

# How to Create Transport Load for Blended Item

To be able to create Transport Load for Blended Item, the following needs to be setup first:

a. **Item Setup:**

1. From **Inventory > Items**, create 2 new items as **Inventory Item Type** and save. Sample below:

Item - Blend Item 1

NewSaveSearchDeleteUndoDuplicateClose

DetailsSetupPricingStockCommodityActivities (0)Attachments (0)Audit Log (1)

Item No:Blend Item 1ManufacturerBrand

Item Type:InventoryStatus:ActiveModel No:

Short Name:CommodityGasolineCategoryInventory

Description:Blend Item 1 DescLot Tracking:NoInv. Valuation:Item Level

Unit of Measure

+ InsertX RemoveLoad UOMViewFilter Records (F3)

| Unit                            | Unit Qty | Short UPC | UPC Code | Stock Unit                          | Allow Purchase                      | Allow Sale                          | Length | Width |
|---------------------------------|----------|-----------|----------|-------------------------------------|-------------------------------------|-------------------------------------|--------|-------|
| <input type="checkbox"/> Gallon | 1.000000 |           |          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0.00   | 0.00  |
| <input type="checkbox"/>        | 0.000000 |           |          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | 0.00   | 0.00  |

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Item - Blend Item 2

NewSaveSearchDeleteUndoDuplicateClose

DetailsSetupPricingStockCommodityActivities (0)Attachments (0)Audit Log (1)

Item No:Blend Item 2ManufacturerBrand

Item Type:InventoryStatus:ActiveModel No:

Short Name:CommodityGasolineCategoryInventory

Description:Blend Item 2 DescLot Tracking:NoInv. Valuation:Item Level

Unit of Measure

+ InsertX RemoveLoad UOMViewFilter Records (F3)

| Unit                            | Unit Qty | Short UPC | UPC Code | Stock Unit                          | Allow Purchase                      | Allow Sale                          | Length | Width |
|---------------------------------|----------|-----------|----------|-------------------------------------|-------------------------------------|-------------------------------------|--------|-------|
| <input type="checkbox"/> Gallon | 1.000000 |           |          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0.00   | 0.00  |
| <input type="checkbox"/>        | 0.000000 |           |          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | 0.00   | 0.00  |

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2. Create another item as **Finished Good Item Type** and fill in **Factory & Lines** tab > **Factory** tab. Select Company Locations on Factory Name. Each factory name should have Manufacturing Cell Association Cell Name and Default checkboxes should be enabled. Click **Save** button. Sample below:

Item - Blend Item 3

NewSaveSearchDeleteUndoDuplicateClose

DetailsSetupPricingStockCommodityFactory & LinesActivities (0)Attachments (0)Audit Log (1)

FactoryOwner

Factory Association

+ InsertX RemoveViewFilter Records (F3)

| Factory Name  | Default                             |
|---|-------------------------------------|
| <input checked="" type="checkbox"/> 0001 - Fort Wayne | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> 0002 - Indianapolis          | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> 0003 - Richmond              | <input checked="" type="checkbox"/> |
| <input type="checkbox"/>                              | <input type="checkbox"/>            |

Manufacturing Cell Association

+ InsertX RemoveViewFilter Records (F3)

| Cell Name                         | Default                             | Preference |
|-----------------------------------|-------------------------------------|------------|
| <input type="checkbox"/> Blending | <input checked="" type="checkbox"/> | 1          |
| <input type="checkbox"/>          | <input type="checkbox"/>            | 0          |

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Item - Blend Item 3

NewSaveSearchDeleteUndoDuplicateClose

DetailsSetupPricingStockCommodityFactory & LinesActivities (0)Attachments (0)Audit Log (1)

FactoryOwner

Factory Association

+ Insert X Remove View Filter Records (F3)

Factory NameDefault

☐ 0001 - Fort Wayne

☒ 0002 - Indianapolis

☒ 0003 - Richmond

☐

Manufacturing Cell Association

+ Insert X Remove View Filter Records (F3)

Cell NameDefaultPreference

☐ Blending

☐

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Item - Blend Item 3

NewSaveSearchDeleteUndoDuplicateClose

DetailsSetupPricingStockCommodityFactory & LinesActivities (0)Attachments (0)Audit Log (1)

FactoryOwner

Factory Association

+ Insert X Remove View Filter Records (F3)

Factory NameDefault

☐ 0001 - Fort Wayne

☒ 0002 - Indianapolis

☒ 0003 - Richmond

☐

Manufacturing Cell Association

+ Insert X Remove View Filter Records (F3)

Cell NameDefaultPreference

☐ Blending

☐

10

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3. Once filled in, go to **Details** tab and change the Item Type to **Inventory** and select Category with **Work In Progress** GL Account. Sample below:

The screenshot shows the 'Item - Blend Item 3' window with the 'Details' tab selected. The 'Item Type' is set to 'Inventory' and the 'Category' is 'Work In Progress'. The 'Unit of Measure' is 'Gallon'. The 'Status' is 'Active' and the 'Lot Tracking' is 'No'. The 'Inv. Valuation' is 'Item Level'. The 'Unit of Measure' table shows 'Gallon' with a quantity of 1.000000 and 'Item Level' with a quantity of 0.000000.

| Unit   | Unit Qty | Short UPC | UPC Code | Stock Unit | Allow Purchase | Allow Sale | Length | Width |
|--------|----------|-----------|----------|------------|----------------|------------|--------|-------|
| Gallon | 1.000000 |           |          |            |                |            | 0.00   | 0.00  |
|        | 0.000000 |           |          |            |                |            | 0.00   | 0.00  |

4. Make sure to save the changes on the last item.

**b. Recipe Setup:**

1. From Manufacturing > Recipes, create new recipe.
2. Enter Recipe Name, Location, Item (actual item to hold the output - ie. Blend Item 3), Quantity and UOM on the header
3. On Add Input Item grid, add the 2 inventory items as ingredients and add required quantity and its UOM.
4. Set Lower and Upper Tolerance.
5. On Add Output Item grid, added item on the header area will show by default.
6. Click Save. Sample below:

The screenshot shows the 'Recipe - Sample Blended Recipe - Blend Item 3' window with the 'Details' tab selected. The 'Recipe Name' is 'Sample Blended Recipe', 'Location' is '0001 - Fort Wayne', and 'Item' is 'Blend Item 3'. The 'Quantity' is 1.00 and 'UOM' is 'Gallon'. The 'Add Input Item' grid shows two ingredients: 'Blend Item 1' (0.6 Gallon) and 'Blend Item 2' (0.4 Gallon). The 'Add Output Item' grid shows 'Blend Item 3' (1 Gallon).

| Item No      | Description       | Quantity | UOM    | Lower Tolerance (%) | Upper Tolerance (%) | Shrinkage (%) |
|--------------|-------------------|----------|--------|---------------------|---------------------|---------------|
| Blend Item 1 | Blend Item 1 Desc | 0.6      | Gallon | 0.5                 | 0.7                 |               |
| Blend Item 2 | Blend Item 2 Desc | 0.4      | Gallon | 0.3                 | 0.5                 |               |

| Item No      | Description      | Mandatory | Quantity | UOM    | Lower Tolerance (%) | Upper Tolerance (%) |
|--------------|------------------|-----------|----------|--------|---------------------|---------------------|
| Blend Item 3 | Blend Item 3 D.. |           | 1        | Gallon |                     | 0                   |

**c. Transports Implementation:**

1. From Transports > Transport Load, hit New button.
2. Supply Load Date/Time and Driver field.
3. Add the 2 ingredients items on Receipts grid using same vendor and vendor location.
4. Add customer on Distribution Header grid and other required fields. Sample below:

**Transport Load - New**

Details | Diversion | Comments | Attachments (0) | Audit Log (0)

Load Schedule: 6/13/2017 07:59 PM

Ship Via: Truck | Truck No: | Trailer No: | Driver: Jeff the Driver | Transaction: Created on Save

**Receipts**

| Origin*  | Fuel Supplier | Supply Point | Bulk Location*   | BOL No. | Purchase Item | Contract | Gross Units | Net Units | Unit Cost | Surcharge | Freight Rate | Tax Group    | Receipt Link |
|----------|---------------|--------------|------------------|---------|---------------|----------|-------------|-----------|-----------|-----------|--------------|--------------|--------------|
| Terminal | Marathon O... | Muncie       | 0001 - Fort W... | 11      | Blend Item 1  |          | 60          | 60        | 1.050400  |           | 0.000000     | Tax Group... | RL-1         |
| Terminal | Marathon O... | Muncie       | 0001 - Fort W... | 11      | Blend Item 2  |          | 40          | 40        | 1.250000  |           | 0.000000     | Tax Group... | RL-2         |
|          |               |              |                  |         |               |          | 0           | 0         | 0.000000  |           | 0.000000     |              |              |
|          |               |              |                  |         |               |          | 100.00      | 100.00    |           |           |              |              |              |

**Distribution Header**

| Destination* | Customer          | Ship To           | Bulk Location*    | Sales Person  | Invoice Date*      | Purchase Order | Comments |
|--------------|-------------------|-------------------|-------------------|---------------|--------------------|----------------|----------|
| Customer     | Apple Spice Sales | Apple Spice Sales | 0001 - Fort Wayne | Mike Moriarty | 6/13/2017 10:59:00 |                |          |

**Distribution Detail**

| Receipts Link | Item* | Contract | Units | Blend | Price    | Surcharge | Freight Rate | Tax Group |
|---------------|-------|----------|-------|-------|----------|-----------|--------------|-----------|
|               |       |          | 0     |       | 0.000000 |           | 0.000000     |           |
|               |       |          | 0.00  |       | 0.00     |           |              |           |

5. On Distribution Detail grid, select the output item (Blend Item 3) on Item field. Add Units = 100 then tab. Auto Blend screen appears showing the Blend Ingredients quantity required:

**Transport Load - New**

Details | Diversion | Comments | Attachments (0) | Audit Log (0)

Load Schedule: 6/13/2017 07:59 PM

Ship Via: Truck | Truck No: | Trailer No: | Driver: Jeff the Driver | Transaction: Created on Save

**Receipts**

| Origin*  | Fuel Supplier | Supply Point | Bulk Location*   | BOL No. | Purchase Item | Contract | Gross Units | Net Units | Unit Cost | Surcharge | Freight Rate | Tax Group    | Receipt Link |
|----------|---------------|--------------|------------------|---------|---------------|----------|-------------|-----------|-----------|-----------|--------------|--------------|--------------|
| Terminal | Marathon O... | Muncie       | 0001 - Fort W... | 11      | Blend Item 1  |          | 60          | 60        | 1.050400  |           | 0.000000     | Tax Group... | RL-1         |
| Terminal | Marathon O... | Muncie       | 0001 - Fort W... | 11      | Blend Item 2  |          | 40          | 40        | 1.250000  |           | 0.000000     | Tax Group... | RL-2         |
|          |               |              |                  |         |               |          | 0           | 0         | 0.000000  |           | 0.000000     |              |              |
|          |               |              |                  |         |               |          | 100.00      | 100.00    |           |           |              |              |              |

**Distribution Header**

| Destination* | Customer          | Ship To           | Bulk Location*    | Sales Person  | Invoice Date*      | Purchase Order | Comments |
|--------------|-------------------|-------------------|-------------------|---------------|--------------------|----------------|----------|
| Customer     | Apple Spice Sales | Apple Spice Sales | 0001 - Fort Wayne | Mike Moriarty | 6/13/2017 10:59:00 |                |          |

**Distribution Detail**

| Receipts Link | Item*        | Contract | Units  | Blend | Price    | Surcharge | Freight Rate | Tax Group   |
|---------------|--------------|----------|--------|-------|----------|-----------|--------------|-------------|
|               | Blend Item 3 |          | 100    | View  | 7.250000 |           | 0.000000     | Tax Group A |
|               |              |          | 0      |       | 0.000000 |           | 0.000000     |             |
|               |              |          | 100.00 |       | 7.25     |           |              |             |

**Auto Blend**

OK | Close

Details

Recipe Item: Blend Item 3

Qty to Produce: 100.00

**Blend Ingredients**

| Item         | Qty/Ratio | Lower Tolerance | Upper Tolerance | Qty Required |
|--------------|-----------|-----------------|-----------------|--------------|
| Blend Item 2 | 0.40      | 88.00           | 92.00           | 40.00        |
| Blend Item 1 | 0.60      | 8.00            | 12.00           | 60.00        |

6. Click OK button then save and post.