Distribution Enhancements

User Guide

Neon Version

Contents

About Procession

Procession is a Sage X3 suite of modules, which was created by **Procession Software LLC**. Designed for process manufacturers and distributors, **Procession** provides premium features and modules for your Sage X3 system. **Procession** allows companies to get more out of Sage X3.

Procession picks up where Sage X3 leaves off. **Procession** provides enhanced functionality for customers who are looking to get more from their Sage X3 system. **Procession** helps to manage the complexity of process manufacturing allowing you to do more with less.

Procession is a fully integrated solution that runs seamlessly within X3 and does not require additional hardware. Since **Procession** is part of your Sage X3 system, it is easier to install and maintain than external third party applications. Since it shares the Sage X3 user interface, it is quick to learn and adopt. **Procession** becomes part of your Sage X3 system and therefore requires no integration links and all data resides within the Sage X3 database.

About Procession Software LLC.

Procession Software LLC is a team of professionals from the worlds of process manufacturing and software development and implementation. Our vision is to create THE process manufacturing solution for Sage X3. This vision guided our development of **Procession.**

The initial seeds of **Procession** started in 2006 when a team of process manufacturing professionals and developers designed and built software that would handle the unique requirements for chemical manufacturers. The software brought order to the chaos of regulation compliance, formula management, material safety data sheets and quality control.

The solution, which started in 2006, has evolved into **Procession**, an enhancement suite for process manufacturers. Since its launch in 2014, **Procession** has received much praise from the Sage X3 community. Today, companies ranging from hundreds of employees to companies with tens of employees use **Procession**. As our user base continues to grow, our team is dedicated to adding innovative functionality that addresses the ever-changing landscape of regulations and the needs of formulators, quality control professionals, manufacturers and distributors.

 Since 2013, the Procession team has been working closely with Sage Software to ensure that our solution meets the development standards of Sage. **Procession** is Sage Certified Solution and has been since 2015.

Visual Process Flows

Procession
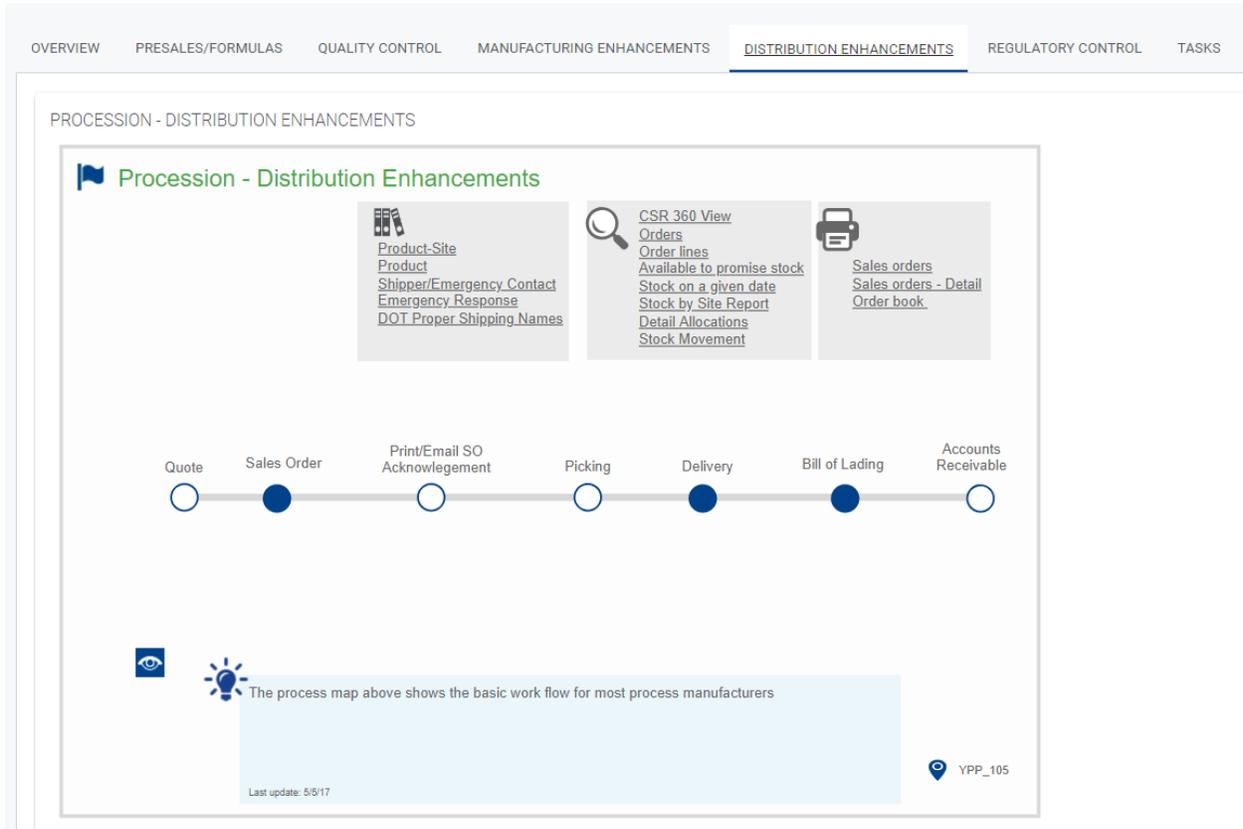
Procession can be accessed from the navigation menu in Sage X3 or from Visual Process Flows. The images above show the standard process map for Distribution provided with Procession.   Users can also create their own process maps in order to access both Sage X3 and Procession features.

Distribution Enhancements - Overview

Procession adds the following distribution functionality to Sage X3 in the following areas:

- Sales Orders
- Deliveries
- Bill of Ladings
- Products
- Product Category

Procession Distribution Enhancements include:

- Parent Product links (New in Neon)
- Product Category defaults for Properties and Freight settings (New in Neon)
- Sales Order/Bill of Lading Blind Shipments
- Sales Order/Bill of Lading Third Party Freight Payer
- UN Number/DOT Proper Shipping Name
- Sales Order Product State/Province Registration Control
- Order Specific Delivery Text
- CSR 360 View with insight into product delivery availability based upon production schedule
- Delivery CofA and SDS Reports
- Bill of Lading package count, handling unit count and weight calculations
- Bill of Lading hazardous material functionality
- Bill of Lading report
- Delivery Warnings when attempting to ship a product that does not meet customer quality specifications
- Regulatory and Technical Requirements per Product (New in Neon)
- Delivery Document distribution (New in Neon)

Setup and Maintenance

This section provides information for setting up the *Procession* Presales/Formulation module for first time use and on-going maintenance.

DOT Proper Shipping Name

Included in the *Procession* data is a list of U.N. proper shipping codes that can be assigned to hazardous products. The DOT table can be accessed by navigating to **Provenio Procession → Setup → DOT Proper Shipping Name.**

DOT Proper Shipping Name data contains a list of thousands of U.N. codes and the hazard classification and packaging groups associated with the UN codes. The data in this list originates from the hazardous materials table defined in U.S. Regulation 49 CFR 172.101.

The shipping codes can be assigned to either the product or a SDS. This information is used to determine if a shipment is hazardous and for building the proper shipping name that will show on the BOL or an SDS.

	ID	Proper Shipping Name	Sym...	Hazard Class	DOT U...	Packa...	Label Codes	Freight c...	NMFC	Special Provisions	Technical Name	Packaging E...	Packaging N...	Packaging b...	Qty Passngr ...
2051	UN1968	Insecticide gases, n.o.s.	G	2.2	UN1968		2.2	Q	Q			306	304	314, 315	75 kg
2052	UN1969	Isobutane see also Petroleum gases, liquefie		2.1	UN1969		2.1	Q	Q	19, T50		306	304	314, 315	Forbidden
2053	UN1970	Krypton, refrigerated liquid (cryogenic liquid)		2.2	UN1970		2.2	Q	Q	T75, TP5		320	None	None	50 kg
2054	UN1971	Methane, compressed or Natural gas, compr		2.1	UN1971		2.1	Q	Q			306	302	302	Forbidden
2055	UN1972	Methane, refrigerated liquid (cryogenic liquid		2.1	UN1972		2.1	Q	Q	T75, TP5		None	None	318	Forbidden
2056	UN1973	Chlorodifluoromethane and chloropentafluor		2.2	UN1973		2.2	Q	Q	T50		306	304	314, 315	75 kg
2057	UN1974	Chlorodifluorobromomethane or Refrigerant		2.2	UN1974		2.2	Q	Q	T50		306	304	314, 315	75 kg
2058	UN1975	Nitric oxide and dinitrogen tetroxide mixture:		2.3	UN1975		2.3, 5.1,	Q	Q	1, B7, B9, B14, B45, B46, B61, B€		None	337	None	Forbidden
2059	UN1976	Octafluorocyclobutane, or Refrigerant gas R(		2.2	UN1976		2.2	Q	Q	T50		None	304	314, 315	75 kg
2060	UN1977	Nitrogen, refrigerated liquid cryogenic liquid		2.2	UN1977		2.2	Q	Q	345, 346, T75, TP5		320	316	318	50 kg
2061	UN1978-A	Propane see also Petroleum gases, liquefied		2.1	UN1978		2.1	Q	Q	19, T50		306	304	314, 315	Forbidden
2062	UN1978-B	Propane see also Petroleum gases, liquefied		2.1	UN1978		2.1	Q	Q	19, T50		306	304	314, 315	Forbidden
2063	UN1982	Tetrafluoromethane or Refrigerant gas R 14		2.2	UN1982		2.2	Q	Q			None	302	None	75 kg
2064	UN1983	1-Chloro-2,2,2-trifluoroethane or Refrigerant		2.2	UN1983		2.2	Q	Q	T50		306	304	314, 315	75 kg
2065	UN1984	Trifluoromethane or Refrigerant gas R 23		2.2	UN1984		2.2	Q	Q			306	304	314, 315	75 kg
2066	UN1986-A	Alcohols, flammable, toxic, n.o.s.	G	3	UN1986	II	3, 6.1	Q	Q	IB2, T11, TP2, TP27		150	202	243	1 L
2067	UN1986-B	Alcohols, flammable, toxic, n.o.s.	G	3	UN1986	I	3, 6.1	Q	Q	T14, TP2, TP13, TP27		150	201	243	Forbidden
2068	UN1986-C	Alcohols, flammable, toxic, n.o.s.	G	3	UN1986	III	3, 6.1	Q	Q	B1, IB3, T7, TP1, TP28		None	203	242	60 L
2069	UN1987-A	Alcohols, n.o.s.		3	UN1987	I	3	Q	Q	172, T11, TP1, TP8, TP27		4b	201	243	1 L
2070	UN1987-B	Alcohols, n.o.s.		3	UN1987	II	3	Q	Q	172, IB2, T7, TP1, TP8, TP28		4b, 150	202	242	5 L

Below is an image of the pop-up view of a row from this table.

ID ★ UN1970	**Packaging Group**	**Technical Name**
Proper Shipping Name Krypton, refrigerated liquid (cryogenic liquid	**Label Codes** 2.2	**Packaging Exceptions** 320

ID ★
UN1970

Proper Shipping Name
Krypton, refrigerated liquid (cryogenic liquid

Symbol

Hazard Class
2.2

DOT UN/NA#
UN1970

Packaging Group

Label Codes
2.2

Freight class
→

NMFC
→

Special Provisions
T75, TP5

Technical Name

Packaging Exceptions
320

Packaging Non-bulk
None

Packaging bulk
None

Qty Passngr Air/Rail
50 kg

Qty Cargo Air Only
500 kg

Vessel Stowage Loc.
D

Vessel Stowage Other

The fields in this table are:

- **ID Number** – Unique shipping code. This shipping code is usually the UN number, however some ID numbers will have the UN Number followed by a letter, such as "-A", "-B", etc.   The letters indicate that there are different hazard levels for the UN number based upon the packaging group.
- **Proper Shipping Name** – For hazardous materials, this is the main description used when building the U.N. Proper Shipping name.
- **Technical Name** - For custom shipping codes, this field contains the description associated with the shipping code.
- **NMFC Number** – National Motor Freight Classification.   NMFC numbers are not defined by default in the DOT record, but can be added at any time.   When an NMFC number is defined on a DOT record, this number will be automatically assigned to a product, when the DOT record is selected for that product.
- **Freight Class** – Freight class code.   Freight Class numbers are not defined by default in the DOT record, but can be added at any time.   When a Freight Class is defined for a DOT record, this Freight Class will be automatically assigned to a product, when the DOT record is selected for that product.
- **Hazard Class** – Primary hazard class. This value indicates whether the shipped product is considered potentially hazardous. This value is added as part of the proper shipping name and is used in calculating weights per hazard class on the BOL.
- **Symbol** - These symbols (+, A, D, G, I, W), if present, will affect how the hazardous materials shipment is prepared and transported.
- **DOT UN/NA#** - United Nations or North American ID number
- **Packaging Group** – Packaging requirements (I, II or III) and part of the proper shipping name.
- **Label Codes** – Additional hazard classes.   This value is used in calculating weights per hazard class on the BOL.
- **Special provisions** – (reference only) Codes which indicate special shipping provisions.
- **Packaging Exceptions** – (reference only) Exceptions for the packaging requirements.
- **Packaging Non-bulk** – (reference only) Non-bulk packaging requirements.
- **Packaging Bulk** – (reference only) bulk packaging requirements.
- **Qty Passenger Air/Rail** – (reference only) Limits for air or rail passenger transportation.
- **Qty Cargo Air Only** – (reference only) Limits for air cargo.
- **Vessel Storage Loc**. – (reference only) Primary shipping vessel storage location.
- **Vessel Stowage Other** – (reference only) other shipping vessel storage location.

Product Category Freight Default Settings (New in Neon)

Freight default settings can be setup on the Product Category window in the Procession tab. When a product is created using the category, the product will inherit these default freight settings. The Product Category can be accessed from the menu **Common Data→Products→Product Category**.

Parent Product Link (New in Neon)

The parent product link is a feature that allows a packaged product to be linked to a bulk product. This feature is designed to be used by distributors only and this field is not available when Procession Manufacturing is installed.

Note: If Procession Manufacturing is installed, then the equivalent functionality is provided by the Master Formula Field on Procession tab of the BOM window.

The benefits for the Parent Product link are:

- **SDS at Delivery Report** – If this link exists, this report will print the SDS for the Parent Product if an active SDS is not found for the current Product.   If the Parent Product SDS is printed, the SDS will show the current product name and description, but the remaining information on the SDS will be from the Parent Product SDS.
- **Informational** – This link can be used on reports and queries in which transactional data is calculated at the parent product level.

DOT Proper Shipping Code Assignment

The DOT proper shipping code can be assigned to a product category, product, SDS, or to a BOL.

On the product, the shipping code is assigned on the product's Regulatory tab. When a product is created, the value for this field defaults to the value defined in the product category.

The shipping code can be selected or entered in the "Proper Shipping Name" field. When selected, the DOT Proper Ship Name for ground shipments is automatically generated from the DOT information.

Other fields in this section are:

- **RQ Requirement** - Reportable Quantity limits for individual packages. If an individual package for a product exceeds the weight limit specified in this field, then a "RQ" will print in the hazardous column for the product on the BOL.   When creating a BOL, the system will calculate the weight of the package being shipped in order to determine if it meets or exceeds the RQ limit.
- **Marine pollutant** - Defines whether a product is considered a marine pollutant.   Products which are marine pollutants and are shipped over water, must specify the words "marine pollutant" on the BOL.

The Freight Class and NMFC# can also be set on the Product Regulatory tab.   When the product is saved, the Product-Site Freight Class and NMFC are automatically updated.

Emergency Responses

⤒ ↑ ↓ ⤓ Procession-Emergency Response

🏠   ✕ ✏ ⌄

ER Code   ER Name
CHEMTREC   CHEMTREC

Phone 1
1-800-424-9300   North America
Phone 2
1-703-741-5500   International

Emergency Reponses are used to define the emergency response phone numbers for shipments. These phone numbers are generally 3rd party companies that are sources of information and emergency incident support for shippers of hazardous materials.

Multiple emergency responses can be defined.   For example, performing a blind drop shipment or when shipping to certain customer, the customer may dictate which emergency response number should be used for the shipment.

Emergency Responses can be accessed from the menu **Procession➔Distribution Enhancements➔Maintenance/Setup/Emergency Responses**.

Shipper Code

A Shipper Code is multi-purpose feature used to define defaults for a customer or site address.   Shipper Codes can be accessed from the menu **Procession➔Distribution Enhancements➔Maintenance/Setup➔Shipper Code**.

Shipper codes define the following:

- The BOL Shipper Address information for blind drop-shipment sales orders
- BOL Freight Billing information (New in Neon)
- Default SDS Locale for the customer (New in Neon)
- Safety Data Sheets (SDS) Logo, company name and address
- Certificate of Analysis (CoA) Shipper Logo, company name and address
- BOL Emergency response information for the customer
- BOL Emergency response registration ID and status

The Shipper/Emergency Contact record can be assigned to any of the following record types:

1. Sales Order
2. Customer or Ship To Address (New in Neon)
3. Bill of Lading
4. Certificate of Analysis
5. Safety Data Sheet

The fields on this window are:

- **ID** - Unique key for the record.   This can be the customer ID or a combination of the customer ID and the Ship-To address for the customer.
- **Description** – Free-Form text description for the record.
- **Shipper** – Select a Business Partner, such as a customer or supplier.

- **Shipment Site** – Select the address for the shipper.
- **Emergency Response** – Emergency Response record   (see section EMERGENCY RESPONSES).
- **ER ID#** - Emergency Response ID number.   This number is assigned by the company providing the Emergency Response and the ID prints on the BOL.   This number is required by Emergency Response companies when calling the emergency response number.
- **Registration** – This option is used by blind drop shipments, where the customer's ER ID# is used on the shipment.   This field is used by Tolling or sub-contract manufacturers which are required to register new product on behalf of the distributor or end customer.
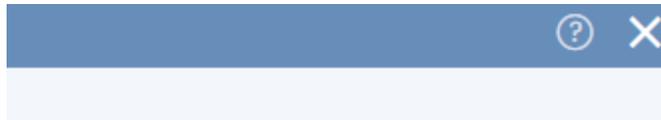
Emergency Resp. Registration

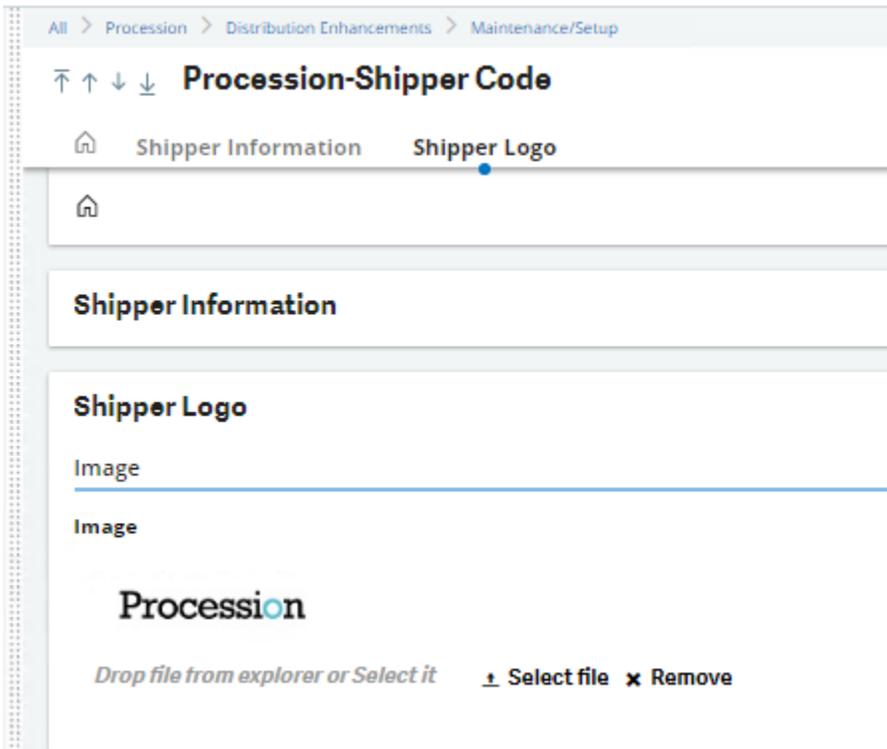| Code	Description	Table
1	Customer registers for self	4850
2	We register for customer	4850
3	We register for ourself	4850
4	Other	4850

- **ER Phone 1** – The first number to call in case of an accident.   This is usually a local number or number for the country where the shipment originates.
- **ER Phone 2** – the second number to call.   This is usually an international number.
- **Shipper Direct Phone** - This is a direct number to the shipper.
- **Email** – Email address of the shipper.
- **Shipping Contact** – The contact person at the delivery address. This information shows on the Sales Order Delivery/Regulatory tab.
- **Bill Freight To –** This field can be used to define third party freight billing.   Note, if this is left blank, then by default, the freight is billed to the customer.   This field appears on the sales order and is used to show the Freight Billing information on the Bill of Lading.
- **Bill Site –** If Bill Freight To is defined, then this is the address information that will appear on the Bill of Lading for billing.
- **Residential –** Indicates the default value for the Residential flag on the Sales Order Delivery/Regulatory tab for this address.
- **SDS Locale –** If a locale is specified here, then this locale will be used when printing an SDS at Delivery for this address.

- **BOL Text Box** – This text box appears at the bottom of the Shipper/Emergency Contact window. If a value is entered into this text box, then it will show as the emergency response information on the BOL.   If a value is not entered here, then the information for the Emergency Response contact will show on the BOL.

Example of text entered in the BOL Text box.
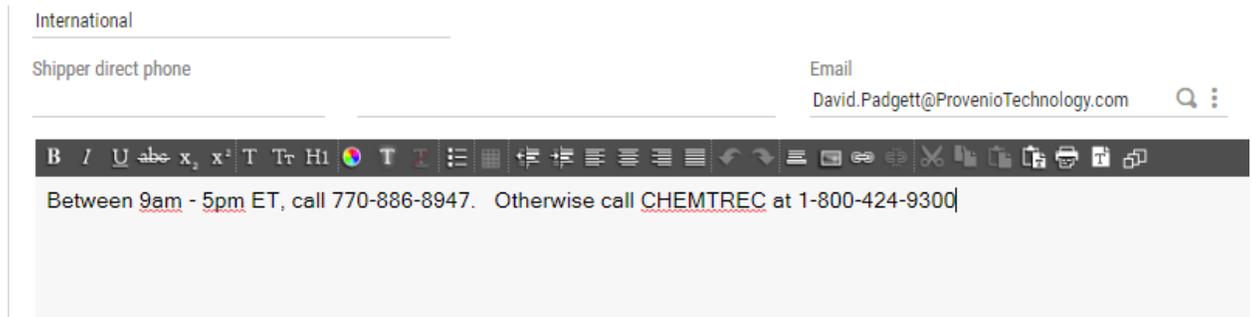
On the Shipper Logo tab, a logo can be added for the shipper. The shipper can be an internal site, division, distributor or end customer. The logo selected for the shipper will print on the SDS or the CofA, when the shipper is selected.

The following example shows the selection of a Shipper when printing the SDS.

Below is an example of the SDS report showing the logo for the selected Shipper Code.

Boilerplate Notes

Boilerplate notes are used to maintain common instructions that are used in the production or common delivery instructions.   These delivery instructions can be added to a sales order or to the BOL.

Boilerplate Notes can be accessed by navigating to **Procession→ Formulation Module → Boilerplate Notes.**

The advantages of boilerplate notes are:

- Reduces user error by eliminating the need for the re-entry of common instructions
- Allows for rapid global changes to instructions. If an instruction is changed on the Boilerplate Note, the instruction is automatically changed on all open sales orders or BOLs where the Boilerplate note is used.

⤒ ↑ ↓ ⤓ Note Code

Stored Note Selections	Description *	Create User
BOLNOTE_001	Keep Refrigerated	DJP

Create Date
01/15/19

Keep refrigerated at 40°F. Do Not Freeze.

Image

Drop file from explorer or Select it   ± Select file

Image size
○ Right of Text (200x400)
○ Left of Text (200x400)
○ Above Text (400X800)
○ Below Text (400x800)
◉ None

Regulatory Documents (New in Neon)

Regulatory Documents are documents whose distribution is required for a product.   Procession provides the following features for Regulatory Documents:

- Track Document Distribution History by Product and Customer
- Generate Documents at Sales Order Delivery
- Set Document Distribution Frequency settings by Product or Customer
- Set document destination, for example set to automatically email to customers or print to printer.

For example, this feature can be used to automatically generate and distribute documents such as allergen statements, safety data sheets or certificates.

When a line item is added to a sales order, any Regulatory Documents assigned to the product are automatically added to the Sales Order Delivery/Regulatory tab for the product.   The settings for each of these Regulatory Documents are determined based upon the Regulatory Document settings assigned to the product and customer records, with the customer record settings taking priority.

See the Sales Order Enhancements – Delivery/Regulatory Tab for more information on how this feature is used on a sales order or delivery.

Regulatory Document Templates

To define a new Regulatory Document, navigate to **Procession→Regulatory Control Module→Maintenance/Setup→Regulatory Document Templates**.

This feature is used to define report templates for different documents and define the default frequency for which the document should be distributed.   Typical examples are certifications and safety data sheets.

These templates allow you to define the text that will print in certain sections of the document.   The template can also specify which customer, product or allergen information to print.

The fields on this template are:

- **Document Id** – The ID for the record. This ID is user defined and it is not system generated.
- **Description** –
- **Report** – The X3 report to use when printing this document.   The default report is XJB1REGDOC and this report is designed to generic so that it can be used for most documents.
- **Default Destination** – The X3 destination for the report.   This can be a printer, preview or a message/email type destination.

If the destination is of type Message, then the XJBPRINT workflow rule should be configured to automatically email the report. Refer to the Procession Setup and Technical Guide for more information on how to setup the XJBPRINT workflow.

- **Frequency** –This option is used to define how often the Regulatory Document should be distributed. For example, if the document is set to distribute annually, then once the product's document has been delivered to the customer, the document will not be required again for another year.

Frequency

Manual ▾
Once
Monthly
Quarterly
Annual
Each Shipment
Only When Changed
Manual
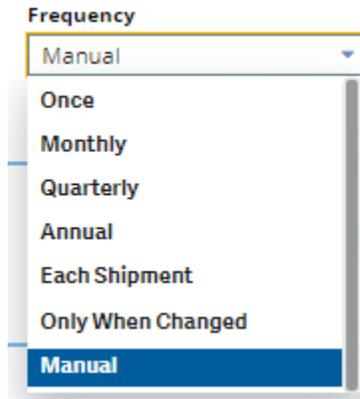
Most of the frequency options are self-explanatory. However, the "Only When Changed" option requires some additional information. This option is used to indicate that the document will only be sent if the "Change Date" on the Regulatory Document record on the Product is more recent then the last date the document was sent. This date can be used to trigger new versions of the product's document to be sent to customers.

The Manual option indicates that the document will **not** be sent when the "Print Regulatory Documents" option is selected on the Product, Sales Order or Delivery. Instead, documents that are set with a "manual" frequency, must be manually distributed.

- **Shipper Code** – A shipper code can be used to define the logo that will print on the document. If a shipper code logo is not provided, then the default logo defined for the company will be used (**Setup→Organizational structure→Companies**).
- **Signator** – Defines the signature line for the document.
- **Show On Report** – This section contains checkboxes which are used to define whether certain sections of data will display on the report. The data in each of these report sections is dynamic and is determined by the product and customer for the sales order.

Show on Report

☑ Date   ☑ Product Id   ☑ Description   ☑ Customer   ☑ Allergen List

- **Header** – Defines text which will show before the salutation line of the document.
- **Salutation** – Defines the text for the Salutation (ex. "To whom it may concern").
- **Body** – Defines the body of the document.
- **Footer** – Defines the text that prints after the signature line.

An example of a regulatory document is shown below.

Date: 7/23/2020

Product: ZSUGARCOOKIES
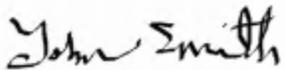
Description: Sugar Cookies

Customer:

This is to certify that to the best of our knowledge, the above product contains only the following allergens:

Allergen List:

- Egg
- Milk
- Wheat

Sincerely,

John Smith
Director
Quality Assurance

Assigning Regulatory Documents to Products

Regulatory document templates can be assigned to product records directly, or published to products from formulas.

To access a Product, navigate to **Common Data→Products→Products**.   On the right panel, select the option "Regulatory".

An example of the regulatory window is shown below.

Options on this window include:

- **Synchronized with Formula** – This is a read-only field that indicates if a product's regulatory documents are synchronized with the formula's regulatory document. If this checkbox is unchecked, then it indicates that changes have been made to either the product or formula and that the two records no longer have matching regulatory documents.   If this occurs, then the formula can be published to the product in order to resynchronize the two records.

  A resynchronization from the product to the formula can also occur when the product is saved. When a product is saved, if any changes were made to the regulatory documents on the product record, these changes are saved back to the formula record.

- **Customer Distribution Log** – This button displays the Customer Distribution Log. This log shows each time that a document was distributed as well as the customer and user.

Customer Distribution Log ⑦

		Requirement ID	Customer	Last Distrib...	Document	Source	Us...
1	⋮	ALLERGEN	C3334	07/28/20	SONNA0230083	GESSOH	DJP
2	⋮						

Other fields on the Product Regulatory window are:

- **Required** – Indicates whether this document is required for distribution.
- **Meets Standards** – Indicates if the requirements have been met that will allow us to distribute this document.
- **Code** – The Regulatory Document Id.
- **Description**
- **Default Frequency** – Distribution frequency for the document.
- **Certified Date** – Indicates the date that this requirement was last certified.
- **Valid Until** – Indicates that the certification is valid until this date. This value can be used in queries in order to determine certificates that need to be renewed.
- **Last Distribution Date** – The last date that this document was distributed for this product.
- **Attachment** – If an attachment should be sent instead of printing the report, then add the attachment here and set the Default Frequency to "Manual". More information on attachments can be found in the next section.
- **Change Date** – This is the date that the document was last changed. If changes are made on the Regulatory Document on the Product, or if changes were published from the Formula, then this field is automatically be populated with the date. However, if the Regulatory Document default frequency is "Only When Changed", then the date can be manually changed to indicate that there is a new version of the document that should be distributed. An example would be if a new revision of the SDS is ready to distribute, this date could change and then the next shipment for each customer will require that the new SDS revision be sent with the delivery.
- **Changed** – This checkbox indicates that the regulatory document was changed in this edit session.

Attachments

Attachments can be added to a Regulatory document to indicate that an attachment should be sent instead of generating a new report.

When selecting the Attachment checkbox, the Attachment dialog is displayed.

Attachments ⑦   OK   Add text   Add image   ⋮   ✕

Attachments

Vi...	Document name	Type	Description	Category	A...	Keyword 1	Keyword 2	Keyword 3	Keyword 4
1 ⋮		Q ⋮	Q ⋮		▾	Q ⋮	Q ⋮	Q ⋮	

Add file
UTILITIES   ‹
HELP   ‹
DIAGNOSIS... ‹
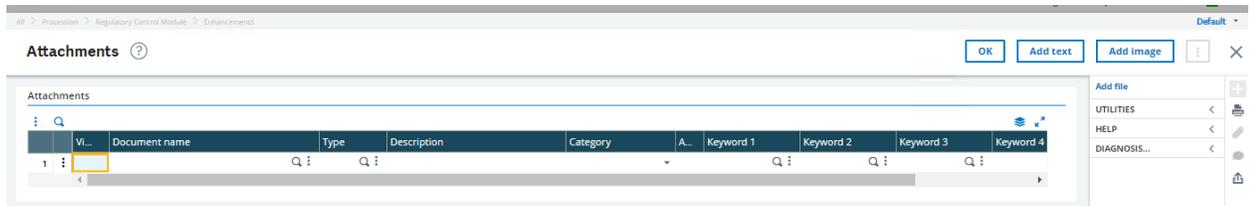
To add the attachment, click on the selector button (i.e. magnifying glass) in the document name field.   Next, either select the file from one of the list volumes, or select to "Upload a file" as shown below.

Selection ⑦

⋮ ⊙ Expand all
▲ 🗐 List of volumes
  ▲ 🗐 [ATT] Attached files   ⋮
      🖾 AfterExplode.png   Upload a file
      🖾 BeforeExplode.png   Refresh
      🖹 formula IMport.txt   Information
      🖾 TTI_Example.png
      🖹 XJB1SDS_V6.pdf

Once an attachment is added, the attachment checkbox will show as checked as shown below for the SDS row.
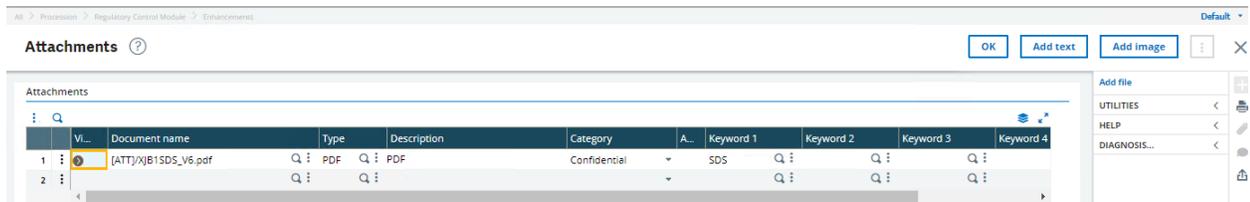
Certifications

5 Results Display: 15

	Required	Meets Standards	Code		Description	Default Frequency	Certified Date	Valid Until	Last Distrib...	Attachment	Change date	Change ...
1 ⋮	☑	☑	ALLERGEN	Q ⋮	Allergen Statement	Once ▾	📅 01/01/19	📅 12/31/19	📅 06/30/20	☐	📅	☑
2 ⋮	☑	☑	GLUTENFREE	Q ⋮	Gluten-Free Statement	Only When Change ▾	📅	📅	📅 06/30/20	☐	📅	☐
3 ⋮	☑	☑	MADEINUSA	Q ⋮	Made In USA	Annual ▾	📅	📅	📅 06/30/20	☐	📅	☐
4 ⋮	☑	☑	NONGMO	Q ⋮	Non-GMO Certificate	Quarterly ▾	📅	📅	📅 06/30/20	☐	📅	☐
5 ⋮	☑	☑	SDS	Q ⋮	Safety Data Sheet	Manual ▾	📅	📅	📅 06/30/20	☑	📅 07/23/20	☑
6 ⋮	☐	☐		Q ⋮		▾	📅	📅	📅	☐	📅	☐

Any attachment that is added using this feature will be stored in the standard Sage X3 attachments that are accessible from the right panel on the product record.

The image below is an example of the attachment window for a product record.   The attachment that was added shows in the list and can be viewed or printed from this window by clicking the "View" button.   Note that the Regulatory Document ID was automatically stored in the Keyword1 field.

Attachments ⑦   OK   Add text   Add image   ⋮   ✕

Attachments

	Vi...	Document name	Type	Description	Category	A...	Keyword 1	Keyword 2	Keyword 3	Keyword 4
1 ⋮	⊙	[ATT]/XJB1SDS_V6.pdf	Q ⋮ PDF	Q ⋮ PDF	Confidential ▾		SDS Q ⋮	Q ⋮	Q ⋮	
2 ⋮			Q ⋮	Q ⋮	▾		Q ⋮	Q ⋮	Q ⋮	

Add file
UTILITIES   ‹
HELP   ‹
DIAGNOSIS... ‹

Technical Requirements (<mark>New in Neon</mark>)

Technical Requirements are lab-related documents that must be delivered or tasks that must be performed when a product is ordered or delivered to a customer.

This feature provides the following benefits:

- Define the Lab documents which are required to be distributed with the product
- Define Lab documents that are required by customer
- Automatically track when a Certificate of Analysis has been printed or sent to the customer.
- Assign report versions or custom reports by product or customer
- Attach and track documents
- Specify lab-related tasks for an sales order

Technical Requirements Master Data

Technical Requirements can be accessed from the menu **Procession→Quality Control Enhancements→Maintenance/Setup→Technical Requirements**.

Technical Requirements can be assigned to formulas and/or customers.

To create a new Requirement, select a blank row in the grid and enter a requirement ID and description. Other fields on this window are:

- **CoA** – If this field has a value of "Yes", then the requirement is a Certificate of Analysis (CoA). This flag is determines whether the delivery status and delivery date are automatically updated on a sales order or delivery when the report is printed.

Note: The Procession standard CoA report that is printed from the Delivery is named "XJB2COA_DLV". In the X3 Report Dictionary, this report has a script called XJBSPVSDHCOA. This script automatically updates the "Delivered" and "Delivery Date" fields on the Sales Order Delivery/Regulatory tab. This update occurs when the report is printed or emailed from the Delivery record. If a custom CoA report is created, then the XJBSPVSDHCOA script should be added to the custom report.

- **Report** – Defines the name of the report to use for this Technical Requirement. Note that the report value is optional and some Technical Requirements may not have a report associated with it.

Assigning Technical Requirements to Products

Technical Requirements can be viewed for a product record. Product records can be accessed from the menu option **Common Data→Products→Product**.

The Technical Requirements menu option can be found on the right panel Procession menu as shown below.

Note: The Technical Requirements on the product are read-only. These requirements are editable on the formula record only.

Customer Enhancements

The following enhancements have been made to the Sage X3 customer feature. Customers can be accessed from **Common Data→BPs→Customers**.

- Shipper Codes and Locales defined by Delivery Address
- Regulatory Documents defined by Delivery address
- Technical Documents defined by Delivery address

The Procession enhancements can be access from the right panel under the **Procession→Requirements/Settings** menu.

Below is the window that displays when this option is selected.

All > Common data > BPs

⟱ ↑ ↓ ⟱ **Procession-Requirement/Setting**

Sales documents

Regulatory Documents

		Regulation ID	Description	Frequency	Langua...	Delivery address	Destination
1		ALLERGEN	Allergen Statement	Manual	ENG		PREVIEW
2		MADEINUSA	Made In USA	Annual	ENG		PREVIEW
3							

Technical Requirements

		Requirement ID	Description	Report	COA	Delivery address
1		COA	Certificate of Analysis	XJB2COFA_DLV	✔	
2		COA	Certificate of Analysis	EUXJB2COFA_DLV	✔	CORP
3		MICRO	Microbial Results		☐	
4		COVERLETTE	Cover Letter		☐	
5					☐	

Shipper Code Mapping

		Delivery address	Shipper Code	SDS Locale	Description
1		CORP	PROCESSION	EU	European Union
2		GA	C3334	USCANADA	U.S.A & Canada
3					

Customer Regulatory Documents

Regulatory document settings defined at the customer level take precedence over regulatory document settings at the product level when adding a line item to a sales order.

Regulatory Documents should be defined at the customer if any of the following conditions are true:

- Customer has requested that one or more regulatory documents be provided for all products
- Customer has asked for custom frequency for a regulatory document
- A default language needs to be defined for the customer or delivery address. For example, this setting can be used to determine which language that the SDS should be printed in.
- Customer has asked for a specific delivery method for their reports, such as Email versus Print/Mail.

The fields in the Regulatory Document section include:

- **Regulation Id** – Select or enter the regulatory document
- **Frequency** – Specify the frequency that the document should be delivered for this customer

- **Language** – Specify the default language for the report
- **Delivery Address** – Define the delivery address for which this regulatory document setting applies. If the regulatory document setting is for all delivery addresses for this customer, then this field should be left blank.
- **Destination** –Specify the default destination for the report.

Customer Technical Requirements

Technical Requirements can also be set at the Customer or Delivery Address Level. When sales orders are created, the system will add all Technical Requirements from the product and the customer. If a Technical Requirement exists in both places, then the customer values for that Technical Requirement will be used.

The customer record can be accessed from **Common data→BPs→Customer**. The Technical Requirements can be access from the Requirements/Settings menu option in the right panel Procession group as shown below.

PROCESSION ⌃

Requirements/Settings

The image below shows an example of the Customer Requirements/Settings window.
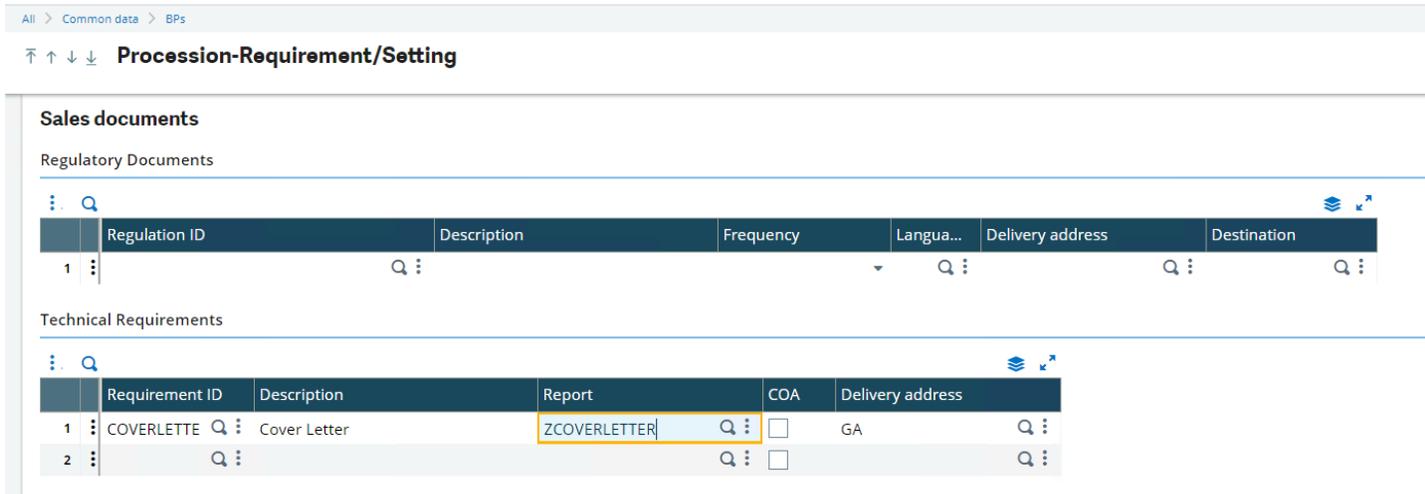
The Technical Requirements grid can be found in the center of this window. The fields in this section are the same as the Technical Requirements Master Data, with the exception of the Delivery Address column. The Delivery Address column is used to specify that the Technical Requirement is for a specific delivery address. If the delivery address is blank, then the Technical Requirement is applicable to all delivery addresses.

Customer Shipper Code Mapping

The Shipper Code Mapping feature provides the following benefits:

- Assignment of shipper codes to a delivery address. Shipper codes are used on the Bill of Lading and the Sales Order.   A shipper code allows the assignment of the following:
  a) Emergency Response number and/or BOL Emergency response text
  b) Emergency registration numbers
  c) Freight billing information
  d) (Optional) Default logo to use on the Certificate of Analysis and the SDS
- Assignment of SDS Locales, which are used to determine the default SDS format for the customer.   This locale is used when printing the SDS at Delivery report.

Shipper Code Mapping

	Delivery address	Shipper Code	SDS Locale	Description
1	CORP			
2	GA	PROCESSION	USCANADA	U.S.A & Canada
3				

Sales Order Enhancements

The following enhancements have been added to the standard Sage X3 sales order feature.   Sales Orders can be accessed from the standard Sage X3 menu or by navigating to **Procession → Manufacturing/Distribution Enhancements → Distribution → Enhancements → Orders.**

The sales order enhancements are:

- Blind Shipments
- 3rd Party Freight Billing
- Order Specific Delivery text
- Regulatory Documents (New in Neon)
- Technical Requirements (New in Neon)
- Product State/Province Registration Control
- CSR 360 View

Delivery/Regulatory Tab

This **Procession** tab is used for the following purposes:

- Bill of Lading information
- Regulatory Documents
- Technical Requirements

The image below shows and example of the Sales Order Delivery/Regulatory tab.

Delivery/Regulatory ⌃

☑ Procession active

Shipper/Blind Shipment

Shipper Code	Shipper	Shipping Contact
→ C3334 🔍 ⋮	C3333	David Padgett
	Sage Chemicals	

Freight Billing/3rd Party Pay

Bill Freight To	Bill Site
→ PROCESSION 🔍 ⋮	MAIN 🔍 ⋮
Procession Software, LLC.	

Regulatory Documents

⋮ 🔍   5 Results Display: 5   ▾ 1 2 ⊜ ⤢

		Delivered	Required	Product	Description 1	Regulation ID	Description	Frequency	Langu
1	⋮	☑	☑	ZNEWPRODUCT2	🔍 ⋮ Paint-Low VOC Acrylic Gloss	ALLERGEN	🔍 ⋮ Allergen Statement	Manual ▾	ENG
2	⋮	☐	☐	ZNEWPRODUCT2	🔍 ⋮ Paint-Low VOC Acrylic Gloss	GLUTENFREE	🔍 ⋮ Gluten-Free Statement	Only When Change ▾	ENG
3	⋮	☐	☐	ZNEWPRODUCT2	🔍 ⋮ Paint-Low VOC Acrylic Gloss	MADEINUSA	🔍 ⋮ Made In USA	Annual ▾	ENG
4	⋮	☐	☐	ZNEWPRODUCT2	🔍 ⋮ Paint-Low VOC Acrylic Gloss	NONGMO	🔍 ⋮ Non-GMO Certificate	Quarterly ▾	ENG
5	⋮	☐	☑	ZNEWPRODUCT2	🔍 ⋮ Paint-Low VOC Acrylic Gloss	SDS	🔍 ⋮ Safety Data Sheet	Each Shipment ▾	ENG

Technical Requirements

⋮ 🔍   ⊜ ⤢

		Delivered	Required	Product	Description 1	Requirement ID	Description	Langua...	Description	Delivery date	Sour
1	⋮	☐	☑	ZNEWPRODUCT2	🔍 ⋮ Paint-Low VOC Acrylic Gloss	COA	🔍 ⋮ Certificate of Analysis	ENG 🔍 ⋮	English - American	📅	FORI
2	⋮	☐	☑	ZNEWPRODUCT2	🔍 ⋮ Paint-Low VOC Acrylic Gloss	COVERLETTE 🔍 ⋮	Cover Letter	ENG 🔍 ⋮	English - American	📅	FORI
3	⋮	☐	☐		🔍 ⋮		🔍 ⋮		🔍 ⋮	📅	

Delivery Information

Booking Number	Residential	Note Code	Edit delivery text
T-3312-A	No ▾	→ BOL_NOTES 🔍 ⋮	✒

Packing slip text

B I U̲ ab̶ x₂ x² T T₊ H₁ 🌐 T I̲ ⋮ ☰ ☷ ▸☰ ☰◂ ☰ ☰ ☰ ☰ ↶ ↷ ☰ ☐ ∞ ⇥ ✂ 🗐 🗋 🗀 🖶 🗑 ⟨⟩

Must delivered in a refrigerated truck with temperature not to exceed 4°C.

The sections and fields on the Delivery/Regulatory tab are:

Shipper/Blind Shipment

- **Shipper Code** –Defines the company name and address that should appear as the Shipper on the BOL. For blind drop-shipments, the Shipper Code should be for the company whose name should appear on the BOL.   Also, the Shipper Code is also to determine the logo and address information on the Certificate of Analysis and the Safety Data Sheet.

  The shipper code will automatically default to the shipper code that is assigned to the customer record, if one exists (refer to CUSTOMER SHIPPER CODE MAPPING).

  If a customer default does not exist, then the system will default to the shipper code for the Shipment Site.   If a shipper code does not exist for the Shipment Site, then the system will create one.

  See the following section for more information on Shipper Codes: SHIPPER CODES.

- **Shipper** – Primary address for the shipper.
- **Shipping Contact** – Defines the contact at the receiving site, not the shipping site. This is the contact at the receiver who should be notified if there is a problem with the shipment.

Freight Billing/3rd Party Pay

- **Bill Freight To**– Specifies which company the freight will be billed to. This defaults to the current company specified for the shipment site.   If the default is changed, then the selected company will print in the BILL FREIGHT TO section of the BOL.
- **Bill Site** – Billing address

Regulatory Documents (New in Neon)

The documents defined in this section can be automatically printed or emailed using the Print Regulatory Documents menu option in the right panel of the sales order record.   This option prints all documents that are flagged as "Required" and which are not currently marked as "Delivered" or as a frequency of "Manual".   The option updates the "Delivered" flag and "Delivery Date" fields.   This option does not print the regulatory document attachments which may have been added to the product record.   Attachments must be manually printed or emailed to the customer.

The fields in the Regulatory Document section of the Delivery/Regulatory tab are:

- **Delivered** – If checked, then the document has been printed or emailed to the client.
- **Required** – If checked, then this document is required to be delivered with this order.   This field is automatically populated, but can be manually changed.   The system populates this field based upon the "Frequency" setting for the document.   For example, if the frequency is set to "Annual" and the document has been delivered to the customer in the last 12 months, then the document would show as not required for the current sales order.
- **Regulation ID** – The ID for the document.
- **Frequency** – Defines frequency for distribution of this document for the product + customer combination.   This frequency determines if the "Required" checkbox is checked for this record.
- **Language** – Determines the language for the document.   This assumes that the report has language translation functionality.   An example of a report with language translation functionality is the Procession Safety Data Sheet report.
- **Delivery date** – The date that the document was last delivered for this product + customer combination.
- **Destination** – The Sage X3 destination for the document.   This can be a printer or it can be an email destination.
- **Source** – Indicates whether the Regulatory Document requirement originated from the Product or the Customer record.

Technical Requirements

- **Delivered** – Indicates if this requirement has been met or the document has been delivered. This checkbox will be automatically updated when printing the standard Procession Certificate of Analysis on the Delivery record.   For other Technical Requirements, this checkbox will need to be manually updated.
- **Required –** Normally, this would be checked for every Technical Requirement.   However, if it is determined that this order is an exception, then the required checkbox can be unmarked.
- **Product –** this is the line item for which this Technical Requirement applies.
- **Requirement ID**
- **Description**
- **Language** – Defines the document's language
- **Delivery Date** – Date the document was delivered.   This field is automatically populated when printing the Procession Certificate of Analysis on the Delivery Record.
- **Source** – The source of the requirement.   The options are FORMULA and CUSTOMER.

Delivery Information

- **Booking Number** – Logistics companies provide load number or booking numbers prior to the pick-up of a delivery.   This booking number can be stored into this field for reference.
- **Residential** – This reference field indicates if the delivery is to a residential address.
- **Note Code** – Boiler plate notes containing delivery text can be selected in this note code field. The boiler plate note master record can be accessed by drilling down to the record from the Note Code field. For more on information on boilerplate notes, refer to the section: **BOILERPLATE NOTES**
- **Edit Delivery Text –** When this button is pressed, it enables the Delivery Text field, allowing the user to edit the delivery text.
- **Delivery Text** – Contains the text that will print in the Special Instructions of the BOL.   This field defaults to the delivery text defined on the Customer Ship To tab.   However, it can be overwritten by selecting a boiler plate note in the Note Code field, or by clicking the Edit Delivery Text button and changing the delivery text.

Print Regulatory Documents (New in Neon)

This feature will automatically print or email all regulatory documents on the sales order which are marked as:

- Not Delivered
- Required
- Frequency is not "Manual"

This option can be found in the right panel of the sales order, under the Procession menu as shown below.

PROCESSION ∧

CSR 360 View

Print Regulatory Docu...

Product Registration Control
(*This feature requires both the **Procession** Distribution and Regulatory Control Modules.*)

Product registrations are required for certain products, such as biocides. For example, a product may be registered in one state/province and the product may be widely used there.   However, the same product may be banned in another state/province because either the product has not been registered, or that state/province has a regulation that specifically bans the product or a chemical that is in the product.

The Product Registration Control feature allows control over where a product can be sold within the U.S. and Canada.   Use of Registration codes are setup for a product or product groups.   These registration codes are assigned to the product on the Product screen's Regulatory tab.

For information on setting up the Registration codes, refer to APPENDIX5-STATE/PROVINCE REGISTRATION SETUP.

When a product is added to a sales order, the system checks the registration status of the product. If a product is prohibited from selling in a state or province, the message similar to the following will appear:

> **! Procession by Provenio**
>
> This product cannot be sold in California.
>
> **Ok**

A product may also be setup to allow non-registered products on a sales orders, but have the sales orders automatically placed on hold for review. In this scenario, a message similar to the following will appear:

> **? Question**
>
> This item is NOT registered for California. The order will be placed on regulatory hold if this item is added. Add the item anyway?
>
> Yes   **No**
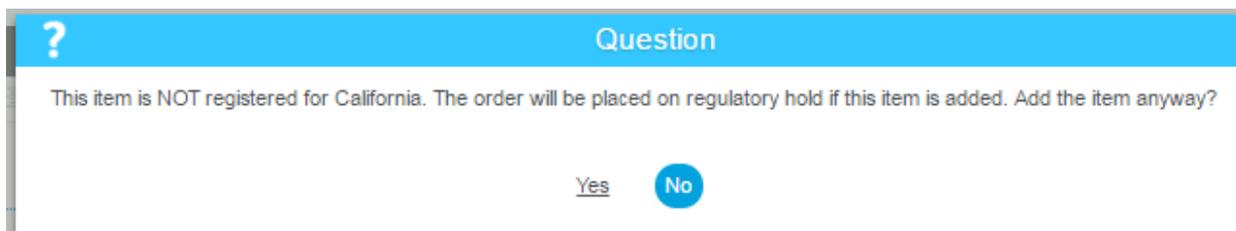
If the order is saved with the non-registered product, the order will be automatically placed on "Regulatory Hold".   This status is displayed on the Management tab of the Sales Order.

Hold

On hold

🔓

REGULATORYHOLD

Regulatory Hold

CSR 360 View

CSR 360 View is an inquiry that can show the status and availability of products on a sales order, including their status in the production schedule.   This View provides the ability to view and drill-down to many different documents related to the order and its delivery, including the BOL.

CSR 360 View can be accessed from either the right-panel menu on a sales order or from the *Procession* menu.

1. From the Sales Order screen, the CSR 360 View can be accessed from the right-side Option menu. When selected from the sales order screen, the view is automatically filtered for the currently selected Sales Order.

2. CSR 360 View can also be accessed from the menu by navigating to **Procession** →**Manufacturing/Distribution Enhancements**→**Distribution**→**Inquiries**→ **CSR 360 View.**

CSR360 - SO Detail Section

The SO Detail section of this inquiry shows where an order line item is in the fulfilment process.   Also shown is the available quantity for each line item.   This information allows customer service or a shipping representative to accurately communicate the status of an order to the customer.

As a product moves through the fulfilment process, the quantity will move into the appropriate column of the inquiry. The quantity in each of the following columns describe which in which stage of the fulfilment process the order is currently in:

- **Qty-Ordered-SAU** – Order Quantity.
- **On Picking Ticket** – Quantity that is currently being picked.
- **In Delivery** – Quantity that is currently being staged for delivery.
- **Delivered** – Quantity that has been delivered.

From the SO Detail section, it is possible to drill-down to each of the records associated with the order. The list of records that can be accessed from this section are listed below:
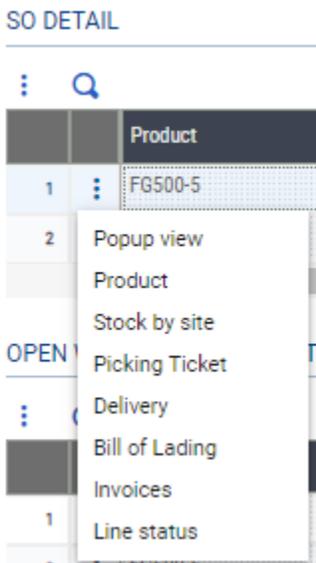
The detail section also shows the document numbers for each of these documents, as well as the Pro-number from the BOL

Pop-up view example showing multiple document numbers:

Product
FIN501

Description 1
Axle Grease-55 GAL Drum

Qty Ordered-SAU
130

Stock Shortage

On Picking Ticket

In Delivery
0.000000

Delivered
130

Qty onhand-STU
164

Allocated qty.

Stock unit *
→ DR

Description
Drum

Shipment date
12/27/17

SAL-STK conv
1.000000

Pick ticket

Delivery number
SHPNA0230048

BOL number
BOL000010

PRO number
FX28483423212-11

Invoice
NA0231302INV000047

Line
1000

Line status

Qty. on list prep.

Qty. being prepared

Qty. prepared

Being delivered

Invoiced qty.

CSR360 - OPEN WOs Section

The Open WOs section shows all <u>open</u> work orders for the product that is currently selected in the SO Detail section.   This information is useful for determining future availability of the product. The status and schedule is provided for each work order.   The allocation status is also shown, which is useful in determining if the work order is being held because of shortage of materials. Additional information about the work order can be accessed by drilling down to the work order from this inquiry.

Pop-up view example showing status of an open work order for the selected product

Current WST

The Current WST (Work Station) column can be used to show the current production stage or work station for the work order. Examples of stages may be "Hold for Art", "Quality Control" or "Packing".

Current WST is found in the OPEN WOs Section.   This field is an optional feature that requires additional setup or integration with a shop floor system.   Contact **Provenio Technology** for more information regarding this feature.

Delivery Enhancements

Delivery Customer QC Specification Warning
(This feature requires both the ***Procession*** Distribution *and* Quality Control modules)

During the creation of a delivery from a sales order, **Procession** verifies that the selected lots meet the customer's specifications.

This verification is performed using:

- Customer specifications for the product and customer combination.
- The last QC results for the lot number.

   Note: This feature assumes that a lot can be repackaged and maintain the same lot number. Therefore, the validation occurs only on the lot number and not the product + lot combination.

If the lot does not meet the customer specifications, the user is presented with a soft warning. The soft warning allows the user to determine whether the customer will accept the lot or if the lot needs to be replaced with an acceptable one.

An example of this warning is shown below.
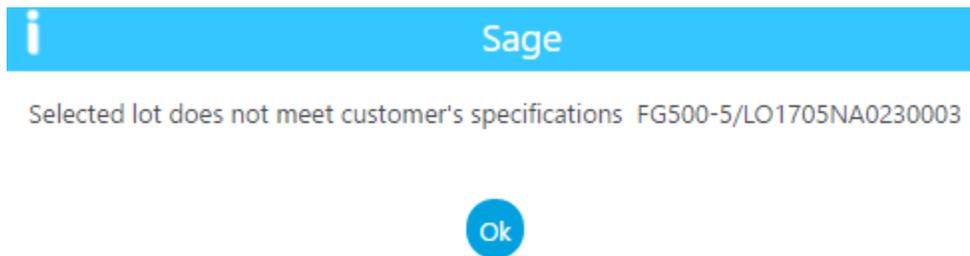
Delivery/Regulatory Tab

This tab contains the same fields as the Sales Order Regulatory tab. All fields on this section are disabled, except for the Delivered fields on the Regulatory Documents and Technical Requirements.

For Regulatory Documents, the Delivered field and Delivery Date fields are automatically populated when the "Print Regulatory Documents" menu option is selected from the right panel of the delivery record.

For Technical Requirements, the Delivered field and Delivered date is automatically populated when the **Procession** Certificate of Analysis Report is printed on the delivery record. For all other Technical Requirements, this Delivered field must be manually checked, once the requirement has been completed.

When saving a delivery, the sales order is automatically updated with any changes made on the Delivery/Regulatory tab.

Refer to the Sales Order Enhancements – Delivery/Regulatory tab for more information regarding the fields on this tab.

Delivery Reports

The following *Procession* reports are available from the standard Sage X3 delivery screen.   The availability of these reports depends upon which *Procession* modules are installed.

- **Certificate of Analysis** – Requires the *Procession* Quality Control Enhancements module.
- **Safety Data Sheet** – Requires the *Procession* Regulatory Control module.
- **Regulatory Documents (New in Procession)** – Regulatory Documents are printed from the right panel menu option shown below.
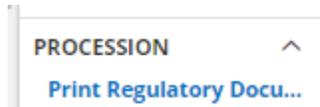
Bill of Lading Enhancements

Procession enhances the standard Sage X3 Bill of Lading (BOL) feature. The BOL can be accessed from the standard Sage X3 menu or by navigating to **Procession → Manufacturing/Distribution Enhancements → Distribution → Enhancements → Bill of Lading**

Standard Sage X3 BOL	Procession BOL

Procession adds the following enhanced BOL functionality:

- **Standard GSI US VICS Format** (https://www.gs1us.org/)
- **Master Bill –** Allows multiple sales orders to show on the BOL with totals shown for each order.
- **Delivery Text –** Ability to enter or select delivery text to show on the BOL
- **Packages & Handling Units** - Show both packages (example Cases) and handling units (example Pallets) on BOL.
- **Groupings** - Calculate totals by U.N. proper shipping name or product description.
- **Blind Drop Shipment** – Control the shipper name that appears on the BOL.
- **Third Party Freight** – Designate where the freight should be charged.
- **Gross/Net Weight Calculations** - Ability to accurately calculate Gross Weight and Net Weight based upon container and package.
- **Weights by Hazard Class**
- **DOT Proper Shipping Names**
- **Automatic Hazardous material determination**
- **Emergency Contact information** – define by shipper.
- **Canadian BOL** – Bi-lingual version of the BOL (French and English).

Packaging Options

Procession supports two separate packaging options.

1. **Packaging Defined on Delivery** - Sage X3 supports the ability to define packaging on a delivery record. When the packaging is defined on the delivery record, *Procession* adds the packaging information, including package numbers to the BOL. When the BOL is created, this packaging is stored in the *Procession* BOL and is printed on the *Procession* BOL report. Procession uses the packaging information in order to calculate a theoretical net and gross weight for the shipping. This calculation includes the weights of the outer and inner container. The calculated weights can be edited on the BOL.

2. **Packaging Defined on BOL** - If packaging is not defined on the delivery record, then it must be defined on the BOL record. *Procession* allows one or more deliveries to be added to the same BOL. When a delivery is added to a BOL, *Procession* automatically adds the delivery lines to the BOL and allows the users to edit or enter the number of handling units, net weight and gross weight for the delivery.

Packaging defined on the Delivery Record

Packaging can be performed in the Delivery task by selecting the "Packaging" button.
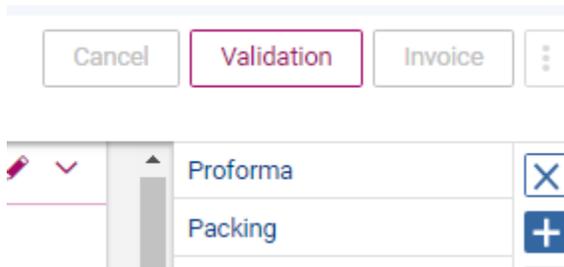
The packaging feature is used to declare the number of handling units for the shipment. Handling units are the highest level of packaging that is handled by the carrier. For example, a product may be packaged in cans, the cans placed in cases and the cases stacked on a pallet. In this scenario, the handling unit is pallets.

In the packaging feature, all delivery lines must be packaged. For products that are not physically packaged, a pseudo-package can be assigned to the delivery line instead. For example, if a delivery consisted of 3 pallets and a loose drum, the drum would require a pseudo-package when using the packaging feature. This pseudo-package can be setup so that it does not have a tare weight. An example would be to define a package called "LOOSE" which can be assigned to all loose items on a delivery.

Packages can be defined in standard Sage X3 by navigating to **Common Data → Product Tables→ Packages.** The tare weight can be setup here for each package, such as a Pallet. This tare weight will be used in the calculation of the Gross Weight for the shipment.

BOL Weight Calculations

Procession calculates both the gross and net weight of a shipment.   This calculation requires the tare weight of both the inner packages (example, a pail or carton) and the outer packages (i.e. Handling units - example, pallet or skid).   Outer packages are typically setup in Sage X3 as packages with a tare weight assigned.

Procession determines the tare weight of the inner package using the following method.   *Procession* considers the sale unit of measure to be the inner package.   For example, a product may have a sale unit on the order of PL5, for a 5 Gallon pail.   The PL5 unit would have first been setup in the Sage X3 Unit of Measure table.   When calculating weights, *Procession* checks for a package record with the same id as the sales unit of measure.   In this example, *Procession* will check for a package named PL5. If defined, the tare weight of this package will also be used by *Procession* in the calculation of either the Gross or Net weights of the shipment.

For more information regarding the weight calculation setup, refer to APPENDIX 4 – PARAMETER SETUP.

Refer to the standard Sage X3 help documentation for more information on packaging on the Delivery screen

Creating a Bill of Lading from a Delivery

A bill of lading is created using standard Sage X3 functionality.   The BOL can be created directly from the Delivery screen or from the menu. If creating from the BOL screen, select the customer BOL type and select the shipment as the reference document.   Additional deliveries can be added on the Shipment Lines tab.

Refer to Sage X3 help documentation for more information on how to create a BOL.

The Sage X3 standard tabs are:

- Detail
- Content

Procession adds the following tabs to the BOL window:

- Additional Ship Info
- Shipment Lines
- Totals

Each of these sections are described in more detail below.

BOL – Detail Tab

The detail tab is a standard Sage X3 tab that contains the package summary data that prints on the standard Sage X3 BOL report. The information on this tab is <u>not</u> printed on the *Procession* BOL report. This tab is automatically populated by Sage X3 when the BOL is created. *Procession* will overwrite the data on this tab whenever the user presses the Recalculate Totals button on the Shipment Lines tab.

BOL – Content Tab

The content tab is a standard Sage X3 tab that shows the main reference document for the BOL.   When using *Procession*, this tab will only contain the shipment record that was initially selected.   If additional shipments are added to the BOL on the *Procession* Shipment Lines tab, those additional shipments are not shown on the Content tab.

Additional Deliveries Menu

Additional deliveries is a right-panel menu option on the BOL screen.   This feature is **not** supported by **Procession**.   Instead of using this menu option, additional deliveries should be added on the **Procession** Shipment Lines tab.

BOL - Additional Shipper Information Tab

The Additional Shipper Information defines the shipper name and the bill to address that prints on the **Procession** BOL. This information originates from the sales order and the information is stored with the BOL when the BOL is first created for a shipment. This information can also be manually entered on the BOL.   Refer to SALES ORDER ADDITIONAL INFORMATION for more information on the fields on this screen.

⟰ ↑ ↓ ⟱   Bill of lading

⌂   DETAIL   CONTENT   ADDITIONAL SHIP INFO   SHIPMENT LINES   TOTALS

ADDITIONAL SHIP INFO   ⌄

☑ Procession active

SHIPPER/BLIND SHIPMENT

Shipper ID *		Shipper	Shipping Contact
→ NA0231000 Q ⋮		NA023	
		Chemical Products	

FREIGHT BILLING/3RD PARTY PAY

Bill Freight To		Bill Site	
→ NA023 Q ⋮		AD1 Q ⋮	
Chemical Products			

DELIVERY INFORMATION

Booking Number	Payment Terms	Note Code		⤺ Edit delivery text
	→ EXW Q ⋮	→ Q ⋮		
	Ex Works (std)			

DELIVERY TEXT

B *I* U̲ ab̶c x₂ x² T T͟ͳ H1 ⬤ T T̲ | ☰ B ⬅E E➡ ☰ ☰ ☰ ☰ ↶ ↷ ☰ ⬚ ∞ ⬚ ✂ ⬚ ⬚ ⬚ 🖨 B B

Keep refrigerated at 40°F.   Do Not Freeze.
Lift gate code 12345

BOL - Shipment Lines Tab

Shipment lines provide details about the packaging for a delivery.   The data in this section is used to calculate the information on the Totals Tab.   The data on this tab prints on the *Procession* BOL report

SHIPMENT LINES   ⌄

☑ Procession active

⤺ Recalculate Totals

⋮ Q

		Delivery no.	Product	Description 1	Package quantity	Pack unit	Handling Unit quantity	Handling Unit	Handling Net...	Handling Gro...	Weight unit	Freight class	NMFC	Hazar...	RQ	Proper Shipping N...	DOT Proper Ship Name
1	⋮	SHPNA0230058 Q ⋮	FG500-5 Q ⋮	Paint-Low VOC Acrylic Gloss 5G	9	P05 Q ⋮	1	Q ⋮	204.116	204.116	KG Q ⋮	55 Q ⋮	189800-04 Q ⋮	☑	☐	UN1970 Q ⋮	UN1970,Krypton, refrigerated liquid (cryogenic liqui
2	⋮	Q ⋮	Q ⋮			Q ⋮		Q ⋮			Q ⋮	Q ⋮	Q ⋮	☐	☐	Q ⋮	

When a BOL is created for a delivery, the BOL shipment lines are populated with either:

- Packages from the delivery (if the delivery was packaged)
- Line Items from the Delivery (if the delivery was not packaged)

Packages can be added on the BOL shipment lines by either:

1. Add additional lines to the BOL shipment lines for each package OR;
2. Edit the Package Quantity or Handling Unit Quantity on the existing BOL shipment lines.

Additional deliveries can be added to the BOL by clicking the selection option on the Delivery No. field.

The fields in this BOL Shipment Lines are:

- **Delivery No.** –delivery number for the line.
- **Product** – product being delivered.
- **Description** – product description
- **Package quantity** – quantity of the inner or mid-level package.   This quantity defaults to the quantity on the delivery.

  As an example of how Pack Units and Handling Units are used in ***Procession***, a customer has ordered 120 liters of a product.   This order is being shipped in 60 2-Liter bottles, with bottles stored 6 to a case.   The 10 cases are stacked on a pallet.   In this example, the handling unit is the pallet.   However, the package can optionally declared as either 120 Liters, 60 Bottles or 10 Cases.

- **Pack Unit** – the unit of measure of the package quantity.
- **Package Gross Weight** – total gross weight (Unit Gross Weight * Units).   This weight is automatically calculated, but can be modified.

  This weight is calculated as follows:
  1. Package Quantity is converted to the product's stock unit of measure
  2. The Stock Quantity is multiplied by the Product STK Weight on the product unit of measure tab.
  3. If the product STK Weight does not include the package weight (parameter XJBITMWTYP, see PARAMETER SETUP), then the package weight is added.

     Package weight = Package Tare Weight * Number of packages

     Note, in order to calculate a package weight, the Pack Unit, which is a standard Unit of Measure, must also be defined in Packaging (**Common Data→Product tables→Packaging**). For example, if the sales order was for 10 boxes with the sales unit "C01", then the unit C01, would need to exist in both the standard unit of measure table and in packaging as shown below.

- **Weight Unit** – unit of measure for the Unit Weight.   This unit defaults to the unit specified in the parameter SALDSPWEU.
- **Handling Unit Quantity** – number of handling units.
- **Handling Unit -** handling units are the outer package, such as a pallet, which is the unit that is handled directly by the carrier.
- **Freight Class –** freight class for the product. This defaults to the Freight Class value defined for the product on the ***Procession*** Product Regulatory tab.
- **NMFC –** NMFC code for the product. This defaults to the NMFC value defined for the product on the ***Procession*** Product Regulatory tab.
- **Hazardous** – Designates whether the material is hazardous.   This value is automatically populated, but it can be modified.   The automatic determination is based upon the DOT ship code/UN number that was assigned to the product.   If the DOT ship code has a hazardous classification, then the material is flagged as hazardous when the BOL is created.
- **Proper Shipping Name** – DOT ship code/U.N. number assigned on the ***Procession*** Product Regulatory tab.   This number can be modified on the BOL.
- **DOT Proper Shipping Name** – carrier information for the product which prints in the detail section of the BOL report.

For hazardous materials, the default value is the proper shipping name assigned on the product Regulatory tab.

For non-hazardous products, the default value is determined by a system parameter (XJBBOLSHNM).   Based upon this parameter, the system will either default to the product description, or it will use the value from the Proper Shipping Name field on the ***Procession*** Product Regulatory tab. (See APPENDIX 4-PARAMETER SETUP for more information regarding the parameter that controls the default value for this field).

When shipping by air or by water or international, the DOT Proper Shipping name may need to be edited. For example, if the product is a marine pollutant, then the words "marine pollutant" would need to be added to the proper shipping name when shipping by water.

- **Marine pollutant (optional)** – defines whether the product is a marine pollutant.
- **Package no. (optional) –** handling unit's package number.   This defaults to the package numbers for a packaged delivery.   If the delivery was not packaged before the BOL was created, then package numbers can be entered on the BOL, although they are not required.
- **Delivery Line –** Line number on the delivery.

The Recalculate Totals button is used to recalculate the totals on the Totals tab. These totals are calculated from the data on the Shipment Lines tab.

Recalculate Totals

When the Recalculate Totals option is selected, *Procession* also updates the Detail tab of the BOL with a summary of the shipment and stores the proper shipping name into the comment column.   The detail tab is standard Sage X3 functionality and is not used by the *Procession* BOL report.

BOL Totals Tab

The total shipment weight is calculated on the Bill of Lading Totals tab. This tab provides different weight calculations including net weight, package gross weight, and handling gross weight. Weights are displayed in pounds (LB) on the left side and kilograms (KG) on the right.   These are the totals that display on the BOL.

If necessary, these totals can be edited by clicking on the "Manual Entry" checkbox.

WEIGHT/UNIT TOTALS

Packing Units

| 1 |

Handling Units

| 1 |

Net Weight (LB/KG)

| 10.000 | | 4.535 |

Package Gross Weight

| 10.000 | | 4.535 |

Handling Gross Weight

| 10.001 | | 4.536 |

☐ Manual Entry

Weight by Hazard section shows the total weight by hazard classification on the shipment. The weights in this section are only calculated for products which were packaged on the delivery and have a UN Number that has a hazardous classification assigned to the product on the Product Regulatory tab.

On *Procession* Proper Shipping Name feature, the Hazard Classes are defined for each UN number.

⤒ ↑ ↓ ⤓ Procession-Proper Ship Name

UN1970

		ID	Proper Shipping Name	Sym…	Hazard Class	DOT U…	Packa…	Label Codes	Freight c…	
2051	⋮	UN1968	Insecticide gases, n.o.s.	G	2.2	UN1968		2.2	Q ⋮	
2052	⋮	UN1969	Isobutane see also Petroleum gases, liquefie		2.1	UN1969		2.1	Q ⋮	
2053	⋮	UN1970	Krypton, refrigerated liquid (cryogenic liquid)		2.2	UN1970		2.2	Q ⋮	
2054	⋮	UN1971	Methane, compressed or Natural gas, compr…		2.1	UN1971		2.1	Q ⋮	
2055	⋮	UN1972	Methane, refrigerated liquid (cryogenic liquid		2.1	UN1972		2.1	Q ⋮	
2055	⋮	UN1973	Chlorodifluoromethane and chloropentafluor…		2.2	UN1973		2.2	Q ⋮	

When a BOL is created for a packaged delivery, the weights by hazard type are displayed on the totals tab of the Bill of Lading screen. If a product has multiple hazard classes, its weight will be added to each hazard class total.

WEIGHT BY HAZARD TYPE

9 Results Display: 50

		Hazard Type	Net Weight (…	Net (KG)	Package Gro…	Gross (KG)
1	⋮	1-Explosives	0.000	0.000	0.000	0.000
2	⋮	2-Gases	450.000	204.116	450.000	204.116
3	⋮	3-Flammable Liquids	0.000	0.000	0.000	0.000
4	⋮	4-Flammable Solids	0.000	0.000	0.000	0.000
5	⋮	5-Oxidizers	0.000	0.000	0.000	0.000
6	⋮	6-Toxic Materials	0.000	0.000	0.000	0.000
7	⋮	7-Radioactive Materials	0.000	0.000	0.000	0.000
8	⋮	8-Corrosive Materials	0.000	0.000	0.000	0.000
9	⋮	9-Miscellaneous	0.000	0.000	0.000	0.000
10	⋮					

BOL Package Codes

The package type printed on the BOL derives from the short description for the sales unit of measure.

PACKAGE	
QTY	TYPE
1	Case

This short description can be found in the standard Sage X3 unit of measure screen. When shipping hazardous materials, the short description should contain the U.N. Package code.

Some examples of the UN packaging codes are shown below:

UN Packaging Codes

1A1 Steel Drum, tight head

1A2 Steel Drum, open head

1B1 Aluminium Drum, tight head

1B2 Aluminium Drum, open head

Procession Bill of Lading Report

The *Procession* Bill of Lading can be printed from the BOL screen by selecting the printer icon followed by "Record". The *Procession* BOL reports are named XJB3BOL (English) and XJB3BOL_CANADA (English & French).

Selection Print codes

Type	Code	Title
Reports	BILLLAD	Bill of lading
Reports	XJB3BOL	Procession-Bill of Lading
Reports	XJB3BOL_CANADA	Procession-BOL English&French

In the report parameters is an option for Weight Unit.   The options are "LB" for pounds or "KG" for kilograms.

Enter report parameters

Report code *
XJB3BOL   Procession-Bill of Lading

PARAMETERS

		Parameter title	Parameter type	First value		Final value	
1		Authorized purchases	Single	BOL000009	Q		Q
2		Weight Unit	Single	LB	Q		Q
3					Q		Q

BILL OF LADING

SHIP FROM (ORIGIN)
Chemical Products 6523 Irvine Center Drive IRVINE, CA 92618 US SID#

Bill of Lading Number: **BOL000009**

Carrier Name:	Roadway Freight Lines
Trailer/Container #:	
Seal Number(s):	

SHIP TO (DESTINATION/CONSIGNEE)
ABC Industrial **4205 River Green Parkway** **DULUTH, GA 30096 US** CID#

SCAC:
Pro Number

THIRD PARTY FREIGHT CHARGES BILL TO

Freight Charge Terms:
Ex Works (std)

SPECIAL INSTRUCTIONS: Keep refrigerated at 40°F. Do Not Freeze.
Lift gate code 12345

CUSTOMER ORDER INFORMATION

CUSTOMER ORDER NUMBER	HANDLING UNITS	WEIGHT lbs.	PALLET/SLIP (circle one)	ADDITIONAL SHIPPER INFO
Procession 01/17/19	3.00	465.00	Y / N	SONNA0230067
GRAND TOTAL	3.00	465.00		

CARRIER INFORMATION

HANDLING UNITS		PACKAGE		WEIGHT lbs.	H.M. (X)	COMMODITY DESCRIPTION Commodities requiring special or additional care or attention in handling or stowing must be so marked and packaged as to ensure safe transportation with ordinary care. See Section 2(e) of NMFC Item 360	LTL ONLY	
QTY	TYPE	QTY	TYPE				NMFC#	CLASS
3.00	PAL	43.74	P05	465.00	X	UN1970,Krypton, refrigerated liquid (cryogenic liquid),2.2	189800-04	55
3		44		465.00				

NOTE: Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property.
The agreed or declared value of the property is hereby specifically stated by the shipper to be not exceeding:

_____ per _____   0.00

COD AMOUNT $
Fee Terms: COLLECT ☐   PREPAID ☐
Customer check acceptable ☐

NOTE Liability Limitation for loss or damage in this shipment may be applicable. See 49 U.S.C   14706(c)(1)(A) and (B).

RECEIVED subject to the classifications and tariffs in effect on the date of the issue of this Bill of Lading, the property described above in apparent good order, except as noted (contents and condition of packages unknown), marked consigned and destined as indicated above which said carrier (the word carrier being understood through this contract as meaning any person or corporation in possession of the property under the contract) agrees to carry to its usual place of delivery at said destination. If on its route, otherwise to deliver to another carrier on the route to said destination. It is mutually agreed as to each carrier of all or any of said property, over all or any portion of said route to destination and as to each party at any time interested in all or any said property, that every service to be performed hereunder shall be subject to all the Bill of Lading terms and conditions in the governing classification on the date of shipment.
Shipper hereby certifies that he is familiar with all the Bill of Lading terms and conditions in the governing classification and the said terms and conditions and hereby agreed to by the shipper and accepted by himself and his assigns.

The carrier shall not make delivery of this shipment without payment of freight and all lawful charges.

_____   _____
Signature   Shipper

SHIPPER SIGNATURE/ DATE
This is to certify that the above named materials are properly classified, described, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the Department of Transportation.

_____   _____
Signature   Date

Trailer Loaded:
☐ By Shipper
☐ By Driver

Freight Counted:
☐ By Shipper
☐ By Driver/pallets said to contain
☐ By Driver/Pieces

CARRIER SIGNATURE/PICKUP DATE
Carrier acknowledges receipt of packages and required placards. Carrier certifies emergency response information was made available and/or carrier has the DOT emergency response
Property described above is received in good order, except as noted.

_____   _____
Signature   Date

EMERGENCY CONTACT: CHEMTREC   1-800-424-9300 North America   1-703-741-5500 International
ID#   Chemical Products

BILL OF LADING / BON DE TRANSPORT

SHIP FROM (ORIGIN) / ADRESSE DE L' EXPEDITEUR	Bill of Lading Number/ N° bon de transport	**BOL000009**

Chemical Products
6523 Irvine Center Drive
IRVINE, CA 92618 US
SID#

SHIP TO DESTINATION (CONSIGNEE) / ADRESSE DU DESTINATAIRE

ABC Industrial
4205 River Green Parkway
DULUTH, GA 30096 US

CID#

Carrier/ Transporteur:	Roadway Freight Lines

Trailer/Container # / Numéro de remorque:

Seal Number(s)/sc:

SCAC:

THIRD PARTY FREIGHT CHARGES BILL TO/FRAIS DE PORT TIERS FACTURES A :

Pro Number / Numéro progressif

Freight Charge Terms / Termes des frais de transport
Ex Works (std)

SPECIAL INSTRUCTIONS/ INDICATIONS PARTICULIERE: Keep refrigerated at 40°F. Do Not Freeze. Lift gate code 12345

CUSTOMER ORDER INFORMATION / INFORMATIONS DE COMMANDE CLIENT

CUSTOMER ORDER NUMBER / Numéro de commande	HANDLING UNITS / Nombre d'unités à manipuler	WEIGHT Poids kg	PALLET/SLIP (circle one) PALETTE/SLIP (Encerclez un)	ADDITIONAL SHIPPER INFO / INFORMATIONS SUPPLEMENTAIRES SUR L'EXPÉDITEUR
Procession 01/17/19	3.00	210.92	Y / N	SONNA0230067
GRAND TOTAL / QTE TOTALE	3.00	210.92		

CARRIER INFORMATION / INFORMATION POUR LE TRANSPORTEUR

HANDLING UNITS/Unités à manipuler		PACKAGE/ COLIS		WEIGHT/ Poids kg	H.M. /Hau teur	COMMODITY DESCRIPTION / DESIGNATION DES MARCHANDISES	LTL ONLY	
QTY/ QTÉ	TYPE	QTY / QTÉ	TYPE				NMFC#	CLASS/ CLASSE
3.00	PAL	43.74	P05	210.92	X	UN1970,Krypton, refrigerated liquid (cryogenic liquid),2.2	189800-04	55
3		44		210.92				

NOTE: Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property. The agreed or declared value of the property is hereby specifically stated by the shipper to be not exceeding:

NOTE -Si le taux dépend de la valeur, les expéditeurs doivent désigner expressément par écrit la valeur approuvée ou déclarée du bien, de la manière suivante. L'expéditeur stipule expressément que la valeur approuvée ou déclarée du bien ne dépasse pas la limite autorisée

_____ per _____

COD AMOUNT $ / C.R. MONTANT Fee Terms/Modalités port :	
Collect/Port payé	☐
Prepaid/Port dû	☐
Customer check acceptable/ Chèque client accepté	☐

RECEIVED subject to the classifications and tariffs in effect on the date of the issue of this Bill of Lading, the property described above in apparent good order, except as noted (contents and condition of packages unknown), marked consigned and destined as indicated above which said carrier (the word carrier being understood through this contract as meaning any person or corporation in possession of the property under the contract) agrees to carry to its usual place of delivery as said destination. If on its route, otherwise to deliver to another carrier on the route to said destination. It is mutually agreed as to each carrier of all or any of said property, over all or any portion of said route to destination and as to each party at any time interested in all or any said property, that every service to be performed hereunder shall be subject to all the Bill of Lading terms and conditions in the governing classification on the date of shipment. Shipper hereby certifies that he is familiar with all the Bill of Lading terms and conditions in the governing classification and the said terms and conditions and hereby agreed to by the shipper and accepted by himself and his assigns.

REÇU, en vertu des classifications et des tarifs légalement déposés à compter de la date d'émission du présent bon de connaissement, le bien décrit ci-dessus en bon état apparent sauf tel qu'indiqué (contenu et condition du contenu des colis inconnus), marqué, consigné et destiné, comme il est indiqué ci-dessus que ledit transporteur (au sens de toute personne ou société en possession du bien conformément au contrat) accepte de livrer à son emplacement habituel de livraison de la dite destination, si elle se trouve sur son itinéraire, autrement de le livrer à un autre transporteur desservant l'itinéraire de ladite destination. Chaque transporteur de tout ou partie desdits biens le long de tout ou partie dudit itinéraire vers la destination et chaque partie ayant un intérêt dans tout ou partie desdits biens convient de façon mutuelle que tout service devant être effectué en vertu des présentes soit assujetti à toutes les conditions figurant au recto et au verso

The carrier shall not make delivery of this shipment without payment of freight and all lawful charges/ Le transporteur ne doit pas livrer cet envoi sans le paiement du fret et de tous les frais légaux.

_____
Signature Shipper/ Transporteur

SHIPPER SIGNATURE/ DATE	**Trailer Loaded/**	**Freight Counted/**	**CARRIER SIGNATURE/PICKUP DATE/**
Date et signature expéditeur	**Chargement**	**Inventaire transport:**	**Signature du transporteur et date de collecte**

This is to certify that the above named materials are properly classified, described, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the Department of Transportation./

Il est certifié que les matières désignées ci-dessus sont correctement classées, décrites, conditionnées, marquées et étiquetées, et en bon état pour le transport, conformément aux réglementations du service des transports en vigueur.

effectué:

☐ By Shipper/par l'expéditeur
☐ By Driver/par conducteur

☐ By Shipper/par l'expéditeur
☐ By Driver/pallets said to contain/ Par conducteur: contenu pal. estimé
☐ By Driver/Pieces / Par conducteur : pièces

Carrier acknowledges receipt of packages and required placards. Carrier certifies emergency response information was made available and/or carrier has the DOT emergency response guidebook or equivalent documentation in the vehicle.

Property described above is received in good order, except as noted.

Le transporteur accuse la réception des marchandises et des plaques exigées. Le transporteur certifie disposer des informations nécessaires en cas de procédure d'urgence et/ou dispose, dans son véhicule, du guide des mesures d'urgence du Department of Transport (DOT) des États-Unis, ou documentation similaire.

_____ Signature Date _____

_____ Signature Date _____

EMERGENCY CONTACT / CAS D'URGENCE	CHEMTREC 1-800-424-9300 North America 1-703-741-5500 International ID# Chemical Products

Appendix 1 – Miscellaneous Table

Miscellaneous Table 204

MISCELLANEOUS TABLE

Table * : 204

Description : Manual hold reasons

Dependency table

LIST OF VALUES

		Code	Description	Short description	Acc
1	⋮	LATE	Late	Late	
2	⋮	MANUAL	Manual	Manual	
3	⋮	REGULATORYHOLD	Regulatory Hold	Rgltry Hold	
4	⋮				

This table holds the manual hold reasons used on Sales Orders. Users need to add REGULATORYHOLD to this table to use the Regulatory Hold functionality of State/Province Registration.

Appendix 2 – Transaction Entry Screens

The following contains Procession setup information related to Sage X3 Entry Transactions.

Sales Order Entry Transaction

For each order entry transaction, navigate to the Display tab and verify that the <u>Hold Status</u> field is checked selected (see image below).   C*lick* on ***Validate*** to rebuild the Sales Order entry transaction.

Delivery Entry Transaction

Validate each Delivery Entry Transaction after the installation of Procession.

Appendix 3 – Parameter Setup

Refer to the ***Procession Setup and Technical Guide*** for information on how to setup the Procession application parameters.

Appendix 4 - State/Province Registration Setup

1. Navigate to State/ Province Registration. **Provenio Procession → Setup → State/Province Registration**
2. Assign a unique code for a new Registration.
3. Enter description of the Registration.
4. Choose a Hold/Allow option as shown below. The hold/allow options are listed below and are defined in LOCAL MENU 4853 – STATE REGISTRATION HOLD.

    a. No Blocks/Hold If Not Registered
    b. Block if Can't Sell/No Holds
    c. Block if Not Registered/No Holds

5. **Define the registration access for each state or province.**

State Registrations
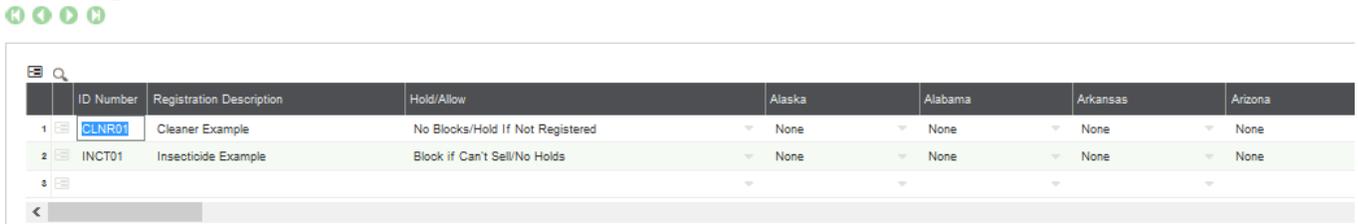
	ID Number	Registration Description	Hold/Allow	Alaska	Alabama	Arkansas	Arizona
1	CLNR01	Cleaner Example	No Blocks/Hold If Not Registered	None	None	None	None
2	INCT01	Insecticide Example	Block if Can't Sell/No Holds	None	None	None	None
3							

State registrations are assigned to products on the Product Regulatory tab as shown below.

Product Cancel Product-site Sales price

REGULATORY ▾

NO

STATE/PROVINCE REG. CONTROL

State Registration
→ INCT01
Insecticide Example

Country of Origin
→ US
United States of America

END USER LICENSE AGREEMENT

This copy of *Procession* ("the Software Product") and accompanying documentation is licensed and not sold. This Software Product is protected by copyright laws and treaties, as well as laws and treaties related to other forms of intellectual property. **Procession Software LLC** or its subsidiaries, affiliates, and suppliers (collectively "Procession") own intellectual property rights in the Software Product. The Licensee's ("you" or "your") license to download, use, copy, or change the Software Product is subject to these rights and to all the terms and conditions of this End User License Agreement ("Agreement").

Acceptance

YOU ACCEPT AND AGREE TO BE BOUND BY THE TERMS OF THIS AGREEMENT BY SELECTING THE "ACCEPT" OPTION AND DOWNLOADING THE SOFTWARE PRODUCT OR BY INSTALLING, USING, OR COPYING THE SOFTWARE PRODUCT. YOU MUST AGREE TO ALL OF THE TERMS OF THIS AGREEMENT BEFORE YOU WILL BE ALLOWED TO DOWNLOAD THE SOFTWARE PRODUCT. IF YOU DO NOT AGREE TO ALL OF THE TERMS OF THIS AGREEMENT, YOU MUST SELECT "DECLINE" AND YOU MUST NOT INSTALL, USE, OR COPY THE SOFTWARE PRODUCT.

License Grant

This Agreement entitles you to install and use one copy of the Software Product. In addition, you may make one archival copy of the Software Product. The archival copy must be on a storage medium other than a hard drive, and may only be used for the reinstallation of the Software Product. This Agreement does not permit the installation or use of multiple copies of the Software Product, or the installation of the Software Product on more than one computer at any given time, on a system that allows shared used of applications, on a multi-user network, or on any configuration or system of computers that allows multiple users. Multiple copy use or installation is only allowed if you obtain an appropriate licensing agreement for each user and each copy of the Software Product.

Restrictions on Transfer

Without first obtaining the express written consent of Procession, you may not assign your rights and obligations under this Agreement, or redistribute, encumber, sell, rent, lease, sublicense, or otherwise transfer your rights to the Software Product.

Restrictions on Use

You may not use, copy, or install the Software Product on any system with more than one computer, or permit the use, copying, or installation of the Software Product by more than one user or on more than one computer. If you hold multiple, validly licensed copies, you may not use, copy, or install the Software Product on any system with more than the number of computers permitted by license, or permit the use, copying, or installation by more users, or on more computers than the number permitted by license.

You may not decompile, "reverse-engineer", disassemble, or otherwise attempt to derive the source code for the Software Product.

Restrictions on Alteration

You may not modify the Software Product or create any derivative work of the Software Product or its accompanying documentation. Derivative works include but are not limited to translations. You may not alter any files or libraries in any portion of the Software Product.

Restrictions on Copying

You may not copy any part of the Software Product except to the extent that licensed use inherently demands the creation of a temporary copy stored in computer memory and not permanently affixed on storage medium. You may make one archival copy which must be stored on a medium other than a computer hard drive.

Disclaimer of Warranties and Limitation of Liability

UNLESS OTHERWISE EXPLICITLY AGREED TO IN WRITING BY PROCESSSION, PROCESSION MAKES NO OTHER WARRANTIES, EXPRESS OR IMPLIED, IN FACT OR IN LAW, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE OTHER THAN AS SET FORTH IN THIS AGREEMENT OR IN THE LIMITED WARRANTY DOCUMENTS PROVIDED WITH THE SOFTWARE PRODUCT.

Procession makes no warranty that the Software Product will meet your requirements or operate under your specific conditions of use. Procession makes no warranty that operation of the Software Product will be secure, error free, or free from interruption. YOU MUST DETERMINE WHETHER THE SOFTWARE PRODUCT SUFFICIENTLY MEETS YOUR REQUIREMENTS FOR SECURITY AND UNINTERRUPTABILITY. YOU BEAR SOLE RESPONSIBILITY AND ALL LIABILITY FOR ANY LOSS INCURRED DUE TO FAILURE OF THE SOFTWARE PRODUCT TO MEET YOUR REQUIREMENTS. PROCESSION WILL NOT, UNDER ANY CIRCUMSTANCES, BE RESPONSIBLE OR LIABLE FOR THE LOSS OF DATA ON ANY COMPUTER OR INFORMATION STORAGE DEVICE.

UNDER NO CIRCUMSTANCES SHALL PROCESSION, ITS DIRECTORS, OFFICERS, EMPLOYEES OR AGENTS BE LIABLE TO YOU OR ANY OTHER PARTY FOR INDIRECT, CONSEQUENTIAL, SPECIAL, INCIDENTAL, PUNITIVE, OR EXEMPLARY DAMAGES OF ANY KIND (INCLUDING LOST REVENUES OR PROFITS OR LOSS OF BUSINESS) RESULTING FROM THIS AGREEMENT, OR FROM THE FURNISHING, PERFORMANCE, INSTALLATION, OR USE OF THE SOFTWARE PRODUCT, WHETHER DUE TO A BREACH OF CONTRACT, BREACH OF WARRANTY, OR THE NEGLIGENCE OF PROCESSION OR ANY OTHER PARTY, EVEN IF PROCESSION IS ADVISED BEFOREHAND OF THE POSSIBILITY OF SUCH DAMAGES. TO THE EXTENT THAT THE APPLICABLE JURISDICTION LIMITS PROCESSION'S ABILITY TO DISCLAIM ANY IMPLIED WARRANTIES, THIS DISCLAIMER SHALL BE EFFECTIVE TO THE MAXIMUM EXTENT PERMITTED.

Limitation of Remedies and Damages

Your remedy for a breach of this Agreement or of any warranty included in this Agreement is the correction or replacement of the Software Product. Selection of whether to correct or replace shall be solely at the discretion of Procession. Procession reserves the right to substitute a functionally equivalent copy of the Software Product as a replacement. If Procession is unable to provide a replacement or substitute Software Product or corrections to the Software Product, your sole alternate remedy shall be a refund of the purchase price for the Software Product exclusive of any costs for shipping and handling.

Any claim must be made within the applicable warranty period. All warranties cover only defects arising under normal use and do not include malfunctions or failure resulting from misuse, abuse, neglect, alteration, problems with electrical power, acts of nature, unusual temperatures or humidity, improper installation, or damage determined by Procession to have been caused by you. All limited warranties on the Software Product are granted only to you and are non-transferable. You agree to indemnify and hold Procession harmless from all claims, judgments, liabilities, expenses, or costs arising from your breach of this Agreement and/or acts or omissions.

Governing Law, Jurisdiction and Costs

This Agreement is governed by the laws of Georgia, without regard to Georgia's conflict or choice of law provisions.

Severability

If any provision of this Agreement shall be held to be invalid or unenforceable, the remainder of this Agreement shall remain in full force and effect. To the extent any express or implied restrictions are not permitted by applicable laws, these express or implied restrictions shall remain in force and effect to the maximum extent permitted by such applicable laws.