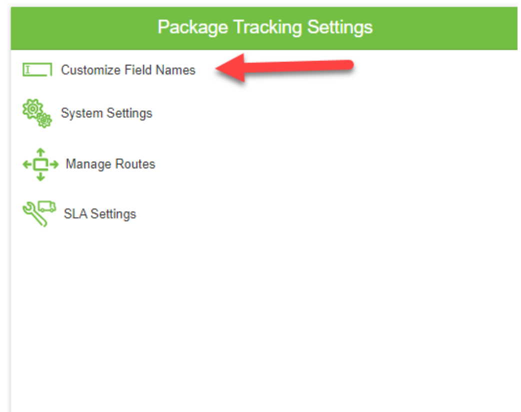
Receive Screen Setup

The Receive screen is very customizable and gives the customer the opportunity to have whatever details they may use for receiving on the screen. Here you can activate all or any fields available to WTS/WTS-P.



Changing the name of a Field

All fields can change the name it goes by including any required fields such as Recipient and Location.

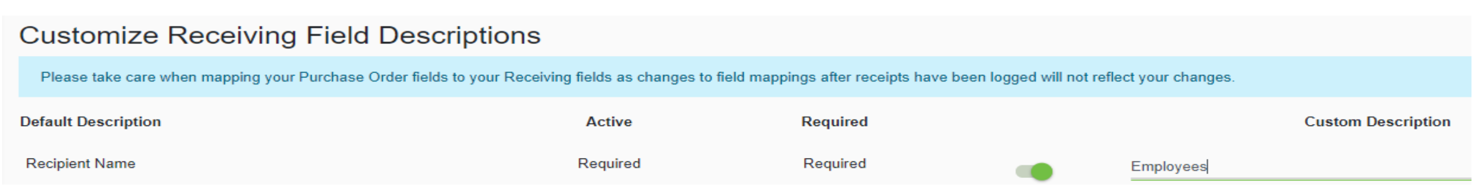
1. Locate the Default Description you would like to change

2. Make the Field Active*

3. Click on the box next to the Active box and write in the desired Description. This will change the description within all of WTS/WTS-P for this field.

4. Select "Submit" at the bottom of the page to save and activate changes

For example if I want Recipient to be Employees I would do the following:



Active fields are not required the only two fields that can be required on WTS are Recipient and Location.

Changing the Order of the Receive Screen

A customer may want the Receive screen to have a certain order that is better for their workflow.

1. Activate all fields that will be utilized on the receive screen

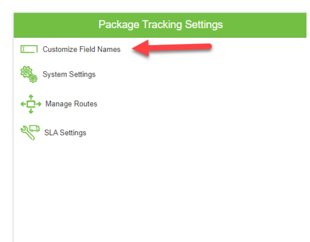
2. Use the  buttons that appear when you put the mouse over the field to move the field up or down until it is in its desired position.

How to use Next Action

Next Action allows the user to receive an item and then put the item to a different status without using the action screen. This is helpful if there are multiple work-flows for the customer.

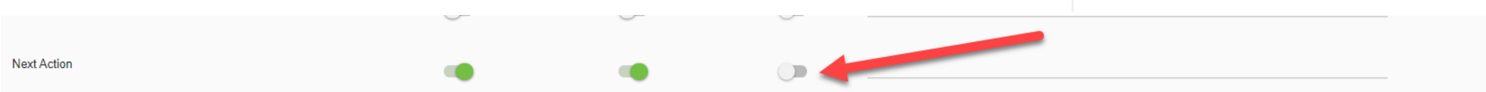
Note: When using Next Action do not modify the receive status for an email, instead always have the user use the next action for all of their items and put the emails to those statuses.

1. Go to Admin



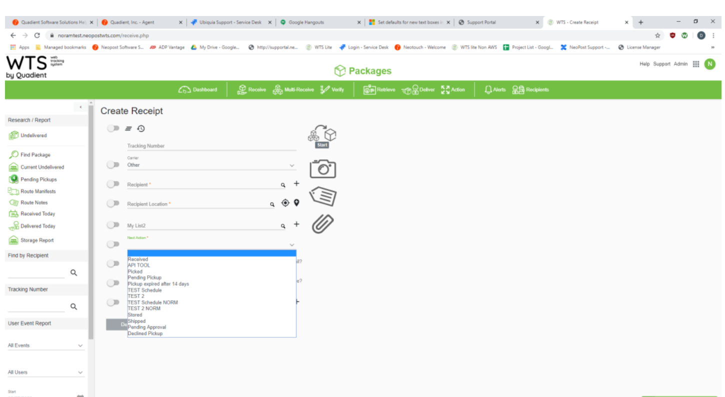
2. Select "Customize Field Names"

3. Enable "Next Action"



4. Select "Submit"

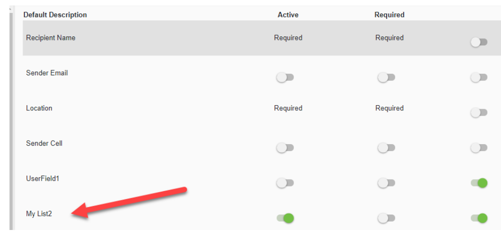
5. On the receive screen Next Action will appear and if the drop down is chosen all statuses that are not release statuses and are actions will appear.



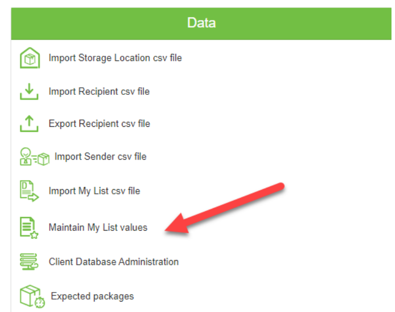
MY List

Note List allows users to have a list of internal notes available on the receive screen.

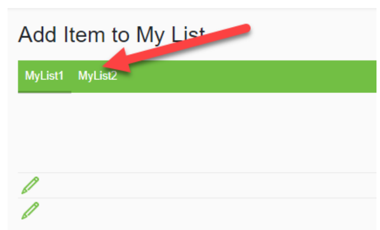
1. Enable My List under “Customize Field Names”



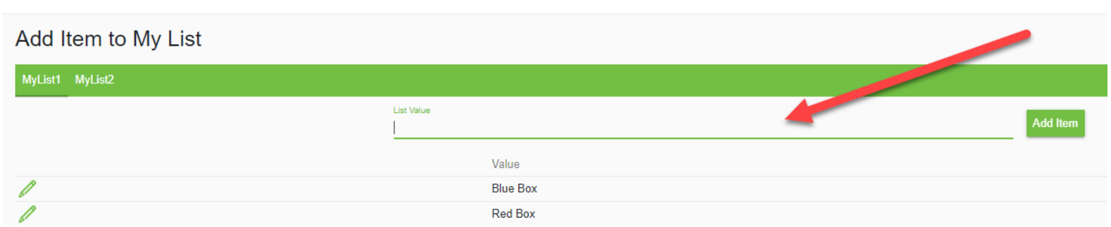
2. Go to “Admin” and then to “Maintain MyList Values”



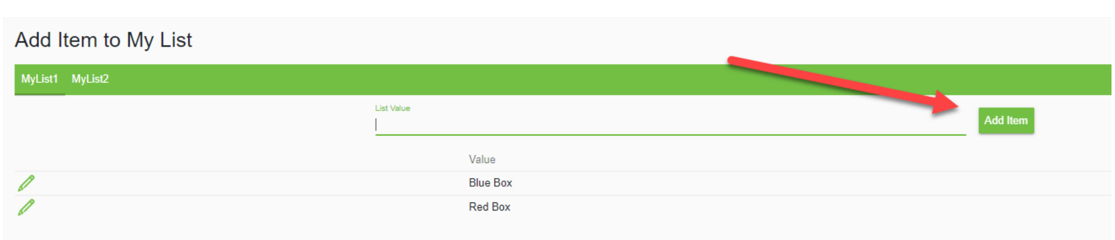
3. Select MYList 1 or MyList 2



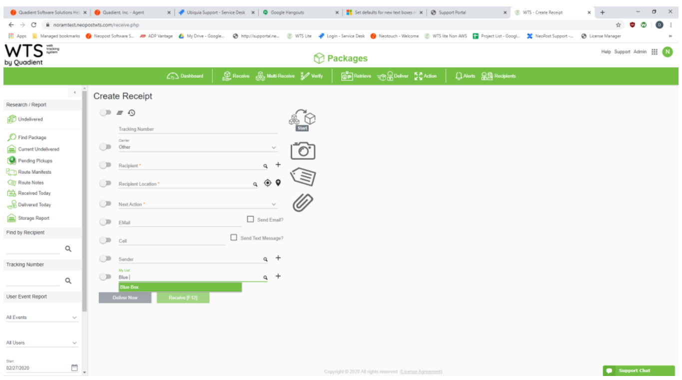
4. In List Name enter a short description or number. In List Value enter the note.



5. Select “Add Item” The notes will show below



6. To see the MYList go to the receive screen and start typing the Search As you Type function will bring up items in the list that you added.



How to use Formulas

Formulas Σ allows you to combine fields into one field using excel like formulas. It can also be used to pull data from the Recipient information that may not show on this screen.

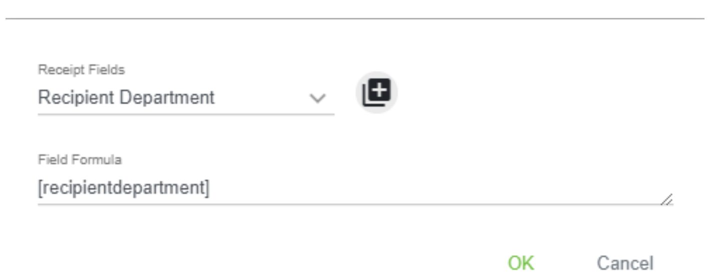
1. Activate all fields that will be utilized on the receive screen

2. Locate the field(s) you want to use for formulas

3. The Σ will show when you put the mouse over the field you are wanting to configure. Select Σ

4. In the Field Formula box enter a formula (i.e. sum,=,sub,etc.) then "Insert" the Recipient field(s) you want to pull from the database

For example if I want Userfield2 to pull the Department of the Recipient I would enter the following:



5. Click Ok and then make sure to hit submit at the bottom of the page to save your formula.

How to Setup Quick Search

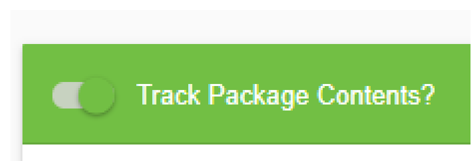
There are already two default Quick Searches on the WTS-P screen. Tracking Number and Recipient. They are located on the left side of the screen. However WTS-P allows three Quick Searches

1. Select the Checkbox next to "Use Quick Search" at the bottom under all of the Descriptions
2. Select the Active Field you want to use for Quick Search from the dropdown
3. Save settings by clicking "Submit" at the bottom of the screen

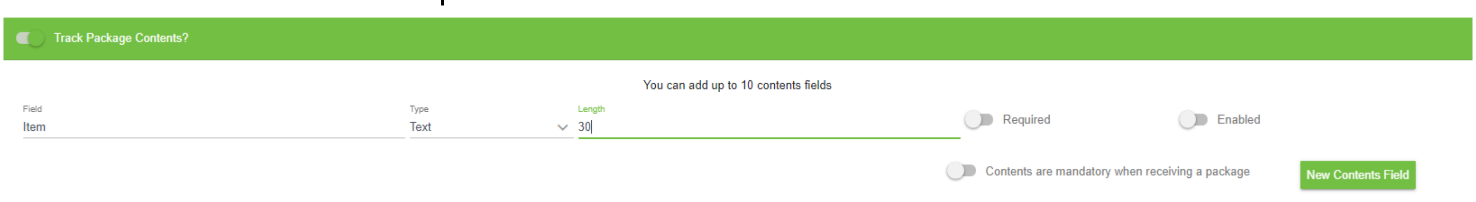
Tracking Package Contents

WTS allows the customer to track package contents on the Receive screen. You can add up to 10 content fields that are part of the contents. Then on the Receive screen you can have as many contents the customer would like to use.

1. Select the checkbox next to "Track Package Contents?"
2. Select "New Contents Field"



3. The First Field will populate. Here add the name of the field, the type of field it is (i.e. Text,Number,decimal), enter the max number of characters for the field. Enter if this field will be required. Last click the checkbox next to Enabled.



4. Choose if this will be mandatory for receiving a package (has to be at least one package content filled out) before the package will receive.
5. Select "Submit" to save and look at the result