Creating and Maintaining Branches and Territories

Release 8.6.5 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.5 (Eterm) Online Help System

Publication Date: April 7, 2009

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Branch and Territory Maintenance Overview

A branch is an entity that is part of your company. Branch designations in the system provide the structure used to maintain accuracy and detail throughout the system. The system uses branch designations in the following ways:

- Control maintenance records set up by branch. For example, RF may be enabled at one warehouse but not at any other warehouse.

- Each customer, vendor, and user is assigned a home branch for pricing, accounting, reporting, and tracking purposes.

- Accounting branch designations provide accuracy for A/P, A/R, and reports. General ledger postings are identified by branch. For example, in your general ledger, you may want to differentiate between A/R collected from your different branches.

- Pricing is assigned according to branch or location. For example, items purchased from Branch 10, located on an island community, may be priced higher than items purchased from Branch 1 on the mainland.

- Tax jurisdictions are assigned according to the geographic location of a branch.

A territory is a name given to a group of branches. It is much easier to maintain branches within territories because you can set branch-specific pricing, product, or entity parameters for multiple branches at a time, rather than spending hours changing parameters for each branch.

Your branches can reside in more than one territory, depending on how you organize your company. For example, you can organize branches in territories according to geographic location, what products you sell at each branch, or branch functionality, such as pricing or shipping. Territories are prioritized so that the system knows what branch-specific setting to use for reports and transactions. Territory priorities create the branch hierarchy, which allows you to define branch-specific settings at the territory level throughout the system.

Territory Priority Basics

A territory is a name given to a group of branches. Eclipse's branch hierarchy allows you to define branch-specific settings at the territory level, rather than entering the same setting, for example sell package quantity, branch by branch. The branch hierarchy eliminates the need for complicated mass load operations when setting branch parameters.

Territory priorities create the organization for branches that are in multiple territories. Plan your territory and branch structure before creating territories and assigning branches to them. Create categories for your branches when the branches have similar settings, or reporting needs. Branch categories can reflect regions, states, and products, for example. This process helps you create a branch hierarchy that the system can use to efficiently maintain branch-specific options in many areas of the system.

Throughout the system you can add and view only branches and territories to which you have access. Branch and territory access is defined in User Maintenance. To view or edit the Territory Maintenance screen, where you define territory priorities, you must be assigned the TERRITORY.MAINT authorization key.

When you change territory priorities, the system requires that you rebuild the territory list. We recommend that you schedule the rebuild for after normal business hours to ensure that the process does not interfere with daily transactions.

Defining Territories

Use the Territory Maintenance screen to create as many territories as you need to maintain the system's branch-specific settings. Create territories to organize branches into geographic locations, or types of products sold. For example, you might run reports on regions, such as South and East, or you might run a report focused on two states, for example Alabama and Georgia. If your branches sell different types of products, you might categorize territories as plumbing and HVAC to accurately report sales at those branches.

If your company has only one branch or multiple branches, use the ALL territory to maintain branch settings throughout the system. That way, if you ever add a branch, the new branch can inherit all of the properties of other branches through the ALL territory. You can also set different parameters for the new branch, if necessary, because individual branch settings always override territory settings.

> **Note:** You do not have to create the ALL territory, it was created as part of the Eclipse system.

Assigning Territory Priorities

A branch can belong to more than one territory. The branches in these territories may need different settings for reporting purposes, tax purposes, pricing setup, inventory, and products. How does the system know what settings to use for branches maintained in multiple territories? You give each territory a priority for product and entity settings that the system uses to determine which parameter to use, such as package quantity for products and branch-specific overrides for entities. You can always override territory settings at the branch level.

Set territory priorities, from 1-99, according to the specificity of each territory, giving more specific territories a higher priority than less specific territories. You cannot maintain data on a territory that does not have a priority number; such territories can be used only for reporting purposes.

In this example, a higher priority is assigned to a territory focusing on automation products than to a territory containing all of the Southeastern branches, as shown in the following table. You will determine the correct priority for doing business at our own company.

Territory	Product Priority
AUTO	90
ELECGRP	80
GEORGIA	75
SOEAST	50

For example, you have ten branches in the Southeast, five in Georgia, and five in Alabama, and sell electrical products at all of your branches, and automation products at 6 of those ten branches. Your state branches have equal priority, and are more specific than the regional, SOEAST territory, and less specific than the ELECGRP territory. Product and entity priority settings do not need to be the same for a territory, but should remain equal between like territories. The following table shows the priority distribution for state, regional, and product-specific territories:

Territory Name	Number of Branches	Product Priority	Entity Priority
AUTO	6	90	95
ELECGRP	10	80	85
ALABAMA	5	75	70
GEORGIA	5	75	70
SOEAST	10	50	40

You purchase a Midwestern company that has five branches, two in MICHIGAN, and three in OHIO. All five branches sell electrical products, but none sell automation products. Now you have two regional territories and four state territories. Give both regions equal priority, and give all of the states equal priority. The number of branches in the ELECGRP territory jumped to 15 because all of your branches fall into that category. The following table shows how the addition of branches and territories can change the branch hierarchy:

Territory Name	Number of Branches	Product Priority	Entity Priority
AUTO	6	90	95
ELECGRP	15	80	85
ALABAMA	5	75	70
GEORGIA	5	75	70

Territory Name	Number of Branches	Product Priority	Entity Priority
OHIO	3	75	70
MICHIGAN	2	75	70
MIDWEST	5	50	40
SOEAST	10	50	40

To determine which territories have priority within the branch hierarchy, set territory priorities in Territory Maintenance. The following diagram shows the three territories that contain the MI01 branch, which is listed at the top of the **Br/Terr** column on the Product Price Maintenance screen. The territories are listed under the MI01 branch in the order of the priority set in each Territory record.
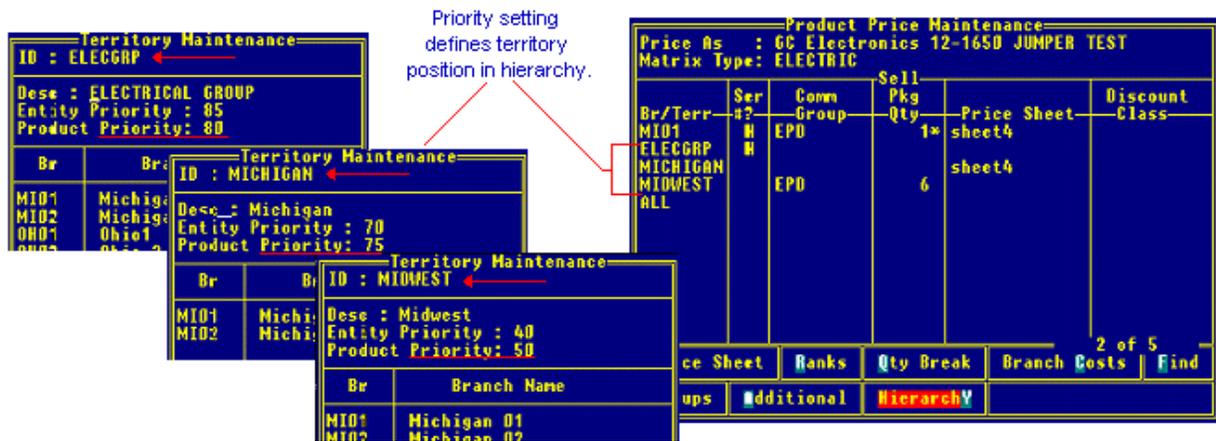
If you change the priority settings, you must rebuild the authorized territory list, exit the Eclipse program you are in and then re-enter a branch-specific screen to see the change in priority. We recommend scheduling these rebuilds for after work hours to avoid interfering with normal business transactions.

Branch Hierarchy Details

Eclipse's branch hierarchy lets you define branch-specific settings at the territory level, rather than having to define multiple settings for each branch. Branches are categorized in territories and each territory is given a priority. The level of priority establishes the order of the territory list within the branch hierarchy. The system uses the branch hierarchy to apply the correct branch setting to a given system parameter, such as sell package quantity for a product, or the minimum order cycle for a buy line. Maintaining settings at the territory level, rather than at the branch level, eliminates the need for complicated mass load operations when making company wide changes to branch settings.

Each Eclipse screen where you can set branch-specific parameters, such as Product Price Maintenance or Buy Line Maintenance, lets you do one of the following:

- View overrides for the branches and territories for which you have access.

- Add an override to a branch or territory setting.

- View settings for a specific branch, and where those settings came from.

Viewing Territory Override Settings

When you enter a screen that displays branch-specific parameters, such as Product Price Maintenance, the branches and territories that currently have settings display in the **Br/Terr** column. The column lists branch overrides first, followed by territory settings that are currently in effect.

> **Note:** You can identify a screen with branch-specific parameters by its **Hierarchy** hot key.

To add an override to another branch or territory, press **Alt** + **Insert** and enter the branch or territory name at the prompt. Scroll to the column that needs an override, and enter the value. You can add branches and territories only if you have access to them, and only if they have a priority assigned to them in Territory Maintenance.

Viewing a Branch with its Associated Territories

To view the territory list for a selected branch, in a screen that has branch-specific parameters, use the **Hierarchy** hot key and enter the branch. The system populates the **Br/Terr** column with the selected branch at the top as the highest priority, and lists all of the territories containing that branch that you have authorization to view in the order of their priorities. The highest priority territory is directly under the branch, and the lowest priority territory is at the bottom of the list. If you have added the ALL territory to your authorized territories in User Maintenance, the ALL territory displays at the bottom of the list. Territories that contain the selected branch, but do not have a priority setting do not display in this list, and you can use them only for reporting purposes.

In the following diagram, the user used the **Hierarchy** hot key and entered branch MI01. The branch displays at the top of the list as the highest priority, followed by the territories that the

user has authority to view. Each of the territories listed contain branch MI01, and are listed by territory priority. Territory priorities are defined in Territory Maintenance.

In screens with branch-specific settings, you can set the parameters by territory, rather than having to set individual branch priorities. You can still set overrides at the branch level because the branch is always the highest priority level. On the Product Price Maintenance screen below, the **Br/Terr** column lists the MI01 branch hierarchy described above, but also includes the ALL or universal territory.

The system applies parameters to the MI01 branch, above, depend on the territory priority or branch override settings, as follows:

Column	Description
Com Group	The MIDWEST territory uses the EPD commission group and the MICHIGAN territory uses the MCH commission group. The MI01 branch adopts the MCH commission group because of the following: • The MICHIGAN territory has a higher product priority setting than does the MIDWEST territory. • No higher priority territory than MICHIGAN's has an entry in this column. • The branch has no override.

Column	Description
Sell Pkg Qty	The default setting for the MIDWEST territory is 6, however, someone determined that for this product in the MI01 branch, the sell package quantity should be 1. The asterisk next to the branch entry indicates that this is a branch override.
Price Sheet	The highest priority territory, ELECGRP, uses the price sheet named Electric, so the MI01 branch adopts this price sheet.
	Discount classes are subsets of price sheets, so an entry in the **Price Sheet** column affects the **Discount Class** column. If you enter a price sheet that has an associated discount class, that discount class displays in the **Discount Class** column for the adjacent territory or branch.
	In this example, the Electric price sheet has no discount class association, otherwise it would have displayed in the **Discount Class** column. Notice that the ALL territory uses the xt discount class, but because the Electric price sheet has no discount class association, it overrides the ALL territory setting. If you remove the Electric price sheet entry, the MI01 branch adopts the ALL territory xt discount class.
Discount Class	Discount classes are subsets of price sheets. The Electric price sheet does not have a discount class association, so the discount class column is blank for the ELECGRP territory and for the branch.
	The ALL territory's discount class is overridden by the Electric price sheet, and therefore the MI01 branch adopts no discount class. If you remove the Electric price sheet the MI01 branch adopts the ALL territory xt discount class.

Creating Branch Records

Create a record in Branch Maintenance for each branch at your company, and assign parameters that associate the branch with system events and procedures. Associate branches with a customer record, so you can track branch activities and you can use the branch for transfer orders. Also, assign a home branch to users, customers, and vendors for pricing, accounting, reporting, and tracking purpose. For more information about setting up a branch for company use, see Setup Requirements for Company Branches.

Branch Maintenance is not the only place in the system where you enter branch-related parameters. The system has at least 15 screens where you set branch-related parameters, such as Product Price Maintenance, Buy Line Maintenance, and Procurement Group Maintenance. You can identify screens throughout the system that have branch-specific parameters by the **Hierarchy** hot key.

▶**To create a branch record:**

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.

2. Complete the following fields, as needed:

Field	Description
Branch ID/New	Do one of the following: • Enter the code, up to four characters, used to identify the branch. • Press **F10** and select a branch ID. • Enter **New**. At the prompt, enter the up to four-character code that identifies the branch.
Short Desc	Enter the name of the branch, using up to 10 alphanumeric characters.
Long Desc	Enter a detailed description of the branch, up to 35 alphanumeric characters.
Br Entity	Enter one of the following to map the branch to the branch's customer record: • All or part of the branch name, as it displays in customer maintenance. • The last four digits of the branch phone number. • The branch record ID preceded by a period (.). The **Entity ID** field displays the branch's customer ID. If you have not created a customer record for this branch, use the **Edit Ents** hot key to create a record. For more information, see the hot key table, below. **Note:** For each branch customer record, set up Customer/Group/All sell matrix cells so that no gross profit percentage is calculated on transfer orders.

Field	Description
Remit To	Enter one of the following to indicate the branch that receives payments for this branch's transactions: • Part of the branch's name. • The last four digits of the branch phone number. • The record ID preceded by a period. The **Remit To ID** field displays the selected branch's customer ID.
P/O Bill-To	Enter an alternate bill-to entity to display on purchase orders. The **P/O Bill-To ID** field displays the bill-to entity ID entered in the **P/O Bill-To** field. **Note:** The **P/O Bill-To** and **P/O Bill-To ID** fields display only if the Allow Alternate Branch Bill-To Address control maintenance record is set to **Yes**.
Default Price Class	Enter the branch's default price class. If you assign a default price class in Customer Maintenance, the customer's setting overrides this setting.
Stocking Branch	If this branch handles product, enter **Y**; otherwise, enter **N**. In addition to performing money related tasks, users at a stocking branch can perform tasks such as, entering orders, adjustments, pricing, and edit product parameters. To limit the products displayed to those with on-hand quantities or on transactions at the stocking/shipping branch, activate the Display Active Primary Index Products First In Product Search control maintenance record. This setting can increase system performance when searching for products. **Note:** If you change the stocking branch status, you must run the Delete Branch Cache Files utility. Run the utility after hours to avoid slowing the system during business hours.
Branch Manager	Enter the name of the manager of this branch. To display a list of users that match your entry enter part of the manager's name and press **Enter**.
Cost Center	Enter this branch's primary function, such as **Distribution**, or **Showroom**. Cost center types are defined in the Valid Cost Center Types control maintenance record.

3. Press **Esc** to save the information and clear the screen for the next entry.

4. Use the following hot keys, as needed.

Hot key	Description
CC Proc	Set up credit card processors to be used by the branch.
Edit Ents	Use this hot key to do one of the following: • Edit the customer record associated with this branch. • Create the customer record for this branch. Select one of the following: • **Branch Entity** – Displays the customer record associated with the branch. • **Remit-To** – Displays the branch's remit-to branch, if one exists, otherwise the branch's customer record displays. **Note:** For each branch customer record, set up Customer/Group/All sell matrix cells so that no gross profit percentage is calculated on transfer orders.
Del Br	Delete the branch. The system prompts to confirm the deletion.
Inv Inq Brs	Display the Inventory Inquiry Brs screen, where you enter all of the branches to associate with this branch. When the displayed branch is your home branch, you can view information for these branches in Inventory Inquiry. For example, your home branch is Denver, but you need to view all Colorado branches in Inventory Inquiry. When the Denver branch is displayed on the Branch Maintenance screen, use this option to list all of the Colorado Branches. Then when you display inventory in Inventory Inquiry, the system looks to your home branch, and displays only information for that branch and its associated branches.
ShipVia	Assign the branch's default method of transporting product.
Check Verification	Set up a check processor for the branch.
Matrix	Set up a pricing hierarchy for your branches. Use this if your company uses branch-specific matrix cells for pricing.

Configuring Branch Credit Card Processors

Eclipse is certified with a credit card processor that enables your company to route credit card information to a credit card company, such as Visa, when you place credit card orders. Each branch that will take credit card orders must be set up with the credit card processor you are authorized to use.

To edit information on the Credit Card Branch Setup screen, you must be assigned the CREDIT.CARD.SETUP authorization key.

▶**To configure a branch credit card processor:**

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.

2. In the **Branch ID** field, enter the branch to display the branch record.

3. Use the **CC Proc** hot key to display the Credit Card Branch Setup screen.

    If this hot key is highlighted, a processor is associated with this branch.

    The branch displays in the **Branch** field.

4. In the **Processor** field, enter the name of a credit card processor used by this branch.

5. In the **Merchant ID** field, enter the ID that identifies this branch to the credit card processor. The ID is assigned by the processor.

6. The **Device ID** field displays the name or number assigned to the branch by the credit card processor.

7. A **Terminal ID** displays the name or number assigned to the branch by the credit card processor.

8. Position the cursor on a processor and use the **Add'l Info** hot key to display the Additional Credit Card Info screen, which displays detailed information provided by your processing bank.

9. Use the **Copy CC Info From Branch** hot key to copy another branch's credit card information into the current branch file. Enter the branch ID for which you want to copy information, and press **Enter**.

10. Press **Esc** to save your settings and return to the Branch Maintenance screen.

Assigning Ship Vias to Branches

By assigning a ship via to a branch you can do the following:

- Determine if a ship via requires a routing ticket for deliveries.

- Search for a ship via.

- Assign all ship vias to a branch at once.

- Set up auto scheduling overrides.

- Change the branch tax jurisdiction method.

- Set up a pick ticket printer location.

▶**To assign a ship via to a branch:**

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.

2. In the **Branch ID/New** field, enter a branch ID to display the branch record.

3. Use the **ShipVia** hot key to display the Ship Via Branch Overrides/Auto Scheduling screen.

4. The **Br#** field displays the branch ID of the current branch.

5. In the **Ship Via** field, do one of the following:

   - Enter the ship vias to assign to this branch.

   - Use the **Assign All** hot key to assign all shipment methods to the branch.

   Note: Use the **Find** hot key to search for the ship via if the list exceeds the length of the screen.

6. In the **Tax Juris Meth** field, enter the tax jurisdiction method for the system to use when determining the tax jurisdiction associated with this ship via.

7. In the **PickTicketPtrLoc** field, press **F10** and select the printer location for each branch where the Automatic Shipping Ticket Printing program or the Batch Transfer program prints pick tickets. This setting overrides the setting in the Default Printer Location For Branch control maintenance record.

8. In the **AutoSched** field, press **F10** and select one of the following to set the automatic scheduling of tickets that are manually added to the manifest.:

   - **On** – Enables the auto scheduler so when you add a ticket to the manifest, the system calculates the delivery time and stop number for the ticket.

   - **Off** – Disables auto scheduler, so all delivery scheduling must be done manually. When you add a ticket to the manifest, the system adds the ticket where the cursor is positioned on the manifest and creates a new stop if the ship-to address does not match that of the prior order on the manifest.

The **On** and **Off** settings override the **Auto Schedule** hot key setting on the Shipping Manifest Queue screen (Whs Mgt / Queues).

- **Default** – The auto scheduler uses the setting on the Shipping Manifest Queue screen (**Whs Mgt > Queues**).

9. In the **Rt Ticket** field, if the ship ticket requires a routing ticket for deliveries, enter **Y**; otherwise enter **N**.

10. In the **Pick Pri** field, enter a number from **0** to **99** to assign a priority to each ship via. Zero is the highest priority, and 99 is the lowest priority. If you leave any field blank for a ship via, this ship via is considered the highest priority.

    If two or more ship vias have the same pick priority, blank or otherwise, the system determines the ship via priority by the setting on the RF Pick Selection Sort control maintenance record.

    The Ship Via Pick Priority Maintenance screen in Warehouse Maintenance and this field work together. If you enter a value for a ship via on one screen, it overrides the value for the same ship via on the other screen.

11. If this branch's ship via can have a freight override, the **Frt Ovrd** field displays a **Y**.

    Enter the override status of the ship via for this customer at this branch if you set the **Override Customer Freight Out Exempt** field on the Freight Data screen (**Files > Ship Via**) to **B**, and you activate the **Fght Over** field on the Ship Via Branch Overrides/Auto Scheduling screen.

12. Use the **Status** hot key to display the Order Inprocess Statuses Selection screen and assign statuses to the ship vias. Ship via statuses defined here override the ship via set up in Ship Via Maintenance. List the statuses in order of progression, for example, PRINTED, PICKING, STAGING, and MANIFEST. Each branch can have its own ship via priority.

    For example, branches 1 through 6 use statuses PRINTED, PICKING, STAGING, and MANIFEST, but branch 5 requires a PACKING step between STAGING and MANIFEST. For branch 5, enter PACKING in the appropriate order on the Order Inprocess Statuses Selection screen.

13. Use the **Addl** hot key to display the Branch Shipvia Additional Data screen, where you assign the RF criteria to specific ship vias.

Field	Enter for the selected ship via...
Combine All Zones In RF Pick Select (Y/N)	**Y** to combine all full orders across multiple zones into one pick.
Staging Location	the default location for the staged ship via.
Hold RF Picking until Released (Y/N)	**Y** to hold all manifests from the picking queue until they are manually released. If you enter **N** the system sends all picks to the picking queue as soon as they are released from sales or transfer order entry.
Use in Fleet Routing	**Y** to enable fleet routing for this ship via and branch.

Field	Enter for the selected ship via...
Prevent Close During Staging	**N** to allow users to close orders after they are staged in RF If a user is assigned the RF.LOAD.OVRD authorization key, they can override this setting and close orders after staging.
Document to Print on RF Order Close	Select one of the following types of documents to print when you close an RF order from the Warehouse In Process Queues: • **N – None** • T – Pick Ticket • O – Ship Ticket • F – Routing Ticket

14. Press **Esc** to save changes and exit the screen.

Verifying Check Processors for Branches

Set up an electronic check verification system for a branch to automatically verify the authenticity of a check when it is accepted at that branch. Information required for authorization is drawn from the Check Verification:Required Information control maintenance record.

Before you begin auto-verifying checks, define the default check processor information on the Check Verification Processor Setup screen.

▶**To verify check a processor for a branch:**

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.

2. Use the **Check Verification** hot key to display the Check Verification Branch Setup screen. If a check processor is assigned to this branch, this hot key is highlighted.

   The **Branch** field is populated with the current branch ID, and the remaining fields are populated with the default information defined on the Check Verification Processor Setup screen.

3. In the **Processor** field, press **F10** and select a processor for this branch.

4. In the **Subscriber ID** field, do one of the following:

   - If a default subscriber ID is defined on the Check Verification Processor Setup screen for the processor, this field displays that ID.

   - If no default subscriber is defined, enter the subscriber ID.

   - If a default entry is displayed, but the branch has a unique subscriber ID, change the default ID to the branch's ID. Do not leave this field blank.

5. Ignore the **Host ID** and **Service ID** fields. Their functions are not active at this time.

6. To copy the branch setup information:

   - From another branch to the displayed branch, use the **Copy From Branch** hot key.

   - From the displayed branch to one or more other branches, use the **Copy to Branch(es)** hot key. When entering multiple branches, separate the branches with a comma.

7. Press **Esc** to save your settings and exit the screen.

Overriding Customer Freight Exemptions for Branches

You may want to restrict certain types of shipping from customers who place orders through one of your branches. For example, if Branch 3 is in a remote location, and UPS Gold is an expensive shipping method from that branch, you can restrict customers from the freight exempt status at Branch 3 for UPS Gold.

This procedure overrides the setting in the **Freight Out Exempt** field on the Customer Maintenance screen.

Perform the following procedures in this order:

- Setting up the customer freight out exemption
- Overriding the customer freight out exemption

▶**To set the customer freight out exemption:**

1. From the **Files** menu, select **Ship Via** to display the Ship Via Maintenance screen.

2. In the **ShipVia** field, enter the ship via to which to apply a branch override.

3. Use the **Freight** hot key to display the Freight Data screen.

4. In the **Override Customer Freight Out Exempt** field, enter **B** for Branch. See Assigning Automatic Freight and Handling Charges to a Ship Via for more information.

5. Press **Esc** to save the change and exit the screen.

   The **Frt Ovrd** field on the Ship Via Branch Overrides/Auto Scheduling screen, described below, now accepts the override.

▶**To override the customer freight out exemption for a branch:**

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.

2. In the **Branch ID/New** field, enter a branch ID to display the branch record.

3. Use the **ShipVia** hot key to display the Ship Via Branch Overrides/Auto Scheduling screen.

4. Use the **Find** hot key to search for the ship via to which you applied the "B" setting in the **Override Customer Freight Out Exempt** field, above.

   The **Frt Ovrd** field for this ship via displays an **N**.

5. In the **Frt Ovrd** field, enter **Y**.

   The system prompts to determine the override setting of the customer **Freight Out Exempt** field for this branch.

6. In the prompt's **With** field, to render all customers freight exempt when using this ship via, enter **Y**; otherwise, enter **N**.

The **Frt Ovrd** field displays both entries from steps 5 and 6, as shown below.

The left side of the **Frt Ovrd** field displays one of the following:

- **Y** – The override is applied
- **N** – The override is not applied.

The entry on the right determines the override, and displays only if the left side is set to **Y**. The right entry overrides the entry in the **Override Customer Freight Out Exempt With** field on the Freight Data screen, discussed above.

7. Press **Esc** to save your changes and exit the screen.

Assigning a Pricing Matrix Hierarchy to Branches

If your company uses branch-specific matrix cells for pricing, you must define a pricing matrix hierarchy of territories for a branch to determine the pricing for products sold at that branch.

Note: If you use only the DFLT branch matrix for pricing, do not use the **Matrix** hot key in Branch Maintenance.

The system uses the matrix territory hierarchy only for pricing purposes to select the correct branch-specific matrix cell for pricing an item. Your branch hierarchy, set up in Territory Maintenance, is otherwise used throughout the system.

▶**To assign pricing hierarchy to a branch:**

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.

2. Enter the branch ID press **F10**, select a branch, and press **Enter**.

3. Use the **Matrix** hot key to display the Matrix Hierarchy screen.

4. Press **F10**, select the branch you want to be at the top of the hierarchy, and press **Enter**.

5. Press **Enter** again to move the cursor to the next available line.

6. Repeat steps 4 and 5 for each branch you want to add to the hierarchy.

   When a product is ordered from this branch, the system checks for branch-specific matrix cells using the hierarchy shown.

7. Press **Esc** to save the changes and return to the Branch Maintenance screen.

Assigning Remit-To Addresses to Branches

Each branch in your company has a remit-to entity associated with it that receives payment for products sold at that branch. The remit-to entity's name, address, and phone number display on the customer's bill. You may have several sales branches and one accounting branch where you expect to receive payment. You can designate the accounting branch as the remit-to entity for a branch, to assure that the customer always sends payment to the correct branch.

You can create one or more remit-to override entities in Remit-To Maintenance to override the remit-to entity set up at the branch level for customers and for zip codes. For example, apply an override if you want a billing service to handle a customer's large construction project instead of handling the billing yourself.

▶**To assign a remit-to address to a branch:**

1. From the **Files > Branch** menu, select **Remit-To Maintenance** to display the Remit-To Maintenance screen.

2. In the **Remit-To ID/New** field, do one of the following to display a remit-to ID:

   - Enter **new** to create a new remit-to ID, and then enter the ID of the remit-to entity. You are allowed 25 alphanumeric characters.

   - Press **F10** and select an existing remit-to ID, or enter part of an ID to display a partial list of remit-to entities from which to select.

   - Leave the field blank. The system uses this branch as the remit-to entity.

3. In the **Name** field, enter the full name of the remit-to branch or company that receives payment for product purchased from this branch.

4. In the **Address** field, enter the remit-to entity's street address.

5. In the **City**, **St**, and **Zip** fields, enter the name of the city where the remit-to entity is located.

6. In the **Phone** field, enter the remit-to entity's phone numbers. The first phone number in the list prints on invoices and statement forms.

7. In the **Codes** field, enter a phone code that identifies the type of phone, such as fax, or main contact, if needed. Phone codes are defined in the Valid Phone Codes control maintenance record.

8. In the **Description** field, enter the description of the phone number, such as "Main Office," or "Warehouse."

9. Use the following hot keys, as needed.

To...	Use this hot key...
copy the information defined for this remit-to entity to a newly created remit-to entity record	**Copy**
delete a remit-to override record	**Delete** If you delete the record for a remit-to entity that has been assigned to a zip code customer, the system uses the next remit-to entity in the hierarchy.
display the Maintenance Log Viewing screen for this remit-to entity	**Log**

10. Press **Esc** to save the record and enter another remit-to entity, if necessary.

11. Press **Esc** again to exit the screen.

Adding Branches to Territories

Some reasons you may want to add a branch to a territory are as follows:

- A territory expands, and you need to add a branch location to a territory.

- Your company reorganizes, and you need to change a branch's territory.

- Your company expands, and you need to add a new territory that includes branches.

▶**To add a branch to a territory:**

1. From the **Files > Branch** menu, select **Territory** to display the Territory Maintenance screen.

2. In the **ID** field, enter the territory ID. If necessary, create a territory.

3. Complete the fields in the top of the screen.

4. In the **Br** field, enter a branch, or press **F10** and select from a list.

   The branch name displays in the **Branch Name** field.

5. Press **Esc** to save the new information.

6. Display the branch on the Customer Maintenance screen (**Files > Customer**) or Vendor Maintenance screen (**Files > Vendor**). Enter a customer or vendor ID.

7. Use the **Branch** hot key to display the Accessible Branches screen.

8. Change the **Home Branch** field to the new name.

9. Press **Esc** to save the change and exit the screen.

   Note: If you add or remove branches, or if you change territory priorities, the system requires you to delete branch cache files and to rebuild the authorized territories list. Run these utilities only after business hours to avoid interfering with daily business transactions.

Deleting Branch Cache Files

The system stores data for each branch in branch cache files. When you enter an order or make a branch inquiry, the system retrieves only the data it needs for that branch, rather than having to search a huge database of multiple branch settings. This logic enables the system to retrieve data quickly and efficiently.

> **Important:** Run the Delete Branch Cache Records utility and the Rebuilt Authorized Territory List utility only after business hours to avoid interfering with daily transactions.

The Rebuild Authorized Territory Lists utility and the Delete Branch Cache Records utility have a similar purpose in that they were developed to clear old data from the system and to ensure that the system could quickly and effectively retrieve the most up-to-date branch and territory data possible. The utilities are triggered by the following system changes:

- If you change a priority in Territory Maintenance, the system prompts to delete the branch cache files. The system retrieves data from the old branch cache files until you delete the old files. After running the Delete Branch Cache File utility the system can access the new data.

- If you change the list of branches in Territory Maintenance, the system prompts to delete cache records and then to rebuild the Authorized Territory List. The system cannot find the new data until you delete the old cache files. Running the Rebuilt Authorized Territory List enables the changes you made to the territory priorities.

This page contains the following instructions:

- Change branches in a territory.

- Delete cache records.

▶**To change to branches within a territory:**

1. From the **Files > Branch** menu, select **Territory** to display the Territory Maintenance screen.

2. In the **ID** field, enter the territory name to display the territory record, including the branches associated with the territory.

3. In the BR field, make the necessary changes to the branches.

4. Press **Esc**.

   The system clears the fields on the Territory Maintenance screen. The changes are saved, but they are not effective until you delete the cache records and rebuild the Authorized Territory List.

5. To change more branch records, enter another branch name in the **ID** field.

   Continue steps 2-5 until you have completed making changes to all the branches you want to change.

6. Press **Esc** to display the Delete all Branch Cache Records prompt.

7. Enter one of the following:

    - **Y** – Deletes the old records. DO NOT enter **Y** during business hours.

    - **N** – Displays the Rebuilt Authorized Territory prompt.

▶**To delete cache records:**

1. At the prompt to delete all branch cache records, enter **Y** to display the Delete Branch Cache Records screen.

    Note: You can also run the Delete Branch Cache Records utility from the **Files > Branch** menu.

2. Use the **Select Files** hot key and the **Select Branches** hot key to enter a file or branch to delete, if necessary. For example, you can occasionally run the utility by line for the PROD.BR file to clear the cache during working hours, if necessary.

    Note: You most commonly manually run the utility for the PROD.DYNAM file.

3. Use one of the following hot keys:

    - **Run Now** – Starts deleting cache files now. DO NOT run this process during business hours.

    - **Schedule** – Displays the Phantom Scheduler where you schedule a time to run the utility.

Rebuilding Authorized Territory Lists

Run the Rebuild Authorized Territory Lists utility to update the list of branches within a territory. When you change a territory record, this utility updates the branch hierarchy lists in the **Br/Terr** column on any screen that displays branch-specific data, such as the Product Price Maintenance screen.

> **Important:** Run the Delete Branch Cache File utility and the Rebuilt Authorized Territory List utility only after business hours to avoid interfering with daily transactions.

The Rebuild Authorized Territory Lists utility and the Delete Branch Cache Records utility have a similar purpose in that they were developed to clear old data from the system and to ensure that the system could quickly and effectively retrieve the most up-to-date branch and territory data possible. The utilities are triggered by the following system changes:

- If you change a priority in Territory Maintenance, the system prompts to delete the branch cache files. The system retrieves data from the old branch cache files until you delete the old files. After running the Delete Branch Cache File utility the system can access the new data.

- If you change the list of branches in Territory Maintenance, the system prompts to delete cache records and then to rebuild the Authorized Territory List. The system cannot find the new data until you delete the old cache files. Running the Rebuilt Authorized Territory List enables the changes you made to the territory priorities.

▶**To rebuild an authorized territory list:**

Use the following process to manually run or schedule the utility:

1. From the **Files > Branch > Territory** menu, select **Rebuild Authorized Terrs** to display the Rebuild Authorized Territory Lists screen.

2. Use one of the following hot keys:

   - **Begin** – Runs the rebuild. Run this utility only during non-business hours to avoid interfering with daily transactions. A message scrolls at the bottom of the screen when the system completes the process.

   - **Schedule** – Displays the Phantom Scheduler where you schedule a time to run the utility.

   The system rebuilds the territory lists based on the changes made to the territories, and depending on your territory settings in User Maintenance, as follows:

For the...	The system updates...
Reporting List	all territories that include at least one branch accessible to the user.
Viewable List	any territory that has either an entity or product priority and that includes at least one branch accessible to the user. The entity or product priority setting means the user can view but not edit entries for this territory.

For the...	The system updates...
Editable List	any territory that has either an entity or product priority and the user has all branches for a territory in their authorized branch list. The entity or product priority setting means the user can set overrides at these levels for this territory.

Creating Territories

A territory is a name given to a group of branches. Maintain territories that include one or multiple branches, and name territories by physical locations, such as state or city, by types of products sold at the branches, or by any other category that makes sense for your business.

If you have one branch or multiple branches include your branches in the ALL territory, because if you ever add a branch, the new branch can inherit branch-specific settings from the other branches. This strategy makes setting up a new branch easier than manually entering system-wide branch parameters.

If you have two or more branches that have similar settings, create a territory for those branches. For example, you have two branches in the Denver city tax district, and the rest of your branches are located outside of the Denver tax district. Create a territory named DENVER that includes the two Denver branches. Compare these branches by running reports on the DENVER territory.

A branch can reside in more than one territory. For example, you have 10 branches in Colorado: 2 branches in Denver, 5 branches along major highways on the eastern plains, and three branches in small mountain communities that require a higher rate of freight. In this case, your territories might be named COLORADO, DENVER, PLAINS, and MOUNTAIN. All 10 branches are in the COLORADO territory, and each of those branches also belongs to the territory named for its geographic location.

In any branch-specific screen, such as Product Price Maintenance, you can set territory and branch parameters. Branch settings always override territory settings. You can identify a screen with branch-specific parameters by its **Hierarchy** hot key.

You can edit and view only branches and territories to which you have access. To view or edit the Territory Maintenance screen, you must be assigned the TERRITORY.MAINT authorization key. Branch and territory access is defined in User Maintenance.

▶**To create a territory:**

1. From the **Files > Branch** menu, select **Territory** to display the Territory Maintenance screen.

2. In the **ID** field do one of the following:

   - Type **new** to create a new territory, and then at the prompt, enter the territory name.

   - Press **F10** and select a territory name. The branches belonging to that territory display in the body of the screen.

   Note: The ALL territory was created as part of your Eclipse DMS, so you do not need to create it.

3. In the **Desc** field, enter up to up to 25 alphanumeric characters to clearly describe the territory. For example, if you have three branches in Iowa for the territory you are creating, you might include each branch's geographic location in each description, as follows:

    - Iowa - Des Moines

    - Iowa - Ames

    - Iowa - Sioux City

4. In the **Entity Priority** and **Product Priority** fields, enter the level of importance for the territory, from 1-99. 99 is the highest priority:

    - In the **Entity Priority** field, rank the territory based on customer and vendor parameters, as you would find on the Branch-Specific Overrides screen.

    - In the **Product Priority** field, rank the territory based on product parameters, as you would find on the Forecast Parameters Maintenance screen.

    If you do not assign a priority, you can use the territory for reporting purposes only. Include this territory in the Authorized Territories screen in User Maintenance only if you assigned it an entity or product priority.

    When you view any screen with branch-specific fields, such as the Product Price Maintenance screen, use the **Hierarchy** hot key, and enter a branch. The selected branch displays at the top of the **Br/Terr** column, followed by the territories that contain the selected branch and that you have authority to view. The territories are listed in order of their priority, with the highest priority at the top.

    Note: If you add or remove branches, or if you change territory priorities, the system requires you to delete branch cache files and to rebuild the authorized territories list. Run these utilities only after business hours to avoid interfering with daily business transactions.

5. In the **Br** field, enter the branches in this territory. The next time you display this territory record, the system sorts the branch list alphanumerically.

    The **Branch Name** field displays the full branch name.

    Note: If you add or remove branches, or if you change territory priorities, the system requires you to delete branch cache files and to rebuild the authorized territories list. Run these utilities only after business hours to avoid interfering with daily business transactions.

6. Use the following hot keys as needed:

Hot key	Description
Recall	Reverts changes you made to the screen to its previous settings.
Delete	Deletes the territory. The system prompts for confirmation.
	If you enter **delete** at the prompt, the system prompts to rebuild authorized territories. If you have the Override Automatic Build field set to **Y** in your user record, the territory is not deleted from the list.
	If the territory has an entity or product priority, the system prompts to delete cache records. Delete cache records when changes are made to territories, and only after business hours.
Find	Displays the list of territories you are authorized to view.

7. Press **Esc** to save the territory information.

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