



HOW TO SET UP PALLET CHARGES USING THE FINALIZER

The Finalizer can streamline the process of adding Pallet Charges or Deposits to your customers. Once configured correctly, the Finalizer will calculate the number of pallets for your order and round to the nearest whole number. Setting up the Finalizer involves configuring three tables: Finalize Actions, Finalize Conditions, and Finalize Effects. Review the Prerequisites below before proceeding to the Step-by-Step Set-up

Prerequisites:

- A non-inventory sales item for each type of Pallet Charge/Deposit you wish to set up.
*Depending on how you stage orders, you may want to create a Pallet Charge item for each family of finished goods (kegs, bottles, cans, etc). If you frequently combine <1 pallet's worth of cans and bottles on the same pallet and <1 pallet's worth of 1/2 BBL and 1/6 BBL kegs on the same pallet, you might want to create one Pallet Charge item for Cases and one for Kegs. If you never cross-stage pack types, you may want a Pallet Charge item for each pack type.
- Accurate "Packaging Pallet Quantities" for each pack type you currently package and sell. The Packaging Pallet Quantity defines the number of finished goods that fit on a single pallet (ex: (8) 1/2 BBL kegs). This is defined in the Pack Type Table (*Main Menu Bar > Tools > User Defined Window > ORC_BE_PACK_TYPE*):

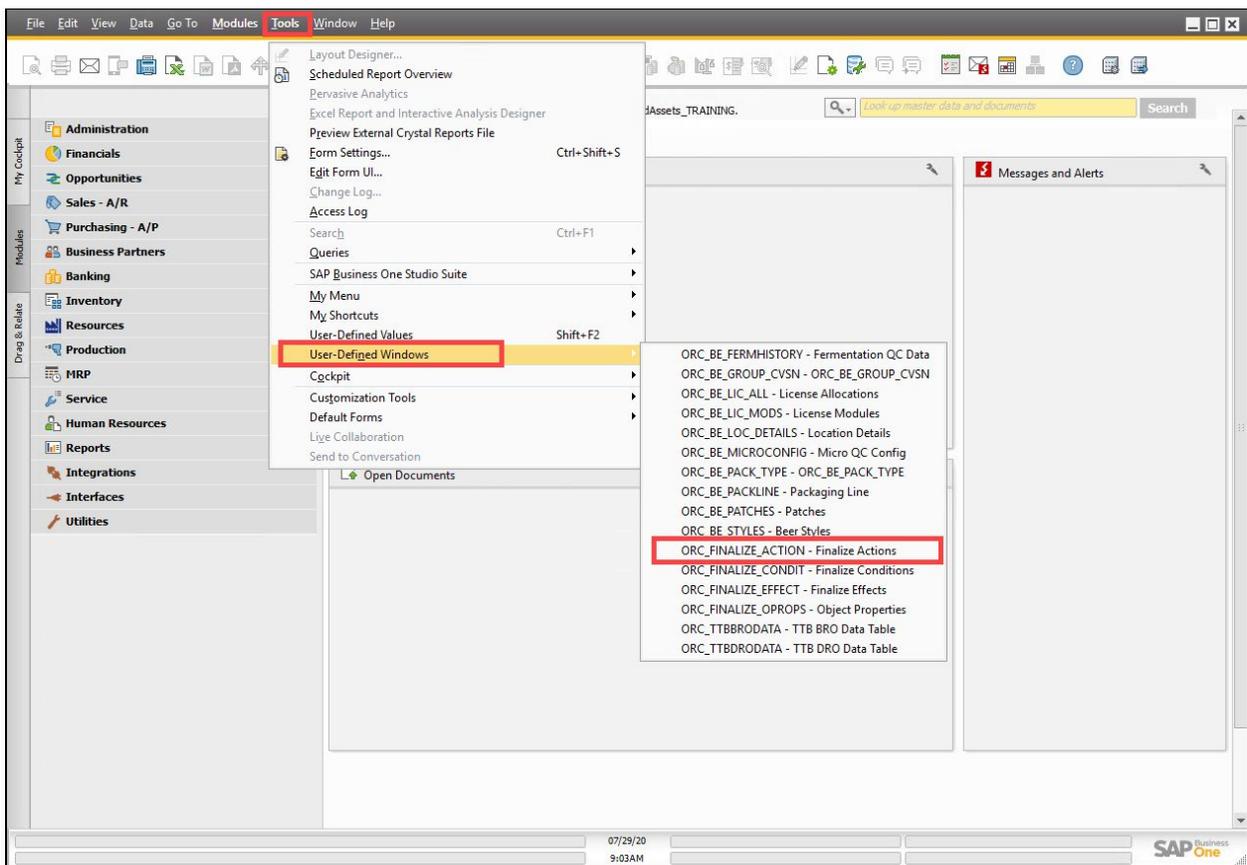
#	Code	Name	Record Count	Name	Pack Family	Unit of Measure	Pack Owner	Packaging Pallet Quantity	Barrels	
32	C1212	Case 12/12 Cans		Case 12pack of 12 CASE CAN	CASE CAN	12 x 12oz		150	0.03629	1.
33	C1512	Case 15/12 Cans		15 pack 12oz cans CASE CAN	CASE CAN	15 x 12oz			0.045363	1.
34	C21212	Case 2/12/12 Cans		Case 2 x 12pack of CASE CAN	CASE CAN	24 x 12oz			0.072581	2.
35	C21216	Case 2/12/16 Cans		Case 2 x 12pack of CASE CAN	CASE CAN	24 x 16oz			0.096768	3.
36	C2412	Case 24/12 Cans		Case 24pack of 12 CASE CAN	CASE CAN	24 x 12oz		100	0.072581	2.
37	C2416	Case 24/16 Cans		Case 24pack of 16 CASE CAN	CASE CAN	24 x 16oz			0.096768	3.
38	C3012	Case 30/12 Cans		Case 30 x 12oz Ca CASE CAN	CASE CAN	30 X 12oz			0.090726	2.
39	C4612	Case 4/6/12 Cans		Case 4 x 6pack of CASE CAN	CASE CAN	24 x 12oz			0.072581	2.
40	C4616	Case 4/6/16 Cans		Case 4 x 6packs of CASE CAN	CASE CAN	24 x 16oz			0.096768	3.
41	C612	Case 6/12 Cans		Case 6pack of 12 CASE CAN	CASE CAN	6 x 12oz			0.018145	0.
42	C6412	Case 6/4/12 Cans		Case 6 x 4pack of CASE CAN	CASE CAN	24 x 12oz			0.072581	2.
43	C6416	Case 6/4/16 Cans		Case 6 x 4packs of CASE CAN	CASE CAN	24 x 16oz		90	0.096768	3.
44	K05	Cask 5L		Cask 5L	KEG	5L			0.042608	1.
45	K10	Cask 10L		Cask 10L	KEG	10L			0.085217	2.
46	K12	Keg 1/2 BBL		Keg 1/2 BBL	KEG	1/2 BBL		8	0.05	1.
47	K14	Keg 1/4 BBL		Keg 1/4 BBL	KEG	1/4 BBL		16	0.05	7.
48	K16	Keg 1/6 BBL		Keg 1/6 BBL	KEG	1/6 BBL		20	0.066667	5.
49	K20	Keg 20L PETainer		Keg 20L PETainer	KEG	20L			0.070433	5.
50	K30	Keg 30L PETainer		Keg 30L PETainer	KEG	30L		36	0.05565	7.
51	K50	Keg 50L (13.2 Gal)		Keg 50L (13.2 Gal)	KEG	50L			0.0426084	1.
52	K51	Keg 51L (13.5 Gal)		Keg 51L (13.5 Gal)	KEG	51L			0.034606	1.
53	KC	Keg Cornelius		Keg Cornelius	KEG	Cornelius Keg			0.06129	5.
54	KF	Firkin		Firkin	KEG	Firkin			0.04879	10.
55	KM155	Keg MS 15.5		Keg Microstar 15.5	KEG	15.5	Microstar		0.05	1.
56	KM52	Keg MS 5.2		Keg Microstar 5.2	KEG	5.2	Microstar		0.066667	5.
57	KP	Pin		Pin	KEG	Pin			0.074194	5.



Step-by-Step Set-up

This guide uses the example of setting up a Pallet Charge for Kegs and includes an additional example of a Pallet Charge for Cases in the screenshots.

- From the gray Main Menu bar, navigate to *Tools > User-Defined Windows > ORC_FINALIZE_ACTION - Finalize Actions*



- On the next available row of the table, enter the following information for each column:

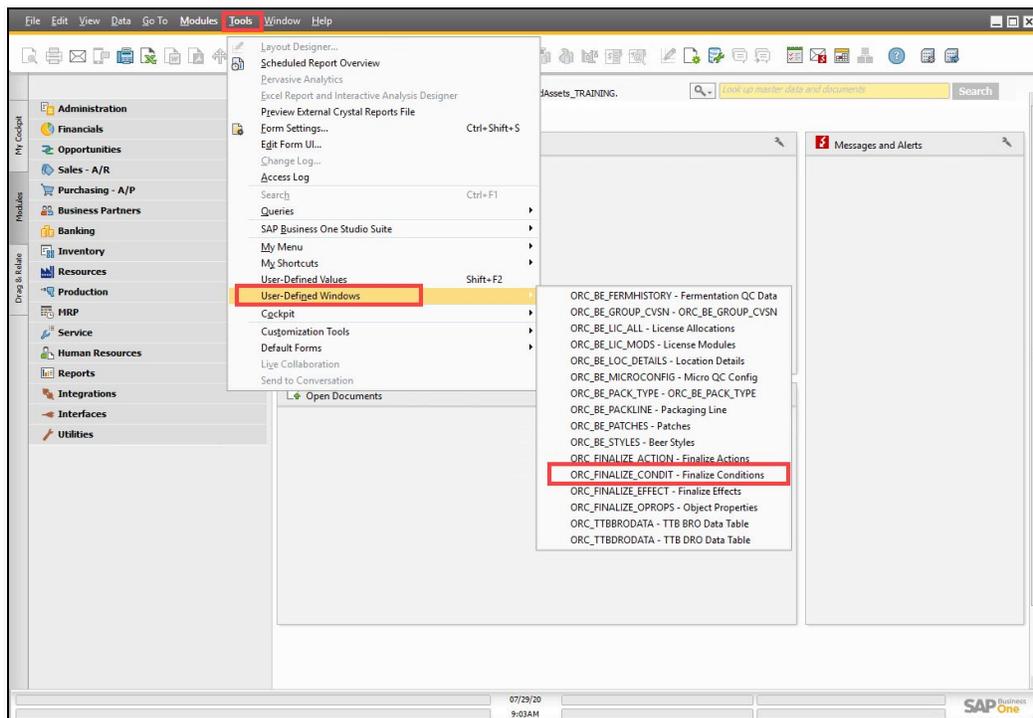
- **CODE:** Pallet-Keg
- *[NOTE: or a pack type specific code of your choosing. ex: Pallet-Case]*
- **NAME:** Pallet-Keg
- *[NOTE: match this field to the Code field]*
- **AFFECTED FORMS:** {139|140|133|179}
- **ACTIVE:** checked
- **RUN LAST:** un-checked

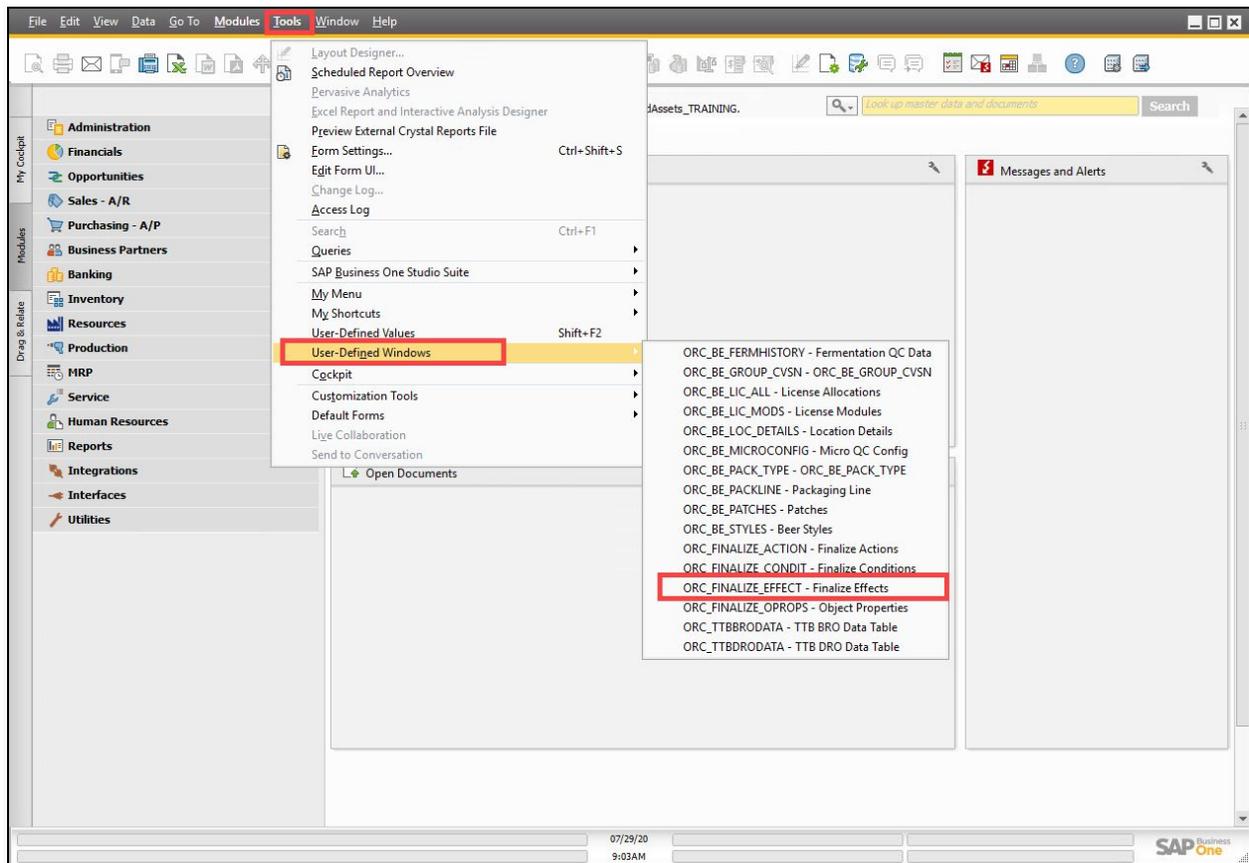


#	Code	Name	Affected Forms	Active	Run Last
1	K12-Deposit	K12-Deposit	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	K16-Deposit	K16-Deposit	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	Pallet-Keg	Pallet-Keg	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Pallet-Case	Pallet-Case	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Update Cancel

- Click UPDATE and repeat with any additional Pallet Charge items you want to set up.
- From the gray Main Menu bar, navigate to *Tools > User-Defined Windows > ORC_FINALIZE_CONDIT - Finalize Conditions*





- On the next available row of the table, enter the following information for each column:
 - **CODE:** Pallet-Keg
 - *[NOTE: match this to your Code and Name from the Actions table]*
 - **NAME:** Pallet-Keg
 - *[NOTE: match this to your Code and Name from the Actions table]*
 - **ACTION CODE:** select the corresponding Action Code from the down down menu
 - **TYPE:** 22
 - **KEY:** ItemCode
 - **VALUE:** enter your Pallet Charge Item Code ex: 19950-PK
 - **CALC PARAM:** leave blank

