. Specify a ticket date range (tickets with dates that fall within the range will be included when you generate invoices). Use the calendar in the **From** field to select the date of the earliest ticket. Use the calendar in the **To** field to select the date of the latest ticket.
9. If you want the invoices to include tickets that were backdated manually, check the **Include Backdated Tickets** box.
10. Check the **Auto-Preview after Generate** box if you want to view the invoices when you generate them.
11. Click the **Generate** button to generate the invoices.

12. A message will appear on screen to tell you if the invoices were generated successfully. An invoice will be generated for each account, and the invoice number will be added to the database record for each transaction that is included on the invoice.

Invoice Templates

You can also use the **Invoicing** table to create invoice templates for generating invoices. A template enables you to save settings for generating invoices so that you can use them repeatedly without having to recreate the settings each time.

1. Enter an Invoice Template ID in the **Invoice Template ID** field. If you want the system to assign an Invoice Template ID, click the **Get System Generated Key** button.
2. Enter a description of the invoice template in the **Invoice Description** field.
3. Select the radio button for the desired type of invoicing: **By Accounts** or **By Invoice Cycles**. Make the desired selections in the **Accounts** or **Invoice Cycle** list boxes (see Step 1 in the procedure for generating invoices).
4. Set any filters that are desired in the **Companies** and **Payment Methods** list boxes (see Steps 2 and 3 in the procedure for generating invoices).
5. When you have completed the invoice template, save the changes. Invoices that are generated using a template will include only transactions that match the accounts (or invoice cycles), payment methods, and companies that are selected.

NOTE: The **Select All** check boxes affect only the records that exist at the time the invoice template is saved. For example, if you use the **Select All** check box to select all companies for a template, a new company that you create later would not automatically be included in the template. You would need to revise the template and save it again.

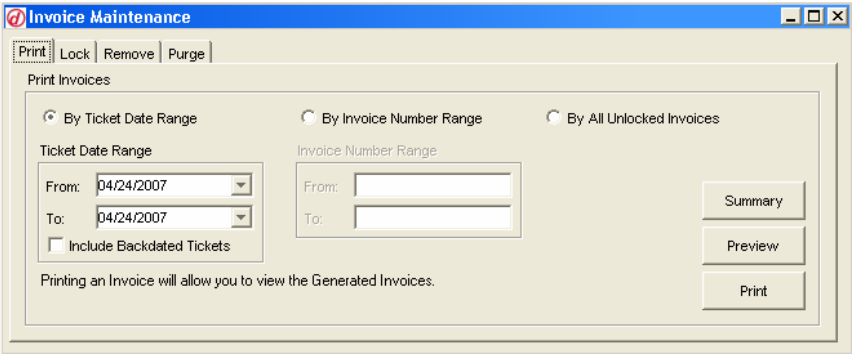
After you have created an invoice template, you can use it to generate invoices. Select the Invoice Template ID, and then follow Steps 4 to 12 in the procedure for generating invoices.

Invoice Maintenance

The **Invoice Maintenance** table is used to print, lock, remove, and purge invoices. NOTE: This table is available only if the Invoicing Module is registered.

Print Invoices

The **Print** tab is used to print invoices that have been generated. You can select the invoices to be printed by specifying a range of dates, a range of invoice numbers, or all unlocked invoices.

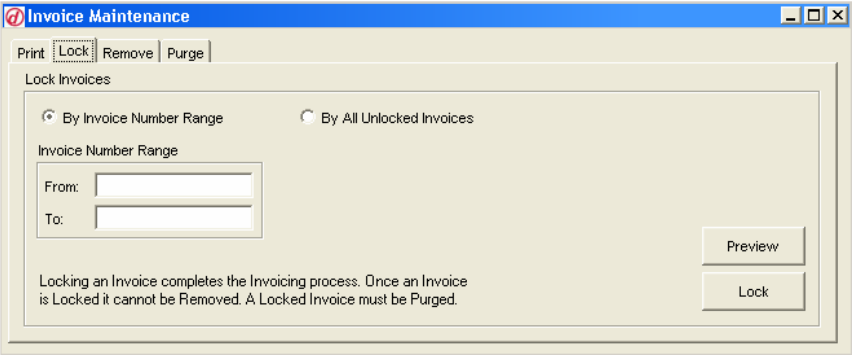


1. Select the radio button for the desired type of range: **By Ticket Date Range**, **By Invoice Number Range**, or **By All Unlocked Invoices**.
   - If you are printing by ticket date range, select a starting date in the **From** field and an ending date in the **To** field.
   - If you are printing by invoice number range, enter the earliest number in the **From** field and the latest number in the **To** field.
   - Printing all unlocked invoices will print all invoices that have not been finalized using the **Lock** tab.
2. If you want to include tickets that were backdated manually, check the **Include Backdated Tickets** box.
3. Click one of the buttons to print or view the invoices.
   - The **Summary** button creates a report that includes the invoices that fall within the specified range.
   - The **Preview** button opens a window that enables you to view the invoices that fall within the specified range.

- The **Print** button prints the invoices that fall within the specified range.

Lock Invoices

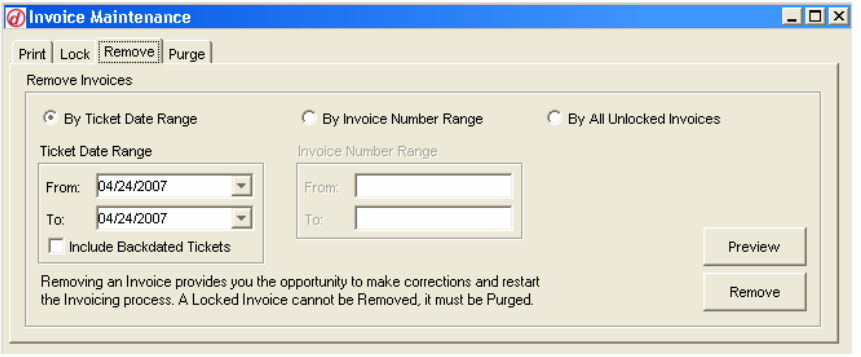
The **Lock** tab is used to lock invoices so that they cannot be changed. That enables you to make sure that the invoices stored in the database match the invoices that were mailed to customers. You can select the invoices to be locked by specifying a range of invoice numbers or all invoices that are not locked.



1. Select the radio button that indicates how you want to choose the invoices to be locked: **By Invoice Number Range** or **By All Unlocked Invoices**.
   - If you are specifying an invoice number range, enter the earliest number in the **From** field and the latest number in the **To** field.
   - You can choose to lock all invoices that are not currently locked.
2. If you want to view a report listing the invoices that will be locked, click the **Preview** button.
3. Click the **Lock** button to lock the invoices so that they cannot be changed.

Remove Invoices

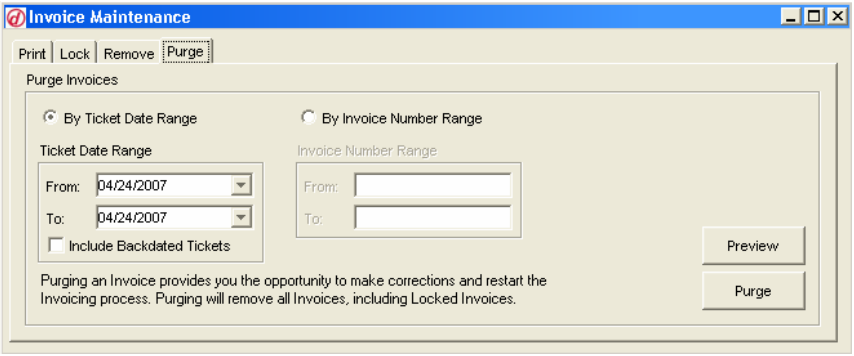
The **Remove** tab is used to delete unlocked invoices. You can select the invoices to be removed by specifying a range of ticket dates, a range of invoice numbers, or all invoices that are not locked.



1. Select the radio button that indicates how you want to choose the invoices to be removed: **By Ticket Date Range**, **By Invoice Number Range**, or **By All Unlocked Invoices**.
   - If you are specifying a ticket date range, select a starting date in the **From** field and an ending date in the **To** field.
   - If you are specifying an invoice number range, enter the earliest number in the **From** field and the latest number in the **To** field.
   - You can choose to remove all invoices that are not currently locked.
2. If you want to include tickets that were backdated manually, check the **Include Backdated Tickets** box.
3. If you want to view a report listing the invoices that will be removed, click the **Preview** button.
4. Click the **Remove** button to delete the invoices.

Purge Invoices

The **Purge** tab is used to delete invoices from the database. You can select the invoices to be purged by specifying a range of dates or a range of invoice numbers.

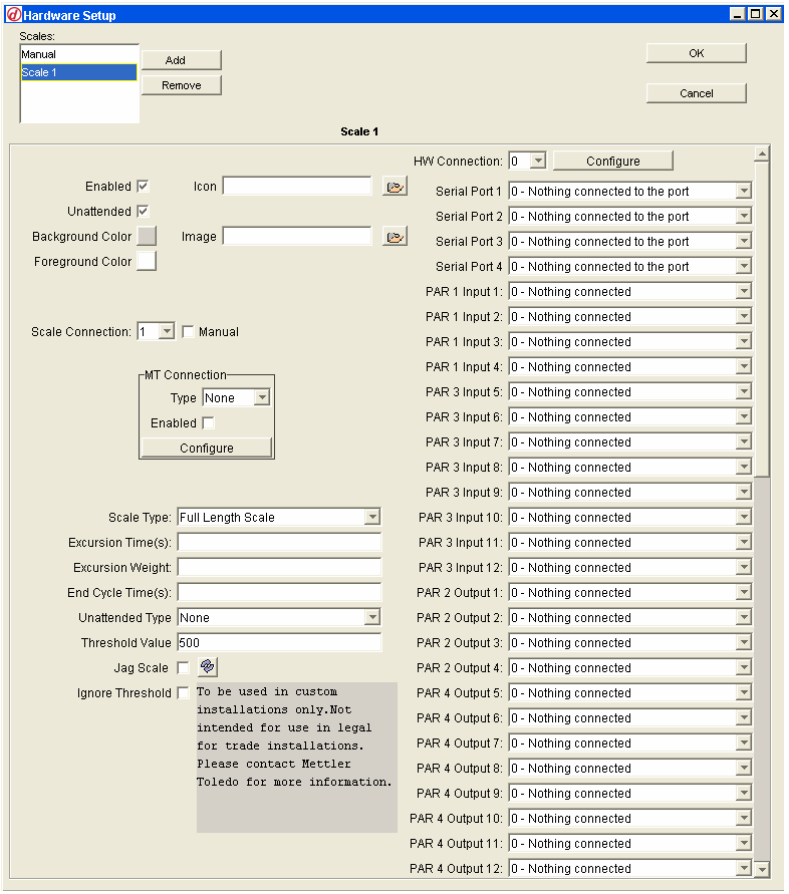


1. Select the radio button for the desired type of range: **By Ticket Date Range** or **By Invoice Number Range**.
   - If you are specifying a ticket date range, select a starting date in the **From** field and an ending date in the **To** field.
   - If you are specifying an invoice number range, enter the earliest number in the **From** field and the latest number in the **To** field.
2. If you want to include tickets that were backdated manually, check the **Include Backdated Tickets** box.
3. If you want to view a report listing the invoices that will be purged, click the **Preview** button.
4. Click the **Purge** button to delete the specified invoices from the database.

19 Hardware Setup

Introduction

OverDrive software can communicate with as many as six scales, plus traffic lights, gates, and other peripheral devices used with the scales. This chapter describes the **Hardware Setup** screen and how to use it to configure connections for your system. To open the screen, click on **Hardware Setup** in the **Application Setup** folder.



Adding a Scale

To connect a scale to the system, you must add it to the **Scales** list box and then configure its hardware settings.

1. Click the **Add** button to open the **New Scale** window.

2. Enter the scale name in the **Name** data field on the **New Scale** window.
3. Click the **OK** button on the **New Scale** window to add the new scale to the list box.

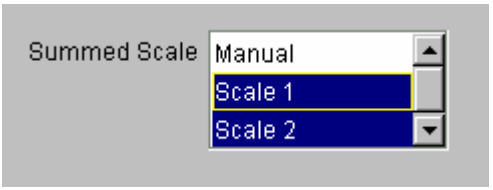
Once a scale has been added, highlight it in the list box to display its current settings on the **Hardware Setup** screen. The settings are described throughout this chapter. Adjust them to meet the needs of your application, and then click the **OK** button to save the changes. You will need to restart the program for the changes to take effect.

To delete a scale from the list box, highlight the scale in the list box and then click the **Remove** button.

Adding a Summed Scale

A summed scale provides a weight reading that is the sum of the weights from two or more other scales. Add the other scales to the system first, and then use the following procedure to add the summed scale.

1. Click the **Add** button to open the **New Scale** window.
2. Enter the scale name in the **Name** data field on the **New Scale** window.
3. Check the **Summed Scale** box.
4. Click the **OK** button on the **New Scale** window to add the summed scale to the list box.
5. A **Summed Scale** list box will appear on the screen in place of the **Scale Connection** data field. In the list box, highlight the names of the scales that you want to sum together. You can do that by holding down the SHIFT key or CONTROL key and clicking on the scale names.



You will need to check the **Enabled** box to enable the scale. Then click the **OK** button to save the changes. You will need to restart the program for the changes to take effect.

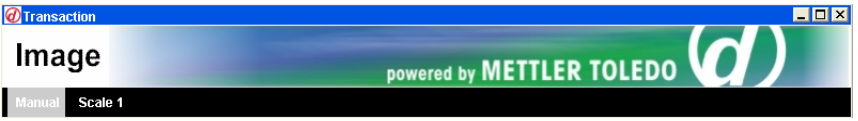
Enable the Scale

Use the **Enabled** and **Unattended** check boxes to enable or disable the scale. You will not be able to process transactions on a scale unless it is enabled.

- Check the **Enabled** box to enable the scale.
- Check the **Enabled** box and the **Unattended** box to enable the scale as an unattended weighing station.

Customize the Scale Tab

You can customize the appearance of the scale tabs on the **Transaction** screen by changing colors and adding graphics. In the portion of the **Transaction** screen shown below, the image is the area in which the word "Image" appears. Immediately below it are two scale tabs ("Manual" and "Scale 1").



- Click the **Background Color** button to open the **Color Selector** window so that you can change the color of the background for the scale tab that is selected. The background is the area behind the text on the scale tab. The background color on the virtual scale indicator will also be changed.
- Click the **Foreground Color** button to open the **Color Selector** window so that you can change the color of the foreground for the scale tab that is selected. The foreground is the text on the scale tab.

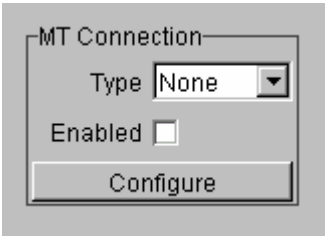
- You can add an icon to each scale tab. Click the **Icon** button to open a window that allows you to browse for a graphics file. The graphic that you select will appear to the left of the scale name on the tab. The default tab size is small (approximately 40 x 15 pixels), but the tab will be enlarged automatically to accommodate larger icons.
- You can add an image for each scale tab. Click the **Image** button to open a window that allows you to browse for a graphics file. The graphic that you select will replace the default graphic (the word "Image" on the sample screen shown above). The default image size is approximately 106 x 58 pixels, but you can use larger or smaller images.

Connecting a Scale

You can configure as many as six scale connections. Use the **Scale Connection** combo box to select a number (1 to 6) for the scale that you have added. Select 0 if there is no connection. This combo box will not be active if the **Manual** box is checked.

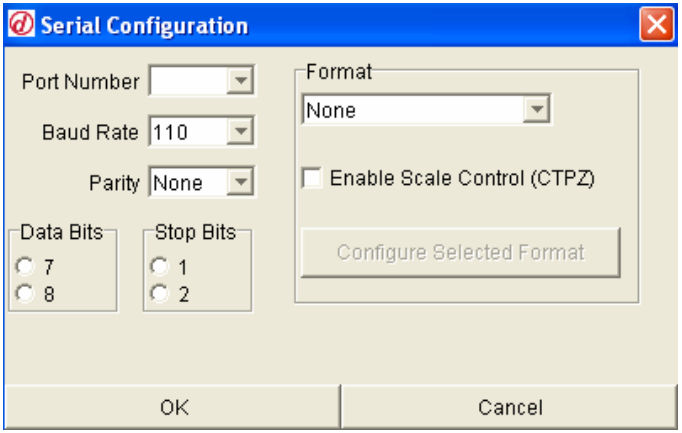
If you are setting up a manual scale, check the **Manual** box. This type of setup allows you to enter weights manually instead of having the system read them from an actual scale.

The OverDrive system uses MT Connections software to facilitate the transmission of weight data from scale terminals to computers. You can configure the system for a serial connection or an Ethernet connection. Select **Serial** or **Ethernet** from the **Type** combo box and check the **Enabled** box. Then click the **Configure** button to open a window where you can configure the type of connection that you selected.



Serial Configuration

A serial connection between a JAGXTREME terminal and a computer is used to transmit weight data. If you configure a scale for serial communication, you will not be able to use the JAGXTREME terminal to control peripheral devices. Use the **Serial Configuration** window to configure a serial connection for a scale. The settings that you select should match those of the scale terminal. Click the **OK** button when you have finished.



Port Number: Select a COM port (1 to 8) from the combo box. You can configure serial connections for as many as eight communication ports on a computer.

Baud Rate: Select a baud rate from the combo box.

Parity: Select the parity setting (**None**, **Even**, or **Odd**) from the combo box.

Format: Select the type of serial format from the combo box. This setting must match the format of the scale terminal you are using.

Enable Scale Control: Check this box to enable the scale to respond to CTPZ commands (C = Clear, T = Tare, P = Print, Z = Zero) entered from a computer keyboard.

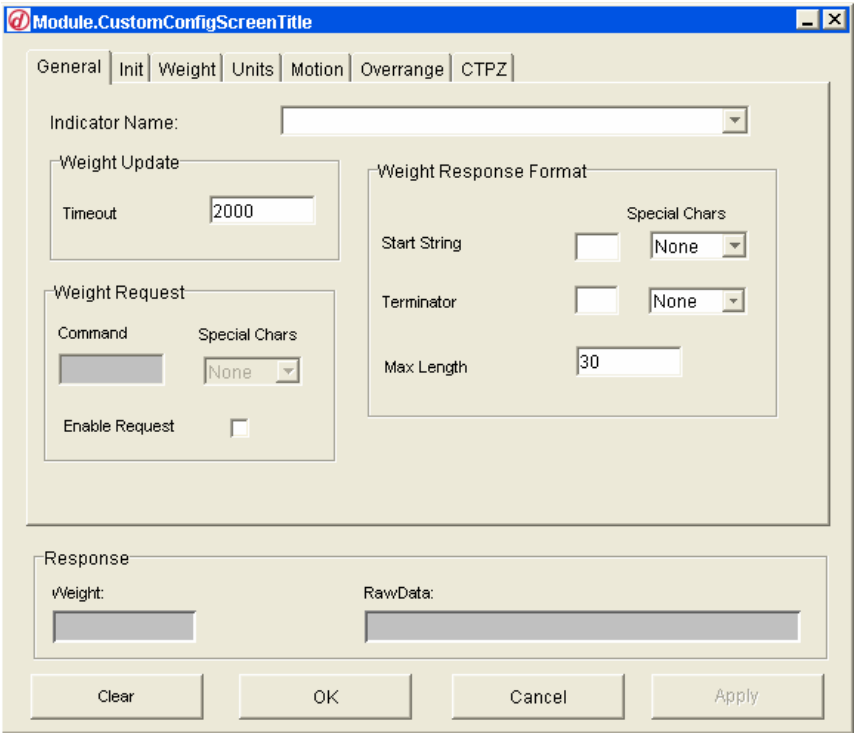
Data Bits: Use the radio buttons to select 7 or 8 data bits.

Stop Bits: Use the radio buttons to select 1 or 2 stop bits.

If you have configured a scale for serial communication, use a cable to connect a serial com port on the computer to a serial com port on the scale terminal.

Custom Formats

From the **Serial Configuration** window, you can configure a custom serial format for a scale terminal. Select **Custom** in the **Format** combo box, and then click the **Configure Selected Format** button. When the **Custom Configuration Screen** opens, enter a name in the **Indicator Name** data field on the **General** tab and set the options on the screen's tabs to match the configuration of the scale terminal. Then click the **OK** button to save the custom format.



Indicator Name

Enter the name of the scale terminal that you are configuring.

Weight Update

Timeout: Enter the length of time (in seconds) that the system will pause between sending requests for a weight. This is for demand-mode terminals only.

Weight Request

Command: The command used to request a weight if the terminal is in demand mode. This is entered automatically when you select a special character.

Special Chars: The character that the terminal must receive to start sending a weight.

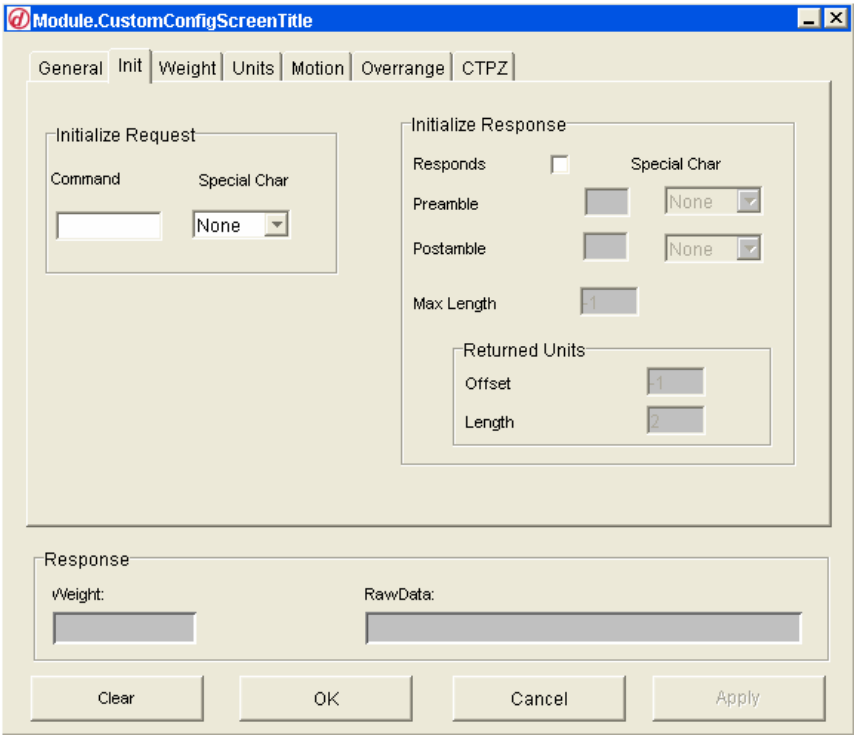
Enable Request: Check this box to require the system to request the weight. Checking this box enables the other two fields.

Weight Response Format

Start String: In the combo box, select the character that represents the start of the string. The corresponding ASCII character is entered automatically in the parallel field.

Terminator: In the combo box, select the character that represents the end of the string. The corresponding ASCII character is entered automatically in the parallel field.

Max Length: The maximum length of the entire string.



The **Init** tab is used to configure the system to communicate with a terminal that uses demand mode and returns a string containing the weight. It is not needed for terminals that are in continuous mode.

Initialize Request

Command: The command used to initialize the terminal to request the string. This is entered automatically when you select the special character.

Special Char: The character that the terminal must receive to start sending the string.

Initialize Response

Responds: Checking this box enables configuration of the preamble and postamble to the response from the terminal.

Preamble: In the combo box, select the special character that represents the start of the string with which the terminal will respond.

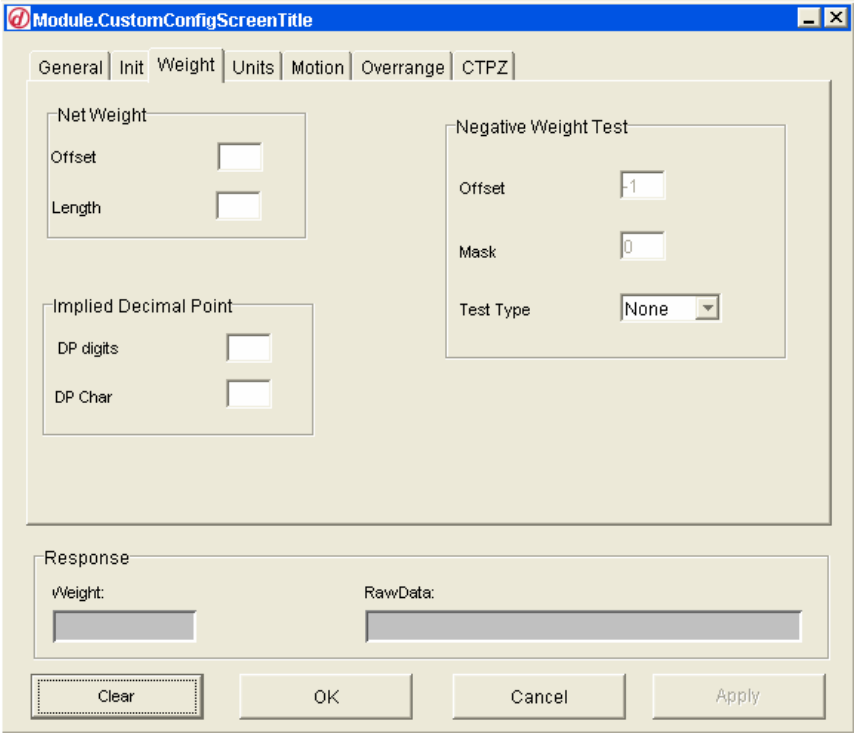
Postamble: In the combo box, select the special character that represents the end of the string with which the terminal will respond.

Max Length: Enter the maximum length of the entire string.

Returned Units

Offset: The number of characters from the left end of the string to the character(s) representing the weight unit.

Length: The number of characters used to represent the weight unit.



Net Weight

If the string contains the net weight and another weight (gross weight, tare weight, etc.), indicate which weight is the net weight. If the string contains only one weight, this setting is not needed.

Offset: The number of characters from the left end of the string to the character(s) representing the net weight.

Length: The number of characters used to represent the net weight.

Implied Decimal Point

If the terminal uses a decimal point, these settings will determine how the system reads it.

DP Digits: Enter the number of digits that follow the decimal point.

DP Char: Enter the ASCII code for the character that represents the decimal point.

Negative Weight Test

These settings indicate how to check for a negative weight.

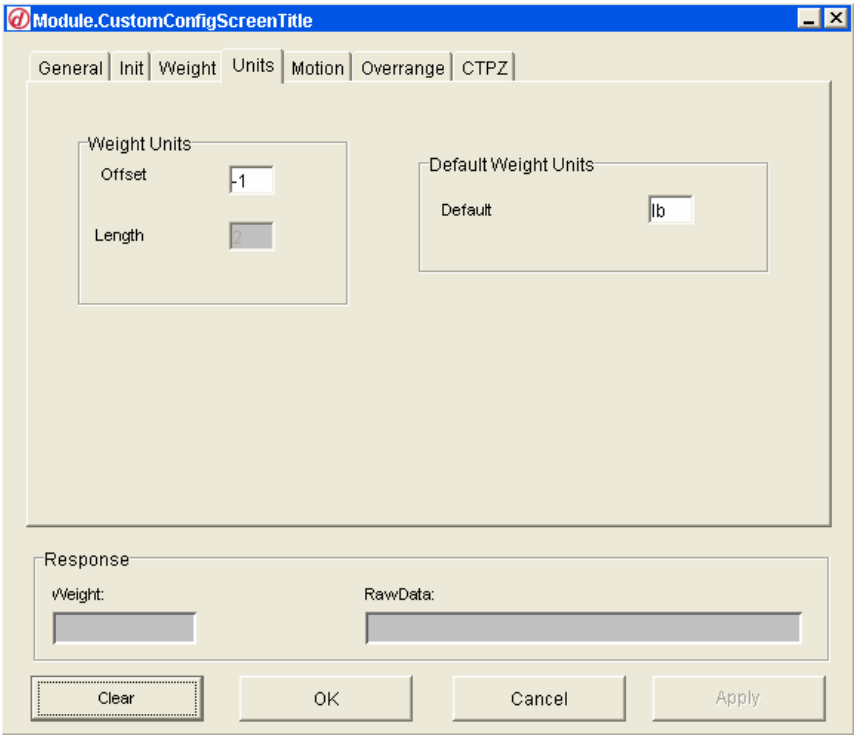
Offset: The number of characters from the left end of the string to the character(s) representing the negative weight.

Mask: Enter the ASCII character that represents the negative weight indication.

Test Type: **And** and **NAnd** are not used in this setting.

Equal states that the desired result is equal to the mask. For example, if you set the mask to 45 (ASCII code for the – sign) and select **Equal**, a "-" in the string will be interpreted as a negative weight.

Not Equal states that the desired result is not equal to the mask. For example, if you set the mask to 45 (ASCII code for the – sign) and select **Not Equal**, anything but a "-" in the string will be interpreted as a negative weight.



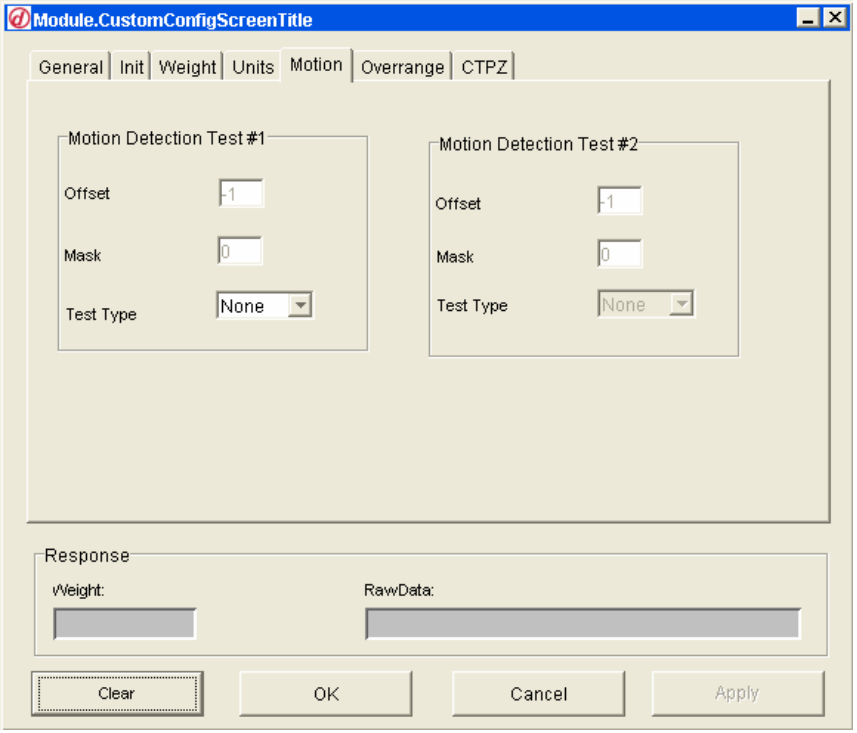
Weight Units

Offset: The number of characters from the left end of the string to the character(s) representing the weighing unit.

Length: The number of characters used to represent the weighing unit.

Default Weight Units

Default: Enter a default unit if you do not wish to receive the unit from the terminal or if the unit does not exist or is not accessible. The system will use this unit when processing transactions.



Motion Detection Test #1

Offset: The number of characters from the left end of the string to the character(s) representing motion.

Mask: Enter the ASCII character that represents motion.

Test Type: **And** states that if the desired result and the result from motion detection test #2 are found, then interpret as in motion.

NAnd states that if the desired result or the result from motion detection test #2 are found, then interpret as in motion.

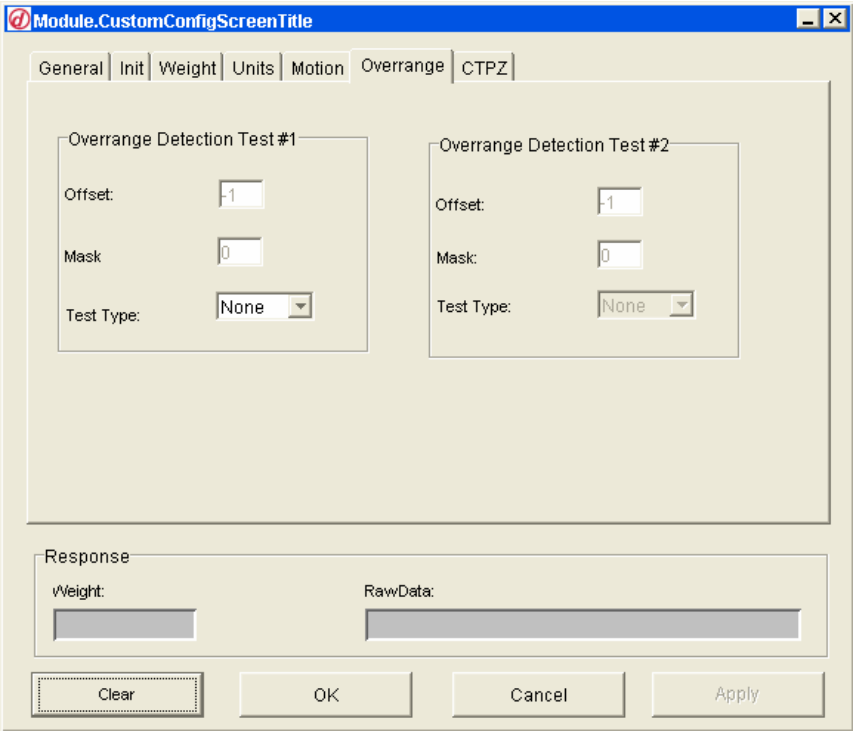
Equal states that the desired result is equal to the mask. For example, if you set the mask to 126 (ASCII code for the ~ sign) and select **Equal**, a "~" in the string will be interpreted as in motion. Use this setting if there is no motion detection test #2.

Not Equal states that the desired result is not equal to the mask. For example, if you set the mask to 126 (ASCII code for the ~ sign) and select **Not Equal**, anything but a "~" in the string

will be interpreted as in motion. Use this setting if there is no motion detection test #2.

Motion Detection Test #2

Use this test if there is more than one character representing motion. See Motion Detection Test #1 for an explanation of the settings.



Overrange Detection Test #1

Offset: The number of characters from the left end of the string to the character(s) representing overrange.

Mask: Enter the ASCII character that represents overrange.

Test Type: **And** states that if the desired result and the result from overrange detection test #2 are found, then interpret as overrange.

NAnd states that if the desired result or the result from overrange detection test #2 are found, then interpret as overrange.

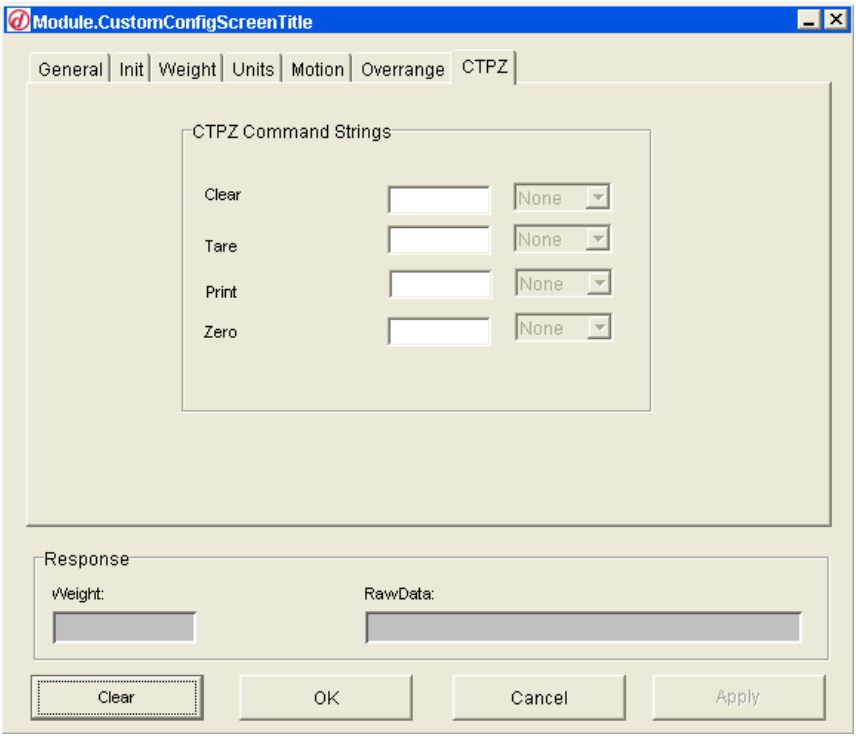
Equal states that the desired result is equal to the mask. For example, if you set the mask to 126

(ASCII code for the ~ sign) and select **Equal**, a "~" in the string will be interpreted as overrange. Use this setting if there is no overrange detection test #2.

Not Equal states that the desired result is not equal to the mask. For example, if you set the mask to 126 (ASCII code for the ~ sign) and select **Not Equal**, anything but a "~" in the string will be interpreted as overrange. Use this setting if there is no overrange detection test #2.

Overrange Detection Test #2

Use this test if there is more than one character representing overrange. See Overrange Detection Test #1 for an explanation of the settings.



CTPZ Command Strings

Clear: In the combo box, select the character representing the clear command that the terminal uses. The correct ASCII character will then be entered into the blank field.

Tare: In the combo box, select the character representing the tare command that the terminal uses. The correct ASCII character will then be entered into the blank field.

Print: In the combo box, select the character representing the print command that the terminal uses. The correct ASCII character will then be entered into the blank field.

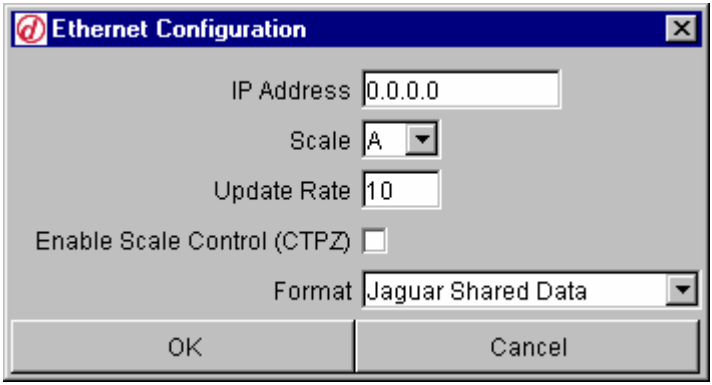
Zero: In the combo box, select the character representing the zero command that the terminal uses. The correct ASCII character will then be entered into the blank field.

ASCII Characters

ASCII	CHR		ASCII	CHR		ASCII	CHR		ASCII	CHR
0	NUL		32	SP		64	@		96	`
1	SOH		33	!		65	A		97	a
2	STX		34	"		66	B		98	b
3	ETX		35	#		67	C		99	c
4	EOT		36	$		68	D		100	d
5	ENQ		37	%		69	E		101	e
6	ACK		38	&		70	F		102	f
7	BEL		39	'		71	G		103	g
8	BS		40	(		72	H		104	h
9	HT		41	)		73	I		105	i
10	LF		42	*		74	J		106	j
11	VT		43	+		75	K		107	k
12	FF		44	,		76	L		108	l
13	CR		45	-		77	M		109	m
14	SO		46	.		78	N		110	n
15	SI		47	/		79	O		111	o
16	DLE		48	0		80	P		112	p
17	DC1		49	1		81	Q		113	q
18	DC2		50	2		82	R		114	r
19	DC3		51	3		83	S		115	s
20	DC4		52	4		84	T		116	t
21	NAK		53	5		85	U		117	u
22	SYN		54	6		86	V		118	v
23	ETB		55	7		87	W		119	w
24	CAN		56	8		88	X		120	x
25	EM		57	9		89	Y		121	y
26	SUB		58	:		90	Z		122	z
27	ESC		59	;		91	[		123	{
28	FS		60	<		92	\		124	|
29	GS		61	=		93	]		125	}
30	RS		62	>		94	^		126	~
31	US		63	?		95	_		127	DEL

Ethernet Configuration

An Ethernet connection requires a JAGXTREME terminal. It enables you to transmit weight data and control peripheral devices. Use the **Ethernet Configuration** window to configure an Ethernet connection for a scale. Click the **OK** button when you have finished.



IP Address: Enter the IP address for the JAGXTREME terminal.

Scale: A JAGXTREME terminal can connect to as many as four scales, plus a virtual scale for summing weights. Select a scale (A, B, C, or D) from the combo box. E is used for a virtual scale.

Update Rate: Enter a number to indicate how many times per second the data from the scale will be updated. The maximum recommended update rate is 10 times per second. If more than one terminal is used, you might need to set a lower update rate.

Enable Scale Control: Check this box to enable the scale to respond to CTPZ commands (C = Clear, T = Tare, P = Print, Z = Zero) entered from a computer keyboard.

Format: Select a format for the connection. Jaguar Shared Data can be used for most scale setups. It is required if peripheral devices are connected to the JAGXTREME terminal.

If you have configured a scale for Ethernet communication, you can connect the computer directly to the JAGXTREME terminal or connect them through an Ethernet network. When connecting the devices directly, use a crossover Ethernet cable with RJ-45 connectors. When connecting the devices through an Ethernet network, connect the JAGXTREME terminal to the network via a hub.

Scale Settings

Configure the following data fields to match your application.

Scale Type

Use the **Scale Type** combo box to select a scale type (**Full-Length Scale**, **Axle Scale**, or **Split-Weigh Scale**). Axle scales and split-weigh scales are used to weigh portions of a vehicle separately and then sum the weights together. With an axle scale, for example, a driver positions one axle on the scale so that its weight can be captured. Then the driver moves the vehicle to position a second axle on the scale. This interval is called an excursion.

Excursion Time(s)

Enter the minimum time (in seconds) that the system will signal to the driver that a weight has been captured. This signal is usually given by a green traffic light that lets the driver know it is okay to move the vehicle. The traffic light will remain green for at least the number of seconds entered in the data field.

Excursion Weight

Enter an excursion weight. When the weight reading changes by at least this amount (either up or down), it signals to the system that the vehicle has moved.

End Cycle Time(s)

Enter an end cycle time (5 to 10 seconds is typical). When a scale has been empty for this length of time, the system assumes that the final weight has been captured and the vehicle has left the scale.

Unattended Type

If the scale will be used as an unattended weighing station, select the type of unattended interface from the combo box: **Touch Screen**, **JagHMI**, or **Four-Line Display**. If the scale is not being used as an unattended weighing station, select **None**.

Threshold Value

Enter a threshold weight. This weight should be higher than the excursion weight. When the weight reading reaches this level, it signals to the system that a vehicle is on the scale.

Jag Scale

You can use a JAGXTREME terminal to control peripheral devices and another terminal to read weight from a scale. If a JAGXTREME terminal is connected to the scale, check this box. If another type of terminal is connected to the scale, do not check this box. Any changes to the hardware settings should be saved to the JAGXTREME terminal automatically when the OverDrive program is

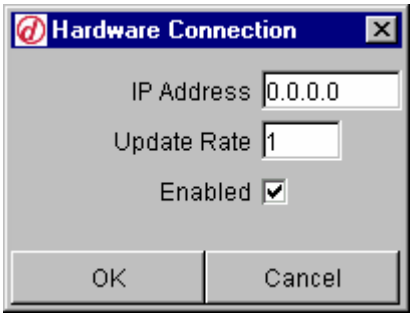
restarted. If new hardware settings are not saved automatically, you can save them to the JAGXTREME terminal manually by clicking the button next to the **Jag Scale** check box.

Ignore Threshold

Check this box to enable the system to ignore the threshold value. This function cannot be used in legal-for-trade applications.

Connecting to Peripherals

The system can communicate with peripheral devices via a JAGXTREME terminal. You can configure as many as six hardware connections for those devices. Use the **HW Connection** combo box to select a number (7-12) for the hardware connection between the JAGXTREME terminal and peripheral devices. Select 0 if there is no connection. Selecting a connection will activate the **Configure** button, which opens the **Hardware Connection** window.



1. Select a number (7-12) from the **HW Connection** combo box.
2. Click the **Configure** button.
3. Configure the connection in the **Hardware Connection** window.
   - Enter the IP address for the JAGXTREME terminal in the **IP Address** data field.
   - Enter a number in the **Update Rate** data field to indicate how many times per second the data from the scale will be updated. The maximum recommended is 10 times per second.
   - Check the **Enabled** box to enable the hardware connection.
4. When you have configured the settings, click the **OK** button on the **Hardware Connection** window.

Serial Ports

A JAGXTREME terminal provides two serial ports, plus an additional two serial ports when the optional multi-function card is installed. These ports are used for connecting to displays, printers, and card readers. Use the serial port combo boxes to select the hardware that will be connected to each port.

Serial Port Options

0 – Nothing connected to the port

1 – Four-Line Display

3 – Scoreboard

20 – Thermal Ticket Printer

21 – Dot Matrix Display

40 – LF – Don't remove any characters

41 – LF – Remove last character

42 – LF – Remove last two characters

43 – LF – Remove first & last character

44 – LF – Remove first & last two characters

45 – LF – Remove first & last three characters

46 – AAR Encoded Rail Tags

47 – Smart Pass 5110 Tags

50 – CR – Don't remove any characters

51 – CR – Remove last character

52 – CR – Remove last two characters

53 – CR – Remove first & last character

54 – CR – Remove first & last two characters

55 – CR – Remove first & last three characters

60 – ETX – Don't remove any characters

61 – ETX – Remove last character

62 – ETX – Remove last two characters

63 – ETX – Remove first & last character

64 – ETX – Remove first & last two characters

65 – ETX – Remove first & last three characters

70 to 75 – Serial Keyboard

80 to 85 – Future Use

90 to 95 – Future Use

Wire the peripheral devices to the serial ports on the JAGXTREME terminal according to the selections made here.

Parallel Ports

A JAGXTREME terminal provides two parallel ports, one with four inputs and one with four outputs. When the optional multi-function card is installed, it provides two more parallel ports with eight more inputs and eight more outputs. These ports are used for connecting to traffic lights, gates, and other peripheral devices. Use the PAR combo boxes to select the hardware to be connected to each port.

Parallel Port Input/Output Options

0 – Nothing connected

1 – Entrance Green Traffic Signal Direction 1

2 – Entrance Red Traffic Signal Direction 1

3 – Exit Green Traffic Signal Direction 1

4 – Exit Red Traffic Signal Direction 1

5 – Entrance Barrier (Gate)

6 – Exit Barrier (Gate)

7 – Illumination

8 – Entrance Green Traffic Signal Direction 2

9 – Entrance Red Traffic Signal Direction 2

10 – Exit Green Traffic Signal Direction 2

11 – Exit Red Traffic Signal Direction 2

51 – Entrance Loop or Photoeye

52 – Exit Loop or Photoeye

53 – Entrance Barrier Limit Switch

54 – Exit Barrier Limit Switch

55 – Photocell

56 – Split Weighing Push Button

Wire the peripheral devices to the parallel ports on the JAGXTREME terminal according to the selections made here.

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