



Creating and Maintaining Customers and Vendors

Release 8.6.5 (Eterm)

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Activant® Eclipse™ 8.6.5 (Eterm) Online Help System

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Customer Maintenance Overview

Use Customer Maintenance to create and store records for customers, branches, and prospects. The customer record includes information about the following:

- Shipping, billing, and freight.
- Employee contacts.
- Individualized product and customer rank, including detail lots.
- Pricing classification, lets you offer each customer the most reasonable price based on the customer's sales and reliability.
- The branches from which the customer can order products.

When you enter a customer's name on an order, on reports, or anywhere in the system, the search index accesses the customer's record, and uses the information it contains, as needed.

Set up each branch in your organization as an entity in Customer Maintenance before you set it up in Branch Maintenance.

Creating Customer Records

Use the Customer Maintenance screen to create and maintain records for customers that identify customer-specific details such as freight, credit specifications, and detailed pricing information. If the customer has different billing and shipment addresses, create a separate record for each, and you must create the bill-to record first.

You can restrict access to fields and hot keys on the Customer Maintenance screen by setting the following control maintenance records and authorization key:

- Customer Maintenance Authorization Levels Lists each field and hot key in the customer record, and you assign security levels to each item.
- Customer Maintenance Authorization Levels For New Customers BT/ST Restricts editing access to the Bill To and Job or Ship To fields on the Customer Maintenance screen when creating new customers.
- The system uses the level assigned in these records with the level assigned in a user's CUSTOMER.MAINT.LEVEL authorization key to determine whether the user can edit these fields.

►To create a customer record:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. Complete the following fields, as needed:

Field	Description
Customer/New	Enter new . The system assigns a customer number, which displays in the upper right corner of the screen. Note: To edit an existing customer record, enter that customer's name in the Customer/New field.
Name	Enter the customer's name as you want it to appear on documents. If this is the customer's bill-to record, use the customer's legal name.
Address	Do one of the following: <ul style="list-style-type: none"> • If this is a bill-to customer, enter the address to which to send correspondence. • If this is a ship-to only customer, enter the address to which to send product shipments. Note: If you need additional lines to complete the address, use the Add'l Info hot key, and then use the Addl Address hot key to enter the remainder of the customer's address.
City	Enter the name of the city that corresponds to the address entered above. The system displays a selection list. Select the state and zip code from the list and press Enter to populate the ZIP , ST , and Country fields.

Field	Description
Sort By	Enter up to 15 alphanumeric characters of the most significant word in the customer name, or any combination of numbers or letters for the system to refer to when sorting customers in alphabetic order.
Bill	If this is a ship-to customer, enter the customer's bill-to record name. The bill-to customer record must already exist.
Index	<p>Enter additional words for the search index to use when searching for this customer. This field is required.</p> <p>The system uses the words in this field and the other fields on this screen as tokens in the search index. You can add any information in this field that might be useful for a search. For example, if you know your customers by their customer number on your old system, enter that number in this field; or if the customer name is long, enter an abbreviation for the name.</p>
Contacts Phones	<p>Enter the customer's primary phone and fax numbers, as well as the names, phone and fax numbers of any of the customer's employees with whom you do business. Follow the guidelines:</p> <p>Field 1 Type the name of the primary contact for this customer. Field 2 Type FAX to identify the main fax machine. Fields 3 - 6 List additional company contacts and fax codes associated with additional fax numbers:</p> <ul style="list-style-type: none"> • For invoices, enter INV.FAX as the contact. • For statements, enter STMT.FAX as the contact. • For memos, enter MEMO.FAX as the contact. <p>If you do not enter the fax code, faxed invoices, statements, and memos go to the main fax number.</p> <p>Note: Use the Contact field as a quick-reference list. This information is not directly connected to the information entered through the Contacts hot key, where you can add detailed contact information. However, by activating the Validate Name In 'Ordered By' Field Against Customer Contact control maintenance record, the system can use this list to check user authorization for taking credit card orders.</p>

3. Move the cursor to the upper right of the Customer Maintenance screen, and enter an asterisk (*) for any of the options that apply to this customer record.

Flag this option...	if...
Bill To	this customer's name and address is the one used for billing purposes. You can flag the customer as both a bill-to and a ship-to. See Assigning a Customer Status for more information.
Job or Ship To	<p>this customer's name and address is the one to which you ship product. You can flag the customer as both a bill-to and a ship-to. If the customer is a ship-to but not a bill-to, enter the bill-to customer associated with this ship-to in the Bill field.</p> <p>Note: You can set a ship-to only customer's price class to null on the Customer Pricing/Printing screen, so that the ship-to inherits the bill to's price class.</p>

Flag this option...	if...
Branch	if the entity is a branch of your company, so the branch activities can be tracked and you can use the branch for transfer orders. If this is a non-stocking branch and you will never order from this branch, activate No Order Entry in customer credit control parameters.
Branch Cash Acct	you do not want A/R to accumulate in this account. When you flag this option, also flag the Bill-To and Job or Ship-To fields. Use this type of customer to: <ul style="list-style-type: none"> • Enter cash sales for people who are not regular customers • Create a <i>generic</i> customer record for cash sales.
Prospect	this is a prospective customer. See Assigning a Customer Status for more information.
PO/Release#	a purchase number or a release number is required. Select from the following options: <ul style="list-style-type: none"> • None – Neither a purchase order number nor a release number is required. • P/O – A purchase order number is required. • Release# – A release number is required. • Both – purchase order number and release number are required. <p>Note: The system prompts for these numbers in order entry if you select any option except None.</p>
Auto-Delete	you want this customer deleted from the system AFTER all associated history, open bids/orders and closed invoices are purged. You can delete a customer only if there are no ledger, PSUB, or A/R records associated with it. Note: To keep the unused customer from displaying on reports, set the home branch to a dummy branch, and do not include that branch on the report.

4. Move the cursor to the lower right of the Customer Maintenance screen, and complete the following fields as needed:

Field	Descriptions
Bal Fwd/Open Item	Select one of the following to define which type of statement to print for this customer: <ul style="list-style-type: none"> • B (balance forward) – Includes unpaid invoices from previous billing cycles. • O (open item) – Includes invoices from the current billing cycle only. This is the default.

Field	Descriptions
B/O Status	<p>Do one of the following to enter a Sales Order Entry default statuses for backordered items for this customer:</p> <ul style="list-style-type: none"> • L - (Call When Available) The order is displayed in the Call When Complete Queue when any item on that generation is available, even a partial quantity of that line item. • A - (Ship When Available) The system ships items on the generation of an order as they become available even if the total quantity of that line item is not available. • C - (Call When Complete) The order is displayed in the Call When Complete Queue when the entire generation of the order is available. • H - (Ship When Complete) The system ships the entire generation of the order when it is complete. • M - (Ship Item Complete) The System ships total line item quantities on the generation of an order as they become available. It does not ship partial quantities of line items. • B - (Bid) Bid status is assigned to the item, which does not commit inventory. • X - (Cancel) No backorders will be placed for this customer. • Leave the field blank to decide the status at the time of purchase, or the system refers to the Percent Of Order To Fill Before Automatically Shipping control maintenance record.
Dflt Out Salesperson	<p>Press F10 and select the user ID of the default outside salesperson for this customer.</p> <p>If split commissions are in effect for this customer, and you enter a salesperson who is not included in the split commission percentage, the Salesperson Split Commission Percentage screen displays. You can then update the split commissions settings to reflect your change.</p>
Dflt In Salesperson	<p>Press F10 and select the user ID of the default inside salesperson for this customer.</p> <p>If split commissions are in effect for this customer, and you enter a salesperson who is not included in the split commission percentage, the Salesperson Split Commission Percentage screen displays. You can then update the split commissions settings to reflect your change.</p>
Dflt Ship Via	<p>Press F10 and select the default method of shipment for this customer.</p>
Frt In Exempt (Y/N)	<p>To exempt the customer from incoming freight charges, enter Y, otherwise leave N in the field.</p> <p>If you enter Y, when you enter a freight charge on the Order Entry Total screen or on the OE Freight Distribution screen, a message displays confirming that this customer is exempt.</p>
Frt Out Exempt (Y/N)	<p>To exempt the customer from outgoing freight charges, enter Y, otherwise leave N in the field.</p> <p>If you enter Y, when you enter a freight charge on the Order Entry Total screen or on the OE Freight Distribution screen, a message displays confirming that this customer is exempt.</p>

5. Use the following hot keys as needed:

Hot Key	Use to...
Add'l Info	Display additional hot keys for customer-specific information.
Credit	Set up credit information for this customer.
Pricing	Set up printing options and contract pricing for this customer.
Tax #	Assign this customer's sales tax status.
Tax Groups	Add a tax-exception group to this customer record.
Rebate	Set up this customer to receive vendor rebates.
Part #	Enter customer-specific part numbers.
Del	Delete the customer record. Enter delete at the prompt. A warning displays if the customer has open orders or invoices.
Log	Display all the changes made to this customer record.
Contacts	Enter the customer's employees with whom you do business.
Copy	Create a new customer record from the displayed record.
OE Msg	Enter a message to display in Sales Order Entry each time this customer places an order.
Branch	Assign branch access to this customer.
OE Instr	Create a message that appears when this customer is displayed in Sales Order Entry.
Delivery	Add a customer to a ship via delivery list, or edit a ship via delivery list.
Lines	Create a price line list for generating customer reports.
Notes	Write notes about this customer.
Remote	Set up parameters for users on Remote Order Entry (ROE).
EDI	Set up an EDI trading partner profile for this customer.
UET	Set the number of days before and after the due date that a shipment can arrive from a vendor without creating an unquality event.
Access	Restrict user access to a customer, vendor, or contact record.
Classify	Display the User Defined Data screen for this customer.
WWW	Enter the customer's internet address and e-mail address.

6. Press **Esc** to save the record and exit the screen.

Uploading Customer Information

Use the Customer File Update utility to upload customer data from a spreadsheet or text file to the system for existing customers and for prospective customers. The uploaded data creates a customer record for new customers and updates information on existing customer records. This method saves the time it would normally take to create and update individual customer records.

This page contains the following procedures:

- Uploading customer data.
- Changing the file format.

► To upload customer data:

1. From anywhere in the system press **Shift F2** to display the Spooler Control screen.
2. Upload the file to the Eclipse Spooler screen, if necessary.
3. Select the file to process and use the **Process** hot key to display the User Defined Upload Processing screen.
4. In the **Processing Type** field, enter **Customer Update**.
5. Use the **Begin** hot key to display the Customer File Update screen.
6. The **Input File** field displays the name of the upload file.
7. In the **Work ID** field, do one of the following:
 - Leave the field blank – Does not save the template after this upload.
 - Enter a name that identifies the upload file – Creates a new template for use with future uploads.
 - Press **F10** and select an ID – Uses an existing template.
8. In the **Desc** field, enter a complete description for the upload.
9. In the **Update Index** field, enter an index to match the customer in the system to the contact on the spreadsheet.

Use the CUS.NO Eclipse dictionary index to match the customer record ID using the @ID dictionary item. All other entries search on user-defined data.

10. Use the **Layout** hot key to prepare the system for the type of upload file.
11. In the **New Items Mode** field, enter one of the following:
 - **Prompt** – Selectively adds new customers to the file. The Update Matching screen displays every time the system encounters a new customer. This update may take several minutes if the update file contains many new customers.
 - **Ignore** – Updates existing customers without adding new customers. Unless the update contains new customers only, use the Ignore mode the first time you run the

update. Run the Ignore mode a second time for existing customers that were missed by the update after correcting the records.

- **Create** – Updates existing customers and creates records for any new customers in the update file. Run the update in Create mode only after you have updated the existing customers. If the file contains new customers only, you can select Create the first time you run the update.
- We recommend running the update in Ignore mode the first time you run it.

New customers created using this process use the customer record specified in the New Customer Maintenance Template control maintenance record as a template for the home branch of the user running the customer update.

12. In the **Customer Data** field, press **F10** and select the data criteria to update, such as ADDRESS.
13. In the **Start** or **Elmt#** field, scroll down the list to find the data format to match in the update file.

The title of the first column in the **Data Format** section toggles depending on which format you are using for the update. In blocked format the column shows **Start**, in variable format it shows **Elmt #**. In either format, you point to the location of data in the update file.

For blocked records:

- **Start** – For each **Customer Data** item, enter the number for the starting position on the upload file.
- **Length** – For each **Customer Data** item, enter the number of characters needed for the data on the upload file.

For variable records:

- **Elmt#** – For each **Customer Data** item, enter the column number from the upload file.

14. In the **Dec#** field, enter one of the following for numeric data:

- The appropriate number of decimal places if the decimal point is not embedded, but the numeric data contains a defined number of decimal places.
- A zero if the decimal point is embedded.

15. Use the following hot keys as described below:

- **Begin** – Starts the upload. The system imports customer data into new or existing records.
- **Delete** – Deletes the upload template when you type **delete** at the prompt.
- **Fixed Value** – Hard-codes a value for the selected item in the **Customer Data** column. For example, to use the 80303 zip code for all updated customer records, select ZIP and enter 80303. This entry overrides the value in the **Elmt#** or **Start** field for the selected item.

Note: If the system finds errors in the report data, it generates a Failed Entries report and places it in your Hold file.

► **Changing the file format:**

1. From the Customer File Update screen, use the **Layout** hot key to display the Customer File Updating Record Layout screen.
2. In the **Record Type** field, enter one of the following formats for the upload file:
 - **Blocked** – fixed-length.
 - **Variable** – comma- or tab-delimited.

Note: Data elements in a blocked record may also be separated by a delimiter.

3. In the **Record Length** field, enter one of the following:
 - Enter the number of characters necessary if specifying a record length.
 - Leave the field blank if not specifying a record length.

Note: This field is accessible only for blocked-type records.
4. In the **Delimiter Char** field, enter the character used between each field as a delimiter, such as a comma. This field is active only for variable record type files.
5. In the **ASCII Value** field, enter the ASCII value for the non printable delimiter. For example, the ASCII value for a comma is 044.
6. In the **Delete Chars** field, enter any characters you do not want read as data, such as quotation marks or the dollar sign.
7. Press **Esc** to save the format and return to the Customer File Update screen to complete the upload.

Changing Customer Statuses

As you add customers to the system, you need a way to distinguish between billing addresses and shipping addresses. You will also want to keep track of prospective customer information, so that when a prospect places an order, you can enter additional information in their record. Use the Customer Maintenance screen to store this information.

When a customer status changes from ship-to to bill-to, you may need to change the status of other customers, vendors, or branches that are linked to that customer record.

► To change a customer's status:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. In the upper right section of the screen, remove the asterisk (*) from any status that no longer applies.
4. Enter an asterisk next to one or more of the following:
 - **Bill To** – See the following table for more information.
 - **Job or Ship To** – See the following table for more information.
 - **Prospect** – You need the CONVERT.PROSPECT authorization key to change a status of Prospect. When you enter an order or bid for a prospect, the flag is removed from the Prospect field in the customer record, and the **Bill To** and **Job or Ship To** fields are automatically flagged.

The following table describes the results of changing a customer's status.

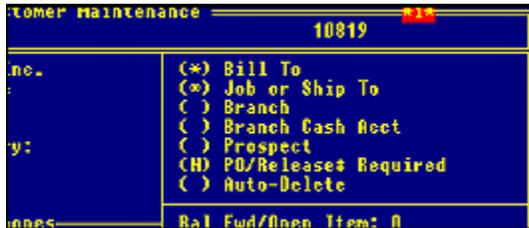
If you...	then...
change a prospect to a customer,	flag the Bill To or Job or Ship To field, or both on the customer record with an asterisk.
change a customer back to a prospect,	ensure the customer has no history, open orders, or open bids, remove the asterisk from the Bill To or Job or Ship To field, and then flag the Prospect field.
change a bill-to and ship-to customer record to a bill-to only	the system displays a list of ship-tos pointing to that bill-to.
change a bill-to and ship-to customer record to a bill-to only, and there is only one ship-to pointing to that bill-to	you cannot remove the last ship-to.
move any A/R records from one ship-to to another, in order to correct the above changes	run the Overnight Maintenance Report (System/ System Programming/ System Maintenance) to locate duplicate entries.

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

Defining Parent Companies and Subsidiaries

In many cases, a customer order is shipped and billed to the same address. However, a customer may have parent/subsidiary relationships that require that the bill be sent to a different location than the shipping address. For this reason, a customer can have separate ship-to and bill-to records.

In the upper right section of the Customer Maintenance screen, set up the customer's bill-to and ship-to status as described in the table below.



If a customer is flagged as a...	send the customer...	and, set up the customer record as...
ship-to only	only the product sold	a ship-to record with assigned bill-to customer. Note: You can set a ship-to only customer's price class to null on the Customer Pricing/Printing screen, so that the ship-to inherits the bill to's price class.
bill-to only	only the bill for the product sold	a bill-to record with assigned ship-to customer(s).
bill-to and a ship-to	both the product and the bill	one customer record.

Entering Additional Address Information

If you need additional lines to complete the customer or vendor address, use the Additional Address screen.

► **To enter additional address information for a customer or vendor:**

1. From the **Files** menu, select **Customer** or **Vendor** to display the Customer Maintenance screen or Vendor Maintenance screen.
2. Enter a customer or vendor ID to display the customer or vendor record.
3. From the customer or vendor record, use one of the following hot keys to display the Additional Address screen.
 - **Customer record** – Use the **Add'l Info** hot key, and then use the **Addl Address** hot key.
 - **Vendor record** – Use the **Add'l Data** hot key, and then use the **Addl Address** hot key.
4. Enter the additional address information in the fields provided. This information prints under the first street address line you entered on the Customer or Vendor Maintenance screen.
5. Press **Esc** to save the information and exit the screen.

Creating Price Line Lists for Customer Reports

If you attach price lines to your customers' maintenance records, you can then limit customer-related reports to the specific price lines they use.

►To create a price line list for customer reports:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Lines** hot key to display the Price Line Selection screen.
4. Enter each price line the customer uses in the space provided.
5. To save this list for use with other customers, use the **Save** hot key to display a prompt.
6. At the Save Work ID prompt, type a code that describes the list of price lines and press **Enter**.
7. Press **Esc** to save the list and return to the Customer Maintenance screen.

►To edit a price line list:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Lines** hot key to display the Price Line Selection screen.
4. If the list you want does not display, use the **Recall** hot key to display the Recall Work ID prompt. . Type the work ID of a previously saved list, or press **F10** and select it from a list and press **Enter**.
5. Edit or add to the list as follows:
 - To change an entry, type over the existing entry or use **F10** and select a price line.
 - To delete an entry, select the item to delete, and press **Alt-Delete**.

Note: Do not use the **Backslash**, **Spacebar**, or **Delete** key to delete entries. These methods leave a blank line that the cursor cannot move past.

 - To add a new price line on a blank line, enter the price line ID.
6. Press **Enter** to move the cursor to the next line.
Also, press **Enter** after entering the last piece of data.
7. Use the following hot keys, as needed:

Hot Key	Description
Move	Select the item to move. Use the Move hot key. Move the cursor to the new position for the item and press Enter . The item is inserted at the cursor.
Clear	Clears the list from the screen, removing all price lines for this customer. You are prompted for conformation.

Hot Key	Description
Sort	Sorts the list in one of the following ways: <ul style="list-style-type: none">• Alphabetic or numeric order by code.• Alphanumeric order by Description.
Save	Saves the list for later recall.
Recall	Displays a previously saved list.
Recall All	Displays all the price lines in the system. Use after deleting the current list by using the Clear hot key.

8. Press **Esc** to return to the Customer Maintenance screen.

Entering Customer Rebate Information

Record products, price lines, or price groups in Customer Rebate Maintenance that qualify your customers for a vendor rebate.

►To enter customer rebate information:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Rebate** hot key to display the Customer Rebate Maintenance screen.

The customer name displays in the **Customer** field.

4. In the **Prod Desc, /Prc Line, !Group** field, enter a product, a price line, or a price group as follows:

To enter a...	Enter...	The rebate applies to...
Product	a period (.) followed by the part number or part of the product description, and press Enter to display a list of products from which to select.	the products entered only.
Price Line	a forward slash (/) followed by the price line ID or part of the price line description, and press Enter to display a list of price lines from which to select.	all products in the price line entered.
Price Group	an exclamation point (!) followed by the price group ID, or enter part of the price group description, and press Enter to display a list of price groups from which to select.	all products in the price group entered.

5. In the **Contract #** field, enter the number that identifies the contract, if any, associated with the rebate offer. The vendor typically supplies this number. This number displays on the Customer Sales Rebates report (Reprts / End of Month Reports).
6. In the **Rebate Vendor** field, enter the name of the vendor who is offering the rebate. When you complete this field, you can run the Customer Sales Rebates report specific to this vendor and submit it for payment.
7. In the **Expire** field, enter the date the rebate offer is no longer effective. If you leave this field blank, the rebate offer is good indefinitely. The system compares the expiration date to the generation ship date to determine whether a rebate offer is still in effect.
8. Press **Esc** to save the information and return to the Customer Maintenance screen.

More Options for Entering Customer Rebate Information

The Customer Rebate Maintenance screen also offers these options:

Hot Key	Description
Find Item	Enter a product description, part number, price line, or group when prompted to search for a product to display in the Prod Desc, /Prc Line, !Group field.
Copy Line	<p>Inserts into the list a copy of the product, price line, or group on which the cursor is positioned. Use this hot key to minimize typing adding items that need only minor changes from the copied item.</p> <p>Caution: If you copy a product, price line, or price group, any date assigned using the Effective Date Override hot key is also assigned. You should verify if a product, price line or price group has an override date in effect before copying. Otherwise, you might assume that the contract is using the present date to specify a price sheet, when, in effect, you may copy an effective date that points to a different price sheet. That could cause the wrong actual cost to be used in calculating the price assigned to a product in Sales Order Entry.</p>
Eff Date Ovr	<p>Enter price sheet date used to determine the rebate price for the product, price line, or price group. Each product, price line, and price group can have its own effective override date. If a product, price line, or price group does not have an effective date override, the system uses the current date to specify the price sheet in effect.</p> <p>A date entered using this hot key replaces the price sheet cost value, usually REP-COST, on the Customer Sales Rebate Report. The Prc Eff Date Ovr field on the Matrix Cell Rebate Maintenance screen also overrides the actual cost value on the Customer Sales Rebate Report.</p>

Activating a Branch for Customer Purchases

When you create customer records, you must identify from which of your branches the customer can order products. For example, if the customer lives in Oregon, you may not, as a rule, want him to purchase product from your branch in Florida if you have a branch in Utah that carries the same items.

Note: If you want to bend this rule, ask Eclipse Support about the Virtual Supplier companion product.

Assign each customer a home branch, and assign as many branches as necessary to meet the customer's purchasing needs. A customer can purchase products from an active branch, either permanently or as a one-time authorization, in the customer record.

At your branch, when performing a search in Sales Order Entry or Cash Receipts, any customer that matches the search criteria and has your branch listed as active displays in the search list.

► To activate a branch for customer purchases:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Branch** hot key to display the Accessible Branches screen.
4. In the **Home Branch** field, enter the primary branch for this customer. This branch can be a pricing branch, a shipping branch, or both and is the branch with which the customer makes most of their purchases.

If this field is left blank, the system sets the home branch to the home branch of the customer's bill-to record, if the ship-to customer is authorized for that branch.

5. In the **Home Territory** field, enter the home territory for this customer if you have created territories.
6. In the **Branch/Territory** field, enter any additional branches and territories that this customer may use, or enter **ALL** to include all branches and territories.
7. In the **Active** column, for each branch listed in the **Branch/Territory** column, enter one of the following:
 - **Y** – Allows the customer to buy products from this branch. This customer name will display in a Sales Order Entry or Cash Receipts customer primary search list.
 - **N** – Does not allow the customer to buy products from this branch. This customer name will not display in a Sales Order Entry or Cash Receipts customer primary search list.

You cannot override this setting in Sales Order Entry or Cash Receipts. If the branch is not listed in the **Branch/Territory** field, you can add it as an active branch from Sales Order Entry or Cash Receipts, as described in the following procedure.

Note: Use the **Find** hot key to search for a branch if your branches list extends beyond one page.

8. Press **Esc** to save the settings and return to the Customer Maintenance screen.

Defining Customer Branch Override Capabilities

At your branch, when doing a search in Sales Order Entry or Cash Receipts, any customer that matches the search criteria and has your branch listed as active displays in the search list.

A customer's active branches setup determines which branches can create sales orders for that customer. Authorization keys assigned in User Maintenance and activation levels set up in the customer's branch records work together to determine if you can add a branch to a customer record. You can either add a branch to a customer record permanently, or use a branch for a single customer transaction without adding that branch to the customer's record.

To complete this task you must:

- Set the **Display Customers/Vendors Who Are Inactive At A Branch** control maintenance record to **Y** to activate the **Branch Activation Level** and **One-Time Activation Level** fields on the customer's Accessible Branches screen.
- Be assigned either the CUST.BR.AUTH.OVRD or the CUST.BR.AUTH.ONETIME authorization key.

You cannot use this method to activate SOE or Cash Receipts if branches are flagged as inactive on the Accessible Branches screen. Change the branch's active setting on the Accessible Branches screen to activate those branches.

▶ To define branch override capabilities on a customer record:

1. Assign branch access to customers.
2. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
3. In the **Customer/New** field, enter the customer ID to display the customer record.
4. Use the **Branch** hot key to display the Accessible Branches screen.
5. Assign branches to this customer as described above.
6. In the **Branch Activation Level** field, do one of the following to allow customer branch overrides from SOE or Cash Receipts:
 - Enter an authorization level between 0 and 99 to allow users with the CUST.BR.AUTH.OVRD authorization key at that level or greater to add a branch to the customer record.

For example, if you set the activation level at 50, any user with an authorization level of 50 or higher can activate a branch for the customer.

- Leave this field blank to restrict users without the CUST.BR.AUTH.OVRD authorization key set to at least level 1 from assign branch authorization for the customer.

7. In the **One-Time Activation Level** field, do one of the following to allow a one-time vendor branch override from SOE or Cash Receipts:
 - Enter an authorization level between 0 and 99 to allow users working in SOE or Cash Receipts with the CUST.BR.AUTH.ONETIME authorization key at that level or greater to add a branch to the customer record for a transaction.

For example, if you set the one-time activation level at 50, any user with an authorization level of 50 or higher can use an inactive branch for a single transaction.
 - Leave this field blank to restrict users working in SOE or Cash Receipts without the CUST.BR.AUTH.ONETIME authorization key from adding a branch to the customer record for a transaction.
8. For each branch listed in the **Branch/Territory** column, enter one of the following:
 - **Leave this field blank for a branch** – An authorized user can add a one-time activation to a branch not listed, depending on the user's authorization key settings (see step 6).
 - **Y** – Allows the customer to buy products from this branch.
 - **N** – Does not allow the customer to buy products from this branch.

You cannot override this setting in Sales Order Entry or Cash Receipts. If the branch is not listed in the **Branch/Territory** field, you can add it as an active branch from Sales Order Entry or Cash Receipts, as described above.

Note: Use the **Find** hot key to search for a branch if your branches list extends beyond one page.
9. Press **Esc** to save your settings and return to the Customer Maintenance screen.

Adding Customers to Ship Via Delivery Lists

Define the customer's method for transporting products, known as a *ship via*, on the customer's record, and then add the customer's name to that ship via's delivery list. The system lists the deliveries in a logical sequence, saving you time and money.

To enable this feature, assign route delivery information in Ship Via Maintenance. If ship via delivery information is not set up, the system uses the setting in the **Customers Normal Delivery Time of Day** field on the Miscellaneous Customer Information screen.

►To add a customer's name to a ship via delivery list:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field enter a customer ID to display the customer record.
3. Use the **Delivery** hot key to display a list of possible ship vias for this customer. The system highlights the customer's assigned ship via value.
4. Press **Enter** to display a list of customers who are scheduled for delivery for the selected ship via on the ShipVia screen.
5. Do one of the following, as needed:
 - To change the order in which deliveries are made to the customers on the list, select the customer to move by placing the cursor on the customer, then use the **Move** hot key. The customer's name disappears from the list. Then, place the cursor on the customer who will take delivery after the selected customer and press **Enter** to insert the name.
 - To remove all customers from the list, use the **Clear All** hot key. The system prompts for confirmation before clearing the screen.
6. Press **Esc** to save the list and return to the ship via selection list.

Defining Unquality Event Parameters

Set the number of days before and after the due date that a shipment can arrive from a vendor without creating an unquality event. The system posts an unquality event when the set standards are not met.

►To define unquality event parameters:

1. From the **Files** menu, select **Customer** or **Vendor** to display the Customer Maintenance screen or Vendor Maintenance screen.
2. Enter the customer or vendor ID to open the entity record.
3. Use the **UET** hot key to display the UET Parameters Maintenance screen.
4. In the **Early Days Allowed** field, enter one of the following:
 - **For a customer** – The number of days before the due date that a shipment can arrive at this customer's site.
 - **For a vendor** – The number of days before the due date that a shipment can arrive at your company's receiving dock.
5. In the **Late Days Allowed** field, enter one of the following:
 - **For a customer** – The number of days after the due date that a shipment can arrive at this customer site.
 - **For a vendor** – The number of days after the due date that a shipment can arrive at your company's receiving dock.
6. Press **Esc** to save the settings and return to the Customer or Vendor Maintenance screen.

Adding Keywords to Search for Entities

In an entity record, enter additional words for the system to use in the search index for a customer or vendor. For example, if you typically refer to a customer called Atlantic Baseline Systems as ABS, use ABS as an additional keyword.

► To add keywords to search for an entity:

1. From the **Files** menu do one of the following:
 - Select **Customer** to display the Customer Maintenance screen. Enter a customer ID, and use the **Add'l Info** hot key.
 - Select **Vendor** to display the Vendor Maintenance screen. Enter a vendor ID, and use the **Add'l Data** hot key.
2. Use the **Add'l Keywords** hot key to display the Additional Key Words screen.
3. Enter the keywords to use for searches for the customer or vendor.
4. Press **Esc** to save the keywords and return to the previous screen.

Assigning SFA Access to Entities

Define user message groups who can access the following data using the Eclipse Sales Force Automation (SFA) companion product from a laptop or Palm computing device:

- Customer Maintenance
- Vendor Maintenance
- Contact Maintenance
- Eclipse Dictionary Maintenance

Set different levels of access granted to each ID, depending on your security needs.

► **To assign access to an entity:**

1. From the **Files** menu, select one of the following:
 - **Customer** – Displays the Customer Maintenance screen.
 - **Vendor** – Displays the Vendor Maintenance screen.
 - **Contact** – Displays the Contact Maintenance screen.
 - **Eclipse Dictionary > Dictionary Maintenance > Access** hot key – Displays the Dictionary Maintenance screen.
2. Enter an entity or dictionary ID to display the record.
3. Use the **Access** hot key to display the Access Control List screen.
4. Select the first blank line and enter the new user or message group ID, or press **F10** and select it from a list.
5. In the **Levels** field, enter one of the following activity levels:

Activity Level	Description
No Access	You cannot download information from this record to your laptop or Palm device. If you have access to a message group ID, use this option to deny access to users within that group. This level overrides any other levels assigned to the individual User IDs.
View Only	You can download information from this record to your laptop or Palm device, but you cannot make changes to the information.
Review	You can download information from this record to your laptop or Palm device and make changes to the information, but you cannot update the Eclipse database. The system creates a tracker with the changes and sends it to the user ID entered in the SFA Administrator control maintenance record.
Full Access	You can download information from this record to your laptop or Palm device, update the information, and sync it with the Eclipse database.

Note: To delete a user or group, select it and press **Alt-Delete**.

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

Copying Entity Records

If you have several entities, such as customers or vendors who all use the same setup and pricing/cost information, you can create one entity record, copy it, and then change the address, contact, and any other information for similar entities. Copying in this manner prevents you from having to enter the same information repeatedly.

▶ To copy a customer or vendor record:

1. From the **Files** menu, select **Customer** or **Vendor** to display the Customer Maintenance screen or Vendor Maintenance screen.
2. Enter a customer or vendor ID to display the record that contains the information to copy.
3. Use the **Copy** hot key, and change the name to that of the new entity.

Note: In Customer Maintenance, the system may prompt to copy tax information. This prompt is activated in the Prompt To Copy Tax Information From Bill-Tos to All Ship-Tos control maintenance record.

4. Change the name, address, and contact information as needed.
5. Press **Esc** to save the new record and exit the screen.

Entering User-Defined Data for Entities

Use the User Defined Data screen to enter additional user-defined information about a customer, vendor, or contact. This information is usually detailed or personal data that you learn about the company or contact in the course of doing business.

Examples of user-defined customer data:

- Number of Employees
- Buying Group
- Association
- Competitors

Examples of user-defined contact data:

- Birthday
- Years employed at this company
- Spouse's name
- Hobbies

The system stores customer, vendor, and contact user-defined data in the following user-defined files:

- CUST.CLASS
- CUST.GROUP
- VEND.CLASS
- CONTACT.CLASS

To limit which user-defined fields display on the User-Defined Data screens, complete the following control maintenance records:

- Customer Classification Sort List
- Vendor Classification Sort List
- Contact Classification Sort List

For more information, see the Creating User-Defined Files.

▶ To enter user-defined customer, vendor or contact data:

1. From the **Files** menu, select **Customer**, **Vendor**, or **Contact** to display the maintenance screen.
2. Enter the entity name to display the customer, vendor, or contact record.

3. Use the **Classify** hot key to display the User Defined Data screen. The system populates the following fields with:
 - **File Name** – The system file name containing the user-defined prompts listed on the screen.
 - **Desc ID** – The entity for which this screen is displayed.
 - **Prompts** – The field names for which you enter data. If completed, the control maintenance records listed above determine the field order in which the prompts appear on the screen.
 - **Category** – The SFA Category assigned to each prompt in Dictionary Maintenance. The system uses the category for selection and sorting purposes.
4. In the **Input** field for any of the items listed in the **Category** field, enter the value to store for this entity. If the field is validated, press F10 for a lists of possible entries.

Notes: User-defined categories and validated input options are defined in Eclipse Dictionary Maintenance.
5. Use the **Sort** hot key to change the order in the field name list. Enter one of the following sort options:
 - **Default** – Sorts the field names in the order defined in the control maintenance record listed above, or alphabetically if the control maintenance record is blank.
 - **By Attribute** – Sorts the prompts by the attribute number assigned in Dictionary Maintenance.
 - **By Category by Prompt** – Sorts the prompts alphabetically by category, then within each category, alphabetically by prompt name.
 - **By Category by Attribute** – Sorts the prompts alphabetically by category, then within each category, by attribute number.
 - **By Prompt** – Sorts the prompts alphabetically by prompt name.
6. Use the **Category** hot key to filter the categories displayed in the list to only those associated with one or more SFA categories.
7. Use the **Log** hot key, as needed, to view all of the changes made to this screen.
8. Press **Esc** to save the settings and return to the previous screen.

Entering Additional Customer Information

Use the Additional Info screen to access a list of additional hot keys for setting up detailed customer information.

►To enter additional customer information:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Add'l Info** hot key to display the Additional Info screen.
4. Use any of the following hot keys to add related information to a customer record:

Hot Key	Use to...
Misc Cust Info	Define additional information that determines how different parts of your system deal with this customer. The system uses information in these fields for sorting and reporting purposes.
Points Maint	Reward customers for purchasing a target dollar amount of a product.
Product Cert	Create a record of a customer's certified employees who can buy regulated products.
OE Prompts	Create custom prompts for customers.
Freight Data	Identify freight carriers with whom a customer has set up accounts for automatic billing.
Customer Groups	Create a report to group sales by customer group code. Define customer groups on the User-Defined Data screen.
Activity Triggers	Set activities to occur in response to customer- or vendor-related events.
Product Zones	Identify product zones from which the customer is allowed to buy products. If no product zones are defined, the customer has access to all products.
Commerce Fees \$	Set fees paid to vendors when contracting with a buyer.
Alt Billing Addr	Enter a different billing address for a job or ship-to customer.
Valid PO #s	Create a list of parameters for validating purchase order numbers entered in Sales Order Entry for this customer.
Detail Lot Track	Set quality control inspection levels and quality product rankings that the customer requires for detail lot items purchased from you.
Split Commission %	Split the commission between salespersons working with a customer account.
Commission Ovrd	Change the commissions earned by the writer, inside salesperson, or outside salesperson for sales to this customer without affecting that person's overall commission plan.

Hot Key	Use to...
Addl Keywords	Enter additional words for the system to use to search for this customer.
Reminder Notes	Enter reminder notes to display on one or more screens for a specific customer or vendor.
Reorder Pad Exc Prd	Give your customers additional product information by linking to other web sites.
Virtual Supplier	Define products, vendors, and branches for use with the Virtual Supplier companion product.
Staging Locations	Validate a final staging location for a customer.
Branch Overrides	Set override default settings for a customer or vendor at the branch or territory level.
A/R Summary	View a summary of the balances on a bill-to customer's accounts without having to call up each account separately.
Addl Address	Add more lines to a customer name or address if necessary.
Job Maintenance	Attach all sales orders for the customer to a specific master job bid.
Entity Relations	Displays a list of a bill-to customer's ship-to addresses. If you use this hot key from a ship-to only customer record, it displays the customer record of the bill-to address.
Vendor Hold List	Enter one or multiple vendor pay-tos from which this customer is not allowed to buy product without authorization. The system places the P/O on hold if the customer attempts to purchase items from this vendor through your company. To release a hold, you must be assigned the POE.ASL.RELEASE authorization key.

5. Press **Esc** to exit the Additional Information screen and return to the Customer Maintenance screen.

Adding Miscellaneous Customer Information

Define additional information in Miscellaneous Customer Information that determines how different parts of the system organize and interpret customer information. The system uses this information for sorting and reporting purposes.

► To add miscellaneous customer information:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the Customer/New field, enter the customer ID to display the customer record.
3. Use the **Add'l Info** hot key, and then use the **Misc Cust Info** hot key to display the Miscellaneous Customer Information screen.
4. Complete the following fields as needed.

Field	Description
Initial Status Override	<p>The default order status the system uses for all orders for this customer.</p> <ul style="list-style-type: none"> • If this field is blank, the system uses the default order status defined for this customer's ship via. If no order status is defined for the ship via, the system uses the default order status defined for the order taker's terminal. If no order status is defined for the terminal, the system assigns a status of C (Call When Complete) to the order. • If the entry in this field is I (Invoice), the initial status in the order will be P (Pick Up Now). With a status of P, the order is invoiced when the user presses Esc. • If the entry in this field is P (Pick Up Now), the system does not prompt for a required date in Sales Order Entry even if the Prompt For Required Date In Sales Order Entry control maintenance record is set to Y (always prompt) or D (user defined).
Sales Source Override	The sales source the system uses to override the normal sales source assigned to an order for this customer.
Shipping Branch Override	The default shipping branch the system uses for this customer. Override this branch number in Sales Order Entry, if necessary.
Pricing Branch Override	The default pricing branch the system uses for this customer. Override this branch number in Sales Order Entry, if necessary.
Required Date Lead Time	<p>The number of days needed to deliver the product to the customer. If you leave this field blank, the system uses the current date as the required date. In Sales Order Entry, the required date is today's date plus the number of days entered in this field.</p> <p>If you are using Web Commerce, this field overrides the setting in the WOE Required Date Lead Time control maintenance record.</p>
Max Early Ship Days	The number of days before the required date that an order can be shipped to this customer before the early shipment is classified as an <i>unquality event</i> and recorded by the Unquality Event Tracking Program.

Field	Description
SIC Code	This customer's four-digit Standard Industrial Classification (SIC) code. The Office of Management and Budget developed this code to facilitate statistical economic analysis and reporting of the state of the U.S. economy based on production, trade, and service enterprises. Use this code to group businesses with similar production processes, and with Report Writer to sort customers.
Customer Select Code	<p>A code that identifies in what kind of business the customer is involved, including whether they service commercial or residential customers. Use this information to filter customers for inclusion on some reports. One of the following options applies:</p> <ul style="list-style-type: none"> • If no Customer Select Codes are defined, nothing displays. • If only one code is defined, that code is assigned. • If more than one code is defined, select one from the list that displays. <p>Customer select codes are defined in the Valid Customer Select Codes control maintenance record.</p>
Normal Delivery Time of Day	<p>The time of day the delivery truck servicing this customer is scheduled to arrive at the customer's location. An on-the-hour time can be entered with a number including <i>a</i> for A.M. or <i>p</i> for P.M. Separate hours and minutes with a colon.</p> <p>When a manifest includes delivery to this customer, the time assigned here is displayed in the DelTime field for the customer on the Shipping Manifest Queue screen. The system sorts stops using this time if multiple customers are on a route within the same zip code.</p> <p>If you do not set up ship via delivery information for this customer in the Dflt ShipVia field on the Customer Maintenance screen and in Ship Via Maintenance, the system uses the shipping information in this field.</p>
D & B Number	<p>Enter the customer's Dun & Bradstreet number, used to research the operational and financial background of a company.</p> <p>A D&B® or D-U-N-S® Number is a unique nine-digit sequence recognized as the standard for identifying and tracking businesses worldwide.</p> <p>A D&B Number provides a company with the following:</p> <ul style="list-style-type: none"> • Enhances the credibility of your business in the marketplace. • Enables potential customers, suppliers, and lenders to identify and learn about your company. • Provides the number to the U.S. government and corporations that require their suppliers and contractors to have a D&B Number.
Default P/O Number	<p>The default purchase order number to assign to every order entered for this customer. If no default P/O number is entered in this field for a ship-to customer, the system uses the default P/O number entered for the associated bill-to customer.</p> <p>The default P/O number is assigned to the Customer PO # field on the SOE Header screen and it can be edited.</p>

Field	Description
Default Release Number	<p>A control code that the customer can assign to an order for tracking purposes. Enter a default release number to assign to every order entered for this customer. If no default release number is entered in this field for a ship-to customer, the system uses the default release number entered for the associated bill-to customer.</p> <p>The default release number can be overridden in the Customer Rel # field on the SOE Header screen.</p>
Accepts Substitutes?	<p>Identifies whether the customer accepts substitute products. To allow substitutes, enter Y (default value), otherwise enter N.</p>
Disable Duplicate P/O# / Order Check	<p>This field works with the Duplicate Order Check and the Duplicate Customer P/O Number Check control maintenance records. If this field is set to:</p> <ul style="list-style-type: none"> • N – The two control maintenance records function normally. • Y – The system will not check existing (open or invoiced) orders for this customer for a duplicate order or duplicate customer P/O number. <p>Note: We recommend you set this field to Y for a generic customer, such as Retail Cash Sale, who might generate many orders for the same product or customer P/O number.</p>
Consignment Inventory? (Y/N)	<p>To allow the customer to maintain consigned inventory for usage or resale, enter Y, otherwise enter N.</p>
Under Ship-To	<p>Identifies the ship-to customer who is maintaining the consigned inventory. For example, if this is the customer record of a contractor working for a customer using consigned inventory. This contractor can use the consigned inventory of that ship-to customer. This contractor may be one of several crews working from a single parts trailer that is managed by the customer ship-to.</p> <p>Note: Set the Consignment Inventory field to Y to activate this field.</p>
Exclude Consignment Credits? (Y/N)	<p>To exclude credits from consignment billings, enter Y, otherwise enter N.</p>
Extra Handling Charge?	<p>To charge the customer the auto-charge amounts set in Ship Via Maintenance, enter Y, otherwise enter N.</p> <p>These charges apply only to the first generation of the order, regardless of the setting in the Apply Extra Handling For Shipping To First Gen Only control maintenance record.</p>
Commission Plan	<p>Identifies the commission plan that will be used for sales made to this customer. This value overrides the commission plan assigned to the salesperson, but a commission plan entered on a sales order overrides this value.</p>
Exclude from Index	<p>Enter Y to exclude this customer record from index searches, otherwise enter N.</p> <p>If the customer is a ship-to-only account, set this field to Y, and set the Exclude From Ship-To/Ship-From Selection If Excluded From Index control maintenance record to Y. This ship-to account will not be displayed in the ship-to selection list when creating a new sales order.</p>

Field	Description
Time Zone	<p>Indicates the time zone in which the customer resides.</p> <p>The time zone displays in the header of the Customer Activity Log Tracker Entry screen of each tracker created for this customer.</p>
Branch Demand Override	<p>Assign the demand for shipments from a branch to this customer, regardless of from where the goods are shipped.</p> <p>When a branch is entered in this field, a record is written to the PSUB file for this branch in addition to the shipping branch for each invoice.</p> <p>This setting overrides the setting in the Assign Demand Forecast To Price/Ship Branch Or By Zip Code control maintenance record. Therefore, if a branch is specified in this field, the demand for all items for this customer are always applied to that branch.</p> <p>Note: You must be assigned the CUST.DEMAND.BR.OVRD authorization key to access this field.</p>
Allow Quantity Increase During RF Picking	<p>Access this field by using the Misc Cust Info 2 hot key.</p> <p>Enter one of the following:</p> <ul style="list-style-type: none"> • Y – Allows the pickers to increase the pick quantity for products that are flagged to allow quantity changes • No – Prevents the pickers from increasing the quantities for products that are flagged to allow quantity changes. <p>Note: If you have level 2 or 4 of the RF.PICK.QTY.INCREASE authorization key, you can increase the quantity for products that are flagged to allow quantity increases, overriding this option at the customer level.</p>

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

Identifying Customers Who Can Buy Regulated Products

Create a record of a customer's employees who are certified to buy regulated products, such as dangerous chemical compounds or compressed gases that require special handling.

You must have the CUST.CERTIFY.EDIT authorization key assigned to your user ID to edit the information on the Product Certification Maintenance screen.

►To identify a customer's employees who can buy regulated products:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Add'l Info** hot key, and then use the **Product Cert** hot key to display the Product Certification Maintenance screen.
4. In the **Cert Code** field, enter the product certification code that identifies employees who are authorized to purchase a particular type of regulated product. These user-defined codes are set up in the Valid Product Certification Codes control maintenance record.
5. In the **Certified Name** field, enter the name of the employee certified to buy the regulated product. This field is not validated.
6. In the **Certification #** field, type the certification number assigned to the person who is authorized to buy the regulated product.

The testing agency that grants product purchase certification assigns the certification number to the individual. The customer provides the number, if required. This field is not validated.

7. Press **Esc** to save the information and return to the Additional Info screen.

Determining Customer Freight Carriers

Use the Default Freight Data screen to identify freight carriers with which customers have set up accounts for automatic billing. Shipping programs, such as StarShip, can then use this information during shipping procedures. The customer's freight carrier can then bill the freight charges directly to this customer.

► To determine a customer's freight carrier:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Freight Data** hot key to display the Default Freight Data screen.
4. In the **Exempt for Handling** field; enter one of the following:
 - **Y** – Adds no handling charge to the customer's order, regardless of the size of the order.
 - **N** – Adds a handling charge to the customer's order.
5. In the **Insurance Required** field, enter one of the following:
 - **Y** – Requires the customer's shipments to be insured.
 - **N** – Does not require insurance for the customer's shipments.
6. In the **Minimum Order Amount to Allow Freight** field, enter a dollar amount of **0** (zero) or more to identify the minimum dollar amount the distributor pays for freight for this customer.

The system combines the subtotals on all order generations before adding additional charges, such as handling, tax, and freight, to determine the minimum dollar amount of this order.

Note: Customers with a dollar amount in this field must have the **Frt Out Exempt** field on the Customer Maintenance screen set to **N** for this setting to be effective.

If you leave the field blank, the system looks at the setting on the **Frt Out Exempt** field on the Customer Maintenance screen to determine if freight is charged to this customer. If it is set to **Y**, the customer does not pay freight regardless of the order amount. If it is set to **N**, all orders include a freight charge.

7. In the **Residential Address** field, enter one of the following:
 - **Y** – Informs an automated shipping system such as StarShip to apply a residential shipping fee to the customer's freight charge.
 - **N** – Does not apply a residential shipping fee to the customer's freight charge. This is the default.

The **Residential Shipping Address** field on the Additional Header Information screen in Sales Order Entry reflects the entry in this field.

8. In the **Account Number** field, enter the account number for each carrier with which this customer has a shipping account. This account number is billed when items are shipped to the customer using the carrier entered in the **Carrier** field. The **Carrier** field is read-only and lists the major freight carriers defined in the system.
9. In the **Type** field, for each customer account number entered, enter one of the following account types to determine how to bill freight charges:
 - **S – Sender** – Billed to your company's account with the defined carrier.
 - **R – Recipient Billing** – Billed to the customer's account with the defined carrier.
 - **C – Consignee Billing** (for UPS) – Billed to a consignee's account with the defined carrier.
 - **T – Third Party Billing** (for UPS or FedEx) – Billed to a third party's account with the defined carrier.
 - **X – Credit Card Billing** (for UPS or FedEx) – Billed to a credit card account with the defined carrier.
10. Press **Esc** to save the settings and return to the Additional Info screen.

Assigning Customers to Product Zones

Use product zones to restrict customer purchases to a selection of products. Customers with product zones are limited to buying only those products or only from price lines assigned to their zones. All products are available to customers for whom no product zones are assigned.

For example, if you have branches in Florida and Texas that stock the same products, you can restrict Florida customers to purchasing products only from price lines at your Florida branch. This saves money on shipping.

Before using product zones do the following:

1. Define product zones in the Valid Product Zones control maintenance record. Otherwise, all products are available for customer sales.
2. Set the Display Products Within A Customer's Product Zones control maintenance record to determine whether all products display in Sales Order Entry.
3. Assign the PRD.ZONE authorization key to users who need to view products outside the customer's product zone.
4. Assign product zones to customers.
5. Assign product zones to price lines.
6. Assign product zones to products, if necessary.

Product zone assignments at the product level override assignments at the price line level.

▶ To assign customers to product zones:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer's name to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Product Zones** hot key to display the Product Zones screen.
4. Press **F10** and select a product zone from the list.
5. When you have finished assigning product zones, press **Esc** to save the information and exit the screen.

Defining Contract Buyer Fees for Customers

If you use a contract buyer for purchasing materials from vendors, and then directly ship the materials from the vendors to your customers or job sites, you can use Contract Rate Maintenance to set up the fees payable to the contract buyer.

You can set up a customer with Contract Rate Maintenance to charge the vendor a dollar amount or a percentage as a fee for contract buyer's services. When managing payments, the system looks at the rates specified for the ship-to customer first, then to the bill-to for this data.

►To define contract buyer fees for a customer:

1. From the **File** menu select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then the **Commerce Fees \$** hot key to display the Contract Rate Maintenance screen.

The **Customer** field displays the customer name for the current customer record, and the **Vendor** column displays **Default**, which represents bill-to vendors who are not added to the vendor column.

4. For the **Default** vendor, set up the required default fees as described in the table below.
5. In the **Vendor** column, below the default vendor, list vendors that have exceptions to the default payment and commerce fees.
6. Enter one or both amounts and percent values into the fee columns to charge the fee back to the vendor.

For the field...	enter...	for...
Portal Fee	Amount – A dollar amount to charge the customer for credit card payments	the customer's portal fees for their Internet use.
	% – A percentage to charge for credit card payments	
Comm Fee	Amount – A dollar amount to charge the customer for credit card payments	the customer's commerce fees for their Internet use.
	% – A percentage to charge for credit card payments	
Payment Fee	Amount – A dollar amount to charge on each order	general payment fees.
	% – A percentage of each order to charge	

If you enter both dollar amount and percentage, and the customer makes partial payments on an order, the system charges the dollar amount and percentage for the first payment and the percentage for each consecutive payment.

7. Press **Esc** to save your data and exit Customer Maintenance.

Applying Branch-Specific Overrides

Set the following defaults at the customer and vendor level that override settings at a branch or territory level:

- Inside and outside salesperson
- Ship via
- Order entry message
- Terms code
- Price class

For example, if Dan is the default outside salesperson for all branches except for the NORTH territory where Sam is the salesperson you would enter Sam's user ID in the **Value** field of the Branch-Specific Overrides screen for the NORTH territory with an attribute of Outside Salesperson. In order entry, for all branches except the NORTH territory Dan defaults as the outside salesperson, except when an order is entered for a branch in the NORTH territory, in which case, Sam is the default salesperson.

You must be assigned branch access in User Maintenance to override any attribute for a branch or territory.

► To apply a branch-specific override:

1. From the **Files** menu, do one of the following to display the Branch-Specific Overrides screen:
 - Select **Customer** to display the Customer Maintenance screen, then select **Add'l Info**, then select **Branch Overrides**.
 - Select **Vendor** to display the Vendor Maintenance screen, then select **Add'l Data**, then select **Brch Ovrds**.

The **Entity** field on the Branch-Specific Overrides screen displays the name of the customer or vendor from the entity record.

2. In the **Br/Terr** field, enter the branch or territory for which to apply an override. Enter **ALL** to apply the override to all branches.
3. In the **Attribute** field, press **F10** and select from the following attributes for the customer or vendor available for each branch:

For Customer Branches	For Vendor Branches
Outside Salesperson Inside Salesperson Ship Via Terms Code Price Class	Press F10 and select from the list of valid options.

For Customer Branches	For Vendor Branches
OE Message	Do one of the following to create a message in Sales Order Entry or Purchase Order Entry when a customer or vendor place orders: <ul style="list-style-type: none">• Use the Expand Field hot key to enter a message up to 360 characters.• Enter a short message, up to 30 characters, in the Value column.

4. In the **Value** field, press **F10** and select from a list of options relevant to the attribute selected in the **Attribute** field.
5. Press **Esc** to save the changes and return to the Additional Info screen.

Entering Alternate Billing Addresses

You can send invoices for a job or ship-to customer to an intermediate authority for purchase approval, either at the job site or off site before they are forwarded to the assigned bill-to customer for payment.

When assigning an alternate billing address to a ship-to customer, you can do the following:

- Define the job or ship-to customer's address as the billing address.
- Enter an unrelated name and address as the billing address.
- Assign the name and address of another customer to the alternate billing address in the customer file.

The system prints the alternate billing address on all of the job or ship-to customer's invoices. When you access that job or ship-to customer record, "Alternate Billing Address in Effect" displays.

- Assign an alternate billing address to a bill-to customer and copy it to all associated jobs and ship-to customers.

The system prints the alternate billing address on all invoices for the bill-to customer and all associated jobs and ship-to customers. When you access the customer record for the bill-to customer, or for any of the jobs or ship-to customers associated with that bill-to customer, a message informs you that an alternate billing address is in effect.

Note: The bill-to customer assigned to the job or ship-to customer still receives the monthly statement.

▶ To enter an alternate billing address:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Add'l Info** hot key to display the Additional Info menu, and then use the **Alt Billing Addr** hot key to display the Alternate Billing Address screen.
4. In the **Use Ship-To Address (Y/N)** field, enter one of the following:
 - **Y** – Adds the job or ship-to customer's address as the address for invoices. The system populates the remaining address fields.
 - **N** – Adds a different name and address from that of the ship-to customer but not that of another customer in the customer file. You populate the remaining address fields.
5. To add the name and address of another customer from the customer file, use the **Customer** hot key. At the prompt, enter one of the following:
 - A customer number preceded by a period.
 - A customer name.
 - Part of a name. Press **Enter** to display a list of customers from which to select.

6. In the **Name**, **Address**, **City**, **St**, and **Zip** fields, enter the name and address of the customer or vendor.

Note: Because the name and address do not have to be the name defined on the customer or vendor record, you cannot enter a customer or vendor number or search by entering part of a name.

7. In the **Fax** field, enter the fax number the customer will use to receive invoices.
8. In the **Sort By** field, enter the words associated with the alternate billing address to use to search for this address.

Note: Custom programming and modification of your custom invoice printing program is required for printing an alternate billing address on an invoice.

9. For addresses that are longer than the number of lines allowed, use the **Addl Address** hot key to enter additional billing address information for this customer or vendor.

Creating Parameters for Validating Customer P/O Numbers

Use the Valid P/O Numbers Selection screen to create parameters to use to validate purchase order numbers entered on a sales order. When a purchase order (P/O) number is entered for a customer in Sales Order Entry, the number is validated against the number you enter here.

▶ To create parameters for validating a customer P/O number:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Valid PO #s** hot key to display the Valid P/O Numbers Selection screen.
4. Enter one or more of the following:
 - A P/O number.
 - A string of characters followed by a right square bracket, for example, **ABC]**. The P/O number must start with this string of characters.
 - A string of characters preceded by a left square bracket, for example, **[ABC**. The P/O number must end with this string of characters.
 - A string of characters preceded by a left square bracket and followed by a right square bracket, for example, **[ABC]**. The P/O number must contain this string of characters somewhere in the number.
5. Repeat the process to add additional P/O numbers or parameters.
6. To delete an item from the list, select the item and press **Alt-Delete**.
7. When you have finished adding P/O numbers or parameters, press **Esc** to save the information and exit the screen.

Validating Staging Locations for Customers

Use the Staging Locations screen to set up warehouse staging locations at each of your branches for specific customers. This feature provides a cross-reference to validate shipping locations.

► **To validate a staging location for a customer:**

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Staging Locations** hot key to display the Staging Locations screen.

The system populates the **Customer** field with the current customer's name.

4. In the **Br/Terr** field, enter a branch, or enter **All** to display all branches in the **Branches** field.
5. In the **Locations** field, enter the location at which this customer's shipments will be staged for each branch.
6. Press **Esc** to save the information and exit the screen.

Entering Default Master Job Bids

If you have a customer who only orders from you against a master job bid, you can enter that master job bid on the Job Maintenance screen. When you do this, all orders entered for the customer are considered junior orders, and product quantities are entered against the quantities on the master job bid.

In addition, you can use this screen to identify that you want to combine all of the invoices entered each month against the master job bid into the invoice.

► To enter a default master job bid:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Job Maintenance** hot key to display the Job Maintenance screen.
4. In the **My Master Order #** field, enter the number that identifies the customer's master job bid.
5. In the **Consolidated Invoicing** field, enter one of the following as the customer's default setting:
 - **Y** – Includes all the customer's orders in a consolidated invoice.
 - **N** – Does not include the customer's orders on a consolidated invoice.

This setting displays in the **Consolidating Invoicing** field on the Job Maintenance screen in Sales Order Entry. You can change this setting in Sales Order Entry for any individual order to determine which orders to include on the customer's consolidated invoice.

6. Press **Esc** to save the information and exit the screen.

Defining Payment Terms and Credit Control Parameters

Unless a customer plans to pay for orders up front, or by COD, you need to set credit control parameters for them. Define this credit information when a customer places an order, or when you want to inquire about a customer's credit standing with your company.

You must be assigned the CUST.CREDIT.EDIT and CUSTOMER.MAINT authorization keys to edit the Credit Control Maintenance screen.

► To define payment terms and credit control parameters:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Credit** hot key to display the Credit Control Parameters screen.
4. In the **Separate A/R from Bill-To** field, enter an asterisk in this field to allow a ship-to customer's invoices to be excluded from the bill-to customer's statements.

This option is visible only for ship-to records. If you flag this field, the following occurs:

- The bill-to customer's statement does not include the ship-to customer's invoices, even if you flag the ship-to customer's **Batch Statement** field on the ship-to customer's record.
- The A/R Inquiry Report for the bill-to includes the ship-to customer's invoices.

If you select this option, you must also set the Batch Statement field on the ship-to customer's record to **1 Copy**, **2 Copies**, or **FAX**, so the ship-to customer's invoices are included on a statement.

5. To speed customer entry, enter an asterisk (*) in one of the following options to avoid setting specific credit control parameters:

Select this option	To...
Use Default	use the system default credit control parameters for a ship-to or bill-to customer.
Use Bill-To	use the credit control parameters set up for a ship-to customer's bill-to record. This can save time when entering new customers that use a standard set up or have not secured their own credit parameters.

6. If you did not flag one of the above options, you must flag one or more of the following options, as needed:

Enter an asterisk (*) in this field...	To...
Always COD	accept only COD payments from this customer.

Enter an asterisk (*) in this field...	To...
COD when credit limit exceeded	accept only COD payments when this customer's credit limit has been exceeded.
Print approval required message on all shipping tickets	approve purchases by this customer, and print an approval required message on all shipping tickets.
	<p>approve purchases and print an approval required message on shipping tickets only when this customer's credit limit is exceeded.</p> <p>This option works with a custom form modification to define a message to print on the shipping ticket that indicates that the purchase must be approved. This message can be any statement you want to use that indicates to your employees that they need to check for approval. For example, you could add the message, "Have a Nice Day" and your employees will understand that when they see that message, approval is required.</p> <p>If you flag this field without using the custom form, the Sales Order Entry screen displays the message, "See Credit Manager," and the system does not print a message on the shipping ticket. If you simply want to alert the salesperson on the Sales Order Entry screen to check for purchase approval when this customer places an order, we suggest using OE Messages instead.</p>
No Order Entry	accept no orders for this customer. For example, set this option when you set up a branch as a customer, and you never anticipate creating transfer orders for that branch.
No Order Entry when credit limit exceeded, unless authorized	<p>limit items added to a sales order that may contribute to exceeding a customer's credit limit, unless approved by an authorized user.</p> <p>When an unauthorized user adds a line item to an order that causes the order to go over the customer's credit limit, the system does not add the line item to the order.</p>
No Order Entry, regardless of credit limit, unless authorized	accept no orders regardless of this customer's credit limit, unless approved by an authorized user.
No printing of shipping ticket when credit limit exceeded, unless auth	keep a shipping ticket from printing for the customer who has a credit infraction, unless approved by an authorized user.
No printing of shipping ticket, regardless of credit limit, unless auth	keep a shipping ticket from printing for the customer regardless of credit limits, unless approved by an authorized user.
Only customer's authorized personnel may place orders	limit a customer's purchases to authorized personnel.
Company checks accepted	<p>accept the customer's company checks as payment.</p> <p>This information displays when orders are entered and payments are required.</p>
Personal checks accepted	<p>accept this customer's personal checks as payment.</p> <p>This information displays when orders are entered and payments are required.</p>

Enter an asterisk (*) in this field...	To...
Apply credits to oldest buckets when aging account	<p>show the application of all credits to the oldest balances in the aging buckets for the customer, even when the activity at the bottom of the screen indicates that credits are assigned to more recent aging buckets. By flagging this field, the A/R Aging Report and Aged Receivables by Salesman Report display all credits as applied to the oldest aging bucket with a balance. It does not cause a cash receipts application of credits to open invoices. You must do that manually using the Cash Receipts program.</p> <p>This setting overrides the setting in the Bucket to use for Aging field on the Valid Customer Invoice Status Codes control maintenance record.</p>

7. In the **Credit Limit** field, enter the customer's maximum credit limit in dollars. Use this field if credit limits have been selected in the fields listed in the above table.
8. In the **PastDue Limit** field, enter the maximum amount that may be past due before the customer's credit limit is exceeded. This check is made in addition to the overall credit limit. The past due limit may be equal to the overall credit limit.
9. In the **Past Due Days** field, enter the number of days to consider invoices past due. On that day, the system checks the customer's credit using the customer's past due limit.

Note: The system requires that the user has the SOE.CREDIT.RELEASE authorization key at level 999 to release a credit hold that was caused from the customer's past-due days.

10. In the **Deposit %, Stock Items** field, enter the percent deposit required at order entry on stock items for this customer. Zero percent (0%) means no deposit is required on stock items.
11. In the **Deposit %, Nonstocks** field, enter the percent deposit required at order entry on nonstock items for this customer. Zero percent (0%) means no deposit is required on nonstock items.

This setting also adds a percent deposit requirement to lot items.

12. In the **Job Limit** field, enter a sales dollar limit on a job. This job limit works with the combined value of the total sales (paid or unpaid) from the date the job was started plus any open orders.

If the quantity ordered exceeds the job limit, a message to that effect displays on the Sales Order Entry Body screen, and normal credit control parameters go into effect to prevent the order from being printed or processed. For more information, see Reviewing Customers' Credit Standings.

13. In the **Terms Code** field, enter a terms code to allow the customer to pay a percentage of the invoice over a defined payment period. For example, you can create a terms codes in Terms Maintenance where the customer is allowed to make payments of 25 percent over a defined billing period.

14. In the **Override Inv Terms** field, enter one of the following to override the setting in the Terms Code field:

- **Y** – The Post Service Charges program uses the terms code assigned to the customer in the **Terms Code** field instead of using the terms code on the transaction processed for a customer. The customer's current terms code overrides individual invoice terms when calculating service charges. Use this setting if a customer's service charge terms change retroactively and apply to all outstanding invoices.
- **N** – The Post Service Charges program uses the terms setting on individual invoice when calculating service charges.

15. Use the following hot keys, as needed.

Hot Key	Description
Authorized Personnel	Authorize a customer's employee to place credit card orders.
Default Credit Card Info	Set up a default credit card that a customer can use for sales orders.
Add'l Credit Data	Add detailed information about a customer's credit.
EFT	Set up automatic posting of funds for the customer account.

16. Press **Esc** to return to the Customer Maintenance screen.

Authorizing Customer Personnel to Place Orders

To ensure that only the customer's authorized personnel place orders, assign a name to a credit parameter and list the maximum dollar amount available to that individual.

▶To authorize customer personnel to place sales orders:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer name to display the customer record.
3. Use the **Credit** hot key to display the Credit Control Parameters screen.
4. Enter an asterisk (*) in the **Only customer's authorized personnel may place orders** option.
5. Use the **Authorized Personnel** hot key to display the Customer Authorization Maintenance screen.
6. In the **Authorized Personnel** column, enter one or more names of the employees that you have authorized to make purchases..
7. In the **Amount** column for each purchaser, list the maximum dollar amount they may order.

If the dollar amount is left blank, the system checks only the customer's overall credit limit.

8. To delete a name from the list, select it and press **Alt-Delete**.

Defining Default Credit Card Information

Enter a customer's default credit card information so the information is available when customers place orders. The setting on the **Validate Name in 'Ordered By' Field Against Customer Contact** control maintenance record determines whether the contact has authorization to place a credit order for the company.

If you do not have the CREDIT.CARD.ACCT authorization key set to at least level 16, you cannot view the credit card number on the Default Credit Card Information screen.

You cannot add credit card information to a customer account set up as a branch cash account or to customer records that have the **Do NOT allow Credit Cards to be saved to this account** field in the Additional Customer Credit Data screen set to **Y**.

On the Default Credit Card Information screen, you can:

- Determine when to authorize a customer's credit card payment in the course of an order.
- Enter term codes that override payment terms set up in Term Code Maintenance for customers.
- Determine if sales tax is applied when the customer pays for an order with this credit card.
- Define as many credit cards as needed for any customer.
- Set up credit cards for contacts. For example, the system applies this credit card information to any purchases made by a specific contact at one of your customer sites.

► To define default credit card information:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen, or **Contact** to display the Contact Maintenance screen.
2. Enter the customer or contact name to display the entity's record.
3. Do one of the following to display the Default Credit Card Information screen:
 - From a customer record, select the **Credit** hot key to display the Credit Control Parameters screen. Then Use the **Default Credit Card Info** hot key.
 - From the **Files** menu or from an entity record, select **Contacts** to display the Contact Maintenance screen. Then use the **Credit Card** hot key.
4. Press **Enter** to select **New**, or select an existing credit card record.
5. Enter the following credit card information, as needed:

Field	Description
Card #	Enter the 16-digit credit card number.
Card Type	Press F10 and select the credit card type, such as <i>DS</i> for Discover.
Exp Date	Enter the credit card's expiration date.

Field	Description
Card Holder	Enter the name of the card holder, which is printed on the credit card. Credit card types are defined in the Valid Credit Card Types control maintenance record.
Zip Code	Enter the five-digit or zip + 4 zip code for the card holder.
Street Addr	Enter the street address for the card holder.

6. In the **Auth Method** field, press **F10** and select one of the following authorization methods. This method displays in Sales Order Entry when the card used for payment.
- **Pre-Authorize Before Shipment** – Sets money aside from the credit card, guaranteeing funds for the order total plus any freight charges, without transferring the money to your account. Then once the order is final, either the Credit Card Authorization Phantom or the automated shipping program collects the payment.
Potential charges from your credit card processor may apply if you pre-authorize payment from a customer.
 - **Authorize Before Shipment** – Authorizes and transfers payment to your account for the order amount before shipping. The pick ticket is printed upon authorization.
 - **Reference Only** – Uses information on the Credit Card Authorization screen for reference only at the order level.
 - **Authorization After Review** – Authorizes and transfers payment to your account for the order amount once the invoice is sent through batch printing and the shipping ticket is printed.
- Note:** The authorization method for new cards defaults to the setting stored in the Default Auth Method for New Cards control maintenance record.
7. In the **Terms Override** field, press **F10** and select the terms code, if any, to use when this credit card is used for payment.
- For example: If you give the customer a discount to orders when they pay in cash, but discounts do not apply when they pay with a credit card, enter the term code to override the discount.
8. In the **Charge Tax** field, enter:
- **Y** – Applies tax to orders paid with this credit card. For example, customers could be exempt from tax if they pay with a company credit card. If you want to charge tax to payments made with such credit cards, enter **Y**.
 - **N** – Does not apply tax to orders paid with this credit card.

9. In the **Default Ref No** field, enter a default reference number the system should use for this customer. The default reference number can be any of the following:
- Release Number
 - Customer P/O
 - Invoice Number

Set a default reference number for the system in the Credit Card: Default Reference Number control maintenance record.

10. Use the following hot keys as needed.

Hot Key	Description
Add'l Info	Displays the Additional Information screen. Use this screen to include additional credit payment data about the customer. This information does not directly affect any other part of the system and is displayed for informational purposes only.
Delete	Deletes this default credit card information. For example, if a customer changes credit card companies, you can delete the credit card information from the system.

11. Press **Esc** to save the information, and return to the previous screen.

Entering Additional Customer Credit Data

Set up detailed criteria for a customer's credit transactions to do the following:

- Enter information for system reports.
- Override credit-related control maintenance records.
- Narrow searches for open orders in review queues.
- Activate the Anticipation Credit feature.
- Exclude a customer from receiving service charges.

► To enter additional customer credit data:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer's name to display the customer record.
3. Use the **Credit** hot key to display the Credit Control Parameters screen and use the **Add'l Credit Data** hot key to display the Additional Customer Credit Data screen.
4. Complete the following fields, as needed:

Field	Description
Max Collection Days	Enter the number of days by which an invoice must be paid to be applied to a salesperson's commission. You can include or exclude commissions paid over the customer's maximum collection days in the Commissions Report, by populating the report's Over Max Collection Days field.
Credit Manager	Press F10 and select the user or message group ID to use as the credit manager for this customer's account. You can use this information to view only the open orders with a credit status assigned to this credit manager on the Open Order Status Review Queue. Note: The Credit Manager option must be flagged for the user or message group in User Maintenance.

Field	Description
<p>Anticipation Credit Invoice</p>	<p>Enter one of the following:</p> <ul style="list-style-type: none"> • Y - Activates the Anticipation Credit program for this customer. Anticipation credit is a reward that selected customers can receive if they pay an invoice before it is due. • N - Does not activate the Anticipation Credit program for this customer. This is the default entry. <p>The system calculates anticipation credit and applies it when a user completes a cash receipts entry, provided that the user requests that the system check for it, and that the following invoice eligibility criteria are met:</p> <ul style="list-style-type: none"> • The invoice amount is greater than zero. • Invoice terms are not listed in the Terms Code to Exclude From Anticipation Credit Eligibility control maintenance record. • The invoice has not had a previous anticipation credit applied to it. • The invoice balance is zero because of this payment. <p>The system calculates the amount of anticipation credit given to each invoice using the following algorithm:</p> <p>[Invoice Amount - (Discount taken + Miscellaneous Adjustments)] x Anticipation Credit Percentage x # of Days Early / 365</p> <p>Note: To fully implement the Anticipation Credit feature, create a miscellaneous charge product in Product Maintenance, which the system uses to determine the anticipation credit percentage, and then assign this product to the C/R Anticipation Credit Invoice Product control maintenance record.</p>
<p>Include S/C Inv in S/C Calc</p>	<p>Enter one of the following to determine how the system handles service charges for this customer:</p> <ul style="list-style-type: none"> • Y - Overrides the setting in the Include Service Charges In Service Charge Calculation control maintenance record. • N - Uses the setting in the Include Service Charges In Service Charge Calculation control maintenance record.
<p>Credit Card Information</p>	<p>For <i>cash required</i> orders, enter one of the following:</p> <ul style="list-style-type: none"> • None - No credit card information is needed from this customer. • Prompt - Prompts for credit card information when taking a credit card as payment from this customer. • Required - Requires credit card information when taking a credit card as payment from this customer.

Field	Description
Exclude Customer Srv Chgs	Enter one of the following: <ul style="list-style-type: none"> • Y - Excludes this customer from service charge calculation, regardless of the service charge settings on an order. • N - Allows service charges to be calculated on this customer's orders.
Credit Release Percentage Override	Enter one of the following to allow this customer to exceed the pre-defined credit limit by a percentage of that credit limit: <ul style="list-style-type: none"> • 0 - Allows no credit release over the customer's defined limit from the Credit Control Parameters screen, unless approved by an authorized user. • A number between 1 and 998 - Defines the percentage, between 1 percent and 998 percent, that the customer is allowed to go over their defined credit limit. • 999 - Allows the customer to exceed the credit limit by an infinite amount. If you leave this field blank, the customer can exceed the credit limit by the percentage assigned to the user in the SOE.CREDIT.RELEASE authorization key.
Pass-Along Discount Holdback Prent	Enter one of the following to define a percentage discount passed along from the vendor to your customer: <ul style="list-style-type: none"> • 0 (zero) - Uses the setting in the Pass-Along Discount Holdback Percent control maintenance record. • The percentage from 01.00 to 99.00 to use for pass-along holdbacks - Assigns a holdback discount percent to subtract from a vendor pass-along discount due the customer on an order, and overrides the setting in the Pass-Along Discount Holdback Percent control maintenance record. The holdback percent is an absolute value, not a percent of the pass-along discount percent. For example, if a pass-along discount due to a customer is 2% and the holdback percent is .5%, the system reduces the pass-along discount percent to 1.5%. <p>Note: The system does not allow a holdback percent to make a pass-along discount negative so that a customer receives a credit.</p>
Require Check Verification	Enter one of the following: <ul style="list-style-type: none"> • Y - Requires the order writer to verify the customer's checks. • N - Requires no check verification. <p>Note: The system uses this field when you enter a payment in the Check field on the Sales Order Entry Totals screen.</p>
Exclude from Collection Invoices	Enter one of the following: <ul style="list-style-type: none"> • Y - Prevents this customer's overdue invoices from being printed or faxed from the collection queue. The system prompts you that this customer is excluded from collection invoices, but you can override this setting, if necessary. <ul style="list-style-type: none"> • N - Prints or faxes this customer's overdue invoices from the collection queue.

Field	Description
<p>Allow Sending Credit Card Level 3 Data for Customer</p>	<p>Enter one of the following to determine whether or not to send level-3 data in the credit card settlement process:</p> <ul style="list-style-type: none"> • Y - The system sends level-3 data. This is the default. • N - The system does not send level-3 data. This option provides a cost savings if your company does not use the level-3 information. <p>This setting overrides the setting in the Allow Sending Credit Card Level 3 Data control maintenance record.</p>
<p>Do NOT allow Credit Cards to be saved to this account</p>	<p>Enter one of the following regarding credit cards for the customer:</p> <ul style="list-style-type: none"> • Y - Disallows credit card information to be entered for this customer in Customer Maintenance. Setting this field to Y also disables the ability to save credit card information for the customer in Sales Order Entry. Set this field to Y for generic customers you use on sales orders for customers that are not in your system or for those customers who do not want to provide their information for a customer record. • N - Allows credit card information to be entered in Customer Maintenance and in Sales Order Entry for this customer. This is the default.

6. Use the **Comm % by Collection Days** hot key to define a range of days for which unpaid invoices affect the percentage of commission earned.
7. Press **Esc** to save the settings and return to the Credit Control Parameters screen.

Defining Customer Maximum Collection Days

You can enter a maximum number of collection days in the Commissions Report to determine if an invoice has been paid within the required amount of time when calculating a salesperson's commission, if commissions are based on paid invoices. This setting works with an order's invoice or due date, depending on the setting on the Maximum Collection Days Date control maintenance record.

For example, if the Maximum Collection Days Date control maintenance record is set to *Invoice*, the **Max Collection Days** field is set to *60*, and an invoice for this customer is paid on or before the 60th day after the invoice date, then the invoice is included when calculating the commission. However, if the invoice is paid on day 61 or later, the salesperson loses the commission.

Note: This entry can be overridden by the number assigned in the **Max Collection Days** field on the Additional Header Data screen off of the Sales Order Entry Header screen.

► To set a customer's maximum collection days:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Credit** hot key to display the Credit Control Parameters screen.
4. Use the **Add'l Credit Data** hot key to display the Additional Customer Credit Data screen.
5. In the **Max Collection Days** field, enter the maximum number of days in which an invoice can be paid and still be applied to a salesperson's commission.
6. Press **Esc** to save your settings and return to the Credit Control Parameters screen.

Configuring Customers for Electronic Funds Transfers

You can set up the system to receive payment directly from a customer's bank account. The system draws funds from multiple customer accounts, creates cash receipts, and posts them in the Cash Receipts program.

Before setting up a customer's EFT (electronic funds transfer) account information, set up the following control maintenance records:

- Auto C/R Default Customer If Not Found
- Cash Over/Short Maximum Parameters
- Valid Cash Sources

▶ To configure a customer for electric funds transfer:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID to display the customer record.
3. Use the **Credit** hot key to display the Credit Control Parameters screen.
4. Use the **EFT** hot key to display the Electronic Funds Transfer Information screen.
5. In the **Bank Account #** field, enter the customer's bank account number from which to draw funds.

Note: The combination of the numbers entered in the **EFT** and **Bank Account #** fields must be unique for each customer. For example, all of your customers could have the same EFT number, but each would need their own bank account number.

6. In the **Customer ABA #** field, enter the customer's ABA number to identify the customer in the Cash Receipts program.
7. Press **Esc** to save the information and return to the Credit Control Parameters screen.

Defining Customer Invoice Printing Options

Your customers may have different invoice format requirements. For example:

- A customer might want what you call a shipping ticket, but what they call a packing list, printed in a different format.
- A residential contractor might want products listed without prices, so it contains information available to the homeowner.
- A customer might want prices included on the shipping ticket in order to verify prices before getting an invoice.
- A customer might want list prices printed on the shipping ticket, which is then passed to the customer as an invoice.

If you are using Eclipse Forms, see Eclipse Forms documentation for information about setting up invoice printing.

To define customer invoice printing options, you must be assigned the CUSTOMER.MAINT authorization key set to level 2 and the CUST.PRICING.EDIT authorization key. You can view a customer's options if you are assigned level 1 of the CUSTOMER.MAINT authorization key

Use the Customer Pricing/Printing screen to:

- Assign invoice select codes to use to group customers according to how often they receive invoices via the Print Invoices program.
- Sort special reports for use with Report Writer.
- Rename an item for printing.
- Limit the amount of information printed on an item.

▶ To define customer invoice printing options:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Pricing** hot key to display the Customer Pricing/Printing screen.

4. Complete the following fields, as needed:

Field	Description
<p>Print Style</p>	<p>Enter a user-defined print style to use for this customer's shipping tickets. For information about defining print styles, see Maintaining Print Styles.</p> <p>Print styles are assigned to a customer's order on the Order Entry Header screen (Orders > Order Entry >Header hot key) during order entry. Print styles are assigned to customers on the Customer Pricing/Printing screen (Files > Customer >Pricing hot key).</p> <p>Following are some commonly used print styles:</p> <ul style="list-style-type: none"> • NET – Shows the customer unit price extensions. • BLIND – Does not print pricing or totals. • BLIND.TOT – Does not print pricing on the detail lines, but prints subtotals and order totals. This option is used for lot pricing. <p>Keep the following criteria in mind when setting up print styles:</p> <ul style="list-style-type: none"> • A ship-to customer's print style overrides a bill-to customer's print style. • A manual change to the print style on the Order Entry Header screen overrides the default print style assigned on Customer Pricing/Printing screen. • An entry in the Print Style field on the Order Reprinting Options screen (Orders > Printing > Reprint Picking Ticket) overrides the print style assigned on the Order Entry Header screen. <p>Note: If your company has customized versions of order document printing programs, these print styles can override the order print style.</p> <p>The print style specified here is assigned to this customer's order through the Order Entry Header screen, and includes column number and heading, character format, start position, and so forth.</p>
<p>Invoice Print Style</p>	<p>Do one of the following:</p> <ul style="list-style-type: none"> • Enter a user-defined print style to use for this customer's invoices. • Do the following to print consolidated invoices that display a description, such as <i>**Consolidated Invoices**</i>, instead of printing a list of all items from each invoice: <ol style="list-style-type: none"> 1. In Product Maintenance, define a product with the description <i>"**Consolidated Invoices**"</i>. 2. In the Consolidated Invoicing Product control maintenance record, enter that product description. <p>For information about defining print styles, see Maintaining Print Styles in the Application Maintenance documentation.</p>

Field	Description
Invoice Print Copies	<p>This value applies only to batch printing of invoices using the Print Invoices program. The entry in this field determines the number of invoices to print, and if the invoices go to the Invoice Preview Queue. Enter one of the following:</p> <ul style="list-style-type: none"> • A number between 1 and 9 – Indicates the number of copies to print of each invoice. Each invoice automatically goes to the Invoice Preview Queue. <p>If you enter a positive number in this field and either a 1, 2, or E in the Invoice Fax Copies field, the system prints and either faxes or sends invoices using EDI (Electric Data Interchange). If you flag invoices only for faxing or for sending by EDI, the invoices still go to the Invoice Preview Queue.</p> <p>If you print or send more than one copy of an invoice, all copies after the first are labeled as "Reprint."</p> <ul style="list-style-type: none"> • 0 (zero) – No invoices are printed, but print output depends on the setting in the Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue control maintenance record, as follows: <ul style="list-style-type: none"> • Y – Invoices are sent to the Invoice Preview Queue if the print status is Q. • N – Invoices are not sent to the Invoice Preview Queue, regardless of the print status. • -1 (minus 1) – Prevents invoices from printing, but still sends them to the Invoice Preview Queue. Select this option only if you are not printing, faxing, or sending invoices using EDI. • Leave this field blank – Prints only one copy of each invoice, and all invoices go to the Invoice Preview Queue. <p>If this field is blank for the ship-to customer in a bill-to/ship-to relationship, the system uses the setting in the bill-to account and displays Bill-To in this field. If the bill-to customer's field is also blank, the system uses the setting in the Default Setting For Branch Invoices and Statements Default Setting For Branch Invoices and Statements control maintenance record and displays Control in this field.</p>

Field	Description
<p>Invoice Fax Copies</p>	<p>This field applies only to batch faxing of invoices, and sending of invoices through EDI using the Print Invoices Program. Enter one of the following:</p> <ul style="list-style-type: none"> • 0 (zero) – Prevents printing, faxing, or processing of invoices. • 1 or 2 – Defines the number of copies of each invoice to fax to customers. The system sends invoices to the Invoice Preview Queue. The customer record must include a contact name of either INV.FAX, with a corresponding fax phone number, if the recipient has a special fax number for invoices, or FAX with a corresponding fax phone number for a main fax machine. <p>If you print or send more than one copy of an invoice, all copies after the first are labeled as "Reprint."</p> <ul style="list-style-type: none"> • E – Sends each invoice to the customer through EDI, if the customer is set up for EDI. The system sends invoices to the Invoice Preview Queue. • Leave the field blank – Uses the bill-to customer's setup for printing invoices. <p>Note: If you enter a positive number in the Invoice Print Copies field and a 1, 2 or E in this field, the system prints and either faxes or sends invoices via EDI.</p> <p>If this field is blank for the ship-to customer in a bill-to/ship-to relationship, the system uses the setting in the bill-to account and displays Bill-To in this field. If the bill-to customer's field is also blank, the system uses the setting in the Default Setting For Branch Invoices and Statements Default Setting For Branch Invoices and Statements control maintenance record and displays Control in this field.</p>
<p>Batch Statement</p>	<p>Enter one of the following so that this customer's month-end statement is included in batch statement printing when using the Print Statements program:</p> <ul style="list-style-type: none"> • 0 Copies – No copies print for this customer. • 1 Copy – One copy of the statement prints. • 2 Copies – Two copies of the statement print. • F Fax – One copy of the statement is faxed. All statements to be faxed are faxed as a group after printed statements are finished. <p>The customer record must include a contact name of either STMT.FAX, with a fax number, if the customer has a special fax number for statements, or FAX, with a fax number for a main fax machine.</p> <p>If you print or send more than one copy of a statement, all copies after the first are labeled as "Reprint."</p> <p>If Entity displays in this field, the settings are coming from the entity you are reviewing, not the bill-to customer in a bill-to/ship-to relationship.</p>
<p>Invoice Select Code</p>	<p>Press F10 and enter a user-defined code that defines how often a customer receives invoices. Typical invoice select codes are Daily, Weekly, and Monthly, and are defined in the Valid Invoice Select Codes control maintenance record.</p> <p>Note: Use the attribute name SEL.CODE when using Mass Load to update this file.</p>

Field	Description
Customer Statement Cycle	<p>Press F10 and select a statement cycle code, which determines which customer statements print based on your selection when running the Print Statement program and the Post Service Charges Program. Statement cycle codes are defined in the Valid Customer Statement Cycles control maintenance record.</p> <p>For example, if you enter EOM (end of month) in this field for this customer, the system includes the customer's statement when you run the Print Statements program for customers that want their statements printed only at the end of the month.</p>
Percent of Order to Fill Before Automatically Shipping	<p>Enter a percentage of the order that needs to be complete before the phantom processes the ship ticket for orders with a Ship When Available status.</p> <p>To limit the number of partial shipments the system sends for an order with the Ship When Avail status, enter a minimum percentage of the order that must be filled before making a shipment.</p> <p>When an order has a status of Ship When Avail, the system waits until the designated percentage of the order is available before creating a partial shipment, and then backorders the remaining quantity. The Default B/O Status defined in Customer Maintenance or Control Maintenance determines the status of the newly created backordered generation.</p> <p>This field works with the Fill Rate Measure field, where you enter the units of measure to fill for the order, pieces, weight, or dollars.</p>
Fill Rate Measurement	<p>Enter one of the following units of measure to use with the percentage in the Percent of Order to Fill Before Automatically Shipping field:</p> <ul style="list-style-type: none"> • Pieces • Weight • Dollars • Leave the field blank – The system uses the setting in the Percent Of Order To Fill Before Automatically Shipping control maintenance record. <p>The system rounds up when a unit of measure cannot be divided, such as with pieces. For example, if the Percent of Order to Fill Before Automatically Shipping field is set to 67 percent and there are 9 pieces on an order, then 6.03 pieces are required to meet 67 percent ($9 \times 0.67 = 6.03$). Because you cannot ship a portion of a piece, the system rounds up. In this example, the system rounds up to 7.</p>
Disable FTP Billing	<p>Enter Y to make this customer exempt from third-party billing by way of FTP, otherwise, enter N. This setting overrides the settings for third-party billing in the Default Batch Actions control maintenance record.</p>

Field	Description
SO/PO Tiff/PDF Options	<p>Overrides the setting in the E-mail Attachment Settings control maintenance record for this customer for all sales order and purchase order documents generated and sent using e-mail. If the customer has an associated ship-to customer, the system uses the setting for that customer. If both the ship-to and the bill-to are blank, the system uses the setting in the E-mail Attachment Settings control maintenance record. Select from the following options:</p> <ul style="list-style-type: none"> • Tiff of Print Form – Creates a .tiff image file using the Print form. • Tiff of Fax Form – Creates a .tiff image file using the Fax form. • PDF of Print Form – Creates a .pdf file using the Print form. • PDF of Fax Form – Creates a .pdf file using the Fax form. <p>Note: This setting is only available if you are not running Eclipse Forms.</p>
Statement TIFF/PDF Opts	<p>Overrides the setting in the E-mail Attachment Settings control maintenance record for this customer for all statements generated and sent using e-mail. If the customer has an associated ship-to customer, the system uses the setting for that customer. If both the ship-to and the bill-to are blank, the system uses the setting in the E-mail Attachment Settings control maintenance record. Select from the following options:</p> <ul style="list-style-type: none"> • Tiff of Print Form – Creates a .tiff image file using the Print form. • Tiff of Fax Form – Creates a .tiff image file using the Fax form. • PDF of Print Form – Creates a .pdf file using the Print Form. • PDF of Fax Form – Creates a .pdf file using the Fax form. <p>Note: This setting is only available if you are not running Eclipse Forms.</p>

5. Use the following hot keys as needed:

Hot key	Description
Contracts	Set up customer pricing that can be used for multiple customers.
Email Print Styles	Determine which print styles to use for customer e-mails.
Add'l	Add detail to customer pricing and printing options.

6. Press **Esc** to save your settings and return to the Customer Maintenance screen.

Determining Print Styles for Customer E-mails

You can override default print styles for customers and determine different print styles for the following types of e-mails:

- Invoices
- Bids
- Ship tickets
- Acknowledgements

▶ To determine a print style for a customer's e-mail:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Pricing** hot key to display the Customer Pricing/Printing screen.
4. Use the **E-mail Print Styles** hot key to display the Customer E-mail Print Style Override screen.
5. In the following fields, enter the print style for each type of e-mail:
 - **Customer E-mail Print Style for Invoices**
 - Customer E-mail Print Style for Bids
 - Customer E-mail Print Style for Ship Tickets
 - Customer E-mail Print Style for Acknowledgements

Before the system sends an e-mail, it checks the order and the customer record for print style overrides. If it does not find an override, it uses the print style setting in the Default Print Styles control maintenance record.

6. Press **Esc** to save the settings and return to the Customer Pricing/Printing screen.

Defining Customer Pricing Options

Some pricing options can be set up as customer specific to offer the best customer service and provide the highest profitability for your company.

Doing business with customers from a different country may require you to trade in a currency other than your base currency. You can assign the customer's currency for these customers, so the system can calculate the exchange rates for each transaction.

A price class is a way of classifying customers for pricing purposes. Customers can be assigned several different price classes, depending on what products the customers buy and at which branch they buy them. When you create a new customer record, the system assigns the price class defined in one of the following control maintenance records:

- New Customer Maintenance Template
- New SOE Customer Template
- Default Customer Price Class – The system uses the entry in this record if no template is set up.

To change a customer price class for any branch to which the customer has access, you must be assigned the CUSTOMER.MAINT and CUST.PRICING.EDIT authorization keys and have access to those branches.

► To define customer pricing options:

1. From the **Files** menu select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Pricing** hot key to display the Customer Pricing/Printing screen.
4. In the **Primary Currency** field, do one of the following:
 - Press **F10** and select a currency if this customer's primary currency is not the same as your company's base currency.
 - Leave this field blank to use your base currency for this customer's transactions.

If a customer is based in a different country, the customer's primary currency does not have to be the currency of that country.

Note: Foreign currencies are defined in the Valid Foreign Currencies control maintenance record. After you define valid currencies, you can establish a base currency for your company using the Base Currency For Exchange Rates control maintenance record, and then create a table of exchange rates for each foreign currency in Exchange Rate Maintenance.

5. In the **Default Price Class** field, enter the default price class for this customer.

Price classes are defined in the Valid Customer Price Classes control maintenance record.

6. In the **Percent of Order to Fill Before Automatically Shipping** field, enter the percentage of the order that must be on hand before the order can ship.
7. In the **Fill Rate Measurement** field, enter one of the following units of measure to use with the percentage in the **Percent of Order to Fill Before Automatically Shipping** field:
 - **Pieces**
 - Weight
 - Dollars
 - Leave the field blank – The system uses the setting in the Percent Of Order To Fill Before Automatically Shipping control maintenance record.

The system rounds up the fill rate for units of measure that cannot be divided, such as with pieces. For example, if the percentage is set to 67 and the order contains 9 pieces, 6.03 pieces are required to meet 67 percent ($9 \times 0.67 = 6.03$). Because you cannot ship a portion of a piece, the system rounds up the fill rate to 7.

8. In the **Pricing Procedure** field, press **F10** and select the pricing procedure that the system uses for determining prices on this customer's orders.

Note: In the selection screen, the procedure that is preceded by *DEFAULT* is the default procedure set up for your company by IDMS.

9. Use the following hot keys as needed:

Hot key	Description
Contracts	Set up customer pricing for multiple customers.
Email Print Styles	Define which print styles to use for customer e-mails.
Add'l	Add more detail to customer pricing and printing options.
Customer Types	Assign multiple promotional types to customers to make promotions more available to customers who deal in specific business areas, for example, plumbing and HVAC.
Pre Class Ovrld	Associate a matrix type with a customer price class to base price discounts on customer class.
Contract Upload	Use the Contract Upload program to determine if the system should create cost only overrides or both cost and price overrides for rebates set up for a customer's EDI trading partners.

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

Assigning Pricing by Customer Price Class

Customers who buy a broad range of products may require more than one customer price class assignment. You can give different discounts to customers based on the types of products they most often buy. When you assign a customer a price class, you can set up pricing matrix cells for this customer according to the price class rating.

For example, a customer has earned a class 1 rating through sales of electrical supplies, but if class had been rated through sales of wire, the customer would have a class 4 rating. If this customer retains a class 1 rating while buying wire, the discounts remain the same for wire and electrical supplies for this customer.

Setting the price class/product matrix type feature changes the pricing hierarchy as follows:

- Normally, the hierarchy is set in order of: ship-to branch-specific price class overrides, and then ship-to default price class overrides.
- Pairing the customer price class with a product matrix type in Customer Maintenance sets the hierarchy as: ship-to branch-specific price class overrides, and next ship-to price class, and then ship-to default price class overrides.

► To assign pricing by customer price class:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Pricing** hot key to display the Customer Pricing/Printing screen.
4. Use the **Prc Class Ovr** hot key to display the Price Class Override screen.
5. In the **Matrix Type** field, enter the product matrix type for the discount.

Note: Product matrix types are defined in the Valid Product Matrix Types control maintenance record, and each product is assigned a matrix type on the Product Price Maintenance screen.

6. In the **Prc Class** field, enter the customer price class for the discount. Correct discounts are applied when this price class and its corresponding product matrix type defined in Product Maintenance.

Note: Set up and assign price class ratings in the Valid Customer Price Classes control maintenance record, and assign default customer price classes on the Customer Pricing/Printing screen.

7. Press **Esc** to save your changes and return to the Customer Pricing/Printing screen.

►To disable the product matrix type functionality:

1. From the **System > System Files** menu, select Control Maintenance to display the Control Maintenance screen.
2. In the **Keyword** field, enter **Valid Product Matrix Types**, and press **Enter** to display the Prod Matrix Types screen.
3. Delete all entries on this screen.
4. From the **Reports** menu, select **Report Writer** to display the Report Writer/Mass Load Design screen.
5. Replace the entry in the **Matrix Type** field in all product records by mass loading a null entry for that field.

Note: Product matrix types are defined in the Valid Product Matrix Types control maintenance record, and each product is assigned a matrix type on the Product Price Maintenance screen.

6. Replace the entry in the **Prc Class** field on the Customer Prc Class Ovrld screen in all customer records by mass loading a null entry for that field.

Note: Set up and assign price class ratings in the Valid Customer Price Classes control maintenance record, and assign default customer price classes on the Customer Pricing/Printing screen.

Using Contract Pricing With Customer Records

Contract pricing uses a *generic* customer to apply rebates, overrides, and other promotional pricing to multiple customer records. This eliminates the need to create pricing criteria for each customer. You can also set up multiple customers in a home branch, and apply contract pricing to that branch to avoid entering pricing information for each customer.

This page contains the following procedures:

- Creating a contract customer.
- Assigning contract pricing to an existing customer.
- Copying contracts to a group of customers.

▶ To create a contract customer:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, do one of the following:
 - Enter a customer's name to display the customer record that you want to use as the contract customer.
 - Enter a generic customer name to use as a contract customer. A generic customer name can be a description of the pricing rules or override represented in the pricing rules.
3. In Sell Matrix Maintenance, create a cell matrix for this customer that includes the pricing rules that you want to apply to this special pricing circumstance.

▶ To use contract pricing for an existing customer:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer for which to apply the contract pricing rules.
3. Use the **Pricing** hot key to display the Customer Pricing/Printing screen.
4. Use the **Contracts** hot key to display the Contract Pricing screen.
5. Enter the name of the customer associated with the contract you want to use. This customer can be a generic customer you created or an actual customer. You can assign multiple customer names.

The settings in the Search Contract Pricing In Order Listed and the Best Price Check Through Matrix Cells control maintenance records affect how the system searches for the correct price. The example in the following table assumes that the system has at least two contracts set up:

Search Contract Pricing In Order Listed	Best Price Check Through Matrix Cells	Search results
Y	N	Searches first contract product and then group and then searches each consecutive contract, as follows: 1. Contract 1/Product 2. Contract 1/Groups 3. Contract 2/Product 4. Contract 2/Groups
N	N	Searches the first contract for product and then each consecutive contract for product before searching contracts for groups, as follows: 1. Contract 1/Product 2. Contract 2/Product 3. Contract 1/Groups 4. Contract 2/Groups
Y or N	A or C	All Contract cells will always be searched for the best price.

6. Press **Esc** to save the information and return to the Customer Pricing/Printing screen.

This customer record refers to the contract sell matrix only when the customer orders products assigned to the matrix cell. You can point to a contract to include some items ordered by the customer, and you can define different pricing rules for other items by having a separate matrix cell for this customer.

► **To copy contracts to a group of customers:**

1. From the **Files > Price Maintenance** menu, select **Customer Contract Copy Utility** to display the Customer Contract Copy Utility screen.
2. In the **Customer To Copy From** field, enter the customer ID from which information is copied.
3. In the **Home Branch** field, enter the home branch from which to select the customer. The system copies the contract information to customers who have this branch assigned as their home branch.
4. In the **Customer Type** field, enter the customer type from which to select the customer. The system copies the contract information to customers who are assigned this type. Use the **Multi** hot key to include multiple types. Customer types are assigned from the Customer Pricing/Printing screen's **Customer Type** hot key.

5. In the **Price Class** field, enter the price class from which to select the customer. The system copies the contract information to customers who are assigned this class. Use the **Multi** hot key to include multiple price classes. Default customer price classes are assigned on the Customer Pricing/Printing screen.
6. In the **Customers to Copy To** field, enter the customer to which to copy the information. Use the **Multi** hot key to include multiple customers. If you entry a customer here, the system ignores the **Home Branch**, **Customer Type**, and **Price Class** fields and copies the contract information to this customer or set of customers.
7. Use the **Begin** hot key to copy the information to the selected customer.

Creating Contracts for Customers and EDI Trading Partners

The EDI 845 Contract Upload program can create cost-only overrides or both cost and price overrides for rebates that you have set up for a customer's EDI trading partners.

When you receive a pricing contract from a vendor, you need to create a customer contract record for which the system sets up the sell matrix information. Then link the customers for which this contract was created to the customer contract record. Creating and then linking to a customer contract record, enables you to link multiple customers to one pricing contract.

▶ To create contracts for a customer and EDI trading partner:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the customer ID for the generic customer contract record.

In the **Name** and **Index** fields, include words that identify the vendor and the contract number, or use the **Addl Keywords** hot key on the Additional Info screen to store them as keywords.

Note: Because the system displays the **Index** in the 845 Queue, we recommend that you at least include the contract number in the **Index** field. The system cannot create the upload without the contract number being in one of these three locations.

3. Use the **Pricing** hot key to display the Customer Pricing/Printing screen.
4. Use the **Contract Upload** hot key to display the Contract Upload Setting screen.
Any active trading partner that has a group profile for this customer set up for inbound 845s displays in the **Trading Partner** column.
5. In the **Cost Only** column, enter **Y** if you want the EDI 845 Contract Upload program to create cost-only overrides rather than both cost and sell overrides. Leave **N** as the entry to create both cost and sell overrides.
6. In the **Formula** column, enter the formula that the system uses to apply a markup to each vendor used by the customer.

Note: This markup is used only when new groups or items are added to the updated contract, or a when a contract is set up for the first time.

7. Press **Esc** to save the information and exit the screen.

Note: The sell matrix cells will be associated with this customer contract record. The actual customer records to which this contract applies will link to this customer contract record for pricing. Create a customer contract record for each *new* contract number. If a vendor sends an 845 with updated pricing and effective dates for an existing contract, the system uses the customer

contract record that you set up the first time you received that contract number.

Entering Additional Customer Pricing and Printing Data

Use this screen to enter additional customer information related to printing and pricing in addition to data entered on the Customer Pricing/Printing screen.

► To enter additional customer printing and pricing data:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Pricing** hot key to display the Customer Pricing/Printing screen.
4. Use the **Add'l** hot key to display the Additional Customer Pricing/Printing Data screen.
5. In the **Print Kit Comp Override** field, enter one of the following:
 - **Y** – Prints the kit components as well as a kit description, regardless of the setting in the **Print Components** field in Product Kit Maintenance.
 - **N** – Prints only the kit description.
 - **Default** – Uses the setting in the **Print Components** field on the Product Kit Maintenance sub-screen.

Note: For any of these selections to apply, you may need to modify your forms program to honor the selection.

6. In the following fields, define the default printing format for the system to use from the Carting Packing screen. Set the Carton Packing Labels activity triggers to automatically print these items.

Field	Description
Shipping Label Format	Displays format on which shipping labels print for this customer.
Product Label Format	Displays format on which product labels print for this customer.
Carton Label Format	Displays format on which carton labels print for this customer.

Note: If you do not define default printing formats for a customer, the system uses the default printing formats defined for your shipping branch. You can override default printing formats from the Carton Packing screen.

7. In the **SOE User Defined Document** field, press **F10** and select the print routine to run when an order for this customer prints, such as Sales Order Zebra Label, Product Zebra Label, or Shipping Label. Typically, this option defines print labels.
8. In the **Parent Statement Customer** field, enter the customer to include on a parent statement. Typically, this is the bill-to customer.

9. In the **Single Invoice** field, enter one of the following to define how the system bills the customer for an order:
- **Y** – Sends the customer an invoice for the full order amount after the first shipment is made. The system bills for the entire order, even if the invoice contains a backorder.
 - **N** – Sends the customer an invoice with each shipment on the order. This is the default.
10. In the **Use Last Price/Cost Logic** field, specify whether a customer's last price and cost for a product determines the current price and cost for that product. See guidelines, below, if necessary.

Your entry in this field overrides the setting in the Use Last Price/Cost Logic control maintenance record:

- **Prompt** – Displays the Last Price Verification screen for the customer in Sales Order Entry when a product is placed on an order. The last price displayed in this dialog box is the last price paid for the item over all branches. The customer is not affected by the setting in the Use Last Price/Cost Logic control maintenance record.
- **Price Only** – Uses the last price as the current price. To determine the current cost, the system uses the normal costing calculation. If last price pricing is found, and thus overrides standard best-price-check logic, setting this option overrides promotional pricing. Typically, only companies whose business type dictates it will activate last price pricing.
- **Cost Only** – Uses the last cost as the current cost of an item. To determine the current price, it uses the normal pricing calculation.
- **Both** – Uses the last price and last cost of an item as the current price or cost of an item.
- **None** – Checks the Use Last Price/Cost Logic control maintenance record to determine if last price pricing is enabled for the customer.

Note: To correctly price branch transfers, you must set the Last Price/Cost Logic to **None** when the Use Last Price/Cost Logic control maintenance record is turned on.

The following guidelines apply to last price pricing:

- Last price pricing disregards all other pricing or matrix cells with the exception of contract pricing and customer-specific matrix cells (ship-to or bill-to) and generates an order entry price based on the percentage markup from the last sale of the item to that customer.
- When a contract price or customer specific matrix cell is not in effect, the system prices an item at the COGS cost multiplied by the gross margin of the selling price from the customer's most recent shipment for the same item. The pricing audit displays the basis as "LP" and the formula as the percentage of difference between the last price and the calculated new price. The formula for margin is:

Price - Cost

Price

For example, if the customer's price for the item on the most recent invoice was \$1.25, the cost was \$1.00 (a margin of 20%), and the current cost is \$1.10, then the new price will be \$1.375 and the audit displays LP+.10.

- You can activate last price pricing during system implementation, based on your business requirements. For more information, see [Viewing a Customer's Last Price in Sales Order Entry](#).
 - For this customer at each branch, you can define a threshold variance and a cost reduction factor to use to reduce a price if the current cost is less than the previous cost and the difference exceeds the threshold. Define the threshold and reduction factor in the Minimum Variance Before Last Price Reduction control maintenance record.
11. In the **# of Decimal Places for Pricing** field, enter the number of decimal places to show for prices on this customer's invoices. For example, to display prices with two decimal places, such as 10.53, enter **2**. The number of decimals you set here also determines how prices display for the customer on your Web Commerce site.
- Note:** A setting in this field overrides the Number Of Digits Of Accuracy For Pricing control maintenance record for the customer.
12. In the **Restrict Price Changes in Sales Order Entry** field, enter one of the following to determine if a sales order writer can change prices for this customer:
- **Y** – Prevents sales order writers from changing prices in Sales Order Entry for this customer.
 - **N** – Allows the sales order writer to change prices in Sales Order Entry for this customer, based on user authorization.
13. In the **Remit-To Override** field, press **F10** and select a remit-to override entity to display a different remit-to address than the remit-to for the branch on the customer's bills. The remit-to is the entity where the customer sends payment.
14. In the **Back Order Printing** field, enter one of the following to define how backordered items print on invoices:
- **No Back Order Printing** – Does not print backordered items on the ship ticket.
 - **Print on First Gen Only** – Prints all backordered items on the first generation ship ticket only.
 - **Print Back Orders** – Prints backordered items on all ship tickets printed for this customer.
15. Press **Esc** to save the settings and return to the Customer Pricing/Printing screen.

Setting Up Customer Sales Tax

You normally tax a consumer in the district where the consumer takes ownership of the product, but you can enter, change, and override a customer's sales tax. Tax jurisdictions are assigned by zip code.

Use the Sales Tax screen to complete the following tasks:

- Add a tax exception group to a customer record.
- Assign a tax jurisdiction override to a customer.
- Enable line item taxability for a customer.
- Adding a tax exempt number to a customer record

Customer Points Overview

You can promote sales by rewarding customers for purchasing a target dollar amount of a product, products within a price line, or products within a sell group.

Points programs must be set up for each customer who can participate in the program. If you create multiple points programs that include many of the same products and price lines, you can assign points programs to products and price lines to keep the points allocations consistent among the different points programs.

When you assign points programs to products, price lines, and customers, product-level points criteria override price line-level points criteria, and product and price line level points criteria override customer-level points criteria, unless you create an override at the customer level. If no points criteria are entered at the customer level, regardless of points settings at the product or price line level, customers do not earn points.

You can add another level to the points program by defining a qualifying target within a customer's points program. A customer's points program can include numerous products, some listed as qualifying and others as not qualifying. Assigning a qualifying target requires that customers accrue a defined amount of qualifying points, as well as accrue the points required for the minimum target to receive the points program's reward.

Assigning Points Programs to Customers

Your customers can earn points each time they purchase products, products within price lines, or products within sell groups that are listed in the points program. You set the target minimum number of points the customer needs to receive a reward and the number of points the system counts per dollar amount spent. You can save a customer's points program as a template and reuse the template for other customers.

System Setup for Points

To offer a points program to your customers, first define customer points programs in the Valid Customer Points Programs control maintenance record, and then assign the CUST.POINTS authorization key to users who will access and edit the Customer Points Maintenance screen and run the Customer Points Report. Then, use the Customer Points Maintenance screen to set up points programs for each customer who can participate in the program.

Product- and Price Line-specific Points

If you have products or price lines that you offer in multiple points programs, you can assign points programs to these products and price lines to keep points allocations consistent among the different points programs. For example, encourage customers to qualify for a chance to earn a reward when they accrue 1000 points from buying products in your ABC price line. You can set the system to calculate one point for each dollar spent in that price line. At this rate, a customer must spend \$1000 on products in the ABC price line to accrue 1000 points. You are not required to assign a points program to price lines or products to use the customer points program.

When you define points programs at the product, price line, and customer levels, the system applies the product-level points criteria first, if any, and then the system applies the price line-level points criteria. If you enter no points criteria at the product or price line level, the system applies the points criteria entered on the Customer Points Maintenance screen. If you enter no points criteria on the Customer Points Maintenance screen, the customer does not earn points.

Qualifying Target

You can add another level to the points program by creating a list of products, price lines, or sell groups for a qualifying target within a customer's points program or template. A customer's points program can include numerous products or groups of products, some listed as qualifying and others as not qualifying. All points accrued from buying products in the points program – qualifying or not – accrue toward the minimum target, but only those products defined as qualifying accrue towards the qualifying target. Offering qualifying products requires customers to buy a minimum amount of these products, based on what you set as the qualifying target. For example, if you set the minimum target at 100 for products in a sell group, and set the qualifying target at 50 for specific products within that sell group, the customer must accrue 100 points to receive the points program reward, and 50 of those points must come from buying qualifying products.

► **To assign points programs to a customer:**

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer** field, enter the bill-to customer ID for whom points will accrue to display the customer record. If you assign points programs to ship-to only customers, those points will accrue only for the associated bill-to customers.
3. Use the **Add'l Info** hot key, and then the **Points Maint** hot key to display the Customer Point Maintenance screen.

The screen displays the customer name.

4. Complete the following fields, as needed:

Field	Description
Program	<p>Press F10 and select a points program. You can assign as many points programs as you want to a customer, but each points program is maintained separately using the Customer Point Maintenance screen.</p> <p>If you assign points programs to ship-to only customers, those points will accrue only for the associated bill-to customers.</p> <p>Points programs are defined in the Valid Customer Points Programs control maintenance record.</p> <p>Note: If a name displays in the Template field, you must delete the template name before you can access the Program field.</p>
Template	<p>Press F10 and select a previously saved template. Use points templates when you plan to assign the same points program, all with the same product or group criteria, to multiple customers.</p> <p>Create a points template by first creating a customer points program, and then using the Save Template hot key.</p> <p>Note: This screen allows either an entry in the Program field, or an entry in the Template field, not in both.</p>
Minimum Target	<p>Enter the lowest number of points that the customer must accrue to earn the points program's reward. The customer earns points based on the dollar amount spent for any products listed in the points program. The system determines actual point value by the settings for each product, as found on the Product Maintenance, Price Line Maintenance, or Customer Point Maintenance screens.</p> <p>Note: If you save this customer points setup as a template and later change a target points value, the new value is not saved in the original template. Use the Save Template hot key to save the information on a new template to reuse the new target value, or save the information using the existing template name to update the original template.</p>

Field	Description
<p>Qualifying Target</p>	<p>Enter the lowest number of points the customer must accrue to qualify for the points program. Use this field only if you entered a value in the Minimum Target field, and want to add a product or group of products that the customer must purchase in order to qualify for the program reward.</p> <p>For example, if you enter 50 in the Minimum Target field and 10 in the Qualifying Target field, the customer must accrue a minimum of 50 points from buying products in this points program to receive the points program reward, of which 10 points out of the 50 must come from buying products in this points program that are listed as qualifying. Qualifying points also count toward the program's minimum target.</p> <p>Define the customer points program's qualifying and non-qualifying products by entering Y or N in this screen's Qual field.</p>
<p>ALL, Desc,/PrcLine, !Group</p>	<p>Enter products, price lines, or sell groups into the points program, as follows:</p> <ul style="list-style-type: none"> • All – Enter ALL to allow the customer to earn points for all products in the product file. • Desc – Enter a product description if the customer is allowed to earn points for purchasing that product. Type a period (.) followed by the product ID or catalog number. • /Prc Line – Enter a price line to allow the customer to earn points for purchasing products in that price line. Type a slash (/) followed by the price line, or a slash followed by a partial name to display a list of price lines. • !Group – Enter a sell group to allow the customer to earn points for purchasing products in that sell group. Type an exclamation point (!), or an exclamation point followed by a partial name to display a list of price groups. <p>If a product is associated with more than one line item on the screen:</p> <ul style="list-style-type: none"> • A product overrides the a price line to which that product belongs. • A price line overrides a sell group to which that price line belongs. • A sell group overrides ALL. <p>If you enter two line items for the same product, price line, or sell group, the system uses the line item whose effective date is closest to the current date and has not expired.</p> <p>The system indicates that the numbers entered in the Stk and Dir fields are multipliers or percentages used to calculate points earned.</p>

Field	Description
T (type)	<p>Enter one of the following to define whether the value in the Stk or Dir fields is a multiplier or a percentage.</p> <ul style="list-style-type: none"> • An asterisk (*) – Multiplies the number in the Stk and Dir fields by a product's dollar amount to determine the number of points earned for that purchase. For example, if a customer buys two of the same stock product at \$10.00 each, and the Stk field displays 1.0, the customer earns 20 points. If you select this option, you can enter one decimal point in the Stk and Dir fields. For example, enter .5 in the Stk or Dir so that the customer earns half a point for each dollar spent. So, for a \$10 purchase, the customer earns 5 points. • A percent sign (%) – Multiplies the number in the Stk and Dir fields as a percentage of a product's dollar amount to determine the number of points earned for that purchase. For example, for an entry of 20 in the Stk field, the system multiplies 0.2 times the dollar value, so that the customer earns four points after purchasing \$20.00 worth of product. Entries for percentages must be whole numbers; no decimal points are allowed.
Stk	<p>Enter the value to multiply by the dollar amount of stock products purchased from the points program. When a customer buys a stock product, the system multiplies this number or percentage by the dollar amount to calculate the number of points the customer earns.</p> <p>Entries in the T field define whether the system calculates whole numbers (*) or percentages (%).</p>
Dir	<p>Enter the value to multiply by the dollar amount of direct sales products purchased from the points program. When a customer buys a direct sale product, the system multiplies this number or percentage by the dollar amount to calculate the number of points the customer earns.</p> <p>Entries in the T field define whether the system calculates whole numbers (*) or percentages (%).</p>
Ovrd	<p>Enter one of the following to determine if the system overrides points settings at the product or price line level:</p> <ul style="list-style-type: none"> • Y – The system uses the calculation method from Customer Point Maintenance screen, regardless of whether a points calculation method was entered at the product or price line level. • N – If you defined points at the product or price line level, the system uses the calculation method entered at the product level first, and then if a calculation method was not entered at the product level, the system uses the calculation method entered at the price line level. If no calculation method was entered at the product or price line level, the system uses the calculation method entered on the Customer Points Maintenance screen. If no calculation method was entered for the product, price line, or customer level, the customer does not earn points.
Qual	<p>Enter Y for the line item if this product, price line, or sell group contributes as one of this point program's qualifying items; otherwise, enter N. To use this option, you must enter a value in the Minimum Target field and in the Qualifying Target field.</p> <p>Set up qualifying items to require sales of specific products.</p>
Effect	<p>Enter the date the customer can begin accruing points for buying the products on this line item. If no date is entered in this field, the system considers the points program valid from the time you started using Eclipse.</p>

Field	Description
Expire	Enter the date past which the customer can no longer accrue points for buying the products on this line item. If no date is entered in this field, the customer can accrue points indefinitely for buying products in the line.

5. Use the **Save Template** hot key to save the list of products, price lines, and sell groups as a template. At the Enter Save ID prompt, type an ID and press **Enter** to save the list. You can then use this template when setting up points programs for other customers by entering that ID in the **Template** field.

Note: If you save this customer points setup as a template and later change a points value of the target, the new value is not saved in the original template. Use the **Save Template** hot key to save the information on a new template to reuse the new target value when setting up points programs for other customers.

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

Viewing and Editing Customer Points

Accumulated, redeemed, and adjusted customer points are maintained within individual customer accounts. You must be assigned the CUST.POINTS authorization key to view and edit customer points.

► To view and edit customer points:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer** field, enter the customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Points Maint** hot key to display the Customer Points Maintenance screen.
4. Use the **Edit Points** hot key to display the Points Maintenance screen.

Points data for the current year displays as the default. Use the **Change Year** hot key and press **Alt-<** to shift backward or **Alt->** to shift forward one year at a time.

The **Year** column displays the following:

- The year for the displayed data.
- The balance forward from the previous year (*Bal*).
- Each month of the current year.
- A year-to-date total (YTD).
- The overall balance (*Bal*).

The view-only **Accrued** column displays the points accrued by the system for each month of the year.

5. In the **Redeemed** column, enter one of the following when a customer redeems points:
 - The number of points *redeemed* as a positive number when a customer uses a defined number of points for a reward.
 - The number of points as a negative number if a customer *returns* previously redeemed, but unused points.
6. In the **Adjustments** column, enter the number of points, either positive or negative, to adjust the customer's accrued points for a given month.
7. The ***Bal*** (Balance) field displays the total accrued points that have not been redeemed. The formula is:
$$\text{Balance} = \text{Accrued} - \text{Redeemed} + \text{Adjustments}$$
8. Press **Esc** to return to the previous screen.

Printing Points Statements and Reports

Run the Customer Points Report and the Customer Points by Price Line Report for all customers, for all customers in a branch or territory, or for a single customer. The reports list the monthly accrued, redeemed and adjusted points for a year and the balance for previous years.

Use the Customer Points Report to list the accumulated, redeemed and adjusted points for a given year for one or more customers.

Use the Customer Points by Price Line Report to list the month-to-date and year-to-date accumulated points and purchase amounts as of a given date for each price line purchased by each customer, or use Report Writer to create your own custom reports.

Use the Customer Points Statement Report to update your customers on their points program status for customers participating in the Customer Points program.

In addition to using the system's prepared reports, dictionary items, defined in the entity file, can be used to create reports. For information about using the Eclipse Dictionary, see Eclipse Dictionary Overview.

Splitting Commissions

You can split the commission between sales representatives working with one customer account. For example, one of your outside salespeople and one of your inside salespeople share in a commission. The outside sales person who is the on-site contact receives 80 percent of the commission and the inside salesperson receives 20 percent. Use split commission percentage to divide the commission between the two.

► To split a commission:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Split Commission %** hot key.
4. At the prompt, enter one of the following to display the Salesperson Split Commission Percentage screen.

- **o** – Assigns an outside salesperson.
- **i** – Assigns an inside salesperson.

The Salesperson Split Commission Percentage screen displays for the selected type and any split commissions in effect.

If split commissions have not been assigned, the Salesperson Split Commission Percentage screen displays with the salesperson's ID and the percentage set to 100.

5. In the **Branch** field, enter the branch for which the split commission applies.
6. In the **CommGrp** field, enter the commission group to which the salesperson at the branch belongs. If left blank, all commission groups are assigned to the salesperson at the branch.

Note: **DLFT** is a valid commission group for this field. The system uses the default commission group when a product is not assigned to a commission group.

7. In the **Salesperson** column, enter the names of the salespeople assigned to the commission group at the branch.

The system populates this column with the default inside or outside salesperson set in Customer Maintenance.

Note: The system uses the following hierarchy when determining split commissions for salespeople:

1. Commission Split on the Ship-To
2. Default Outside Salesperson on the Ship-To
3. Commission Split on the Bill-To
4. Default Outside Salesperson on the Bill-To

8. In the **Percentage** column, enter the percentage of the commission each salesperson receives. The percentage total must equal 100 and can have up to two decimal places.
9. Press **Esc** to save the information and return to the previous screen.

Changing the Sales Commissions Earned

You can change the commissions earned by the order writer, inside sales representative, or outside sales representative without changing their standard commission plans. Use this feature to encourage sales to new customers, or to offer a higher commission during promotions.

►To change the sales commission earned:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter a customer ID to display the customer record.
3. Use the **Add'l Info** hot key, then use the **Commission Ovrld** hot key to display the Customer Commission Overrides screen.
4. In the **Writer**, **Inside**, and **Outside** fields, enter percentages of increased or decreased commission for each salesperson.

The system changes the salesperson's commission for sales to this customer by multiplying the salesperson's standard commission percentage by the percentage entered on this field. For example: To double the commission earned, enter 200%; or to reduce the commission earned by half, enter 50%.

5. In the **Review Date** field, enter the date to review the percentages set on this screen, as needed. Use this information to create a report using Report Writer that lists all customers with commission overrides in effect and their corresponding review dates.
6. In the **Reason** field, enter an explanation of the commission overrides entered on this screen, as needed.
7. Press **Esc** to save the information and return to the previous screen.

Vendor Maintenance Overview

Use Vendor Maintenance to create vendor records that store location, transaction, and shipping information for all of the companies from which you buy products.

When you enter a vendor's name on a purchase order, on reports, or anywhere else in the system vendor data is used, the system refers to the vendor record.

You can:

- Assign branch accessibility to determine which branches can purchase products from a vendor. You can assign as many branches as necessary to a vendor to meet your company's purchasing needs.
- Create vendor expense distribution codes to pre-define the distribution of a vendor's invoice to G/L accounts based on a percentage.
- Monitor a vendor's shipping practices by setting a number of days before and after a purchase order's due date that a shipment can arrive from a vendor without creating an unquality event. The system posts an unquality event when these standards are missed.
- Enter the minimum amount your vendors require you to buy of a target type to prevent the release of purchase orders before those target amounts are met.
- Determine the branch to serve as the default drop point for central purchasing purchase orders submitted to each vendor.
- Set parameters for outsourcing accounts payable checks for vendors to determine when and under what circumstances a vendor gets a check.

Creating Vendor Records

Use the Vendor Maintenance screen to create and maintain vendor records. The vendor record identifies details such as shipment schedules and consignment specifications. If the vendor has different payment and shipment addresses, you need to create separate records for each, and you must create the pay-to record first.

For information about creating vendors for customer refunds and other one-time transactions, see *Creating Vendor Records for Customer Refunds and Other One-Type Payments*.

► To create a vendor record:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field enter **new**.
The system assigns a vendor ID number that displays in the upper right corner of the screen.
3. In the **Name** field, enter the vendor's name as you want it to appear on documents. If this is a pay-to record, use the vendor's legal name.
4. In the **Address** field, do one of the following:
 - If this is the pay-to address, enter the address to which to send correspondence.
 - If this is the ship-from address, enter the address from which products will ship.

Note: If you need additional lines to complete the address, use the **Add'l Info** hot key, then use the **Addl Address** hot key to enter the remainder of the vendor's address.
5. In the **City** field, enter the name of the city that corresponds to the address entered above.
The system displays a selection list. Select the state and zip code from the list and press **Enter** to populate the **ZIP**, **ST**, and **Country** fields.
Use the **Add'l Info** hot key, then the **Addl Address** hot key to enter additional vendor address information if necessary.
6. In the **Sort By** field, enter as many as 15 characters of the most significant word in the vendor name or any combination of numbers or letters for the system to refer to when sorting vendors in alphabetical order.
7. If this is a ship-from vendor, in the **Pay To** field, enter the vendor' pay-to record name.
8. In the **Index** field, enter additional words for the search index to use when searching for this vendor. This field is required.

The system uses the words in this field and the other fields on this screen, as tokens in the search index. You can add any information in this field that might be useful for a search. Some examples:

- Example 1: If you know your vendor by their vendor number on your old system, enter that number in this field.
- Example 2: If the vendor name is Alan Clawson Plumbing, enter the abbreviation ACP.

9. In the **Contacts-Phones** field, list the vendor's primary company phone and fax numbers, as well as the names, phone numbers, and fax numbers of the vendor's employees with whom you do business. Follow the guidelines:

Field 1 – Type the name of the person who is the primary contact for this customer.

Field 2 – Type FAX to identify the main fax machine.

Fields 3 - 6 – List additional company contacts and fax codes associated with additional fax numbers:

- For invoices, type INV.FAX as the contact.
- For statements, type STMT.FAX as the contact.
- For memos, type MEMO.FAX as the contact.

If you do not enter the fax code, faxed invoices, statements, and memos go to the main fax number.

Note: Use the **Contact** field on this screen as a quick-reference list. This information is not connected to the information entered through the **Contacts** hot key, where you can add detailed contact information.

10. Navigate to the upper right section of the Vendor Maintenance screen, and flag any of the following options with an asterisk (*):

Flag the option...	if...
Pay To	this is a vendor's pay-to name and address. You can flag the vendor as both pay-to and a ship-from.
Ship From	this is a vendor's ship-from name and address. You can flag the vendor as both a pay-to and a ship-from. If the vendor is a ship-from but not a pay-to, enter the pay-to vendor associated with this ship-from in the Pay-To field. If there is no ship-from identified in the vendor record, the vendor is not available for purchase order creation.
Auto Delete	you want this vendor deleted from the system after all history and open transactions for this vendor are purged. A vendor can be deleted only if there are no ledger, PSUB, or A/P records associated with it.

Flag the option...	if...
Freight Vendor	<p>the vendor provides and charges for freight. A freight vendor must be flagged as pay-to and ship-from to be entered on a P/O totals screen.</p> <p>Note: If you flag this option, you cannot change the freight vendor status after the vendor has transaction history.</p>
Manufacturer	the vendor is a manufacturer.

11. Navigate to the lower right section of the Vendor Maintenance screen and complete the following fields, as needed:

Field	Description
Dflt Ship Via	Press F10 and select the default method of product shipment this vendor uses..
Vendor Type	Press F10 and select a value that identifies how you use the vendor's services, for example, FREIGHT, or SERVICE. Control user access to vendor types by assigning the VALID.VEN.TYPES or INVALID.VEN.TYPES authorization key. Vendor types are stored in the Valid Vendor Types control maintenance record.
Over/Short% and Over/Short\$	<p>Enter the following information in each field:</p> <p>Over/Short percentage – The percentage a purchase order amount is allowed to be greater or less than the invoice amount when reconciling P/Os in A/P.</p> <p>Over/Short dollars – The dollar amount a purchase order amount is allowed to be greater or less than when reconciling P/Os in A/P.</p> <p>For example, if the settings are 1% and \$5, and the vendor invoice is \$100, and the reconciled P/O's total is \$96, then the system does not approve the invoice because the difference exceeds 1%.</p> <p>Note: Use these fields only for exceptions to the default settings in the A/P Over/Short Maximum control maintenance record.</p>
Pay Terms	Press F10 and select a payment terms code to use for this vendor's invoices. You can override this setting in Purchase Order Entry.
Freight	<p>Enter a freight term to restrict entry of freight on a purchase order, require a freight vendor to be specified, notify the user that the vendor is freight allowed, require the user to enter a freight amount when the purchase order is received, or prohibit the user from entering a freight vendor on the Totals window of the purchase order.</p> <p>In A/P Entry, the system displays a warning message if a user enters a freight amount on a P/O for a vendor and this field is flagged. Freight terms for vendors are set up in the Vendor Freight Terms control maintenance record.</p>

Field	Description
B/O Days	<p>Enter one of the following to determine how to handle backorders:</p> <ul style="list-style-type: none"> • R – Adds backordered items to the Review P/O Backorders queue, usually found on the Purchasing menu. • C – Cancels any backordered items from this vendor. • # – Enter the number of days to be added to the receiving date to set the anticipated receiving date for backordered items. • Leave the field blank – Uses the entry in the Default B/O Days For Purchase Orders control maintenance record. <p>For direct lot generations, the system also looks at the settings in this field and the Default B/O Days For Purchase Orders control maintenance record. If both this field and the control maintenance record are blank, or are set to R or C, the lot generation default ship date is three days from the current date.</p>
Primary Currency	<p>If this vendor's primary currency is not the same as your company's base currency, press F10 and select a currency from the list, otherwise, leave this field blank.</p> <p>Note: Even if a vendor is based in a foreign country, the vendor's primary currency does not have to be the currency of that country.</p>

12. Use any of the following hot keys, as needed:

Hot Key	Description
Del	Deletes this vendor record. The system prompts for confirmation before deleting. If this vendor has open orders or payables, the system warns that it cannot delete this vendor.
Expense Distr	Create vendor expense distribution codes to pre-define the distribution of a vendor's invoice to G/L accounts based on a percentage.
OE Message	Enter a message to appear each time this vendor is displayed in Purchase Order Entry. Press Esc to save the message and return to the Vendor Maintenance screen.
Branch	Assign branch accessibility to this vendor. This information is required before the vendor displays in the primary index search.
EDI	Create an EDI trading partner profile for this vendor.
UET	Set parameters that determine unquality events for this vendor.
Maint Log	View a record of every change made to this vendor record.
Access	Assign access to this vendor for those using Eclipse Sales Force Automation.
Part#	Assign vendor-specific part numbers to this vendor.
Add'l Data	Add more detailed information to the vendor record.
Notes	Write user-defined notes for this vendor record.
OE Instructs	Write internal notes and vendor instructions that display on the Header screen of Purchase Order Entry.
Contacts	Enter vendor-related contact information.
Copy	Create a new vendor record by copying the information from the currently displayed record.
Classify	Displays the User Defined Data screen for this vendor.
WWW	Enter the vendor's internet address and e-mail address.

Assigning Branch Access to Vendors

When you create vendor records, you must identify which branches can order products from this vendor. If your company is located in Massachusetts, for example, you may not want your purchasing agent to buy materials from a vendor located in California if you can get the same materials from a vendor in Connecticut.

You can assign each vendor a home branch, and then assign as many other branches as necessary to meet your company's purchasing needs.

At your branch, when performing a search in Purchase Order Entry or A/P Entry, any vendor that matches the search criteria and has your branch listed as active displays in the search list. If you do not assign accessible branch information for a vendor, the vendor does not display in the primary index search.

► To assign branch access to a vendor:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter the vendor name to display the vendor record.
3. Use the **Branch** hot key to display the Accessible Branches screen.
4. In the **Home Branch** field, enter the name of the primary branch for this vendor.
5. In the **Home Territory** field, enter the name of the primary territory to the vendor if you have created territories.
6. In the **Branch/Territory** field, enter any additional branches and territories that require access to this vendor, or enter All to include all branches and territories,
7. In the active column, for each branch and territory listed in the **Branch/Territory** field, enter one of the following:
 - **Y** – Authorizes the branch to create P/Os for this vendor.
 - **N** – Does not authorize the branch to create P/Os for this vendor.

You cannot override this setting in Purchase Order Entry or A/P Entry. If the branch is not listed in the **Branch/Territory** field, you can add it as an active branch, as described in the following procedure.

Note: Use the **Find** hot key to search for a branch if your branches list extends beyond one page.

8. Press **Esc** to save the settings and return to the screen.

Defining Vendor Branch Override Capabilities

At your branch, when doing a search in Purchase Order Entry or A/P Entry, any vendor that matches the search criteria and has your branch listed as active displays on the search list.

A vendor's active branches setup determines which branches can create purchase orders for that vendor. Authorization keys assigned in User Maintenance and activation levels set up in the vendor's branches record work together to determine if a user in Purchase Order Entry or A/P Entry can add a branch to a vendor record. The user can either add a branch to a vendor record permanently, or use a branch for a single vendor transaction without adding that branch to the vendor's record.

To complete this task, you must:

- Set the **Display Customers/Vendors Who Are Inactive At A Branch** control maintenance record to **Y** to activate the **Branch Activation Level** and **One-Time Activation Level** fields on the vendor's Accessible Branches screen.
- Assign either the VEN.BR.AUTH.OVRD and/or the VEN.BR.AUTH.ONETIME authorization key to required users.

If branches are listed and set up as inactive on the Accessible Branches screen, they may not be activated through POE or A/P Entry by this method. You must change the branch's active setting on the Accessible Branches screen to activate those branches.

▶ To set vendor branch override capabilities:

1. Set up branch access to vendors.
2. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
3. In the **Vendor/New** field, enter vendor ID to display the vendor record.
4. Use the **Branch** hot key to display the Accessible Branches screen.
5. Assign branches to the vendor.
6. In the **Branch Activation Level** field, do one of the following to allow vendor branch overrides from Purchase Order Entry or A/P Entry:

- Enter an authorization level between 0 and 99 to allow users with the VEN.BR.AUTH.OVRD authorization key at that level or greater to add a branch to this vendor record.

For example, if you set the branch activation level at 50, any user working in Purchase Order Entry or A/P Entry with an authorization level set to 50 or higher can add a branch to this vendor record.

- Leave this field blank to restrict all users without the VEN.BR.AUTH.OVRD working in Purchase Order Entry or A/P Entry from adding branches to this vendor record.

7. In the **One-Time Activation Level** field, do one of the following to allow a one-time vendor branch override from Purchase Order Entry or A/P Entry:
 - Enter an authorization level between 0 and 99 to allow users with the VEN.BR.AUTH.ONETIME authorization key at that level or greater to use an inactive branch for a single transaction from Purchase Order Entry or A/P Entry.
For example, if you set the one-time activation level at 50, any user working in Purchase Order Entry or A/P Entry with an authorization level of 50 or higher can use an inactive branch for a single transaction.
 - Leave this field blank to restrict all users without the VEN.BR.AUTH.ONETIME authorization key working in Purchase Order Entry or A/P Entry from adding branches to this vendor record.
8. In the **Active** column, for each branch listed in the **Branch/Territory** column, enter one of the following:
 - **Y** – The branch has the authorization to create P/Os for this vendor.
 - **N** – The branch does not have authorization to create P/Os for this vendor.
You cannot override this setting in Purchase Order Entry or A/P Entry, but if the branch is not listed in the **Branch/Territory** field, you can add it as an active branch from Purchase Order Entry or A/P Entry.
 - **Leave this field blank for a branch** – An authorized user can add a one-time activation to a branch not listed (see step 7).
9. Press **Esc** to save the settings and return to the Vendor Maintenance screen.

Creating Vendor Expense Distribution Codes

Create vendor expense distribution codes to pre-define the distribution of a vendor's invoice to G/L accounts based on a determined percentage for that vendor. Codes created for a vendor are available for the vendor in A/P Entry.

Codes set up for one vendor are unique to that vendor and are not available for other vendors.

▶ To create a vendor expense distribution code:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter a vendor ID to display the vendor record.
3. Use the **Expense Distr** hot key and select **NEW** from the list to display the Vendor Expense Distribution screen.

Note: To view or edit an existing expense distribution code, select it to display the information for that code.

4. In the **Exp Dist Code** field, enter a name, up to 10 characters, to use for the expense distribution code.
5. In the **Br#** field, enter the branch to which to apply a percentage of the vendor's invoice.
6. In the **G/L Account** field, enter the G/L account to which to apply a percentage of the vendor's invoice. Enter a partial account name or press **F10** and select from a list of accounts.
7. In the **Dist %** field, enter the percentage of the invoice to apply to the G/L account. Use the format xx.x. The sum of the percentages for the entries listed on this screen does not need to equal 100 percent.

The A/P program prompts you to distribute any amount that is not distributed by these entries.

Note: To delete this vendor expense distribution code, use the **Delete** hot key. The system prompts for confirmation.

8. Press **Esc** to save the code and exit the screen. This code displays in the Exp Distr selection list the next time you use the **Expense Distr** hot key.

Defining Unquality Event Parameters

Set the number of days before and after the due date that a shipment can arrive from a vendor without creating an unquality event. The system posts an unquality event when the set standards are not met.

►To define unquality event parameters:

1. From the **Files** menu, select **Customer** or **Vendor** to display the Customer Maintenance screen or Vendor Maintenance screen.
2. Enter the customer or vendor ID to open the entity record.
3. Use the **UET** hot key to display the UET Parameters Maintenance screen.
4. In the **Early Days Allowed** field, enter one of the following:
 - **For a customer** – The number of days before the due date that a shipment can arrive at this customer's site.
 - **For a vendor** – The number of days before the due date that a shipment can arrive at your company's receiving dock.
5. In the **Late Days Allowed** field, enter one of the following:
 - **For a customer** – The number of days after the due date that a shipment can arrive at this customer site.
 - **For a vendor** – The number of days after the due date that a shipment can arrive at your company's receiving dock.
6. Press **Esc** to save the settings and return to the Customer or Vendor Maintenance screen.

Assigning SFA Access to Entities

Define user message groups who can access the following data using the Eclipse Sales Force Automation (SFA) companion product from a laptop or Palm computing device:

- Customer Maintenance
- Vendor Maintenance
- Contact Maintenance
- Eclipse Dictionary Maintenance

Set different levels of access granted to each ID, depending on your security needs.

► **To assign access to an entity:**

1. From the **Files** menu, select one of the following:
 - **Customer** – Displays the Customer Maintenance screen.
 - **Vendor** – Displays the Vendor Maintenance screen.
 - **Contact** – Displays the Contact Maintenance screen.
 - **Eclipse Dictionary > Dictionary Maintenance > Access** hot key – Displays the Dictionary Maintenance screen.
2. Enter an entity or dictionary ID to display the record.
3. Use the **Access** hot key to display the Access Control List screen.
4. Select the first blank line and enter the new user or message group ID, or press **F10** and select it from a list.
5. In the **Levels** field, enter one of the following activity levels:

Activity Level	Description
No Access	You cannot download information from this record to your laptop or Palm device. If you have access to a message group ID, use this option to deny access to users within that group. This level overrides any other levels assigned to the individual User IDs.
View Only	You can download information from this record to your laptop or Palm device, but you cannot make changes to the information.
Review	You can download information from this record to your laptop or Palm device and make changes to the information, but you cannot update the Eclipse database. The system creates a tracker with the changes and sends it to the user ID entered in the SFA Administrator control maintenance record.
Full Access	You can download information from this record to your laptop or Palm device, update the information, and sync it with the Eclipse database.

Note: To delete a user or group, select it and press **Alt-Delete**.

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

Copying Entity Records

If you have several entities, such as customers or vendors who all use the same setup and pricing/cost information, you can create one entity record, copy it, and then change the address, contact, and any other information for similar entities. Copying in this manner prevents you from having to enter the same information repeatedly.

▶ To copy a customer or vendor record:

1. From the **Files** menu, select **Customer** or **Vendor** to display the Customer Maintenance screen or Vendor Maintenance screen.
2. Enter a customer or vendor ID to display the record that contains the information to copy.
3. Use the **Copy** hot key, and change the name to that of the new entity.

Note: In Customer Maintenance, the system may prompt to copy tax information. This prompt is activated in the Prompt To Copy Tax Information From Bill-Tos to All Ship-Tos control maintenance record.

4. Change the name, address, and contact information as needed.
5. Press **Esc** to save the new record and exit the screen.

Creating Vendor Records for Customer Refunds and Other One-Time Payments

As you conduct business, you might find it necessary to provide customers refunds for products or services, or to make a one-time payment to a third party. Create refunds and one-time payments as payables in the system using A/P entry. Because A/P entry requires a vendor name and address to which to remit payment to, you need a vendor record to use for the refund or payment, however, each time you create these types of payments, the remit-to information is likely different.

Create a generic vendor record that allows users with the AP.GEN.VDR.INFO.EDIT authorization key to override the remit-to name and address in A/P entry each time you create that payable for the vendor. Using a generic vendor allows you to have a single vendor record for such one-time payments instead of having to create a miscellaneous vendor record each time you need to refund a customer or create a one time payment.

You cannot change an existing vendor record to a generic vendor if any payables have ever been created using the vendor. You also cannot change a generic vendor to a non-generic vendor.

► To create a vendor record for customer refunds and other one-time payments:

1. Create a vendor record with the **Pay-To** field selected.

Note: If your generic vendors have the Ship-From field in the Vendor Maintenance screen selected, they are available for purchase orders. All of the override functionality described in Printing Customer Refund Checks Or Making One Time Payments is available in the Purchase Order Entry screen.

2. Use the **Add'l Data** hot key, then use the **Check Info** hot key to display the Check Information screen.
3. In the **Vendor Requires Separate Checks (Y/N)** field, enter **Y** to indicate that payables for the vendor should always print on separate checks.
4. In the **Is This a Generic Vendor (Y/N)** field, enter **Y** to indicate that this vendor is used for creating customer refund checks or other one-time payments.
5. Press **Esc** to save your changes and return to the Vendor Maintenance screen.
6. Press **Esc** to save your changes to the vendor record.

Entering User-Defined Data for Entities

Use the User Defined Data screen to enter additional user-defined information about a customer, vendor, or contact. This information is usually detailed or personal data that you learn about the company or contact in the course of doing business.

Examples of user-defined customer data:

- Number of Employees
- Buying Group
- Association
- Competitors

Examples of user-defined contact data:

- Birthday
- Years employed at this company
- Spouse's name
- Hobbies

The system stores customer, vendor, and contact user-defined data in the following user-defined files:

- CUST.CLASS
- CUST.GROUP
- VEND.CLASS
- CONTACT.CLASS

To limit which user-defined fields display on the User-Defined Data screens, complete the following control maintenance records:

- Customer Classification Sort List
- Vendor Classification Sort List
- Contact Classification Sort List

For more information, see the Creating User-Defined Files.

▶ To enter user-defined customer, vendor or contact data:

1. From the **Files** menu, select **Customer**, **Vendor**, or **Contact** to display the maintenance screen.
2. Enter the entity name to display the customer, vendor, or contact record.

3. Use the **Classify** hot key to display the User Defined Data screen. The system populates the following fields with:
 - **File Name** – The system file name containing the user-defined prompts listed on the screen.
 - **Desc ID** – The entity for which this screen is displayed.
 - **Prompts** – The field names for which you enter data. If completed, the control maintenance records listed above determine the field order in which the prompts appear on the screen.
 - **Category** – The SFA Category assigned to each prompt in Dictionary Maintenance. The system uses the category for selection and sorting purposes.
4. In the **Input** field for any of the items listed in the **Category** field, enter the value to store for this entity. If the field is validated, press F10 for a lists of possible entries.

Notes: User-defined categories and validated input options are defined in Eclipse Dictionary Maintenance.
5. Use the **Sort** hot key to change the order in the field name list. Enter one of the following sort options:
 - **Default** – Sorts the field names in the order defined in the control maintenance record listed above, or alphabetically if the control maintenance record is blank.
 - **By Attribute** – Sorts the prompts by the attribute number assigned in Dictionary Maintenance.
 - **By Category by Prompt** – Sorts the prompts alphabetically by category, then within each category, alphabetically by prompt name.
 - **By Category by Attribute** – Sorts the prompts alphabetically by category, then within each category, by attribute number.
 - **By Prompt** – Sorts the prompts alphabetically by prompt name.
6. Use the **Category** hot key to filter the categories displayed in the list to only those associated with one or more SFA categories.
7. Use the **Log** hot key, as needed, to view all of the changes made to this screen.
8. Press **Esc** to save the settings and return to the previous screen.

Entering Additional Vendor Information

Vendor records may require more detailed information than can be provided on the Vendor Maintenance screen, so the hot keys on the Vendor Additional Info screen provide more options.

► **To enter additional vendor information:**

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter a Vendor ID to display the vendor record.
3. Use the **Add'l Data** hot key to display the hot keys on the Additional Info screen.
4. Use the following hot keys as needed:

Hot Key	Use to...
Misc Vend Info I and II	apply overrides for a vendor, provide tax numbers, enter a cage code, and more.
Drop Point	determine which branch serves as the default drop point if your company uses central purchasing.
Activity Trigger	assign triggers to activities such as order entry, shipment confirmation, or purchase order entry for a fax, email, or EDI transmission.
Addl Address	add additional information to the vendor's address.
Reminder Notes	create a reminder note that displays when you enter this vendor on a screen, such as Purchase Order Entry Header.
Brch Ovrds	set defaults at the vendor level to override settings at the branch or territory level.
A/P Summary	view a summary of a pay-to vendor's account balances, without calling up each account separately.
Addl Keywords	add words to the search index for the system to use when searching for a vendor.
Check Info	set up parameters for a vendor for outsourcing and printing accounts payable checks.
Entity Relations	display a complete list of a pay-to vendor's ship-from records. If you use this hot key from a ship-from only vendor record, it displays the pay-to vendor record.
Work Order Proc	create a vendor record for each of your internal and external service-work vendors.
E-mail Print Styles	override a vendor's default e-mail print styles, originally set in the E-mail Attachment Settings control maintenance.
Tax Information	enter a vendor's 1099 tax information, if the vendor is not including tax in the price they charge you. You are legally required to track the total dollar amount you have paid to the vendor for tax purposes.

Hot Key	Use to...
Job Management	enter a specific product to serve as a template for pricing for price line and buy line purposes when creating orders and reports in Eclipse Job Management. The product you enter here overrides the Default Product Management setting in the Job Management Admin control maintenance record. For more information about Job Management, see the Job Management online help available from the Help icon within the Job Management application.

Entering Miscellaneous Vendor Information

Enter additional details into a vendor record that can be used for reporting or sorting purposes on the Miscellaneous Vendor Information screen.

► **To enter miscellaneous vendor information:**

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter a vendor ID to display the vendor record.
3. Use the **Add'l Data** hot key, then the **Misc Vend Info** hot key to display the Miscellaneous Vendor Information screen.
4. Enter data in the following fields, as needed. Press **Enter** to advance to the next field, or press **Esc** to save your changes and exit the screen:

Field	Description
Initial Status Override	Enter one of the following to override the default P/O entry status for this vendor: <ul style="list-style-type: none"> • V – Vendor Shipment Notification – The vendor confirms the shipment. • O – Open Purchase Order – Returns the setting to the default setting of Open. • B – Request for Bid – Enters the P/O as a bid. • X – Canceled – Sets the status to Canceled. For example, if you have a fictitious vendor for training or testing purposes, set the status to X, so settings and transactions for this vendor do not enter the system.
Override GL Account Number	Enter the GL account number for which to post a received purchase order. This prevents it from posting to Un-billed Accounts Payable. Typically when a purchase order is received, the amount of the order is posted to UBAP (un-billed Accounts Payable). Then the purchase order displays in A/P Entry and a payable is created for an equal amount that offsets the entry in UBAP. When you enter an override general ledger account in this field and a purchase order is received, the amount of the order is posted to the override general ledger account, but not to the UBAP. In turn, this order does not show up in A/P Entry and no payable is made for the purchase order.

Field	Description
Print Status Override	<p>Enter one of the following to determine how to generate documents for vendor transactions:</p> <ul style="list-style-type: none"> • Y – Prints the item immediately. • N – Does not print the item. • F – Faxes the item. • A – E-mails the item. • H – Sends the item to your Hold file. • E – Sends the item via EDI. <p>If this field is left blank, the system uses the setting defined in the Default Print Status To "E" For All EDI Vendors control maintenance record. However, if the system sent an 850 for the original order generation, the system will not populate any new generations created for that order during receiving with E, even if the Print Status Override field and/or this control maintenance record are set to Y.</p>
Certificate of Insurance Received Date	<p>Create tracking tools for Certificates of Insurance and W-9 forms that you receive annually from each vendor. These forms assist A/P with maintaining vendor records.</p>
Freight Days	<p>Used for EDI transactions only.</p> <p>Enter the number of days to add to the vendor's ship date to determine the expected receive date for a purchase order.</p> <p>The system uses the following logic to determine the correct ship date on the purchase order:</p> <ul style="list-style-type: none"> • For the EDI 856 Advance Ship Notice, the system adds freight days to the ship date. • For an 855 VMI P/O Acknowledgement, the system adds the number of days entered here to the ship date on the purchase order.
Cage Code	<p>Assign a cage code if your company buys parts for military (milspec) projects.</p> <p>You are legally required to identify authorized suppliers to the military. If your company buys parts for military projects, you may need a vendor or manufacturer's default quality rating required by the government. The system uses this <i>cage code</i> in the Detail Lot Maintenance programs.</p>
Consignment Inventory	<p>Enter one of the following:</p> <ul style="list-style-type: none"> • Y – Sets up this vendor for vendor consignment inventory. This setting activates the Consignment Transfers field. • N – Does not set up this vendor for vendor consignment inventory.
Consignment Transfers	<p>Enter one of the following to determine what happens to consignment items on a transfer order:</p> <ul style="list-style-type: none"> • Leave the field blank – The system uses the setting in the Default Vendor Consignment On Transfers control maintenance record. • Consigned to Inventory – The system adds the item to regular inventory in the receiving branch. • Consigned to Consigned – The system adds the item to consignment inventory in the receiving branch.

Field	Description
Exclude from Index	<p>Exclude the vendor from the search index and emergency procurement list by entering Y, otherwise enter N.</p> <p>Set this field to Y if:</p> <ul style="list-style-type: none"> • This vendor is a ship-from-only account. • The Exclude From Ship-To/Ship-From Selection If Excluded From Index control maintenance record is set to Y. • This ship-from account does not display in the ship-from selection list when creating a new purchase order. <p>If this vendor is a ship-from-only account, this field is set to Y, and the Exclude From Ship-To/Ship-From Selection If Excluded From Index control maintenance record is set to Y, this ship-from account does not display in the ship-from selection list when creating a purchase order or when querying for emergency procurement vendors.</p>
Time Zone	<p>Enter the vendor's time zone. The time zone displays in the header of the Vendor Activity Log Tracker Entry screen of each tracker created for this vendor.</p>
Freight G/L Override	<p>Active for freight vendors only. Press F10 and select the vendor's G/L account to use for freight.</p>
Target Type and Target	<p>Enter the minimum purchase amount for a target type to prevent the release of purchase orders when vendor-specific target amounts have not been met.</p>
Ordered With/Order ID Required	<p>Determine the requirement for entry in the Ordered With field or Order ID field on the Purchase Order Entry Header screen for this vendor by entering one of the following:</p> <ul style="list-style-type: none"> • None – Neither the Ordered With field or the Order ID field is required. • Ordered With – Only the Ordered With field is required. • Order ID – Only the Order ID field is required. • Both – Both the Ordered With and Order ID fields are required.
No Order Entry	<p>Enter one of the following to define whether to create purchase orders for this vendor:</p> <ul style="list-style-type: none"> • N – Purchase orders are created for this vendor. • Y – No purchase orders are created for this vendor. In Purchase Order Entry, if you enter a vendor with this field flagged, the system prompts you to enter a different vendor. For example, you would never create purchase orders for pay-to only vendors. <p>Note: Entering Y in this field makes the vendor unavailable for display in A/P Entry.</p>
ASL Vendor Type	<p>Enter the ASL type for this vendor. ASL types are defined in the Valid Vendor ASL Types control maintenance record.</p>

Field	Description
Allowed Pricing Variance%	<p>Select and enter the variance percentage or dollar amount the system uses when evaluating inbound 810s and 855s.</p> <ul style="list-style-type: none"> For 810s, the variance is the percentage or dollar amount by which the discount amount on an inbound EDI 810 invoice can vary from the discount amount on the EDI 850 P/O to which it is being matched without the system flagging the transaction for review. If the invoice discount amount is within the variance specified, then the invoice will match. The system checks the Allowed Pricing Variance% field only when an invoice (810) comes in and matches against a P/O (850) and the only difference is between the invoice discount amount and the P/O discount amount. For 855s, the variance is the percentage or dollar amount by which a price on the 855 can vary from the corresponding price on the P/O to which it is being matched without the system flagging the transaction for review due to a pricing discrepancy. If all pricing discrepancies fall within the pricing variance, the system treats the 855 as a perfect match. <p>Select one of the following:</p> <ul style="list-style-type: none"> D - Dollar Amt – The system flags the transaction for review when the difference is greater than the dollar amount you specify in this field. P - Percentage – The system flags the transaction for review when the difference is greater than the dollar amount you specify in this field. N - None – The system flags the transaction for review when the difference is greater than the dollar amount you specify in this field.
Create A/P Invoice When Booking Rebate Letter of Credit	<p>Enter one of the following to determine whether the system should also create a credit accounts payable invoice, known as a vendor debit when a letter of credit is created:</p> <ul style="list-style-type: none"> N – The system creates a letter of credit for this vendor. This is the default. Y – The system creates a credit accounts payable invoice for the amount of the rebate, automatically reconciles the letter of credit, and creates letters of credit depending on the entry in the P/O Creation (Single/Split) field in the Customer Sales Rebate Report for booking letters of credit: <ul style="list-style-type: none"> Single – The system creates one credit purchase order for the branch entered in the Posting Branch field on the Booking Letter of Credit screen. Split – The system creates one credit purchase order for each branch requesting a rebate claim. <p>Note: This field applies only to pay-to vendors.</p>
Manufacture Uniform Code Council (UCC)	<p>Enter the manufacturer uniform code council. Access this field by using the Misc Vend Info II hot key from the Miscellaneous Vendor Information I screen.</p>

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

Entering Vendor Tax Information

If a vendor is not including tax in the price they charge you, you are legally required to track the total dollar amount you have paid them so that you can send them and the government a 1099 form at the end of the year. Use the Vendor Tax Information screen to enter a vendor's 1099 tax information, so that the system includes that vendor in the 1099 Summary Report of payments to vendors.

► To enter vendor tax information:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
 2. In the **Vendor /New** field, enter the vendor's name to display the vendor record.
 3. Use the **Add'l Data** hot key to display the Additional Info hot keys.
 4. Use the **Tax Information** hot key to display the Vendor Tax Information screen.
 5. In the **Vendor 1099 Tax ID** field, assign the vendor's 1099 tax number. This vendor will be included in the 1099 Summary report.
 6. In the **W-9 Forms Received Date** field, enter the date you receive W-9 forms from this vendor.
 7. In the **Disallow Tax Capitalization** field, enter one of the following:
 - **Y** – Does not allow tax capitalization, which is similar to freight capitalization.
 - **N** – Allows tax capitalization to distribute tax evenly for items on a purchase orders when calculating landed average cost for this vendor. This is the default.
- Note:** The Capitalize Tax on Purchase Orders control maintenance record must be set to **Y** to enable this functionality.
8. Press **Esc** to save your changes and return to the Additional Info hot keys.

Assigning Vendor Targets

Because transporting small shipments is not cost effective, you may want to define a specific dollar amount, total shipment weight, number of pieces, or total shipment volume that your purchasing agents must purchase from a vendor. Then when a purchasing agent enters a purchase order that does not meet the required amount, the system will not release the purchase order.

Only a user assigned the FREIGHT.TARGET.OVERRIDE authorization key can release purchase orders for which the defined target has not been met.

The Include Directs In Vendor Target Check When Printing a P/O control maintenance record controls the target check for vendor minimums on purchase orders and direct sales orders.

► To assign vendor types:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter a vendor ID to display the vendor record.
3. Use the **Add'l Data** hot key, then use the **Misc Vend Info** hot key to display the Miscellaneous Vendor Information screen.
4. In the **Target Type** field, enter one of the following target types:
 - **\$ - Dollars** – The dollar amount.
 - **# - Weight** – The value assigned to a product in the **LBS/** field on the Product Maintenance screen.
 - **P - Pieces** – Any of the units of measure defined for a product or buy line.
 - **L - Load Factor** – The cubic dimensions of a product or the point value of a product, as displayed on a vendor specification sheet.
5. In the **Target** field, enter a target amount, based on the value in the **Target Type** field.

If the target type is...	Enter...
\$	up to nine digits, a decimal point and two more digits, such as 3225.50.
#	up to four digits, decimal point, and as many additional digits as are defined in the Number Of Digits Of Accuracy For Product Weight control maintenance record.
P	up to twelve digits with no decimal point. Use whole numbers only.
L	up to seven digits, a decimal point, and up to four more digits, such as 2321.4500.

6. Press **Enter** to advance to the next field, or press **Esc** to save the settings and return to the previous screen.

Defining Drop Points for Vendors

If your company uses central purchasing, you need to determine which branches will serve as the default drop points for purchase orders submitted to this vendor from central purchasing. You can define multiple drop points for this vendor, but only one drop point can be defined or edited at a time.

You cannot assign a branch to more than one drop point. Any branch not assigned to a drop point serves as its own drop point.

► To define a drop point:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter a vendor ID to display the vendor record.
3. Use the **Add'l** hot key to display the Additional Info screen.
4. Use the **Drop Point** hot key to display the Drop Point Maintenance screen.
5. In the **Drop Point Brch** field, press **F10** and select the branch to which this vendor will ship all materials.

The company's branches display in the **Branches** field.

6. In the **Branches** field, enter each branch for which the assigned drop point branch will receive materials from this vendor.

The system uses these settings for the initial drop points, but you can override them through Purchase Order Entry if necessary.

7. To delete the displayed drop point, use the **Delete** hot key. The system prompts to confirm the deletion.
8. Press **Esc** to save the settings. You can then assign another drop point or press **Esc** again to exit.

Entering Additional Address Information

If you need additional lines to complete the customer or vendor address, use the Additional Address screen.

▶ **To enter additional address information for a customer or vendor:**

1. From the **Files** menu, select **Customer** or **Vendor** to display the Customer Maintenance screen or Vendor Maintenance screen.
2. Enter a customer or vendor ID to display the customer or vendor record.
3. From the customer or vendor record, use one of the following hot keys to display the Additional Address screen.
 - **Customer record** – Use the **Add'l Info** hot key, and then use the **Addl Address** hot key.
 - **Vendor record** – Use the **Add'l Data** hot key, and then use the **Addl Address** hot key.
4. Enter the additional address information in the fields provided. This information prints under the first street address line you entered on the Customer or Vendor Maintenance screen.
5. Press **Esc** to save the information and exit the screen.

Applying Branch-Specific Overrides

Set the following defaults at the customer and vendor level that override settings at a branch or territory level:

- Inside and outside salesperson
- Ship via
- Order entry message
- Terms code
- Price class

For example, if Dan is the default outside salesperson for all branches except for the NORTH territory where Sam is the salesperson you would enter Sam's user ID in the **Value** field of the Branch-Specific Overrides screen for the NORTH territory with an attribute of Outside Salesperson. In order entry, for all branches except the NORTH territory Dan defaults as the outside salesperson, except when an order is entered for a branch in the NORTH territory, in which case, Sam is the default salesperson.

You must be assigned branch access in User Maintenance to override any attribute for a branch or territory.

► To apply a branch-specific override:

1. From the **Files** menu, do one of the following to display the Branch-Specific Overrides screen:
 - Select **Customer** to display the Customer Maintenance screen, then select **Add'l Info**, then select **Branch Overrides**.
 - Select **Vendor** to display the Vendor Maintenance screen, then select **Add'l Data**, then select **Brch Ovrds**.

The **Entity** field on the Branch-Specific Overrides screen displays the name of the customer or vendor from the entity record.

2. In the **Br/Terr** field, enter the branch or territory for which to apply an override. Enter **ALL** to apply the override to all branches.
3. In the **Attribute** field, press **F10** and select from the following attributes for the customer or vendor available for each branch:

For Customer Branches	For Vendor Branches
Outside Salesperson Inside Salesperson Ship Via Terms Code Price Class	Press F10 and select from the list of valid options.

For Customer Branches	For Vendor Branches
OE Message	Do one of the following to create a message in Sales Order Entry or Purchase Order Entry when a customer or vendor place orders: <ul style="list-style-type: none">• Use the Expand Field hot key to enter a message up to 360 characters.• Enter a short message, up to 30 characters, in the Value column.

4. In the **Value** field, press **F10** and select from a list of options relevant to the attribute selected in the **Attribute** field.
5. Press **Esc** to save the changes and return to the Additional Info screen.

Adding Keywords to Search for Entities

In an entity record, enter additional words for the system to use in the search index for a customer or vendor. For example, if you typically refer to a customer called Atlantic Baseline Systems as ABS, use ABS as an additional keyword.

▶To add keywords to search for an entity:

1. From the **Files** menu do one of the following:
 - Select **Customer** to display the Customer Maintenance screen. Enter a customer ID, and use the **Add'l Info** hot key.
 - Select **Vendor** to display the Vendor Maintenance screen. Enter a vendor ID, and use the **Add'l Data** hot key.
2. Use the **Add'l Keywords** hot key to display the Additional Key Words screen.
3. Enter the keywords to use for searches for the customer or vendor.
4. Press **Esc** to save the keywords and return to the previous screen.

Outsourcing A/P Checks and Defining Check Information for Vendors

Set up parameters for a vendor for outsourcing accounts payable checks. These parameters determine when and under what circumstances a vendor gets a check from the bank. You also use the Check Information field to set the standard check information for a vendor.

Outsourcing checks through the bank requires the following setup in Eclipse:

- Define information in the **Minimum Check Disbursement Amount** control maintenance records:
- Define vendor check information on the Vendor Maintenance Check Information screen.
- Run the Print Checks program in Accounts Payable to construct a check information file to send to the bank.
- Run the EFT Transmission program in Accounts Payable to electronically send the file to the bank.

▶ To outsource A/P checks and to define check information for a vendor:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter the vendor ID to display the vendor record.
3. Use the **Add'l Data** hot key, then use the **Check Info** hot key to display the Check Information screen.
4. In the **Vendor Requires Separate Checks (Y/N)** field, enter one of the following to determine the result when running the Print Checks program:
 - **Y** – Prints a check for each payable. You cannot print negative or zero value checks with this setting.
 - **N** – Prints a single check that includes the total amount payable.
5. In the **Is This a Generic Vendor (Y/N)** field, enter **Y** to indicate that this vendor is used for creating customer refund checks or other one-time payments.

For more information about generic vendors, see *Creating Vendors for Customer Refunds and Other One-Type Payments*

6. In the **Minimum Check Amount** field, enter the lowest amount you will pay on one check to this vendor.

A setting in this field overrides the setting in the Minimum Check Disbursement Amount control maintenance record. If you enter zero (0) in this field, the system uses the value entered in the control maintenance record.

7. In the **Maximum Days Since Posted** field, enter a number for maximum days since approved posted for a vendor.

A setting in this field overrides the setting in the Minimum Check Disbursement Amount control maintenance record. If you enter zero (0) in this field, the system uses the value entered in the control maintenance record.

Note: The **Minimum Check Amount** and **Maximum Days Since Posted** fields work together. An entry is expected in both fields when setting this parameter at the vendor and control maintenance levels.

8. In the **Pull Code** field, enter one of the following options to determine how checks are sent:

- **E** – Mails checks in a single UPS envelope, unfolded and un-stuffed, via UPS for delivery the next day to an address, for example, to your Accounts Payable department.
- **D** – Mails checks via first class domestic mail to the vendor address.
- **Z** – Mails checks via first class foreign mail to the vendor address.
- **R** – Sends checks in envelopes from your company, including other required documents.

9. In the **Payment via EFT (Y/N)** field, enter one of the following:

- **Y** – Sends the vendor payment via electronic funds transfer when the payment is included in a check run from the Print Checks screen. Check information for this vendor then goes to an EFT Staging file and the funds are transmitted using the EFT Transmission Release program.
- **N** – Sends the vendor a printed check when payment is included in a check run from the Print Checks screen. This setting makes remaining fields on this screen inaccessible.

To print a check for a vendor from the ...	and that vendor ...	then ...
A/P Entry screen	is flagged to receive payment via EFT	the system prompts to generate the check via EFT.
A/P Preview Queue screen	is flagged to receive payment via EFT	the Next EFT Check # field on the Single Check Printing screen displays an Eclipse-generated number. When you use the Print hot key on that screen, the system sends the check information to the EFT Staging file for transmission to the outsourcing bank.

To print a check for a vendor from the ...	and that vendor ...	then ...
	is not flagged to receive payment via EFT	the Next Check # field on the Single Check Printing screen displays an Eclipse-generated number. When you use the Print hot key at that screen, the system prints a check for the vendor.

10. In the **Payment Transfer Method** field, enter one of the following to determine how to pay this vendor:

- **Check** – The bank will send the vendor a check. Renders the remaining fields on this screen inaccessible.
- **ACH** – The bank will transfer funds electronically by ACH (Automated Clearing House).

Use the ACH method to make a corporate payment (CCD) or a consumer/payroll payment (PPD).

11. In the **ACH Format** field, press **F10** and select the ACH format. ACH formats are defined in the Valid ACH Formats control maintenance record.

12. In the **ACH Vendor Routing Transit #** field, enter the nine-digit American Banking Association number of the vendor's bank.

13. In the **ACH Vendor Account #** field, enter the vendor's ACH account number.

14. In the **ACH Vendor Account Type** field, enter the type of account in which to deposit the payment:

- **Checking**
- **Savings**

15. Press **Esc** to save the settings and exit the screen.

Assigning Activity Triggers

To improve efficiency and accuracy, you can set up your system to automate activities when specific trigger parameters are met. For example set up a trigger, so the system sends an e-mail message to your customer when an order is placed through the web. You can also set up these activity triggers to respect the e-mail address of the contact attached to the order. To do this, set the **Validate Name In "Ordered By" Field Against Customer Contact** control maintenance record.

► **To assign activity triggers:**

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen or **Vendor** to display the Vendor Maintenance screen.
2. Enter the customer or vendor's name to display the entity record.
3. In the **Inherit** field, enter **Y** if the entity can inherit triggers from another entity in the corporate hierarchy, otherwise, enter **N**. This setting overrides the setting in the **Activity Trigger Default Inherit** control maintenance record.
4. Use the **Add'l Info/Add'l Data** hot key, then use the **Activity Trigger** hot key to display the Activity Trigger Maintenance screen.

The system populates the **Customer/Vendor** field with the entity name.

5. In the **Trigger Description** field, enter one of the following triggers:

This item...	Triggers an event ...
Backorder Acknowledgement	when an order is closed from an RF branch. A backorder acknowledgement is faxed or printed depending on the customer setup. A backorder acknowledgement is a ship ticket that lists only backordered items.
Batch Invs in Lieu of Prt	when the batch invoice printing program is run. Instead of printing the invoices, the program e-mails them to the customer. The Eclipse Outbound E-mail companion product is required.
BC-XML Submit Order	when the system receives an order in XML format from the Business Connect XML companion product.
Calling Queue - All Orders	when the Calling Queue - All Orders Report runs, the system checks for customers with the activity trigger set and pulls all the orders in the Customer Calling Queue for that customer that have a Call status and are open as of the run date. These orders include backorders, new orders not yet available, and available orders as of the run date. Note: To set up the report to run when you want and in the format you want, see Sending Customers Calling Queue Data in the Sales Management documentation.

This item...	Triggers an event ...
Calling Queue - Available Orders	<p>when the Calling Queue - Available Orders Report runs, the system checks for customers with the activity trigger set and pulls all the orders in the Customer Calling Queue for that customer that have a Call status and are complete (available) as of the run date.</p> <p>Note: To set up the report to run when you want and in the format you want, see Sending Customers Calling Queue Data in the Sales Management documentation.</p>
EDI Order Entry	when an Eclipse Electronic Data Interchange (EDI) order is received. This option requires the Eclipse EDI companion product.
EFT Remittance Advice	after a successful electronic funds transmission. This trigger is available in Vendor Maintenance only.
E-mail Stmt in lieu of Prt	when the batch statement printing program is run. Instead of printing the statements, the program will send them to the customer using e-mail.
E-mail Stmt-Invs lieu of Prt	<p>when the batch statement program is run. Instead of printing the statements and invoices, the program sends them to the customer using e-mail.</p> <p>This trigger works only if you set the Also Print Invoices field on the Print Statements screen (A/R > Print Statements) to anything but No. If you set the print statements program to also print invoices and have this trigger set for the customer, the system sends both the statement and the invoice to the customer through e-mail.</p> <p>The Eclipse Outbound E-mail companion product is required.</p>
Invoice Order	when an order is invoiced.
Invoice Print	when an invoice is printed.
Manifest Lock	when a manifest is locked on the manifest queue.
New Direct Order	<p>when a new direct order is completed. Use this trigger to route sales orders to another vendor, or to source sales orders through another branch. This trigger is available in Vendor Maintenance only.</p> <p>This option requires the Eclipse Outbound E-mail companion product.</p>
New Purchase Order	<p>when exiting a manually created purchase order. This trigger is available in Vendor Maintenance only.</p> <p>This option requires the Eclipse Outbound E-mail companion product.</p>
New Purchase Order Bid	upon exiting a purchase order bid. This trigger is available in Vendor Maintenance only.
New Sales Order	when a new sales order is completed.
New Sales Order Bid	upon exiting a sales order bid.

This item...	Triggers an event ...
Order in Calling Queue	<p>when the Order in Calling Queue Notification runs, the system checks for customers with the activity trigger set, and pulls copies of the sales acknowledgements for all the orders in the Customer Calling Queue that meet the criteria you have set up in the trigger. For example, you can set up the system to send a notification when orders with a specific ship via are added to the queue. The system sends the sales acknowledgement per the information set up in the customer's activity trigger.</p> <p>Set up your preferences as follow:</p> <ul style="list-style-type: none"> • Select the type of notification to send. After you select the description, the remaining fields populate for you. <ul style="list-style-type: none"> • E-mail standard sales document • E-mail standard message • E-mail HTML sales document • Fax sales document • Use the Trig Props hot key to display the Calling Queue Notification Trigger screen selection to further narrow the selections the system makes for the information on your notification, such as who wrote the orders or a specific ship via. <p>Note: To setup how you want the information sent to you for this trigger, see the Running the Order In Calling Queue Notification Report.</p>
Order in Trouble	<p>when the Trouble Order Notify process runs, the system checks for orders for this customer that have a ship date that has slips and sends an updated sales document by e-mail or by fax.</p>
Overdue Invoices	<p>when the number of days an invoice is overdue is reached. This number is determined by the number entered using the Trig Props hot key. This activity trigger notifies the system to send an e-mail notification once per generation. Multi-generation orders get a notification per generation. If a process is re-run and an e-mail has already been sent for a generation, the system <i>does not</i> send a second e-mail.</p> <p>To enable this trigger, schedule the Overdue Invoice Notification utility in Accounts Receivable (AR).</p> <p>Note: To set triggers for additional numbers of late days, assign the number of days overdue to additional triggers.</p>
Pick Ticket Print	<p>when a pick ticket prints. This option requires the Eclipse Outbound Email companion product.</p>
PO Ack Received on Direct	<p>when an 855 purchase order acknowledgement is received in response to a direct order. This option requires the Eclipse Outbound E-mail and the EDI companion products.</p>
RDC Order Entry	<p>after an order has been created through Remote Data Collection (RDC). This option requires the Palm SFA companion product.</p>
Received Purchase Order	<p>when a purchase order is received. This trigger is available in Vendor Maintenance only.</p>

This item...	Triggers an event ...
RF Order Close	after an entire order has been picked through RF and is ready to ship. This option requires the Eclipse RF Sales Order Entry companion product.
Shipment Notification	when StarShip sends shipping information back to the system. This option requires the Eclipse Electronic Shipping with StarShip companion product.
Ship Ticket Print	when a ship ticket prints.
Transfer Received	when a transfer is received.
Web Integration Submit Order	when an order is submitted through Web Order Entry. This option requires the Eclipse Web Commerce companion product.

6. From the **Activity Description** field, enter one of the following activities to occur as a result of the event selected in the **Trigger Description** field. Selections vary depending on your entry in the **Trigger Description** field:

Activity	Description
B2B Adv Ship Notice	Sends an advanced shipping notice in XML format by way of B2B Commerce or Business Connect XML.
B2B Purchasing Document	Sends a purchase order in XML format by way of B2B Commerce or Business Connect XML.
B2B Sales Doc	Sends a sales document in XML format by way of B2B Commerce or Business Connect XML.
Create ASN and Product Labels	Creates and prints advanced shipment notification product labels for each item on an order.
EDI Adv Shipping Notification	Sends an EDI 856 advanced shipping notice.
EDI Doc for Remit Advice	Generates an EDI 820 document on the EDI outgoing status queue.
EDI Purchasing Document	Generates an EDI 850 document on the EDI outgoing status queue.
EDI Sales Document	Sends an e-mail containing a message and the EDI sales document.
EDI Single Adv Shipping Not	Generates an EDI document for each stop on a manifest.
E-mail Message	Sends an e-mail containing only a message.
E-mail Purchasing Doc	E-mails a purchasing document.
E-mail Purchasing Doc HTML	E-mails a purchasing document in HTML format.
E-mail Remittance Advice	Sends email with remittance advice.
E-mail Remittance Advice HTML	Sends email of remittance advice in HTML format.
E-Mail Sales Doc HTML	Sends an e-mail containing a message and the sales document in HTML format.
E-mail Sales Document	Sends an e-mail containing a message and the sales document.
E-mail Shipment Tracking Info	E-mails order shipment information, such as order shipment numbers and ship vias.

Activity	Description
E-mail Statement	Sends an e-mail containing a message and the statement associated with the trigger event.
E-mail Statement HTML	Sends an e-mail in HTML format.
Fax Purchasing Doc	Faxes a purchasing document.
Fax Remittance Advice	Sends fax with remittance advice.
Fax Sales Document	Sends a message and sales document by fax.
Fax SOE Report	Faxes a Sales Order Entry report.
FTP Tibersoft Adv Ship Notice	Creates and sends the advanced shipment header information to Tibersoft by FTP (file transfer protocol).
FTP Tradepowers PO Ack	Adds order to a Tradepowers purchase order acknowledgement that is sent by FTP at a future date.
New Sales Order	Creates a new sales order.
Single ASN and Product Labels	Creates and prints advanced shipping notification product labels for each stop on a manifest.

The **Typ** field displays the type of activity assigned.

7. In the **F** field, enter one of the following options to determine how the system performs the activity when the event that triggers the activity occurs as a result of a program running in the system's foreground:
 - **P** The system performs the process.
 - **C** The system prompts the user for confirmation before performing the activity.
 - **X** The system does not perform the activity.
 - **Q** The system transfers the activity to a queue, from which it will be performed after being reviewed. This option is currently not implemented.
8. In the **B** (background) field, enter one of the following options to determine how the system responds to the trigger as a result of a program being scheduled to run in the Phantom processor in the system's background:
 - **P** Performs the activity.
 - **X** Does not perform the activity.
 - **Q** Transfers the activity to a queue from which it will be performed after being reviewed. This option is currently not implemented.
9. In the **D** field, enter an asterisk (*) to disable this activity trigger for this customer or vendor. This activity will not take place for the entity, even if inherited triggers in branches above it in the hierarchy would have executed that activity. Once an activity is disabled, it may not be executed by any inherited triggers.

For example, **Email Sales Doc HTML** on a new order is enabled at the ship-to level, disabled at the bill-to level, and enabled at the branch level. The ship-to executes the e-mail, the bill-to will not because it is flagged as disabled. The branch will not execute the e-mail because the lower, bill-to, entity has disabled it.

10. Use the following hot keys, as needed:

Hot Key	Description
Trig Props	Displays a screen to set specific criteria for the trigger selected in the Trigger Description field. The screen that displays depends on your trigger selection. For more information on these options, see the following: <ul style="list-style-type: none"> • Calling Queue Notification • Sending E-Mail • Sending a Fax
Activity Props	Displays the a screen to set specific criteria for the activity selected in the Activity Description field. The screen that displays depends on your activity selection. For more information on these options, see the following: <ul style="list-style-type: none"> • Sending E-Mail • Sending a Fax
Dollar Entity Triggers	This hot key is active if you assign triggers to a ship-to only customer. Use this hot key to duplicate these triggers for the bill-to customer.

11. Press **Esc** to save the trigger and activity settings.

Overriding Activities Assigned to Triggers

Instead of using the standard Eclipse activities to respond to triggers, you may want to set up your own subroutines as activities that respond to triggers.

For example, when an order is submitted through E-mail Order Entry, instead of triggering the default activity, you can trigger a replacement activity. The replacement activity can be a subroutine that you write, or it can be a system-defined subroutine.

A system administrator can program subroutines into your system for any activity required. You can then assign the subroutines in the Activity Trigger Subroutine Overrides control maintenance record. Activity trigger subroutines set up in customer or vendor maintenance override these subroutines.

►To override an activity:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen or **Vendor** to display the Vendor Maintenance screen.
2. Enter the customer or vendor's name to display the entity record.
3. Use the **Add'l Info** hot key, then use the **Activity Trigger** hot key to display the Activity Trigger Maintenance screen.

This customer's current activity triggers display.

4. Select the activity trigger to override and use the **Subroutine** hot key to display the Activity Trigger Override Maintenance screen.

The read-only **Setting Level** field displays the current level at which the subroutine is set: Customer, Control, or Default.

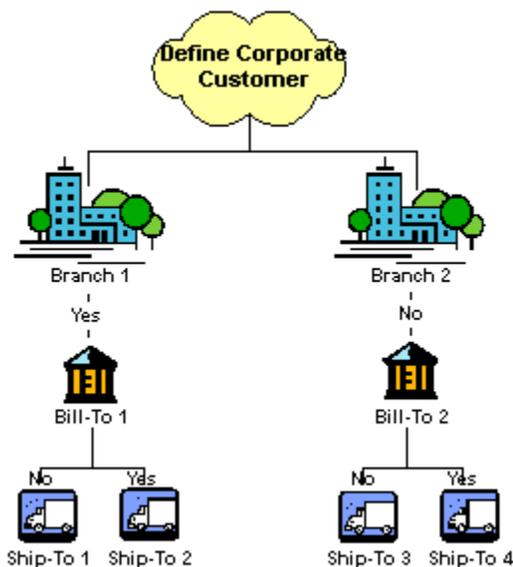
5. In the **Subroutine** field, enter a replacement activity, or press **F10** and one from a list.
6. Press **Esc** to save your settings and return to the Activity Trigger Maintenance screen.

Flagging Entities to Inherit Triggers

In a single or multiple branch company, you may want to set activity triggers to affect all of your branches, bill-tos or ship-tos, identically, or you may want to specify triggers for each branch, bill-to or ship-to. For any customer or vendor, you can set activity trigger inheritance to affect branches from the corporate customer to the last ship to, or set triggers that affect only single branches, bill-tos, or ship-tos.

Create a corporate customer in Customer Maintenance, and then define the corporate customer for the system in the Corporate Customer control maintenance record. This setup allows you to define activity triggers that you can set to disseminate throughout your company's hierarchy. Inheritance can start at any level, from the corporate customer, until you reach the ship-to level. The corporate customer is used solely for activity triggers, and nowhere else in the system.

The diagram below shows a hierarchy setup with a variety of inherited triggers, from the corporate customer to several bill-to and ship-to branches. "Yes" represents an entity set to inherit triggers, and "No" represent an entity set not to inherit triggers.



In this diagram, Branch 1 and Branch 2 are both set Yes to inherit triggers.

Bill-tos set to Yes inherit triggers from branches above it in the hierarchy.

Bill-tos set to No must have their own triggers set up for themselves. These triggers can be inherited by any entity below the bill-to in the hierarchy.

According to this scenario, the following is true:

- Bill-to 1 and Ship-to 2 inherit triggers from Branch 1.
- Ship-to 1 requires its own triggers.

Note: If no triggers are defined, the system uses triggers defined for the bill-to, but no inherited triggers.

- Bill-to 2 does not inherit triggers from Branch 2.
- Ship-to 4 inherits triggers from Bill-to 2.
- Ship-to 3 requires its own triggers.

Note: If no triggers are defined, the system uses triggers defined for the bill-to, but no inherited triggers.

If you disable an activity, it may not be inherited by any lower entities. For example, if a bill-to and ship-to are set to inherit from a branch that has ten triggers defined, and the bill-to disables one trigger, the ship-to inherits nine triggers from the branch.

▶ **To flag entities to inherit activity triggers:**

1. In Customer Maintenance, set up a fictitious customer that represents the corporate customer.
2. In the Corporate Customer control maintenance record, enter the name of the corporate customer you created in step 1.
3. From the **Files** menu, select **Customer** to display the Customer Maintenance screen or select **Vendor** to display the Vendor Maintenance screen.
4. Enter the customer or vendor's name to display the entity record.
5. Use the **Add'l Info** hot key in Customer Maintenance or the **Add'l Data** hot key, in Vendor Maintenance to display additional hot keys.
6. Use the **Activity Trigger** hot key to display the Activity Trigger Maintenance screen.
The system populates the **Customer/Vendor** field with the entity name.
7. Assign triggers and activities as needed.
8. Use the **Inherit** hot key to enter one of the following to determine if one entity can inherit triggers from another entity:
 - **Leave the field blank** – The system uses the setting in the Activity Trigger Default Inherit control maintenance record.
 - **Yes** – The system overrides the setting in the Activity Trigger Default Inherit control maintenance record. This entity inherits triggers from the entity above it in the corporate branch hierarchy.
 - **No** – The system does not inherit triggers from any other entity.
9. Press **Esc** to exit the screen.

Customer/Vendor Specific Part Numbers Overview

When you add a product to the product file, the system assigns it an internal part number. The system uses this number to identify the product for all system operations. Your customers and vendors may use their own part numbers for the products they order from you. If you assign these part numbers to your products, the customer can then use them to request the products they need, and you can use the vendor's part numbers when you order product from them, as a means to speed the order entry process.

You can also enter the customer/vendors' sell price and comments to further personalize their part numbers. You can also generate auto-replenish numbers for entering orders by way of Remote Data Collection (RDC) from customer/vendor-specific part numbers.

Each customer can create bar code labels with their own customer part number for each product that they order from you. You set up the parameters for printing custom labels, then print custom retail price labels.

Complete the following tasks to set up your customers and vendors to use their part numbers:

- Display the Customer/Vendor Specific Part Numbers screen.
- Enter customer/vendor specific part numbers for a customer or vendor.
- Limit the list of customer/vendor specific part numbers to specific criteria.
- Create customer/vendor specific part numbers from existing part numbers.
- Create a template for customer vendor specific part numbers.
- Create and Edit customer/vendor specific part numbers.
- Create auto-replenish numbers for RDC.
- Set up criteria for creating auto replenish numbers for RDC.
- Print custom labels for customers.

Displaying the Customer/Vendor Specific Part Numbers Screen

You can access customer/vendor part numbers from multiple locations in the system. However, you must be assigned the ENTITY.PN.EDIT authorization key to view, edit, or delete the items on the Customer/Vendor Specific Part Number screen.

Access the Customer/Vendor Specific Part Numbers screen from the following paths:

- From the **File** menu, select **Customer** to display the Customer Maintenance screen, and then use the **Part#** hot key.
- From the **File** menu, select **Vendor** to display the Vendor Maintenance screen, and then use the **Part#** hot key.
- From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen, and then use the **Inq** hot key to display the Customer Inquiry screen, then use the **Customer Part#** hot key.
- From the **Purch** menu, select **Purchase Order Entry** to display the Purchase Order Entry screen, use the **Inq** hot key to display the Purchase Order Inquiries screen, and then use the **Vendor Part#** hot key.

Note: This screen is view-only if accessed from Remote Order Entry.

Entering Customer/Vendor Specific Part Numbers

Enter customer/vendor specific part numbers to cross-reference the customer's product numbering scheme with part numbers assigned on your system. The customer/vendor-specific part number retains the product's original part number while matching part numbers for customers. You can assign more than one customer/vendor specific part number to a product and each product can have its own sell price and comments.

► To enter customer/vendor specific part numbers:

1. Display the Customer/Vendor Specific Part Numbers screen.

The **Cust/Vendor** field displays the customer or vendor name from the previous screen.

2. To enter an alternate source for customer/vendor-specific part numbers for this entity, enter the name of the alternate customer or vendor in the **Alternate Cust/Vendor** field.

For example, when you enter a customer-specific part number on an order, the system searches the customer-specific part numbers defined for the primary customer, but if it does not find the product, it searches the customer-specific part numbers defined for the alternate customer.

3. In the **Product Desc** field, use up to 28 alphanumeric characters to enter a product description.
4. In the **Customer /Vendor Part #** field, enter the customer or vendor part number for this product. For more information, see *Creating, Editing, and Deleting Customer/Vendor-Specific Part Numbers*.
5. In the **Location** field, enter the location code if the customer stores inventory parts using location codes. Enter a code for every product on this screen, if you use location codes. The scanned item must match this location code to create an order.

If you change a product location, the system warns that you will update all consignment locations in Product Location Maintenance. Select whether to update locations for this customer only, or for all locations.

Note: You can create bar code labels for locations that you can scan with the PDT 3100.

6. Use the **Add Line** hot key to add all the products in a price line to the Product Description column as follows:
 - At the **Select Price Line** prompt, enter the price line ID.
 - At the **Use the Product ID for the Customer/Vendor Part #** prompt, enter **Y** to use the Eclipse part number for the product as the Customer/Vendor part number. The system precedes the part number with an **@** symbol in the **Customer/Vendor Part #** field. When you add these products to an order, the "Your Part #" note does not display with the line item on the order.
 - At the next prompt, enter the cost code that identifies the phase in a project for which the products within this price line are used, or press **Esc** to continue.

7. To add additional information, use the **View** hot key and select any of the following options:

- Location – This is the default view.

Enter the customer or vendor's warehouse storage location for the displayed customer/vendor-specific part numbers.

Customer / Vendor Specific Part Numbers		
Cust/Vendor : MODERN YANKEE BUILDING, INC.		
Alternate Cust/Vendor :		
Product Description	Customer/Vendor Part #	Location
R547JBD 1-1/2X1-1/4 WASH D	*PR23423	101-DCB Consignment
W-573P (W-251) SINK STRAIN	*PR98453	102-DCB Consignment

- Pricing Formula

Print custom retail price labels for this customer/vendor-specific part number. Enter a unique basis and formula to calculate the price to print on the custom labels. The basis and formula entered on this screen do not affect the actual product pricing.

Customer / Vendor Specific Part Numbers			
Cust/Vendor : MODERN YANKEE BUILDING, INC.			
Alternate Cust/Vendor :			
Product Descript	Customer/Vendor Part #	Basis	Formula
R547JBD 1-1/2X1-1/4 WASH	*PR23423	LIST	*.57
W-573P (W-251) SINK STRA	*PR98453	LIST	*.65

- Min/Max

Assign minimum and maximum inventory replenishment levels to a customer/vendor-specific part number for Remote Data Collection.

Customer / Vendor Specific Part Numbers				
Cust/Vendor : Merritt Builders				
Alternate Cust/Vendor :				
Product Descript	Customer/Vendor Part #	Min	Max	Last
#701 AMERICAN AIR VENT	1255	6	18	
MERRILL REPAIR KIT# PKCF	24405	4	12	
6 FT #306E EXTENSION HAN	@1234	4	10	
12 EMT CONDUIT PIPE	CC00908	24	400	

- Desc/Comment

Display the product description for a customer/vendor-specific part number.

Customer / Vendor Specific Part Numbers	
Cust/Vendor : MODERN YANKEE BUILDING, INC.	
Alternate Cust/Vendor :	
Product Description	Customer/Vendor Part # Comment
R547JBD 1-1/2X1-1/4 WASH DC TRAP W/ W-573P (W-251) SINK STRAINER POLY T	

- Cus PN/Comment

Enter comments to the customer/vendor-specific part number to attach to the product description and printed with the description when the customer/vendor-specific part number is ordered.

Customer / Vendor Specific Part Numbers	
Cust/Vendor : MODERN YANKEE BUILDING, INC.	
Alternate Cust/Vendor :	
Customer/Vendor Part #	Customer/Vendor Part # Comment
*PR23423	
*PR98453	

- Cus PN/PO/Break

Associate a purchase order or customer-defined break point with the customer/vendor-specific part number. The automatic replenishment feature of Remote Data Collection depends upon this information.

When RDC creates an order for this customer/vendor-specific part number, the customer purchase order number is added to the order. When RDC encounters a customer/vendor-specific part number with a different purchase order number or break point, it starts a new order. For example, if a customer places work station locations in the **Break Point** field, you can generate a separate order for every work station. You can use break points to generate multiple orders to deliver to different locations.

Customer / Vendor Specific Part Numbers		
Cust/Vendor : MODERN YANKEE BUILDING, INC.		
Alternate Cust/Vendor :		
Customer/Vendor Part #	Purchase Order	Break Point
*PR23423		
*PR98453		

- Cus PN/PO/Release

Associate a purchase order or release number with the customer/vendor-specific part number. The automatic replenishment feature of Remote Data Collection (RDC) depends on these fields.

Customer / Vendor Specific Part Numbers		
Cust/Vendor : MODERN YANKEE BUILDING, INC.		
Alternate Cust/Vendor :		
Customer/Vendor Part #	Purchase Order	Release Number
*PR23423	-	
*PR98453		

When RDC creates an order for this customer/vendor-specific part number, the customer's purchase order number and release number are added to the order. When RDC encounters a customer/vendor-specific part number with a different purchase order or release number, it starts a new order.

- Print Override

If you let the system generate and assign a replenishment ID, using the "!" entry, for use with Remote Data Collection, you can select a customer-defined part number assigned to this product to use in place of the system-generated replenishment ID when it prints on orders, shipping tickets, and invoices.

Customer / Vendor Specific Part Numbers		
Cust/Vendor : MODERN YANKEE BUILDING, INC.		
Alternate Cust/Vendor :		
Product Description	Customer/Vendor Part #	Print Override
R547JBD 1-1/2X1-1/4 WA	*PR23423	
W-573P (W-251) SINK ST	*PR98453	

- Line Item Taxability

Override the customer taxability at the product level. This overrides the set up for that product on the Customer Sales Tax screen (**Files > Customer > Tax**).

Customer / Vendor Specific Part Numbers			
Cust/Vendor : MODERN YANKEE BUILDING, INC.			
Alternate Cust/Vendor :			
Product Description	Customer/Vendor Part #	Line Tax	Tax Code
R547JBD 1-1/2X1-1/4 WASH DC	*PR23423		
W-573P (W-251) SINK STRAINER	*PR98453		

- Cost Code

Cost codes are user-defined numbers that group similar products for pricing and subtotalling.

Customer / Vendor Specific Part Numbers			
Cust/Vendor : AIR MECHANICAL MANAGEMENT, INC.			
Alternate Cust/Vendor :			
Product Description	Customer/Vendor Part #	Cost Code	
1-1/2 CRC DWV FITTING REDU 77		1456.2	
10-60L 5' LH F'GLASS TUB 0 76		1456.2	
674835A-R AQUA GLASS (NS) 46367		1425.1	
AS6026-56S AQUA SHIELD (NS) 57973		1425.1	
034936A R/L AQUA GLASS (NS) 23249		1425.1	
626035D-L AQUA GLASS (NS) 23301		1425.1	
**AQUA GLASS CORP. 2/18/9 377		1425.1	
**AQUA GLASS ENCLOSURES 2 378		1425.1	
**AQUA GLASS 0000 379		1425.1	

8. For each product listed, enter the information for any of the following fields within the listed views:

In the field...	Do the following...
Basis	Press F10 and select the pricing or costing basis name to use with the entry in the Formula field. The system uses these entries to calculate the price on printed custom retail price labels for the product. This entry does not affect product pricing.
Formula	Enter the pricing or costing formula to use with the entry in the Basis field. The system uses these entries to calculate the price on printed custom retail price labels for the product. This entry does not affect product pricing.
Customer/Vendor Part # Comment	Enter comments to attach to the product description. These comments print with the description when the product is ordered.
Min	Enter the minimum quantity of this product to maintain in inventory. If the inventory quantity falls below this number, the system adds the product to the order.
Max	Enter the maximum quantity of this product to maintain in inventory. When the inventory falls below the minimum level specified in the previous field, the system calculates how much product to order to bring the current inventory quantity up to this amount.
Level	This view-only column displays the last level entered through RDC. This level is the level at which the system is triggered to replenish this product. For example, if the Min is set to 30 and the Max is set to 45, and the Level is set at 35, when inventory drops to 35, the system notifies the Warehouse Operation Queue to generate replenishment tasks.
Line Tax	Enter one of the following to determine if tax is charged on the product: <ul style="list-style-type: none"> • Y – Charges tax on the item. • N – Does not charge tax on the item. The system checks the bill-to, if applicable. If you leave the column blank, the system uses tax rules set up on the Customer Sales Tax screen. For more information, see Creating Tax Jurisdiction Codes.
Tax Code	Press F10 and select the tax code to use for this line item.
Print Override	Substitute a system-generated replenishment ID in place of a customer-defined part number assigned to this product to print on orders, shipping tickets, and invoices. Press F10 and select a pre-defined customer/vendor-specific part number.

In the field...	Do the following...
Cost Code	Enter the cost code number as follows: <ul style="list-style-type: none"> • To the left of the decimal point enter a number for the job phase. For example, phase 1425 of a job might be rough-in, phase 1450 build-out, and phase 1490 might be finish work. • To the right of the decimal point, enter a number representing the type of products used in this phase of the job. For example, 1425.1 might be rough-in electrical products, while 1425.2 might be rough-in plumbing products.
Release Number	Enter the customer's release number to assign to orders the system generates for this product. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.
Purchase Order	Enter the customer's purchase order number. The system assigns this number to any order it generates for this product. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.
Break Point	Enter the customer-defined code, or break point. The system assigns this break point to orders it generates for this product. Use break points to generate multiple orders that are delivered to different locations. When RDC generates an order and encounters a product with a different break point, a new order is started. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.

9. Use the following hot keys as needed:

To...	Do the following...
add products from a price line with system-generated part numbers.	Use the Add Line hot key, and enter the price line ID. The system prompts to use the product as the part number. If you enter Y , the system prompts for a cost code for the price line.
copy one or all customer/vendor-specific part numbers from one customer or vendor record to another customer or vendor record.	Use the Copy hot key.
set parameters for printing custom labels for customers or vendors	Use the Print Label hot key.
see more detail about one part number.	Select the product to view and use the Detail hot key.

To...	Do the following...
arrange the list of part numbers in a different order	Use the Sort hot key to select one or the following sorting options: <ul style="list-style-type: none"> • Cust/Vend PN • Location • Product Desc • Rank #1 • Rank #2 • Rank #3
create default values for fields on a Part Number record.	Use the Template hot key.
import or export part numbers using Windows Excel.	Use the Excel Export or Excel Import hot keys.
substitute products.	Use the Subs and Change Primary hot keys.

10. Press **Esc** to save this information and return to entity record.

Selecting Customer/Vendor Specific Part Numbers

Limit the number of products in the customer/vendor specific part numbers list by displaying a subset of customer/vendor specific part numbers. This makes the list easier to work with because you display only the items of immediate interest.

►To select customer/vendor specific part numbers:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. Do one of the following:
 - To find a specific product in the list, use the **Find Item** hot key and enter the description.
 - Use the **Select** hot key to display the Selection Criteria screen, and continue with the following instructions.
3. In the **Eclipse Product** field, enter a partial description to display a list of products matching that description, and select one, or press **F10** to select from a list of the most recently viewed products.
4. In the **Partial Eclipse Desc** field, enter a partial description of the product to display all customer or vendor-specific part numbers assigned to products that match that description.
5. In the **Customer Part Number** field, enter all or part of a customer/vendor specific part # to display all customer/vendor-specific part numbers that match that number.
6. In the **Price Line** field, press **F10** and select a price line to display all customer/vendor-specific part numbers for products in that price line.
7. In the **Location** field, enter a product location to display all the customer/vendor specific part numbers within that location.
8. In the **Purchase Order** field, enter a P/O number to display all the customer/vendor specific part numbers associated with that P/O number.
9. In the **Break Point** field, enter a customer- or vendor-defined break point to display all the customer/vendor-specific part numbers associated with that break point.
10. In the **Release** field, enter all or part of a customer or vendor release number to display all the customer/vendor-specific part numbers associated with that release number.
11. In the **Comment** field, enter all or part of the customer/vendor specific PN comment to display a list of products that contain that comment.
12. Press **Esc** to return to the Customer/Vendor Specific Part Numbers screen. Only those products that match that criteria display.

Viewing Customer/Vendor Specific Part Number Details

Display a detailed account of a customer/vendor specific part number to:

- View or edit the customer/vendor specific part number.
- Enter RDC replenishment min/max values.
- View service stock levels, pricing information, comments, and other information.
- Set up replenishment contracts with customers.
- Create sell matrix cells for a product with a customer specific part number.

You must be assigned the ENTITY.PN.EDIT authorization key to view, edit, or delete items on Customer/Vendor Part Number Detail screen.

► To view customer/vendor part number details:

1. Do one of the following to display the Customer/Vendor Part Number Detail screen:

- From the **Orders > Inquiry** menu, select **Customer Part Numbers**. Enter a customer ID in the **Cust/Vend** field, then enter a description and a specific part number in the fields provided to display the part number detail.

You can view or edit only customer records from this screen.

- From the **Files** menu, select **Customer** or **Vendor**, then select the **Part #** hot key to display the Customer/Vendor Specific Part Number screen, and then select the product for which you want to view the part number detail, and use the **Detail** hot key.

The system prompts you for customer or vendor specific part numbers. You can view both customer and vendor records from this screen, but you can edit only customer records.

2. Enter or view values in the following fields, as needed:

Field	Description
Cust/Vend	The customer or vendor for whom this customer/vendor specific part number is defined.
Description	The product description for the customer/vendor specific part number you are viewing.
Cust/Vend Part Number	The customer/vendor specific part number for this product. For more information, see Creating and Editing Customer Specific Part Numbers.
Rank #1-3	The product rank assigned to Rank #1-3 for this customer. This rank is re-calculated when you run the Customer Product Ranking program.
Service Stock Qty	The service stock quantity for this customer or vendor, up to five digits.
Service Stock Branch	The branch associated with the service stock quantity, if one was entered for this customer or vendor.

Field	Description
Service Stock Eff Dt Service Stock Exp Dt	The service stock quantity effective date and expiration date, if one was entered for this customer or vendor.
Contract Stock Qty	The contract stock quantity for this customer or vendor.
Contract Stock Eff Dt Contract Stock Exp Dt	The contract stock quantity effective date and expiration date, if one was entered for this customer or vendor.
Customer Price	The product price calculated by the sell matrix in the system. This field is view-only. To change this information, use the Matrix hot key.
GP %	The product gross profit percentage calculated by the sell matrix. This field is view-only. To change this information, use the Matrix hot key. A value displays in this field only if you have been assigned the COGS.VIEW authorization key.
Source CC	The class, customer or Typ/Qte on the sell matrix. This field is view-only. To change this information, use the Matrix hot key.
Source PP	The group or product on the sell matrix. This field is view-only. To change this information, use the Matrix hot key.
Effective Expire	The sell matrix effective and expiration dates for this product. This field is view-only. To change this information, use the Matrix hot key.
Min. Level	Enter the minimum quantity of this product to always remain in inventory. If the inventory quantity falls below this number the system adds the product to the purchase order.
Max Level	Enter the maximum quantity of this product to always remain in inventory. When the system adds this product to an order, it selects the amount necessary to bring the current inventory quantity up to this number.
Purchase Order	Enter the customer's purchase order number. The system assigns this number to any order it generates for this product. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.
Release	Enter the customer's release number to assign to orders the system generates for this product. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.

Field	Description
Break	<p>Enter the customer-defined code, or break point. The system assigns this break point to orders it generates for this product.</p> <p>Use break points to generate multiple orders that are delivered to different locations. When RDC generates an order and encounters a product with a different break point, a new order is started.</p> <p>This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.</p>
Print Override	<p>Substitute a system-generated replenishment ID in place of a customer-defined part number assigned to this product to print on orders, shipping tickets, and invoices.</p> <p>Press F10 and select a pre-defined customer/vendor specific part number.</p>

3. Use the following hot keys, as needed.

Hot Key	Function
Matrix	<p>Displays the Sell Matrix Maintenance screen, where you can edit a customer/product matrix for the product cross-referenced to a customer/vendor specific part number. The current date is the default effective date for the new matrix cell.</p> <p>This hot key is disabled when the Customer/Vendor Specific Part Number Detail screen displays in view-only mode.</p>
Commodity Code	Displays the Commodity Codes screen, where you can enter a customer-defined code used to categorize this product.
Comment	Displays the Comment screen, where you can enter a comment related to this product.
Delete	<p>Deletes the currently displayed customer/vendor specific part number from the Customer/Vendor Part # file.</p> <p>You must have the ENTITY.PN.EDIT authorization key with Level 3 to delete a record.</p>
Location	Displays a Location prompt, where you can view or enter the customer's warehouse storage location code for this product.
Inq	<p>Displays the hot keys for the following screens:</p> <ul style="list-style-type: none"> • Inventory Inquiry • Future Ledger • History Ledger • Product Maint • Inventory Data • Sales History
Entity-C	Toggles between the customer and vendor views. The customer or vendor information is view-only.

4. Press **Esc** to save the entries and exit the screen.

Creating Customer/Vendor Specific Part Number Templates

Use a customer/vendor specific part number template to create default values for fields on a Customer/Vendor Specific Part Number record. Copy this template when you define new part numbers for a customer or vendor. The template enables you to quickly enter similar data for several products.

When you copy the template, it does not override pre-existing data.

► To create a customer/vendor specific part number template:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. Use the **Template** hot key to display the Customer / Vendor Specific Part Number Template screen.
3. In the **Product Description** field, enter the Eclipse product description for the part numbers to enter in this template.
4. In the **Location** field, enter the location code to assign the same warehouse storage location to the part numbers.
5. In the **Min** field, enter the minimum on-hand quantity of the item to maintain in inventory.
6. In the **Max** field, enter the maximum on-hand quantity of the item to maintain in inventory.
7. In the **Purchase Order** field, enter the purchase order number to use when the item using this part number is ordered.
8. In the **Break Point** field, enter the number to assign to the customer-defined code, or break point, to the part numbers you enter in this template.

The system assigns this break point to orders it generates for this product.

Use break points to generate multiple orders that are delivered to different locations. When RDC generates an order and encounters a product with a different break point, a new order is started.

This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.

9. In the **Release Number** field, enter the customer or vendor's release number to use when the item using this part number is ordered.
10. In the **Comment** field, enter any additional information about the part numbers you enter in this template. This comment displays when a customer orders this product.

11. In the **Basis** field, enter name of the price basis to use to calculate this item's price or cost.
12. In the **Formula** field, enter the formula to use to calculate this item's price or cost.
13. Press **Esc** to save the information and return to the Customer/Vendor Specific Part Numbers screen.

Creating, Editing, and Deleting Customer/Vendor Specific Part Numbers

Edit new customer part numbers when you want to organize and monitor a customer's specific part numbers.

Create and edit replenishment numbers the same way you keep track of customer specific part numbers for those placing orders at the customer site through RDC.

This page contains the following instructions:

- Replacing a part number
- Creating a part number
- Creating an auto-replenish number for RDC
- Deleting part numbers

You must be assigned the ENTITY.PN.EDIT authorization key to view, edit, or delete items on the Customer/Vendor Specific Part Number Detail screen. If you access the screen through Remote Order Entry, the screen displays in view-only mode.

►To replace a part number:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. In the **Product Description** field, select the product to view and use the **Detail** hot key to display the Customer/Vendor Specific Part Number Details screen.

You can view both customer and vendor records from this screen, but you can edit only customer records.

3. Enter one of the following at the **Delete Old Record and Create a New One?** prompt:
 - **N** – Retains the original customer or vendor specific part number record and creates a new record using the number you just entered.
 - **Y** – Replaces the original customer or vendor specific part number with the new number.
4. Press **Esc** to return to the Customer/Vendor Specific Part Number Details screen.

►To create a part number:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. In the **Product Description** field, select the first blank line and do one of the following:
 - Enter the part number to use with this product. Press **Esc** or **Enter** to save the data and return to the Customer/Vendor Specific Part Numbers screen. This number displays in order entry preceded by "Your #."
 - Enter **@** and press **Enter**. The system assigns the product ID as the part number preceded by **@**.

The following is an example of how these numbers display on the Customer/Vendor Specific Part Number screen and on the Order Entry screen.

For Example, the first screen, below, shows two ways of creating part numbers entered on the Customer/Vendor Part Number screen. The second screen shows how the two items display on the Sales Order Entry screen.

```

Customer / Vendor Specific Part Numbers
Cust/Vendor : Merritt Builders
-----
Alternate Cust/Vendor :
Product Description      Customer/Vendor Part #      Location
6 FT #306E EXTENSION HANDL @1234
MERRILL REPAIR KIT# PKCF F 24405
    
```

Part numbers as shown in Customer/Vendor Specific Part Numbers.

```

Bill To: Merritt Builders, 786 S. Easton Dr., DENVER, NC 28037
Ship To: Merritt Builders, 786 S. Easton Dr., DENVER, NC 28037
-----
Qty/Unit  Product Description      Basis  Formula  Unit  Price
1ea      6 FT #306E EXTENSION HANDLE     LIST   *1      35.000
1bx      MERRILL REPAIR KIT# PKCF FOR     LIST   *1      17.500
          C-1000 YARD HYDRANT
          branch 1 nonstock comment
          Your # 24405
-----
Order #   Stat  PrcBr  ShpBr  ReqrDate  ShipDate
$1353378  W      1      1  03/20/02  03/20/02
-----
Comment  View  NonStk/Lot  Header  Subs  Label  Sched-Off  Imp  ShipDates
Pricing  Mode  Subtotal   Totals  Find  Cr/Abl  Quick Prc  InQ  ReordPAD
    
```

Sales Order Entry screen showing no part number for the first item, and the customer part number with "Your" for the second item.

For Example, the first screen, below, shows two ways of creating part numbers entered on the Customer/Vendor Part Number screen. The second screen shows how the two items display on the Sales Order Entry screen.

```

Customer / Vendor Specific Part Numbers
Cust/Vendor : Merritt Builders
-----
Alternate Cust/Vendor :
Product Description      Customer/Vendor Part #      Location
6 FT #306E EXTENSION HANDL @1234
MERRILL REPAIR KIT# PKCF F 24405
    
```

Part numbers as shown in Customer/Vendor Specific Part Numbers.

Bill To		Ship To	
Merritt Builders 786 S. Easton Dr. DENVER, NC 28037		Merritt Builders 786 S. Easton Dr. DENVER, NC 28037	
Qty/Unit	Product Description	Basis	Unit Prc
1ea	6 FT #306E EXTENSION HANDLE	LIST	*1 35.000
1bx	MERRILL REPAIR KIT: PKCF FOR C-1000 YARD HYDRANT branch 1 nonstock comment Your # 24405	LIST	*1 17.500
Order #	Stat	PrcDr	ShpBr
S1353378	W	1	1
ReqDate	ShipDate	1 of 5	
03/20/02	03/20/02		
Comment	View	NonStk/Lot	Header
Pricing	Mode	SUBtotal	Totals
		Find	Cr/Abl
		Quick Prc	InQ
		ReordPAd	

Sales Order Entry screen showing no part number for the first item, and the customer part number with "Your" for the second item.

► **To create an auto-replenish ID number for RDC:**

1. Display the Customer/Vendor Specific Part Numbers screen.
2. In the **Product Description** field, select the first blank line, and enter the product ID.
3. In the **Customer/Vendor Part #** field, enter an exclamation mark (!) and press **Enter**.

The system generates a unique auto-replenish number, for example, !2343, to use when ordering products remotely for that product.

No customer can have two identical replenishment numbers and no two customers can have the same replenishment number. Because a replenishment ID is unique, when an employee scans a label containing the replenishment ID, the system identifies the customer, location, and product.

► **To delete part numbers:**

1. Display the Customer/Vendor Specific Part Numbers screen.
2. Do one of the following:
 - Use the **Del All** hot key to delete all products in the **Product Description** list. The system prompts for confirmation.
 - Select the product to delete and press **Alt - Delete** to delete that product from the list. The system prompts for confirmation.

Note: On the Customer/Vendor Specific Part Numbers screen, if you delete one line, delete all lines, or change the Eclipse product number for the current line, and if a service stock number exists for a customer/PN combination, the system prompts to remove the customer service stock number from the product for that customer.

3. Press **Esc** to return to the Customer or Vendor Maintenance screen.

Copying Customer/Vendor Specific Part Numbers

You can copy one or all customer/vendor specific part numbers from one customer or vendor record to another customer or vendor record. You can also create templates that you can copy to customer or vendor records.

► To copy customer/vendor specific part numbers:

1. Display the Customer/Vendor Specific Part Numbers screen.
The **Cust/Vendor** field displays the customer or vendor name from the previous screen.
2. Use the **Copy** hot key to display the Copy Choices screen.
3. In the **Copy to Customer** or **Copy to Vendor** field, enter a customer or vendor name to which to copy the part numbers.
4. In the **Copy Current Item/All Selected Items (C/A)** field, enter one of the following:
 - **C** – Copies the currently selected product and part number to the entity.
 - **A** – Copies the entire list of products and their part numbers to the entity.
5. Press **Enter** to copy the part numbers.
The system displays a message saying what it copied.

► To copy template information to part numbers:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. Select the product from which to build the template.
3. Enter the data as described in the previous instruction.
4. Press **Esc** to save the template information.
5. Use the **Copy** hot key and select one of the following:
 - **Copy Template to Current Item** – Copies the template information to the selected product.
 - **Copy Template to All Selected Items** – Copies the template information to all products from the currently selected product to the bottom of the list.

The system returns to the Customer / Vendor Specific Part Numbers screen. Your products now display the template's information.

Defining Substitute Products for Customers

The products displayed on the Customer/Vendor Specific Part Numbers screen are the primary products listed for the customer, but you create a list of substitute products for each primary product listed. When you select a substitute item from the list, the line item on the Customer/Vendor Specific Part Numbers screen updates to reflect the new primary item and the former primary item becomes one of the valid substitute products.

Customer specific substitute items are available when entering orders for that customer. You can also create product-specific substitutes in Product Maintenance.

► To define substitute products for a customer:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. Select the primary product for which to create substitutes.
3. Use the **Subs** hot key, and enter a list of products that can substitute for the primary product.
4. Press **Esc** to save the list and return to the Customer/Vendor Specific Part numbers screen.
5. Select the product to substitute for the primary product.

The product selected on the Customer/Vendor Specific Part Numbers window changes places with the substitute product in the list. You can change the primary product back at any time.

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

Printing Custom Labels

Set up parameters for printing custom labels for customers or vendors to identify products that have customer/vendor specific part numbers. Then, you can print custom retail price labels for one or more customer/vendor specific part numbers at a time.

This page contains the following procedures:

- Setting up for printing custom labels.
- Printing custom labels.

▶To set up for printing custom labels:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. Use the **Find Item** hot key, if needed, to find a product in the list without having to scroll.

The system prompts for the product description, and then lists products matching the description. The product is selected when found.
3. Use the **View** hot key and select **Pricing Formula**.
4. In the **Basis** and **Formula** fields, enter the basis name and formula for the system to use to calculate the price to print on custom retail product labels.

Note: The basis and formula entered on this screen do not affect the product pricing.

▶To print custom labels:

1. Display the Customer/Vendor Specific Part Numbers screen.
2. Use the **Prt Lbl** hot key to display the User Defined Document/Label Printing screen.
3. In the **Doc/Lbl Format** field, the default format displays. To select a different label format, press **F10** and select a label format.
4. In the **Print Selection** field, enter one of the following:
 - **All Items Listed** – Prints a label for each item listed on the Customer/Vendor Specific Part Numbers screen.
 - **Current Item Only** – Prints a label for the item at the cursor's current position.
 - **All Items for Current PN** – Prints a label for the item at the cursor's current position and each item listed that has the same customer/vendor specific part number.
5. In the **Total Count** field, enter the number of each item to print.
6. Use the **Print** hot key to print the labels.

Note: To design more custom retail price labels, contact Eclipse for custom programming.

Importing and Exporting Customer/Vendor Specific Part Numbers Using Microsoft Excel

You can import customer/vendor part number information from an Excel spreadsheet to display on the Customer/Vendor Specific Part Numbers screen, or you can export customer part number information from the Customer/Vendor Specific Part Numbers screen to an Excel spreadsheet.

This process does not require the use of Mass Load to populate the Customer/Vendor Specific Part Numbers screen. Collect part number information from your customer in Microsoft Excel, save the file in tab-delimited text (.txt) format, and import it. To accurately import selected information, you must map column headings from the import file to Eclipse's field names on the Customer/Vendor Specific Part Numbers screen.

Exporting customer part numbers requires no additional file manipulation or Eclipse setup before exporting data directly to an Excel spreadsheet.

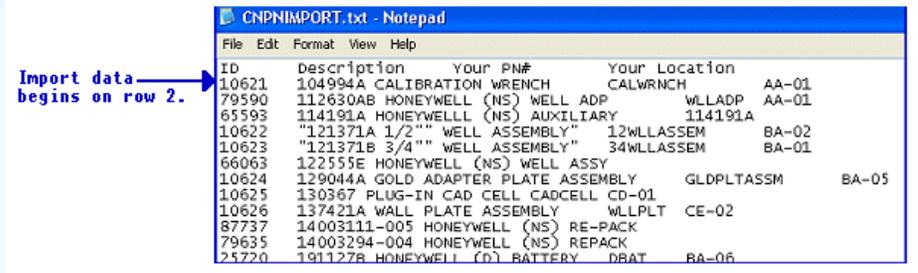
► To display the import or export utility:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer** field, enter the customer ID to display the customer record.
3. Use the **Part #** hot key to display the Customer/Vendor Specific Part Numbers screen.
4. Use the **Excel Import** or **Excel Export** hot key, depending on which process you want to use:
 - Importing product data.
 - Exporting product data.

► To import product data:

1. Save the Excel spreadsheet you want to import in tab-delimited text (.txt) format.
2. Display the Customer/Vendor Specific Part Numbers screen as described above, and use the **Excel Import** hot key to display the Excel Import screen. The following read-only data displays, along with lists of columns to import and export:

- Use the **Data Info** hot key to display the Data Import Information screen, and set up the fields as needed:

Field	Entry
Import Type	<p>Press F10 and select one of the following to determine if the system updates product records upon import:</p> <ul style="list-style-type: none"> • Create New (When Not Found) – Creates a new product record when no match is found for an Eclipse product and a customer/vendor-specific part number during the import process. When it finds a match for the product, the system does not overwrite any existing information. • Create New and Update – Creates a new product record when no match is found for an Eclipse product and a customer/vendor-specific part number during the import process, and then updates existing data from the import file. • Update Only – Does not create new product records, but updates existing data from the import file.
Start Column Import on Row	<p>Enter the row number from the spreadsheet from which to start importing product information. For example, if the spreadsheet has column headings on the first row, enter 2 in this field to skip the heading row.</p> 
Use User Defined Column Headings (Y/N)	<p>Enter one of the following:</p> <ul style="list-style-type: none"> • Y – Displays ### in the Col field for each Eclipse heading listed in the Columns Imported From Excel field. Match the spreadsheet headings to the Eclipse field names via the User-Defined Headings screen, accessed by using the UD Column Header hot key. This setting activates the UD Column Header hot key. • N – Uses Excel's A, B, C headings to map Eclipse fields from the Customer/Vendor Specific Part Numbers screen. The Col field displays Excel's A, B, C headings for each field name listed in the Columns Imported From Excel column.
Column Headings Located on Row	<p>Enter the row number where the user-defined headings appear on the import file.</p>

- In the **Columns Imported From Excel** column, use the **Arrow** keys and **Shift** hot key to create a list of the Eclipse field names for the product information you want to import.

The **Product ID** item is required in the **Columns Imported From Excel** column for the system to match its product ID or description to the product information on the spreadsheet. The product ID can be the Eclipse part number or the exact product description.

You can use the **Insert Blank** hot key to add blank lines to this column only if the **Use User Defined Column Headings** field on the Data Info screen is set to **N**.

- Use the following hot keys to organize the list in the order the information appears on the import document.

Hot Key	Description
Shift	Moves a selected item from either column to the bottom of the other column. For example, if you do not want to import the Location item, select Location in the Columns Imported From Excel column, and use the Shift hot key to move Location to the Columns Not Imported column.
Move Up	Moves a selected item in the Columns Imported From Excel column up one position.
Move Down	Moves a selected item in the Columns Imported From Excel column down one position.
Insert Blank	Inserts BLANK COLUMN at the cursor's position in the Columns Imported From Excel column. Use this option for any column on the spreadsheet you do not want to import. The system skips those columns when importing.
Recall	Restores the list to its original or last saved version.

If user-defined headings are defined, the spreadsheet headings display when you select an Eclipse field, and the **Col** field displays ### for each item in the list.

Note: The ***Product ID** item is required in the **Columns Imported From Excel** column for the system to match its product ID or description to the product information on the spreadsheet. The product ID can be the Eclipse part number or the exact product description.

- If you entered **Y** in the **Use User Defined Column Headings (Y/N)** field in the Data Import Information screen, use the **UD Column Header** hot key to display the Import Column Heading screen, and map the column headings in the **User Defined Column Heading** field to the Eclipse field names in the **Columns Imported From Excel** field.

The **Columns Imported From Excel** field lists the field names from the Customer/Vendor Specific Part Numbers screen that represent the information to be imported.

Note: Only if you enter **N** for this field, can you use the **Insert Blank** hot key to add blank lines to the **Columns Imported From Excel** column.

- Use the **Import** hot key to display the Select file screen, where you browse to select the text (.txt) file, and then click **Open** to import the file to the Customer/Vendor Specific Part Numbers screen.

► **To export product data:**

- From the Customer/Vendor Specific Part Numbers screen, use the **Excel Export** hot key to display the Excel Export screen.
- In the **Columns Exported to Excel** field, use the **Arrow** keys and **Tab** key to navigate the columns, and use the following hot keys to list the Eclipse field names in the order you want them to appear on the exported spreadsheet:

	A	B	C	D	E	F
1	Customer/Vendor Part # for Customer : Merritt Builders					
2	Customer Number : 29017					
3						
4	Eclipse ID	Product Description	Customer/Vendor Part #	Location	Max	Min
5	122185	Stilen Exhaust 3	@122185	B-12-47	8	4
6	122194	H&R Sport Springs	@122194	B-18-47	12	4
7	123	GC Electronics 12-1650 JUMPER TEST	@122198	D-11-77	12	4
8	345	#701 AMERICAN AIR VENT	@122198	H-17-12	3	1
9	477	AG6490 DUSTY ROSE 5' LH 2-PC				
10	122326	PERRY SERIAL KIT COMP A (122326)				
11	72327	3/4 - 1/2" 90 DEGREE COPPER				
12	72325	1/4" 90 DEGREE COPPER ELBOW WRO				
13	72324	3/4" 90 DEGREE COPPER ELBOW				
14	1222	26.10304-620 VB BAR FAUCET (D#)				
15	2344	22X61 CORIAN SGL BOWL TOP - BONE				
16	101128	G31-317 ABC-20 FUSE 5PK				
17						

The Columns Exported to Excel column become the headings on the Excel spreadsheet.

Columns Exported to Excel	Columns Not Exported
Eclipse ID Product Description Customer/Vendor Part # Location Max Min	Break Comment Cost Code Purchase Order Release #

2 of 6

Shift Columns | Move Up | Move Down | Export | Reset | F12-Abort

Hot key	Description
Shift	Moves a selected item from either column to the bottom of the adjacent column. For example, if you do not want to export the Location column, select Location in the Columns Exported to Excel column, and use the Shift Columns hot key to move Location to the Columns Not Exported column.
Move Up	Moves a selected item in the Columns Exported to Excel column up one position.
Move Down	Moves a selected item in the Columns Exported to Excel column down one position.
Save	Requires you to name the current import settings, so that you can recall the named version later by using the Recall hot key
Recall	Recalls previous versions of the import settings that were saved by using the Save hot key.

- Use the **Export** hot key to display the Select file screen, where you select a destination, name the file, and click **Open** to export the Excel spreadsheet to that location.

Uploading Customer Part Numbers

Use the User-Defined Customer Part # Entry utility to upload customer part numbers for existing products in the system. The uploaded part numbers display in Customer/Vendor Specific Part Numbers. You can upload part numbers from a spreadsheet or a text file.

This page contains the following procedures:

- Uploading customer part numbers.
- Changing the file format.

►To upload customer part numbers:

1. From anywhere in the system press **Shift F2** to display the Spooler Control screen.
2. Upload the file containing the part numbers if necessary.
3. Select the file to process and use the **Process** hot key to display the User Defined Upload Processing screen.
4. In the **Processing Type** field, enter **Customer Part # Import**.
5. Use the **Begin** hot key to display the User Defined Customer Part # Entry screen.
6. In the **Work ID** field, do one of the following:
 - Leave the field blank. – Does not save the template after this upload.
 - Enter a name that identifies the upload file. – Creates a new template for use with future uploads.
 - Press **F10** and select an ID. – Uses an existing template.
7. In the **Desc** field, enter a complete description for the upload.
8. In the **Customer** field, enter a name to identify which customer part numbers you are uploading.
9. Use the **File Format** hot key to prepare the system for the type of upload file as described in the following procedure.
10. In the **Start** or **Elmt#** field of the **Data Format** section of the screen, scroll down the list to find the data format to match in the update file.

The title of the first column in the **Data Format** section toggles depending on which format you are using for the update. In blocked format the column shows **Start**, in variable format it shows **Elmt #**. In either format, you point to the location of data in the update file.

For blocked records:

- **Start** – For each **Data Format**, enter the number for the starting position on the upload file.
- **Length** – For each **Data Format**, enter the number of characters needed for the data on the upload file.

For variable records:

- **Elmt#** – For each **Data Format**, enter the column number from the upload file.

11. In the **Dec#** field, enter one of the following for numeric data:

- The appropriate number of decimal places if the decimal point is not embedded, but the numeric data contains a defined number of decimal places.
- A zero if the decimal point is embedded.

12. Use the following hot keys as described below:

- **Begin** – Starts the upload. The system imports customer part numbers into the ENTITY.PN.IDS table.
- **Delete** – Deletes the upload template when you type **delete** at the prompt.

Note: If the system finds errors in the report data, it generates a Failed Entries report and places it in your Hold file.

▶ **Changing the file format:**

1. From the User Defined Customer Part # Entry screen, use the **File Format** hot key to display the Upload File Format screen.
2. In the **Record Type** field, enter one of the following formats for the upload file:
 - **Blocked** – fixed-length.
 - **Variable** – comma- or tab-delimited.

Note: Data elements in a blocked record may also be separated by a delimiter.

3. In the **Record Length** field, enter one of the following:

- Enter the number of characters necessary if specifying a record length.
- Leave the field blank if not specifying a record length.

Note: This field is accessible only for blocked-type records.

4. In the **Delimiter Char** field, enter the character used between each field as a delimiter, such as a comma (,). This field is active only for variable record type files.

5. In the **Delete Chars** field, enter any characters you do not want read as data, such as quotation marks or the dollar sign.

6. Press **Esc** to save the format and return to the User Defined Customer Part # Entry screen to complete the upload.

Entering Reminder Notes

You can create customer or vendor reminder notes that display when a screen, such as the Sales Order Entry Header screen is accessed for a customer or vendor. You can set reminder notes to display for the entity for following screens:

- Sales Order Entry Body or Status
- Purchase Order Entry Body, Status, or Header
- Transfer Order Entry Body, Status, or Header
- Customer or Vendor Maintenance
- Cash Receipts, A/R Inquiry
- A/P Entry, A/P Inquiry
- Activity Log Viewing and Entry
- R/F Shipping

You can also create user reminder notes to display when the user logs on or off.

Entering User-Defined Notes

Select a user-defined note category to write a note for this customer, vendor, or product. Define categories for user-defined notes in the following control maintenance records:

- User Defined Customer Notes
- User Defined Vendor Notes
- User Defined Product Notes

Define as many as 20 note categories, such as, "Special Dates" or "Freon Purchases" that you can use to write notes. Note categories cannot be assigned for individual entities or products, but each note you write is specific to that entity or product.

▶To enter user-defined notes for a customer, vendor, or product:

1. From the **Files** menu select **Customer, Vendor, or Product** to display the customer, vendor, or product screen.
2. Enter a name to display a customer, vendor, or product record.
3. Use the **Notes** hot key to display the Notes screen.
4. Select the note category for this customer, vendor or product, and press **Enter**.
5. Type the note pertaining to the category you picked for this entity or product. The screen allows 999 lines of 68 characters each.
6. To read the note, use the **Notes** hot key. The note does not display automatically on any other screen, as do Customer and Vendor Reminder Notes, Order Entry Messages, or Order Entry Reminder Notes for products.

Entering Internal Notes and Vendor Instructions

Enter internal notes and vendor instructions that display on the Header screen of Purchase Order Entry, shown below.

Remit To MERRITT SUPPLY, INC. 1948 ROCKFORD STREET MOUNT AIRY, NC 27030		Ship From MERRITT SUPPLY, INC. 1948 ROCKFORD STREET MOUNT AIRY, NC 27030	
P/O # : P1042865	Branch # : 1 -Boulder (1)	Confirming P/O : N	Ordered with :
Date Ordered : 03/18/2002	Written by : ANIRAE	Payment Terms : 210 2% 10TH PR	Freight : PrePaid & Add
Order ID :	Job Bid Name :	Phone Number : 910-786-4165	Print Style :
Vendor Instructions Deliver before 3 pm.		Internal Notes Check for damage before accepting shipment.	
Add	Chg Log	Ship-To	Instr
Notes	Copy To All : Prompt	Esc-Body	

▶ To enter internal notes and vendor instructions:

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen.
2. In the **Vendor/New** field, enter the vendor ID to display the vendor record.
3. Use the **OE Instruct** hot key to display the OE Instructions screen.
4. Select one of the following:
 - **Vendor Instructions** – To enter instructions for the vendor entered in step 2, above.
 - **Internal Notes** – To enter notes to your personnel regarding this vendor.
5. Enter the messages to display in Purchase Order Entry.
6. Press **Esc** to exit the notes or instruction screen.
7. Press **Esc** again to exit the Vendor Maintenance screen.

The notes do not display on the Purchase Order Entry screen until after you exit Vendor Maintenance.

Entering Internet and E-mail Information Overview

Access an e-mail address or web site without having to retype the address each time. By entering internet information into your customer or vendor records you have immediate access to Internet or e-mail communication. You can add the following Internet information to your customer and vendor records:

- Web site addresses
- E-mail addresses

Entering E-mail Information

Enter e-mail information in your customer or vendor records to e-mail customers or vendors without having to retype the address each time.

►To enter e-mail information:

1. From the customer, vendor, or contact record use the **WWW** hot key to display the Internet Information Maintenance screen.
2. Enter a name in the **Customer**, **Vendor**, or **Contract** field, depending on which screen you display.
3. Use the **WWW** hot key to display the Internet Information Maintenance screen.
4. The **HTTP Document Address** and **Account Manager** fields are for internal Eclipse use only.
5. In the **E-mail Address** field, enter the e-mail address.

If you use the Web Commerce companion product, use a unique e-mail address for this contact. If you enter the same e-mail address for the company and a contact within the company, then Web Commerce cannot respond if the user with that e-mail address submits a "Forget my password" request.

6. In the **Type** field, do one of the following to define a category for the e-mail address:
 - Press **F10** to select a defined e-mail type. E-mail types are defined in the Valid E-mail Types control maintenance record.
 - Enter a word that describes the e-mail address if no e-mail types have been defined. For example, you can describe an e-mail address as a contact's business e-mail address, or as a personal e-mail address.
7. In the **Pref** field, do one of the following to define the format to use to send e-mail messages to this customer:
 - Press **F10** and select an e-mail format preference. E-mail preferences are defined in the Valid E-mail Preference control maintenance record.
 - Enter a word that describes the e-mail format if no e-mail preferences have been defined. For example, you can send e-mail in HTML or in text format.
8. Press **Esc** to save the information and return to the previous screen.

Sending E-mail from Entity Records

You can conveniently send e-mail messages while working in a customer or vendor record.

▶ To send an email message from an entity record:

1. From the customer, vendor, or contact record use the **WWW** hot key to display the Internet Information Maintenance screen.
2. Use the **Down Arrow** key to move the cursor to the e-mail address to which you want to send a message.
3. Use the **Send E-mail** hot key, and enter one of the following to the Create E-mail for All Addresses prompt:
 - **Y** – Sends an e-mail to all addresses listed in the **E-mail Address** field.
 - **N** – Sends an e-mail only to the selected address.

The system displays the Send E-mail screen, with the selected e-mail address in the **To** field.

Entering Web Site Addresses

You can keep Internet information stored with customer and vendor records and easily access the customer or vendor web side from that record.

▶ **To enter a URL address:**

1. From the customer, vendor, or contact record, use the **WWW** hot key to display the Internet Information Maintenance screen.
2. In the **WWW Address** field, enter the web site address of this customer, vendor, or contact.

For example, enter **www. eclipseinc.com**.

▶ **To access the URL address that you have entered:**

1. From the Internet Information Maintenance screen.
2. Click on the address, or use the **Link to WWW** hot key to launch your default browser and display the web site.

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