

# General Information

## How to Enter or Select Data in Envio

You will use several types of fields to collect or display data in Envio. More than one data entry type may be available for a field.

### Checkboxes

Checkboxes allow you to select one or more options from a list. Checkboxes are "on" when checked, and "off" when unchecked.

The screenshot displays the 'Central Produce Distributing - CENTRAL' trading partner screen. The interface includes a menu bar with 'Save and Close', 'Save and New', 'Save', and 'Help'. Below the menu bar are tabs for 'General', 'Contacts', 'Addresses', 'Customer', 'Receiver', and 'Memo'. The 'General' tab is active, showing the 'Attributes' section with fields for Name, Account Code, Short Name, Phone, Is Active, Bin Owner, Customer Accounting ID, Payable Accounting ID, Federal ID/SSN, and Fax. The 'Relationships' section contains checkboxes for Customer, Association, Freight Broker, Receiver, Supplier, Broker, Transporter, and EDI. The 'Category' section features a list box with options: Airlines, Broker, Distributor, Food Service, Government, and Grower. The 'Distributor' checkbox is checked, and the 'Distributor' category is selected in the list box.

This trading partner screen has checkboxes to select the **Relationships** and **Category**.

Select a checkbox by clicking on it with a left-click of your mouse, or pressing the SPACE BAR on the keyboard when the item is selected.

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## Date Fields

There are multiple ways to select a date.

The screenshot shows a software interface for entering load information. At the top, there is a menu bar with 'Save and Close', 'Save', and 'Help'. Below it is a tabbed interface with 'General', 'Load Notes', 'Comments', and 'Materials'. The 'General' tab is active, showing 'Load Information'.

Fields for 'Load Information' include:

- Sup.Receipt Station: Boise Receipt #2 (dropdown)
- Supplier Receipts: (empty text box)
- Load Number: EV1048 (text box)
- Expected: 04/21/2017 12:12 PM (dropdown)
- Driver Name: (empty text box)
- Arrived: (empty text box)
- Started: (empty text box)
- Departed: (empty text box)
- Load at: (empty text box)
- Currently At: (empty text box)
- Freight / Certificate: (empty text box)
- Freight Amount: (empty text box)
- Freight Rate: (empty text box)
- UOM: (empty dropdown)
- Seal #: (empty text box)
- Cert of Treatment: (empty text box)
- Phytosanitary: (empty text box)

A calendar window is open, showing the month of April 2017. The date 21 (Friday) is highlighted in gray. The calendar also shows the days of the week and the month name.

This Receiving Load Screen has date entries for **Expected** and **Arrived** date.

- Click in the date field to autofill today's date and time.
- Type a date into the field.
- Use the dropdown to open the calendar window and choose the desired date.

## How to Select a Date from the Calendar

- **If your desired date is displayed on the calendar:**

1. Left-click the date to select it. Today's Date will be highlighted in gray.

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- **If your desired date is not showing:**

1. Left-click the arrows to advance forward one month or go back one month.
2. Click the Month and Year to display the entire calendar year by month.
3. Click the year to display the calendar by year.
4. Click the year range to see years by decade.
5. Clicking a selection will drilldown until a single date is selected.
6. Once a date is selected, the field populates.
7. At any time, click the word **Clear** to clear your changes to the calendar.

## Dropdown Lists

A dropdown list contains a list of available options populated by Envio. The options are created by the Envio admin during setup.

Load Nbr:

Save and Close | Save | Help

General | Load Notes | Comments | Materials

**Load Information**

Sup. Receipt Station: Boise Receipt #2 | Supplier Receipts: | Carrier: [Dropdown Menu Open]

Load Number: EV1048 | Driver Name: | Frt Broker: |

Expected: 4/21/2017 12:12 PM | Driver Phone: | Booking #: |

Arrived: 4/21/2017 12:45 PM | Vehicle License: | Payee: |

Started: | Trailer Number: |


Departed: | Pallets In: 0 | Out: 0 |

Load at: |

Currently At: |

Freight / Certificates

This New Receiving Load screen has a dropdown menu for selecting a carrier.

Click the  to open the dropdown list. Click the desired selection to fill in the field. You might need to use the scrollbar to see all of the available options.

## Text Fields

Text fields are input areas for text. If a text field is required, it will be highlighted in yellow. Some text fields have character limits, or do not allow spaces. If a text field appears greyed out and you are unable to type in it, then it is filled by system settings that were set elsewhere in the application.

## Radio Buttons (Option Buttons)

Radio buttons, sometimes called option buttons, are used to select one choice from a series of options. Click the circle to select a choice. When the button is selected, it

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displays a blue center.

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