



## Funnel

Megan De Freitas - 2024-11-22 - Sales

### Overview

The Funnel module is a specialized sales document processing screen used to control the processing order of documents in a certain queue. Instead of users choosing which documents to process, the Funnel brings up documents one at a time in the order they are to be processed. The Funnel can be used as a “final check” before sending documents to the warehouse to be processed.

### Security

In Modules > Security Editor:

1. Find *Funnel* in the Security column and enable it by selecting the check box
2. Set the sub-settings to allow processing Manual and Pre Auth payments, and editing line items
3. To allow access to the Configuration screen from the Queue Setup button in the Funnel, enable *Pick Ticket Processing Configuration*
4. Click **Save**

**Note:** You must log out of SalesPad and then back in for security changes to take place.

### Settings

Configure the following settings in the Settings module before using the Funnel:

#### PICK TICKETS

*Add Pick Ticket Printed Note* - This setting is visible in the Funnel screen. If True, it will add a note to the current document in the Funnel when the pick ticket is printed. (Example: "Pick Ticket On: {DATE} {TIME} by {USER}")

*Backorder Batch* - Sets the batch that backorders will be sent to from the Pick Ticket Processing window.

*Evaluate Rules When Pulling* - If True, workflow rules will apply when pulling a document.

*Freight Field Enabled* - If True, enables the freight field from the Funnel.

*Ship Methods* - Sets shipping methods separated by semi-colons, that the Other Report (Report specified in the Funnel setup) should print.

*Show COD Field* - If True, a COD field linked to USRDEF03 will display for a sales document while in the Funnel.

*Update Ship Date If Packing Slip Is Printed* - If True, the ship date will be updated when the packing slip is printed from the Funnel.

#### SALES DOCUMENT SPLITTING

*Split Document* - If True, users will be prompted to split a document containing backordered items when it is processed in the Funnel.

#### Funnel Setup

#### PRINT SETUP

In Modules > Funnel

1. Click the **Print Setup** button
2. In the window that appears, set the individual options for handling the printing jobs from the Funnel by selecting which reports to print, number of copies and which

**Setup...**

**Pick Ticket**

Print Pick Tickets       Preview

Report to Print:

Printer:       Copies:

**Packing Slip**

Print Packing Slips       Preview

Report to Print:

Printer:       Copies:

**Other Report**

Print Other Report       Preview

Report to Print:

Printer:       Copies:

**Options**

Play Alert Sound

Alert Sound:

OK      Cancel

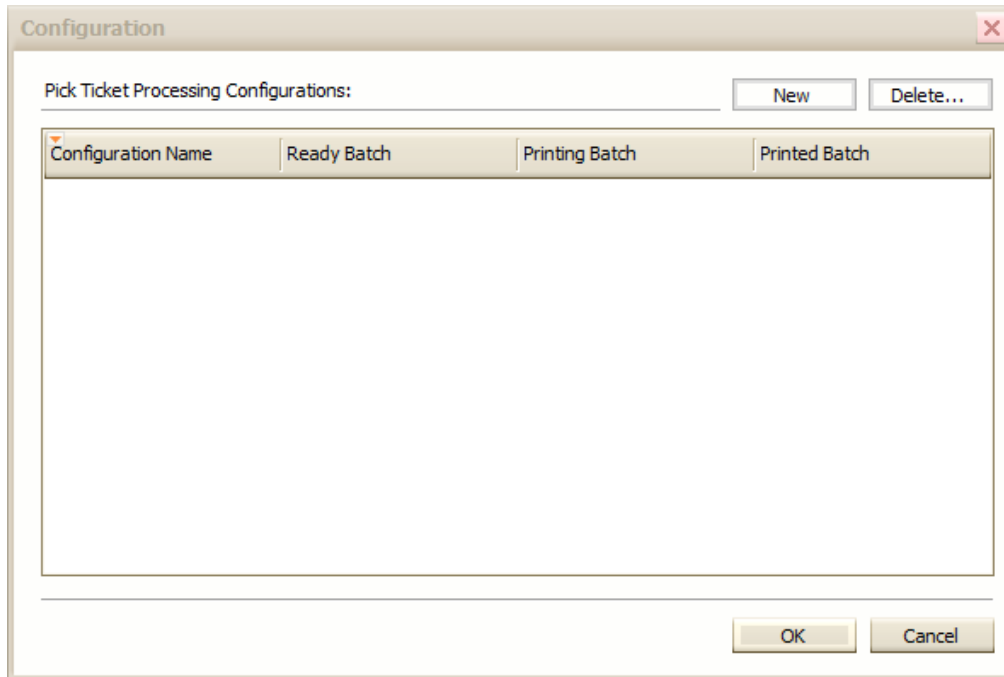
printer to use:

3. Click **OK**

## CONFIGURATIONS

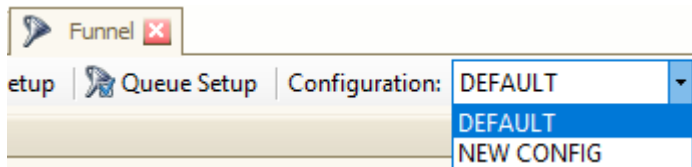
1. On the Funnel header, click **Config:** (or **Queue Setup** in later versions)

The Configuration window appears:



2. Click **New** to create a new Funnel configuration
3. Enter a Configuration Name
4. Enter the queue to use for the Ready Batch, Printing Batch, and Printed Batch
5. Click **OK**
6. After creating new configurations, close and reopen the Funnel

New configurations will now be available from in the "Config:" dropdown



### Using the Funnel

In Modules > Funnel:

1. Select the preferred configuration from the Config: dropdown
2. To load a document, select either the "Ready Number" or the **Get Next** button from the header. To go to a specific document, click the **Goto** button and enter the document number

**Ready Number, Get Next, and Goto** buttons:



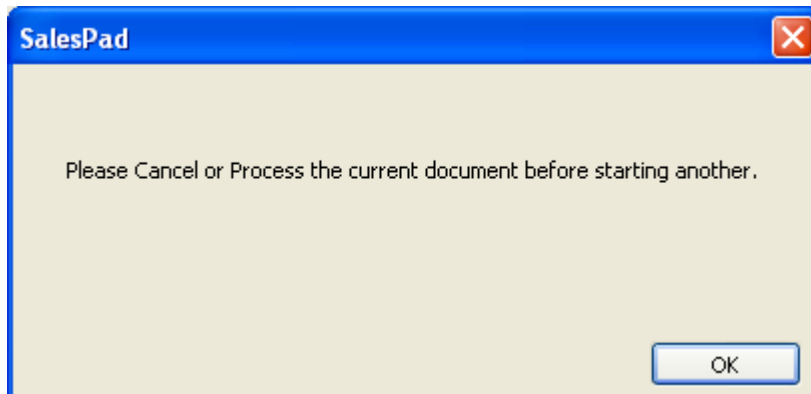
The fields on the Funnel screen will fill with document information, similar to the Sales

Document Entry screen.

1. Make any changes or additions needed
2. Click the **Process** button on the top right of the screen to send the document to the next step of the workflow. The print preview will appear for the document report

**Note:** Clicking the **Cancel** button will unload the document and return it to the Funnel

**Note:** If you click **Get Next** before canceling or processing the current document, the following message will appear:



Repeat the steps for additional sales documents