Entering Customers, Products, Prices, and Payments

Release 8.6.5 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.5 (Eterm) Online Help System

Publication Date: March 23, 2009

Table Of Contents

Sales Management Overview

Use Eclipse to manage every aspect of a sale, from the moment it is quoted until the day it is invoiced.

Flexible Searching

Look up customers, vendors, transactions, and products by virtually any identifier.

- Find customers and vendors by any part of a company name, phone number, or keyword.
- Find transactions by order number, product, customer PO number, or shipping address.
- Find products by UPC number, product description, size, color, or manufacturer.

Numerous Product Entry Options

When entering products on sales orders, change your screen view to see any number of details about order items. Create non-stocks, access substitute and add-on products, or add recently ordered products to the current order. Robust product and pricing information are a keystroke away. Real-time inventory accuracy helps order writers fulfill inventory commitments, increasing customer satisfaction.

Bid Management

Use bid management features to create and copy bids, subtotal and reprice bid items, and convert bids into orders. Follow up on bids by creating bid reminders and reviewing bids that have not been converted into orders.

Management of Everyday Events

Use the system to handle everyday occurrences, like credit denials, product returns, credit and rebill transactions, and warranty tracking. Use reporting options to track trends in these areas, and reprint needed documents at will.

Quick Access to Related Features

Hot keys throughout order entry provide instant access to product features, discounts, shipment history, pricing information, and accounts receivable balances. You can schedule blanket orders, conduct credit checks, review order commitments, and check inventory availability at other locations.

Payment and Credit Management

Review invoices or orders before sending them to your customers, print consolidated invoices, and review invoices that match the criteria you specify. Monitor a customer's credit status at every stage of the order, and establish credit, past-due, and per-order limits as you like.

Operational Excellence

Use management tools to examine sales trends and to list orders that meet the criteria you specify. Uncover issues that impact profitability, view changes to orders, track sales sources, and more effectively manage your sales force.

Entering Existing Customers During Order Entry

This topic explains how to enter an existing customer on the Body screen of a sales order.

To enter an existing customer:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry Body screen.
2. In the **Ship To** field, enter one of the following criteria and press **Enter**. If more than one customer matches the criteria you enter, select one from the list.
   - Enter keywords or other special characters. For example, type "Smith Plumbing" or "Jones Brothers Electrical".
   - Enter a telephone number or zip code:

If you enter...	Then the system...
a 10-digit telephone number	displays the customer matching the telephone number.
the last four digits of a telephone number	displays the customers whose telephone numbers end in those four digits and whose Zip Code begins with those four digits.
a five digit Zip Code	displays the customers whose Zip Code matches the search criteria.

   - Enter the customer ID with a period (for example, ".1234").
3. Respond to any prompts that display, and then begin entering products on the Sales Order Entry Body screen.

Entering New Customers During Order Entry

When entering a sales order for a new customer, such as a walk-in customer, use the New Customer Entry window to enter basic contact and filing information for a new customer. The system creates a new customer maintenance record, but only requires minimal information so you can quickly process the order. You can finish entering the details later in Customer Maintenance.

> **Note:** You can create a new customer in sales order entry even if you do not have the CUSTOMER.MAINT authorization key assigned to you. However the authorization key is required to view or edit the customer in Customer Maintenance.

If the customer does not want to give you their information, in most cases, enter your company's generic "cash customer" instead of the actual customer. We recommend that you set up your company's generic "cash customer" to put the customer on credit hold if you want to review the new customers records.

To enter a new customer during order entry:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry Body screen.
2. In the **Ship To** field, enter **New** to display the New Customer Entry screen.
3. In the **Phone** field, enter the telephone number of the company or individual who wants to place an order. Enter the number without dashes or parentheses.
4. In the **Name** field, enter the name of the company or individual to which the requested items will be shipped.
5. In the **Address** field, enter the shipping address for the requested items. On the second line, enter any additional address information that does not fit on the first **Address** line.
6. In the **Zip** field, enter a five- or nine-digit code.

   The system populates the **City** and **St** (State) fields based on this field.
7. In the **SortBy** field, enter the most significant words in the customer's name.

   The system uses this information to alphabetize the search list.
8. Complete the following fields, as needed:

Field	Description
Index	The name of the company or individual as you want to search for it. The system populates this field when you complete the **Name** field, but you can adjust it to meet your needs. For example, if this is an individual, enter the last name first.
Exempt#	A government-issued number that exempts the customer from having to pay tax for goods purchased from your company. The customer will give you this number if they have one.

Field	Description
InSlsp	(Inside Salesperson.) The login ID of the person who will call the customer to suggest additional orders.
OutSlsp	(Outside Salesperson.) The login ID of the outside salesperson who is assigned to this customer.
SICCode	A four-digit code originally developed by the Office of Management and Budget to facilitate statistical economic analysis and reporting of the state of the U.S. economy based on enterprises engaged in production, trade, and service. You can use this code to group businesses with similar production processes, and to sort customers in the Report Writer for various purposes.
SelCode	The type of business in which the customer engages. This information is used for reporting purposes.

Note: Depending on your authorization, the **InSlsp** and **OutSlsp** fields may be view-only.

9. Press **Esc** to display the order selection list.
10. Select **New** and press **Enter** to return to the Sales Order Entry Body screen.

More Options

The New Customer Entry screen also offers these options:

To...	Use this hot key...
enter additional contact names or phone numbers	**Phone #'s** The Customer Contact / Phone Number Maint screen displays.
enter additional customer information, or edit default settings used for new customer	**Full Record** The Customer Maintenance screen displays.
add the customer's Web address or e-mail address information	**WWW** The Internet Information Maintenance screen displays.

Checking for Authorized Order Placers

Some customers only let certain employees place orders with you. These employees, known as *authorized personnel*, are identified in Customer Maintenance. When a customer is set up for authorized personnel only and the Customer Authorization Maintenance window contains the list of authorized personnel, *and* when the **Validate Name In 'Ordered By' Field Against Customer Contacts** control maintenance record is set to **Yes**, the system prompts you to select an approved order placer from a list during order entry.

To accept an order from an authorized order placer:

1. Begin a sales order for the customer.
2. When the Authorization Selection screen displays, select an authorized order placer and press **Enter**.

   The sales order's Body screen displays, where you can begin entering products. The name you selected displays in the **Ordered by** field on the order's Header screen.

   If the customer is not setup for authorized personnel only, and the **Validate Name In Ordered By Field Against Customer Contacts** control maintenance record is set to **Yes**, you can enter any name in the **Ordered By** field and start the process of creating a new contact for the customer.
3. Complete the order as usual.

Entering Products and Prices on Sales Orders

When entering a sales order, you enter products on the Body screen. Use this same screen to change product prices, when needed.

To enter products and prices on orders:

1. Create or open a sales order and display the Body screen.
2. For each product the customer wants to purchase, complete the following fields:

   Note: Depending on your column view, you may be able to enter additional information.

Field	Description
Qty/Unit	The amount of the item to sell, and its proportions as it is packaged for sale, such as 1 each (ea), 1 box (bx), or 1 case (cs). You can enter only the quantity, if needed.
Product Description	A statement that identifies the item to sell, including assembly or other charges. For more information, see Searching for Products. **Note:** When you enter an item, the system may prompt you to select a unit of measure. Select the unit from the list and press **Enter**.

3. Change the price of any product, if needed.
4. When finished entering products, press **Esc** to proceed to the next required screen.

   Note: When entering an order for an on-account customer, the customer's credit limit is checked upon exiting this screen.

Entering Product Quantities

Before entering a product on a sales order, you first enter the order quantity. Typically the order quantity is at its lowest unit of measure, but some products may be set up to use a different default unit of measure. Certain products can also be sold in multiple units of measure.

Units of measure are set up by your company. Some common units of measure include each, case, feet, and pounds.

If a unit of measure is not entered with the order quantity (for example, if you enter only "1" or "2"), the default unit of measure appears next to the order quantity *after* you enter the product on the sales order. If more than one valid unit of measure exists, you may be prompted to choose a unit of measure.

Authorized users can override the unit of measure when entering the order quantity.

To enter a product quantity:

1. Create or open a sales order and display the Body screen.
2. In the **Qty/Unit** column, enter the quantity or amount that your customer wants to order.
3. Use **Nonstk/Lot** hot key to view the Nonstock screen, if necessary, and search for a nonstock entry item for the order. For more information, see Adding Nonstock Products to Sales Orders.

   The order information populates for your review before applying to the order. The DFLT-LIST and the DFLT-COST (REP-COST) display at the bottom of the screen.
4. In the **Product Description** column, enter the product that your customer wants to order.

Entering or Editing Shipping Package Quantities

Use the Shipping Package Quantities screen to enter or edit shipping packages for a specific invoice. Changes made to this screen update the manifest record in the Shipping Manifest Queue, if the order is on a manifest. In fact, you can enter quantities here even if the order is not yet on a manifest.

To enter shipping package quantities:

1. From the **Orders > Printing** menu, select **Reprint Picking Ticket** to display the Order Reprinting Options screen.
2. In the **Order #** field, enter the sales order number whose pick ticket you want to reprint to display an order generation selection list.
3. Select the generation and press **Enter** to return the order generation information to the Order Reprinting Options screen.
4. Use the **Shipping Pkgs** hot key to display the Shipping Package Quantities screen.
5. In the package type section, enter the number of packages (for example, boxes, cartons, or pallets) to ship on the order generation.

   If the order is being shipped in more than one tote, each tote is listed, and you can change the shipping package quantities for the packages contained within each tote.

   Note: Package types are user-defined and are set up in the Valid Package Types control maintenance record.

6. Press **Esc** to update the shipping manifest and return to the Order Reprinting Options screen.

Searching for Products

The system uses the same search criteria to find products as it does to find customers, vendors, and transactions. However, product searches offer additional options that allow salespeople to get quicker, more narrowly defined search results.

To search for products:

1. Create or open a sales order and display the Body screen.
2. In the **Qty/Unit** column, enter a product quantity.
3. In the **Product Description** column, enter product keywords and press **Enter**.

   Note: If you have recently ordered the product, press **F10** to display a list of recently ordered products. Select the product from the list and press **Enter** to add the product to the order.

   You can also use the following special characters when searching for products:

To search for...	Enter...
a product that contains a specific keyword in its description	the keyword followed by a period (.).
a product by its product ID	a period (.), followed by the product ID.
a product family or price line	a forward slash (/), followed by the search criteria. For example, **/delta** returns a list of products in the Delta family or Delta price line.
a buy line	two forward slashes (//), followed by the search criteria. For example, **//SYL** returns a list of products in the SYLVANIA Buy Line.
a list of buy lines	two forward slashes (//) as the search criteria.
a list of product families and price lines	a forward slash (/) as the search criteria.
products purchased in the last year by the selected ship-to customer	a forward slash and a period (/**.**), followed by the search criteria.
products purchased in the last year by all ship-to customers associated with the selected bill-to customer	a forward slash and a comma (/**,**), followed by the search criteria.
products for which contract prices are in effect for the selected customer	a forward slash and a semicolon (/;), followed by the search criteria.

4. Expand your search to a different product index, if necessary, by pressing **F10**. The system searches for the following groups of products in the order listed below. Depending on your company's setup, not all product indexes may display.

   - **Active Products** - The system first searches for products in this category. These products have been previously sold or purchased at your location, or they are physically on-hand.

- **Primary Index** - Products are assigned this status by your company or branch. These products are items you plan to routinely sell or search for.
- **Catalog Index** - Products are assigned this status by your company or branch. These products, often non-stocks, are items you do not routinely sell or search for, but must be able to order.
- **PDW Catalog Index** - Products in this group include every item sold or manufactured by the suppliers you specify. You must purchase the Product Data Warehouse (PDW) companion product to search the PDW Catalog Index.

PDW Catalog Searches and Nonstock Products

If you search the PDW Catalog Index and select a nonstock product that has no Eclipse product file, the system launches the Nonstock Entry screen and creates a new nonstock product. To assign a price, the system uses the price sheet for the price line to which the product belongs and uses the first date that is currently in effect. It will not use a future effective date, because the system needs a price today.

Scanning Products

If your point-of-sale counter is set up with a UPC scanning device, you can enter products on sales orders by scanning them.

To scan products:

1. Create or open a sales order and display the order's Body screen.
2. In the **Qty/Unit** column, enter a product quantity.
3. In the **Product Description** column, type **/QS** and press **Enter** to display the Quick Scan Entry screen.
4. Scan the item. The system enters the product's bar code in the **Scan Code** field and the product's description in the **Product Description** field.
5. If you want to change the quantity of the item on the order, do one of the following:
   - In the **Quantity** field, enter the number being sold.
   - Scan each item. The system consolidates the items that are the same onto one line
6. Once you finish scanning all the items, press **Esc** to return to the Sales Order Entry Body screen.
7. Enter more products, as needed, and complete the order as usual.

Locating Products on Sales Orders

When working with a sales order that already includes many products, you can quickly locate a specific product using the Find feature.

To locate a product on a sales order:

1. Create or open a sales order and display the Body screen.
2. Use the **Find** hot key to display a search field.
3. Type all, or part of, a product description and press **Enter**.
    - If multiple products match your search criteria, the system displays all potential matches. Use the Up and Down Arrow keys to select the product you want to search for, and press Enter. If the item exists on the order, the cursor moves to the line item it is on.
    - If only one product matches your search criteria, the cursor moves to the line item it is on.

Changing Views on the Body Screen

On the Sales Order Entry Body screen, you can select any of several columnar views to display specific information about an order. For example, if a salesperson wants to see the commission percentage for each item on the order, he or she could change to a view that includes that information.

The views you can choose from depend on your authorization in the system. For example, views that show sensitive pricing information are not available to everyone. Some custom views are also set up in User Maintenance. If you need a view that is not available to you, see your system administrator.

Use the following control maintenance records to update cost views:

- **Update Cost On Sales Order From Tagged Purchase Order**
- **Update Cost On Sales Order From Tagged Return Purchase Order**
- **Update Cost On Sales Order From Tagged Transfer Order**
- **Update Generic Cost During Processing**
- **When Costing, Do No Show Basis With Level Below**

About Pricing Views

For any views that include a unit price, your company specifies whether it wants to display unit price based on the order unit of measure or not, using the **Show Unit Price And Unit Of Measure Based On Order Unit Of Measure** control maintenance record.

About Availability Views

For any views that include an **Avail** (availability) column, note that this column can display any of the following:

- **A date —** The date on which enough product to fulfill the order will become available.
- **Now (followed by an available quantity) —** There is enough product to fulfill the order, and the quantity shown will be available after this order is satisfied.
- **Today —** No product is available at this moment, but enough of the item to fulfill the order is expected today.
- ***I* Plen —** There is an in-process quantity, but plenty is available.
- ***I* (followed by an available quantity) —** There is an in-process quantity, but the quantity shown will be available after the current quantity is committed.

To switch Body screen views:

1. Create or open a sales order and display the Body screen.
2. Select the **View** hot key to display a list of possible views. Any custom views assigned to you in User Maintenance display first, followed by the other views listed in your company's template.
3. Choose one of the views listed below, depending on what information you want to see. The views are listed here in alphabetical order.

To...	Choose this view...
determine how discounts are calculated for each item	**Audit Pricing** – Review the following columns: **Note:** If the pricing matrix is disabled by a user's price override, all columns remain blank for the line item. • **Cls/Type** – A group of customers with a similar type of business or similar level of buying power. Customer-specific values are indicated by *CUS SPEC*. Contract override pricing is indicated by *CONTRACT*. • **Grp/Prod** – A group of products for which the same pricing formula is used to calculate the selling price. Product-specific overrides are indicated by *PRD SPEC*. • **OBLvl** – A specified amount of an item at which a price break is available. Items can have several levels of quantity breaks, depending on how many of the selected items were ordered. If no quantity level is in effect or achieved, the QBLvl field has a value of 1.
return to your default view, as defined in your OE View template	**Auto** – Your default view is determined by your job function.
view line item availability for the order's pricing branch and its central distribution center	**Central Distribution Center Avail** – Review the following columns: • **Net** – The unit price, per item, for this line item. • **SBr Avail** – The quantity of this line item available in the shipping branch. • **CDC Avail** – The quantity of this line item available in the central distribution center.
compare the cost of goods sold, the purchase order cost of goods sold, and the total cost	**COGS / PO COGS / Cost** – Review the following columns: • **COGS** – The Cost of Goods Sold, as mapped in Price Line Maintenance. This is the cost the affects the company's general ledger. The cost can reflect a manual or matrix override. • **PO COGS** – The purchase order cost of a direct order, if any. • **Cost** – Commission Cost. This is the cost the company presents as the expense incurred to purchase this item, as mapped in Price Line Maintenance. This cost can reflect a manual or matrix override. **Note:** If you add items with Inventory Account Override costs, ensure you have the **Copy COST to COGS for IAO Items In SOE** control maintenance record set to ensure you have the appropriate views display.

To...	Choose this view...
see the commission dollars and percentages received on each item	**Commission $ / Comm % –** Review the following columns: • **Unit** – The selling price per unit of an item. • **CPlan$** – The commission the sales representative will receive per item. • **CPlan%** – The commission percentage the sales representative will received per item.
determine how much of a deposit is required for this order	**Deposit Extension** – Review the following columns: • **Ship Qty –** The quantity of the item currently scheduled to ship. • **B/O** – A flag that identifies how backordered items will be processed once they become available. • **Deposit Extension –** The total deposit required for the stated quantity of the item. (Required Unit Deposit) x (Quantity)
view when the product is available to ship, as well as basic pricing details	**Earliest Avail** – Review the following columns: • **List** – The global list price of an item, as defined in Price Line Maintenance. • **Unit Prc** – The selling price per unit of the item. • **BO –** A flag that identifies how backordered items will be processed once they become available. • **Avail** – The earliest date the item will be available to ship.
review the method used to calculate the price	**Formula / Unit Price** – Review the following columns: • **Basis –** The basis field used to calculate the sell/unit price. • **Formula** – The calculation used to determine the price basis. • **Unit Prc** – The selling price per unit of an item.
review freight charges and shipping box information by line item	**Freight / Ship Box** – Review the following columns: • **Box –** The box number in which the line item is shipping. If the line item is split among more than one box, three asterisks (***) display in this field. To enter box information directly from the order, move the cursor into this field. The Multiple Box Entry window displays. Use this window to enter box IDs (1, 2, 3, for example), the quantity shipping in each box, and the packer of each box. • **Freight** – The freight charges applicable to this line item.
determine, or change, which items on the order are taxable	**Line Item Taxable View –** Review or edit the following columns: • **QTY.SHP** – The quantity of the item scheduled for shipment. • **Unit Prc** – The selling price per unit of an item. • **TAX** – Indicates whether a tax is required for the line item, and if so, whether it is taxed at a reduced rate. • **TaxCode –** The jurisdiction used to calculate the tax rate. **Note:** If your company is using the National Sales Tax Database companion product, you cannot edit the **TaxCode** field at the line item level.

To...	Choose this view...
review cost and gross profit details	**Prc / COGS GP% / UOM / BO / Avail –** Review the following columns: • **Unit Prc** – The selling price per unit of an item. • **GP% –** The gross profit percentage, based on cost of goods sold. • **U** – The pricing unit of measure for the product. • **B** – A flag that identifies how backordered items will be processed once they become available. • **Avail** – The earliest date the item will be available to ship.
review the customer's price class and resulting unit price	**Price Class / Unit Price**– Review the following columns: • **Class** – The customer's price class. • **Unit Prc** – The selling price per unit of an item. • **BO** – A flag that identifies how backordered items will be processed once they become available. • **Avail Da** – The earliest date the item will be available to ship.
review extended price amounts and basic product availability details	**Qty Shipped / Extension** – Review the following columns: • **Ship Qty** – The quantity of the item scheduled for shipment. This column only activates if the order is shipped. If the order is still open, it remains view-only. • **B/O** – A flag that identifies how backordered items will be processed once they become available. • **Ext Amount** – The extended selling price of a specified quantity of an item. This extended amount reflects any pricing-per-unit of measure or pricing-per-quantity information defined in Product Price Sheet Maintenance.
review line item level customer release number	**Release #** Review the **Release #** column for each line item. A release number is a control code the customer assigns to an order for any purpose; for example, to identify a specific job or area within a branch. It is usually a sub-P/O (purchase order) number. Default Release numbers can be defined in Customer Maintenance.
see the commission percentage received on each item	**Salesman Commission** – Review the following columns: • **Unit** – The selling price per unit of an item. • **Comm Plan** – The formula used to calculate the sales representative's commission. • **Comm %** – The percentage of the unit price the sales representative receives as a commission.
view how much of the product is available to ship and when	**Ship Qty / Avail Date** – Review the following columns: • **Ship Qty** – The quantity of the item currently scheduled to ship. • **B/O** – A flag that identifies how backordered items will be processed once they become available. • **Avail** – The earliest date the item will be available to ship.

To...	Choose this view...
determine the number of shipping labels needed to ship the product	**Ship Qty / Label Qty –** Review the following columns: • **Ship Qty** – The quantity of the item currently scheduled to ship. • **B/O** – A flag that identifies how backordered items will be processed once they become available. • **Label Qty** – The number of labels that will print if you print labels using the Label hot key.
review shipment quantities by unit price and gross profit percentage	**Ship Qty / Prc / GP%** – Review the following columns: • **Quantity Shi** – The quantity of the line item that is shipping. • **Unit Prc** – The unit price of each line item. • **GP%** – The gross profit percentage earned on each line item.
determine the effect of federal excise taxes on the unit price	**Unit Prc / FET / Unit+FET** – Review the following columns: • **Unit Prc** – The selling price per unit of an item. • **F.E.T.** – The applicable federal excise tax. • **ExtPrc + F** – The selling price of the specified quantity of the item, including federal excise tax.
determine your profit margin, based on cost of goods sold (COGS)	**Unit Price / COGS / Margin –** Review the following columns: • **Unit** – The selling price per unit of an item. • **COGS –** The Cost of Goods Sold, as mapped in Price Line Maintenance. This is the cost the affects the company's general ledger. The cost can reflect a manual or matrix override. • **GP%** – The gross profit percentage, based on cost of goods sold. • **U** – The pricing unit of measure for the product. **Note:** If you add items with Inventory Account Override costs, ensure you have the **Copy COST to COGS for IAO Items In SOE** control maintenance record set to ensure you have the appropriate views display.
determine your profit margin, based on commission cost	**Unit Price / Cost / Margin** – Review the following columns: • **Unit** – The selling price per unit of an item. • **Cost –** Commission Cost. This is the cost the company presents as the expense incurred to purchase this item, as mapped in Price Line Maintenance. This cost can reflect a manual or matrix override. • **GP%** – The gross profit percentage, based on cost of goods sold. • **U** – The pricing unit of measure for the product.
view pricing details	**View Pricing** – Review the following columns: • **List Pri** – The basic price of the item before any discounts are taken. • **Class** – A group of customers with a similar type of business or similar level of buying power. • **Net –** The selling price per unit of an item, after taxes and other charges have been applied. • **UM** - Unit of Measure. The proportions of a specific item as it is packaged for sale, such as 1 each, 1 box, 1 case, or 1 crate.

Additional User-Defined Views

In addition to the standard Sales Order Entry views listed above, you can also ask your system administrator to give you access to the user-defined views listed below, as needed. These views are set up in the OE View Selection screen in User Maintenance.

> **Note:** If you add items with Inventory Account Override costs, ensure you have the **Copy COST to COGS for IAO Items In SOE** control maintenance record set to ensure you have the appropriate views display.

Your company may also set up other custom views, not listed here, from which you can choose.

To...	Choose this view...
compare the commission cost, cost of goods sold, and the unit price	**COST / COGS / PRICE** Review the following columns: • **Comm** – Commission Cost. The cost your company presents as being the expense incurred in the procurement of the item. • **COGS** – Costs actually incurred in producing the product or service. • **Unit Prc** – The selling price per unit of an item.
compare your customer's pricing to the pricing they are showing their own client	**Customer Client Pricing** Review the following columns: • **Client Pri** – Your customer's client's price, as derived from your customer's client's pricing matrix. • **Unit Cost** – Commission Cost. The cost the company presents as being the expense incurred in the procurement of the item. • **Margi** – The gross profit percentage, based on cost of goods sold. • **U** – The unit of measure for this item. **Note:** Using this view you can manually override the client price, just as you can override the standard unit price for your own customer. If you manually override a client price, this price is not recalculated if you later change the entry in the Customers Client field on the Additional Header screen. You must be assigned the SOE.OVERRIDE.CLIENT.PRICE authorization key to override client price.
view or enter customer-specific part numbers for each line item	**Customer Part Number** Reviewing the following column: **Customer Part Number** – The customer-specific part number for this line item. To enter a customer part number directly from the order, type **NEW** and press **Enter** to display the Customer Specific Part Number screen.
view any subtotal groups on the order	**Job Quoting Subtotal** A subtotal group is a method of organizing or repricing an order.
view the selling unit of measure and the total price of each line item	**UOM Cost / Extended Price** Review the following columns: • **UM** – Unit of Measure. The unit of measure in which you are selling the product. • **Ext Price** – The selling price of the total quantity of the product. • **COGS** – Costs actually incurred in producing the product or service.

Adding Nonstock Products to Sales Orders

If you are authorized, you can create nonstock products and add them to orders. The system retains the nonstock product record in case another customer requests the same item.

To add a nonstock product to a sales order:

1. Create or open a sales order and display the Body screen.
2. In the **Qty/Unit** field, enter the amount of the requested nonstock product.
3. Do one of the following things:

If...	Then...
you know the nonstock item has a record	enter a keyword or part of the description to display either the record or the Product Primary Index list. Select the product and press **Enter** to add it to the order. Do not proceed to the next step. **Note:** Press **F9** to add or change keywords. If after several keyword searches you do not find a nonstock product that meets your needs, press **F12** and return to step 2.
you are unsure if the nonstock item has a record	continue with the next step.

4. Use the **NonStk/Lot** hot key to display the NonStock Entry screen and search for a nonstock entry item for the order.

   The order information populates for your review before applying to the order. The DFLT-LIST and the DFLT-COST (REP-COST) display at the bottom of the screen.

5. In the **Search** field, enter a brief description of the non-stock product to do one of the following:

If...	Then...
only one product matches your description	the system returns the item to the Sales Order Entry Body screen.
multiple products match your description	select the correct product and press **Enter** to return the item to the Sales Order Entry Body screen.
no product matches your description	return to step 5 until you have exhausted all probable keywords for the item. If you do not find a matching item, create a new nonstock product record.

6. Continue entering products and process the order as usual.

Creating Nonstock Product Records During Sales Order Entry

Sometimes your customers may want to order nonstock items that do not exist in the system. When this happens, you can enter a new nonstock product record through Sales Order Entry.

To create a nonstock product record during sales order entry:

1. Create or open a sales order and display the order's Body screen.
2. Search for the item to make sure you do not create a duplicate record of an item that is already in the system.
3. Once you determine that the item is not in the system, enter a quantity in the Qty/Unit column, and then use the **NonStk/Lot** hot key to display the NonStock Entry screen.
4. In the **Search** field, type **New** and press **Enter** to display the Product Primary Index list.
5. Select **New NonStock Item** from the last page, and press **Enter** to return to the NonStock Entry screen.
6. In the **Mfr's Code / Description** field, enter a statement that describes the non-stock item.

   The description includes the manufacturer's name, part number, and any other identifying information and can include up to 99 lines of 35 characters each. This field is indexed, so you can use any part of the description to later search for the record.
7. For each unit of measure, complete the following fields:

Field	Description
UM	The default proportions of the nonstock item as it is packaged for sale, such as 1 each, 1 case, 1 crate, or 1 pound. This field is limited to two characters and works in combination with the **Quantity** field.
Quant	The default amount of the nonstock item that must be purchased, dependent upon the unit of measure. • If the unit of measure is **ea** (each), then the quantity is per each individual unit. • If the unit of measure is **bx** (box), and there are twelve individual units per box, then the quantity is per box of twelve. For example, if the customer orders ten boxes, they have ordered a total of 120 units, but the quantity remains ten.

Field	Description
S, P, T, A, I	Indicates whether the quantity and unit of measure specified in the previous columns will be used as the default value for stock orders, purchase orders, transfer orders, adjustments, or inventory cycle counts. Only one default value is permitted per order entry type. Position the cursor in the column and type a character (for example, **x**) and press the **Tab** key to change the character to an asterisk (*****). **Note:** When the salesperson enters a quantity without a unit of measure, the system assigns the default value specified here.

8. Complete any of the following fields, as needed. Some fields are required.

Field	Description
UPC # (Universal Product Code)	A combination of a bar code and numbers the RF (radio frequency) scanner uses to identify the product. **Note:** UPC numbers must be all numeric.
Price Line	A code that identifies a group of products with similar characteristics for the purpose of facilitating price changes. **Note:** Depending on your system setup, you may not be able to assign some price lines to this nonstock product.
Buy Line	A code that identifies a group of products that must be purchased together to meet a vendor's minimum discount requirements.
Per UOM	The default pricing unit of measure for this nonstock product.
Per Qty	The standard quantity that corresponds to the specified pricing unit of measure.
Price Base	The cost or price value to which a pricing formula is applied to calculate the price. LIST is the default value.
Formula	The calculation used to determine the price basis. For more information, see Pricing Formulas.
G/L Type	The category of products under which this product is classified; for example, **plumbing**.
Mx Type	The Matrix Type for this nonstock item. This field is accessible and required only if the Valid Product Matrix Types control maintenance record contains a value. See Assigning Pricing Criteria to Products for more information.
(Costs/Prices)	Costs and prices from the price line selected above that are used together with the price basis and formula to calculate the price for the nonstock product.

9. Press **Esc** to return to the Sales Order Entry Body screen. The system adds the nonstock product to the order.

More Options

The NonStock Entry screen also offers these options.

To...	Use this hot key...
add price sheet details	**Pricing** Complete the G/L Type and Per Qty fields, and then access the hot key. A Reason for Change prompt displays. Enter the reason for changing the prices to display the Product Price Sheet Maintenance screen.
add more details to the nonstock product record	**Product Maint** The Product Maintenance screen displays.
view product data warehouse (PDW) catalog details	**PDW Data Viewer** The PDW Data Viewer screen displays.

Viewing Add-On/Substitute Product Inquiries

When you search for substitute or add-on products that you can add to your sales order, you may need to research products to see if they similar and, more important, in stock. Use the Product Inquiries screen to display a variety of information related to a selected substitute or add-on product.

To view add-on/substitute product inquiries:

1. Create or open a sales order and display the Body screen.
2. If needed, use the **Subs** hot key to display the Substitute / Related Items screen.

   Note: This hot key is also available from the Scheduling screen.

3. Select a product and use the **Inq** hot key to display the Product Inquiries screen.
4. Use hot keys, as needed:

To view...	Use this hot key...
the product's inventory levels	**Inventory Inquiry** The Inventory Inquiry screen displays.
inventory projections for the product	**Future Ledger** The Future Ledger screen displays.
the product's sales/procurement history	**History Ledger** The Inventory History Ledger screen displays.
or change the product's maintenance record	**Product Maint** The Product Maintenance screen displays.
inventory management details, such as demand, lead time, and other factors	**Inventory Data** The Primary Inventory Maintenance screen displays.
how often the product has been sold over the years	**Sales History** The Product Sales History screen displays.

5. Press **Esc** to return to the Substitute / Related Items screen.

Entering Miscellaneous Charge Items

To bill customers for miscellaneous charge items, most companies create products in Product Maintenance that represent these charges. These placeholder products let you add as many miscellaneous charges to a sales order as you need to. Some examples of miscellaneous charge items include:

- Assembly charges.
- Returned check fees.
- Minimum order charges.
- Service charges.

You can also apply handling charges on the Totals screen, but entering miscellaneous charges on the Body screen as products allows you to categorize and report on charges more precisely.

To enter a miscellaneous charge item on a sales order:

1. Create or open a sales order and display the Body screen.
2. In the **Qty/Unit** field, specify the item's quantity and unit of measure.
3. In the **Product Description** field, enter the miscellaneous charge item. For example, enter **Misc Service Charges** as the description.
4. When you have finished entering all the line items, press **Esc** and process the order as usual.

Selecting Items

Selecting only certain items from a long, complex list is often a difficult task. Fortunately, the Select screen makes it easy to restrict a list to just the items you select.

The Select screen can be displayed by using a hot key, which may vary from screen to screen. When prompted, enter your selection criteria. Only the items meeting your criteria are listed. For example, specifying HEAT as the price line will update the list to show just the items in that price line. Or, entering COP as the word pattern will restrict the list to items such as copper tubing and copper elbows.

For detailed information on narrowing your lists using selection criteria, see Using Select Screens in the general Navigation help.

Re-sorting Line Items

When viewing sales order items on the Body screen, you can re-sort the line items by ship date or by other criteria that you specify.

To re-sort an order's line items:

1. Create or open a sales order and display the Body screen.
2. Use the **Mode** hot key to display a list of options.
3. Select **Resort Line Items** and press **Enter** to display the Line Item Resorting screen.
4. In the **Shipdate** field, enter a specific order generation or **All Shipdates**.
5. In the **SortBy** field, enter any criteria by which you want to sort the line items.

   Valid values include:

   - Subtotal Group
   - Price Group
   - Buy Group
   - Price Line
   - Buy Line
   - Select Code
   - Commodity Code
   - UPC Vendor Code
   - Sales Budget Group
   - Product Dictionary
6. In the **Line Number** field, enter the number that identifies the first line on this order to resort. Lines before the line item you specify will not be resorted.
7. In the **Through** field, enter the number that identifies the last line on this order to resort. Lines after the line item you specify will not be resorted.
8. Use the **Begin** hot key to resort the products by the selected criteria.

Reordering Products Using the Reorder Pad

To view all of the items a customer has purchased during the last year, or other specified time period, view the customer's Reorder Pad. Select items from the list that you want to include in the current order. The list of recently ordered products includes items on future-dated invoices.

To reorder a product using the Reorder Pad:

1. Create or open a sales order and display the Body screen.
2. Use the **ReordPad** hot key to display the Reorder Pad screen.
3. Review information for the products listed, as needed.
4. In the **Ord Qty** field for each item to reorder, enter the requested quantity.

   Note: If the item has minimum buy or sell package quantities, the system displays a prompt indicating that the item has package quantity limitations. You can adjust the quantity as needed.

5. Press **Esc** to add the selected items to the Sales Order Entry Body screen.

To reorder products from a product family or price line:

1. Create or open a sales order and display the Body screen.
2. In the **Product Description** field, enter a forward slash (/) to display the Family/Price Line IDs screen.
3. Select a product family or price line and press **Enter** to display the Reorder Pad screen.
4. Continue the reorder process, as described in the steps above.

   Note: The Reorder Pad does not show last or suggested purchase information for a customer when accessed using a product family or price line, and no bill-to or ship-to toggle is available.

More Options

The Reorder Pad also offers these options.

To...	Use this hot key...
filter the Reorder Pad by word, price line, or product select code	**Slct** The Select screen displays. Complete one or more of the fields listed and press **Enter**.
review every product the customer has ever ordered, as of a selected date	**CusHist** The Customer Inventory History Ledger screen displays.
review all sales, purchases, transfers, and adjustments of the selected product	**InvHist** The Inventory History Ledger screen displays.

To...	Use this hot key...
sort the products on the screen by price line, description, hits, suggested quantity, last date (ascending or descending), product select code, or G/L code	**SrT** The Sort Options screen displays. Select an option and press **Enter**.
locate a product you believe the customer has ordered before	**Fnd** When prompted, enter a keyword to display the Product Primary Index screen.
locate products that the customer has not purchased within the last year	**Date** When prompted, enter a date earlier than the date one year ago.
toggle between viewing previous quantities and prices	**View** A selection list displays. Select **Quantity** or **Pricing** to view the corresponding columns.
print the list of previously ordered products	**Prt** A prompt displays. Enter **H** to send the report to your hold queue, or **P** to print the report.
remove products with a suggested quantity of zero from the list	**Zero**
limit the list to items purchased before a specified date or suggested quantities greater than or equal to a specified number	**Last** When prompted, enter a cutoff date or suggested quantity.
toggle between items associated with the bill-to or ship-to customer	**BillTo/ShipTo** The system shows either the ship-to or bill-to customer's items when you display the Reorder Pad screen based on the Default Selection For Reorder Pad control maintenance record. If the hot key reads BillTo, you are viewing the Ship-to customer's items.
review demand statistics for the selected product for this customer	**Alt-~ (Alt+Tilde)** The Customer Product Demand screen displays. Statistics include the number of days in the demand period, the raw demand and number of hits, plus daily and monthly demand calculations.

Printing a Customer's Reorder Pad

To view all of the items a customer has purchased during the last year, or other specified time period, view the customer's Reorder Pad. For each product that was purchased, the Reorder Pad shows information such as last purchase date, last purchase quantity, last purchase price, and current availability. You can print this information for reference by you or your customer.

To print a customer's Reorder Pad:

1. Create or open a sales order and display the Body screen.
2. Use the **ReordPad** hot key to display the Reorder Pad screen.
3. Use the **Prt** hot key to display a prompt.
4. At the <H>old, <P>rint prompt, type **H** to send the report to your hold queue, or **P** to print the report.
5. Press **Enter** to run the report and return to the Reorder Pad screen.

Copying and Pasting Products in Order Entry

Use the Order Entry Clipboard to copy and paste line items between sales orders. This is helpful when working with sales orders that often contain some of the same line items. You can add and remove items from the clipboard, and rearrange the items to suit your needs.

Each user has his or her own clipboard. This allows everyone to store their own frequently needed order items. For example, if your inside salespeople specialize in certain product lines or industries, each can store frequently ordered products on their clipboards.

To copy items to the OE clipboard:

1. Create or open a sales order and display the Body screen.
2. To copy, use one of the following keyboard shortcuts:
   - Use **Ctrl-F3** to copy all line items.
   - Use **Ctrl-F2** to copy the line item selected by your cursor position.
3. To view or manipulate line items, use one of the following keyboard shortcuts:
   - Use **Ctrl-F5** to display the OE clipboard.
   - Use **Ctrl-F4** to display the Line Item Selection screen. Use this screen to select which line items from the current order are included. Once selected, use a keyboard shortcut to copy the items to the OE clipboard.

   In the Line Item Selection screen, do one of the following to select line items:

To...	Do this...
select individual line items	Place your cursor in the **S** field next to the line and press the **Spacebar**.
select all line items on the order	Use the **All** hot key.

Note: To deselect a line item, position your cursor next to it in the **S** field and either press the **Spacebar** or use the **Clear Select** hot key.

To paste items from the OE clipboard:

1. Create or open a sales order and display the Body screen.
2. Use the **Ctrl-F5** keyboard shortcut to display the OE clipboard.
3. Use hot keys, as needed.

To...	Use this hot key...
select a line item	**Select** Access the hot key, and then position the cursor on the line item and press Enter.
select all line items	**Select All**

To...	Use this hot key...
deselect one line item	**Deselect** Access the hot key, and then position the cursor on the line item and press Enter.
deselect all line items	**Deselect All**
paste the selected item, but leave the item on the OE clipboard	**Paste**
paste the selected item, and remove the item from the OE clipboard	**Paste & Remove**
clear selected items from the OE clipboard	**Clear** Confirm when prompted.
find a product	**Fnd** Enter a product description, or partial description, to display the Product Primary Index. Or, press F10 to choose from the User Quick Access List. If the product is found on the OE clipboard, the cursor moves there.
rearrange the OE clipboard	**Move** Access the hot key with the item selected, and then reposition the cursor and press Enter to move the item to a new position. Use line numbers for reference.
resort the OE clipboard	**Srt** Sort items by Description, Order ID, Price Line, and so on. Press F10 for a list.
drill down and view the item's original order	**View** If you select the product for viewing, the hot key allows you to open such screens as Inventory Inquiry, Future Ledger, and Product Maintenance.
add items from other orders to the OE clipboard	**Add Order** When prompted, enter an Order ID; or an Entity, such as a customer. Then select an Order ID from the list. When the Line Item Selection screen displays, select the items and press Esc to add them.

4. Upon pasting items to the order's Body screen, if prompted, specify whether to use the items' last costs and prices, or the current costs and prices. If you are overriding any amounts, such as using a lower cost, you may also be prompted to enter a Cost Override Code for the items. Specify whether to:
   - Use Last COGS.
   - Use Last Price.
5. Continue processing the order as usual.

Keyboard Shortcuts for the Order Entry Clipboard

Use these keyboard shortcuts for the clipboard features:

Shortcut	Function
Ctrl-F5	Opens the OE clipboard to view the currently selected items.
Ctrl-F4	Opens the Line Item Selection screen. Use to select individual line items from current order. Once selected, you can use a keyboard shortcut to copy the items to the OE clipboard.
Ctrl-F3	Copies all line items on current order to OE clipboard.
Ctrl-F2	Copies the selected line item to OE clipboard.

Entering Customer Part Numbers During Order Entry

Enter customer-specific part numbers directly from a sales order by following these instructions. The Customer Part Number view must be assigned to your user profile in User Maintenance before using this feature. You cannot type a customer part number over an existing line item. To enter a customer part number, use a new line.

To enter a customer part number during order entry:

1. Create or open a sales order and display the Body screen.
2. Use the **View** hot key, and select the **Customer Part Number** view.
3. For the line item you want to enter a customer part number for, move the cursor to the **Customer Part Number** column.
4. Type **NEW**. The Customer Part Number prompt displays "/NEW".
5. Press **Enter** to display the Customer Specific Part Number screen.
6. In the **CPN** field, enter the part number to use for this product.
7. In the **Loc** field, enter the location code for this item, if the customer stores inventory parts using location codes.
8. Use the following hot keys, as needed:

To...	Use this hot key...
open and edit the product record for this product	**Product Maintenance**. The Product Maintenance screen displays.
edit other customer part numbers for this customer	**Part Number Maint**. The Customer / Vendor Specific Part Numbers screen displays.

9. Press **Esc** to return to the Body screen. The newly created customer part number displays in the Customer Part Number column.

Importing Order Entry Data

You can customize the system to import line item information from an existing data file into an order. Your outside salespeople can then enter an order on a portable device, for example, and import all of the quantity and product information into a sales order when they return to the office.

Before using this feature, the system must be set up to work with your data files. You can use many types of text or spreadsheet data formats, such as comma or tab delimited data files. You define these file formats in User Defined Bid Upload Format Maintenance.

To import order entry data:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Imp** hot key to display the Order Entry Data Import screen.
3. In the **File Format** field, press **F10** and select the file format for the file you are importing. The names often indicate their purpose or the type of device, such as Handheld.
4. In the **DOS Path Name** field, enter the location of the data. For example, **C:/SOERF_INP.TXT** indicates that the file in question (SOERF_INP.TXT) is located directly on the user's C drive.
5. Use the **Begin** hot key to return to the Sales Order Entry Body screen and populate the order with the customer's line item information.
6. Continue processing the sales order as usual.

Customer Consignments Overview

Use consignment selling when you want to sell product from an alternate location, such as a customer's job site. You must first set up the customer to receive consigned inventory, and then you consign inventory to a customer by entering it on a consignment order. Once the inventory is consigned, it is transferred out of your available inventory and into your customer's. You do not bill the customer until the inventory is used or sold from the consigned location.

For products that are routinely consigned to a customer, you can automate the consignment process. You do this by first setting minimum and maximum inventory levels in Customer Maintenance for each regularly consigned product. Once inventory levels are established, use the Suggested Consignment Auto Transfer utility to compare the currently consigned inventory against the minimum and maximum levels.

> **Note:** You can determine inventory levels using a manual count, or through remote data collection (RDC) in the system. For more information about remote data collection, see the Remote Data Collection Overview.

You view the utility's suggested consignment transfers using the Suggested Consignment Transfer Queue. You can create consignment orders from this queue, or by entering orders manually.

Finally, use the Customer Consignment Report to view customer consignment activity for a specified range of dates.

Consignments and Product Demand

The sale of customer-consigned product contributes to the product's forecasted demand. Therefore, order points, line points, and economic order quantities accrue and allow these items to be evaluated for automated purchasing and transfers.

Manually Consigning Inventory to Customers

When you consign inventory to a customer, it is transferred out of inventory when it leaves your branch, but it is not billed until the customer uses it or sells it. You can enter a consignment order manually, as shown below, or you can automate consignment orders using the Consignment Transfer Queue.

To consign inventory to a customer:

1. Begin a sales order for a consignment customer.

   Note: Before consigning product to a customer, you must set up the customer for consignment in Customer Maintenance.

2. At the Consignment Status of Order prompt, select **Consignment Transfer**.
3. Enter the consignment products and their quantities.
4. On the Status screen, enter the appropriate shipping details. For example, if you are delivering the consignment products, enter an order status of **Ship When Specified** and a ship via of **Our Truck**.

   Note: If information is required on another order screen, such as a purchase order number, enter those details as needed.

5. Press **Esc** to process the consignment. The consignment product is adjusted out of inventory, but will not be billed to the customer until it is actually used or sold.

Automating Consignment Transfers

If you have customers to whom inventory is consigned on a continuing basis, the system allows you to automate the consignment process. Automating the process involves two main steps, which you complete in the following order:

- Schedule the Suggested Consignment Auto Transfer utility to regularly check current consignment inventory levels for all customers, or for a specific customer. The system compares current inventory levels to the minimum and maximum inventory levels established for each product currently consigned. The system populates the Consignment Transfer Queue with suggested consignment transfers.
- Use the Consignment Transfer Queue to view consignment inventory levels, and to select the customers for which you want to create consignment orders.

Important: The original customer consignment order and the associated system-generated transfer cannot be edited once processed. The system cannot place product quantities back in their original stock locations. Therefore, you must create a return sales order to move the product out of customer consignment locations and back into a stock location or a regular branch transfer to send it back.

Use the **Allow Customer Consignment From Multiple Branches** control maintenance record to indicate if you want your company to ship consignment inventory from branches other than the customer's home branch. For more information about this control maintenance record, see Consignments Control Maintenance Records.

To schedule the Suggested Auto Transfer utility:

1. From the **Orders > Consignment Inventory** menu, select **Suggested Consignment Auto Transfer** to display the Suggested Consignment Transfer screen.
2. In the **Br/Tr/All** field, enter the branch or territory for which you want to run the utility. Enter **All** if you want to run it for all locations.
3. In the **Customer** field, enter the customer for which you want to run the utility. Or, leave this field blank to run the utility for all customers to whom inventory is consigned.
4. Specify when to run the utility.

If you want to...	Use this hot key...
run the utility immediately	**Begin** The utility runs, and its results display in the Consignment Transfer Queue.
schedule the utility to run on a regular basis (the best option for fully automating the process)	**Schedule** The Phantom Scheduler screen displays.

To view the Consignment Transfer Queue:

1. From the **Orders > Consignment Inventory** menu, select **Consignment Transfer Queue** to display the Consignment Transfer Queue screen.
2. In the **Br/Tr/ALL** field, enter the branch or territory for which to view suggested consignment transfers. Enter **All** if you want to view the queue for all locations.
3. In the **Customer** field, enter a customer for which to view suggested consignment transfers. Or, leave this field blank to view the queue for all customers.

   The customers to whom inventory is consigned display.
4. To view consignment inventory details for a customer, select the **Detail** hot key to display the Suggested Consignment Transfer Detail screen.
5. Review the following columns for each consigned product, as needed:

Column	Description
PN	The product ID.
Description	The product description.
Order Qty	The system-suggested order quantity, based on the quantity currently consigned.
Min	The minimum amount that should be consigned, as set up in Customer Maintenance.
Max	The maximum amount that should be consigned, as set up in Customer Maintenance.

6. Press **Esc** to return to the Suggested Consignment Transfer Queue screen.
7. To create a consignment sales order for a customer based on the suggestions displayed in the Suggested Consignment Transfer Detail screen, move the cursor to line for that customer and select the **Create** hot key.

   The system creates a new sales order, with the customer and product information already filled in.
8. Process this order as usual. Once you complete the order, the Suggested Consignment Transfer Queue screen once again displays.
9. Repeat steps 7 and 8 until you have created consignment sales orders for all customers in the queue.

Invoicing Consigned Products Once Sold

You bill a customer for consigned inventory only after the customer uses or sells it.

To invoice consignment product once it is used or sold:

1. Begin a sales order for a consignment customer.

   Note: Before consigning product to a customer, you must set up the customer for consignment in Customer Maintenance.

2. At the Consignment Status of Order prompt, select **Consignment Billing**.
3. Enter the consignment products and the quantities that were used or sold.
4. On the Status screen, enter **Invoice** as the order status.
5. Press **Esc** to process the consignment billing.

   Note: If an item is flagged for outbound serial number capture, you are prompted to enter this information.

Crediting Customer Consignments

You can credit and rebill consignments as you would any other stock. The concept is the same, but the process is different. G/L postings credit consigned inventory and debit purchases.

For customer consignments, when you create a credit-only transaction on a consignment transfer transaction, the material returns to the stock/primary location. When you create a credit/rebill transaction on a consignment transfer transaction, the material returns to the stock/primary location and then is removed from the stock/primary location. The system tracks consignment transfers as inventory adjustments and no journal entries are made.

When you create a credit-only transaction on a billing transaction, the material is returned to the consignment location to which it is assigned. Then, it is removed from the consignment location.

> **Note:** All journal entries on consignment billings are tracked in inventory unless the customer consignment inventory originated from vendor consignment material.

When you create a credit/rebill transaction on a billing transaction or a consignment transfer, make the status and stock type of the items the same as the status and stock type of the original item.

Viewing Consignments in the Inventory History Ledger

Use the Inventory History Ledger to view consignment transactions. The ledger shows how the system is using stock items before consignment items and that the system has the orders tagged as containing consignment stock. The Inventory History Ledger shows a snapshot of how sales affect your inventory and tracks movement of items from consignment stock to regular stock.

From a sales order, use the Inventory History Ledger to verify that the system transfers consignment products into regular inventory and bills properly. The stock types display as "CCsnTr" and "CCsnBi". The consignment transfer moves stock from a consignment type to a stock type. The order number is listed twice. The first occurrence of the order indicates that stock is moved out of consignment stock and into regular stock. Therefore the item quantity is listed in the **In** column and the quantity is increased in the **On Hand** column. The second occurrence of the order indicates that the items sold out of inventory to the customer and reduces the quantity in the **On Hand** column.

Running the Customer Consignment Report

Use the Customer Consignment Report to view customer consignment activity for a specified range of dates. The report shows customers, their consigned products, product locations, and beginning and ending on-hand quantities. Consignment transfers and consignment billing for the period is also shown.

To run the Customer Consignment Report:

1. From the **Orders > Consignment Inventory** menu, select **Customer Consignment Report** to display the Customer Consignment Report screen.
2. In the **Branch** field, enter the branch, branches, or territories for which you want to report on customer consignments.
3. In the **Start Date** and **End Date** fields, specify the date range for which to report.
4. In the **Sort by** field, specify how you want to sort the report:
   - Customer
   - Buy Line
   - Price Line
   - Cust Part #
   - Description
5. In the **Select by** field, specify which of the following you want to run the report for:
   - Bill-To Customer
   - Ship-To Customer
   - Buy Line
   - Price Line
   - Product

   Note: Depending on which option you choose, a new field displays.
6. In the **Bill-To Customer**, **Ship-To Customer**, **Buy Line**, **Price Line**, or **Product** field (depending on your selection in the previous step), enter the bill-to customer, ship-to customer, buy line, price line, or product you want to report on.
7. Set options, if needed, and generate the report.

Product Kits Overview

Product *kits* are predefined sets of components, which your company groups and sells together. For example, your company may group the various parts needed for a typical motor rebuild and sell those products as a motor rebuild kit. Other common kits include connector kits, faucet kits, gasket kits, and switch kits.

Advantages of Kits

Products kits have these advantages:

- Kits already include all the needed parts. So for a connector kit, you don't need to enter each washer and widget separately.
- Your company can create additional profit and customer convenience by making its own kits.

Types of Kits

Product managers can create two types of kits:

- Standard kits – These do not show any on-hand quantities (though the various components within the kits do).
- Dynamic kits – These allow their own on-hand quantities (in addition to the on-hand quantities for the components). Use this ability to create new kits from existing dynamic kits.

Customizing Kits

During sales order entry, authorized salespeople can also customize kits on the fly, tailoring a kit to a customer's needs. For example, within a faucet kit, you might be able to exchange chrome handles for gold.

In most ways, selling a kit is like selling any other product. A kit, however, only shows as available when all of its components are available. Depending on the setting for the kit, the tickets and invoices can print all the component parts, or not.

Getting Started with Kits

See the following topics for the normal workflow when using product kits:

- Setup Requirements for Kit Sales
- Creating Product Kits
- Calculation Methods for Product Kits
- Selling and Customizing Product Kits
- Purchasing Product Kits

Selling and Customizing Product Kits

In most ways, selling a kit is like selling any other product. However, if any kit components are not available, you may order the kit differently, depending on how your system is set up. In some cases, you cannot order a kit unless all of its components are available. Or, you might be able to order the available kit components and backorder the rest.

▶To order a product kit:

1. Create or open a sales order and display the Body screen.
2. Enter the product kit just as you would enter any product. Entering a kit automatically includes all of its parts.
3. Complete the order as usual.

▶To customize a product kit:

1. Create or open a sales order and display the Body screen.
2. Enter the product kit just as you would enter any product.
3. With the kit item selected, use the **Sched** hot key to display the Scheduling screen.
4. Select the **Kit** hot key (which is only available if the product is a kit) to display the Product Kit Maintenance screen.
5. In the **Quantity** field, specify the quantity for each product.

   Note: You cannot enter a negative quantity. For more information, see Returning Kits or Kit Components.

6. In the **Component Description** field, enter products using either of these methods:
   - Enter each product individually.
   - Enter a forward slash (/) followed by a price line or family. This opens a simplified Reorder Pad screen. The simplified screen omits last purchase and suggested purchase details.

     On the Reorder Pad screen, specify the quantity for each product, then press **Esc** to move the items onto the Product Kit Maintenance screen.

   You cannot add products that have a Delete status and no available quantity to a kit.

7. Edit other fields, as needed:

Field	Specifies...
Dynamic Kit	whether the kit is a dynamic kit.
Calc Sell Method	how selling price is determined. Press **F10** and choose Use Kit Product Price; Sum Comp Price, Less Kit Disc; or Sum Discounted Comp Prices.

Field	Specifies...
Calc Cost Method or **Calc COGS Method**	how cost is determined. Or use hot key to specify how COGS is determined. Press **F10** for same choices as selling method. Not editable if dynamic kit.
Print Components (Y/N)	whether to print all components on tickets and invoices.
Br#	which branch's kit information to display. Edit using the **Stock Br** hot key.
Quantity	component quantity needed in kit.
Spoil%	spoilage percentage, used to calculate materials spoiled in manufacturing.
Component Description	description of product used as kit component.
Available, **Default List**, **Cost**, or **COGS**	the component's available quantity, default list price, cost, or COGS — depending on your columnar view. To change your view, use the **View** hot key.

8. Press **Esc** to close the Product Kit Maintenance screen and return to sales order entry.
9. Complete the order as usual.

Note: Custom kits built on the fly are not included in the Product Maintenance file for future use. For information about making kits that you can reuse, see Creating Product Kits.

More Options for Selling and Customizing Product Kits

The Product Kit Maintenance window also offers these options.

To...	Use this hot key...
view the Future Ledger for the selected component	**Future Ledger**
add a comment to the selected component	**Comment**
display the kit quantity available in a specific branch	**Stock Br**
choose the Availability, Dflt List, Cost, or COGS column view	**View**
toggle between the Calc Cost Method and Calc COGS Method fields	**Cost Calc Basis**

Selling Partial Kits and Back-Ordering Unavailable Components

Follow these instructions when all of the components of a kit are not available.

Removing Kits or Kit Components from Orders

Note the following things about removing kits and their components:

- You can remove a kit from an order, but you must be authorized to remove kit components.
- Even if you are authorized to remove kit components, if a kit contains components that are on backorder, you cannot delete any components or change their quantities. Instead, you must delete and reenter the kit.

To sell a partial kit and back-order unavailable components:

1. Create or open a sales order and display the Body screen.
2. Enter the product kit just as you would enter any product.
3. If some kit components are not available, do either of the following:
    - Ship the kit to the customer once all kit components are in stock.
    - Ship the available kit components now and ship the rest when they become available. The system automatically backorders the unavailable components.

    Note: For any given kit, you can specify which kit components can be back-ordered, and which ones cannot. The method you choose is set up for each kit in Product Kit Maintenance. You can also use the Back-ordered Partial Kit Comment control maintenance record to define a general comment that will appear below any back-ordered component.

Selling Dynamic Kits

A *dynamic kit* is sold as a complete product and, when pre-assembled, it has its own on-hand quantities and availability. However, unlike standard kits, the individual components of a dynamic kit *also* have their own on-hand quantities and availability.

Depending on kit and component availability, when you enter a dynamic kit on a sales order, the system can fulfill your order by doing any of the following things (in the order listed):

- Use a pre-assembled kit that has its own available quantity (all components are available and pre-assembled).
- Assemble a kit on-the-fly using individual components that are available in inventory.
- Assemble a kit on-the-fly by taking components from other dynamic kits that include the same components.
- Assemble a kit on-the-fly using a combination of (1) components that have available quantities in inventory, and (2) components that are taken from other dynamic kits that include those same components.

For examples of how this works, see Dynamic Kit Sales Examples.

> **Note:** In order for the system to check other similar dynamic kits for available components, the Check Other Dynamic Kits For Needed Parts control maintenance record must be set to **Yes**.

To sell a dynamic kit:

1. Create or open a sales order and display the Body screen.
2. Enter the kit product as you would any other product. Depending on kit and component availability, the system will fulfill the order using one of the methods described above.
3. Complete the order as usual.

Dynamic Kit Sales Examples

A *dynamic kit* is sold as a complete product and, when pre-assembled, it has its own on-hand quantities and availability. However, unlike standard kits, the individual components of a dynamic kit *also* have their own on-hand quantities and availability.

Depending on kit and component availability, when you enter a dynamic kit on a sales order, the system can fulfill your order by doing any of the following things (in the order listed):

- Use a pre-assembled kit that has its own available quantity (all components are available and pre-assembled).
- Assemble a kit on-the-fly using individual components that are available in inventory.
- Assemble a kit on-the-fly by taking components from other dynamic kits that include the same components.
- Assemble a kit on-the-fly using a combination of (1) components that have available quantities in inventory, and (2) components that are taken from other dynamic kits that include those same components.

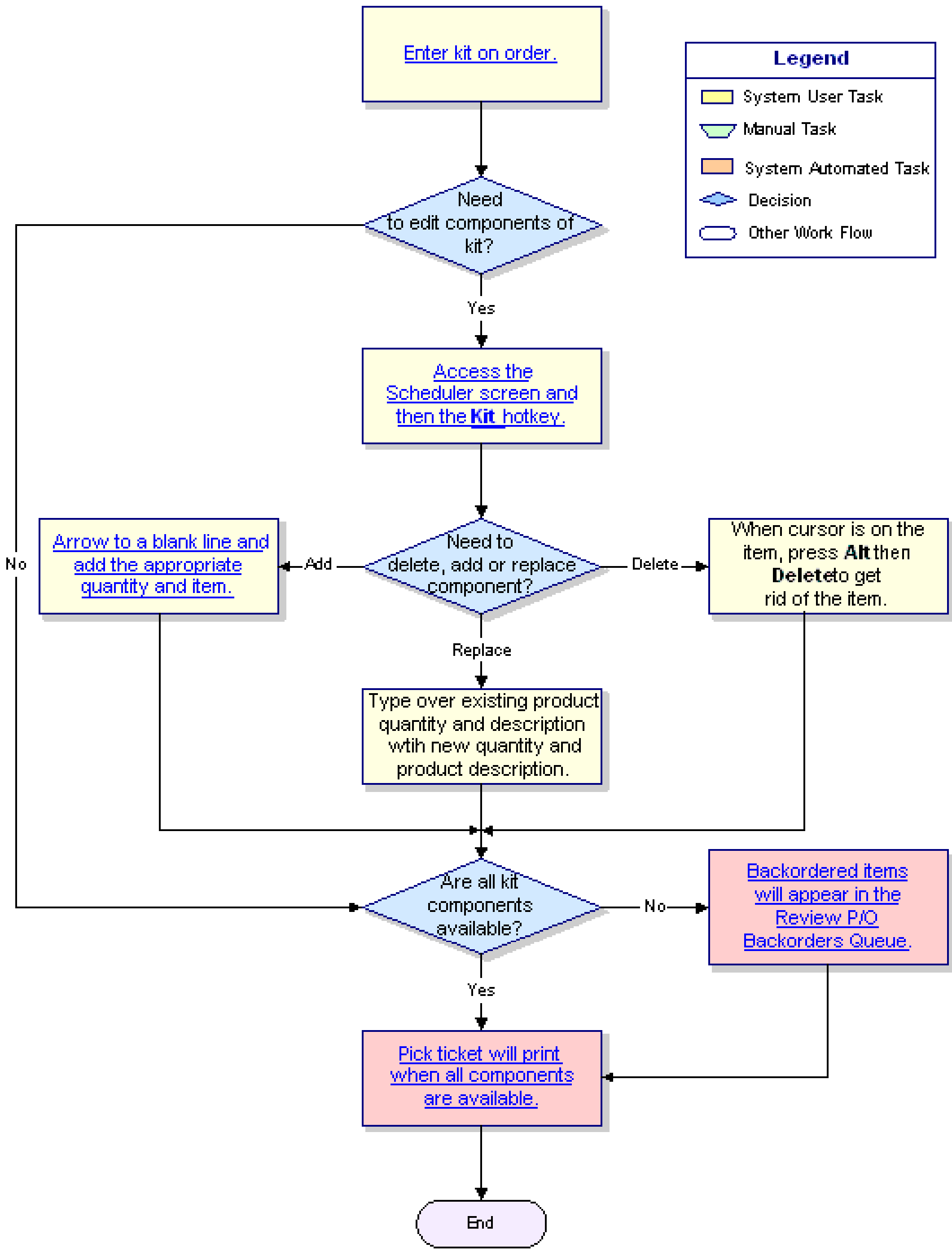
Examples

For example, you might sell pre-packaged antique glass doorknob sets, as well as the individual components (glass doorknobs, spindles, back plates, latch and strike plate sets, and screws) as replacements parts for your customers.

If a customer wants to buy this doorknob set, the system will fulfill the order as follows:

If the doorknob set is...	And the components are...	Then the system...
available, pre-assembled	N/A	commits the available, pre-assembled doorknob set.
out of stock	in stock	builds the doorknob set on-the-fly by committing the individual components from inventory
out of stock	out of stock	builds the doorknob set on-the-fly by disassembling one or more dynamic kits that contain those same components, and then using the individual components to fulfill the order. **Note:** Any unused kit components are then returned to regular inventory.
out of stock	partly in stock, and partly out of stock	builds the doorknob set on-the-fly by (1) committing any available components from inventory, and then (2) disassembling other dynamic kits that contain the same components and using the individual components. **Note:** Any unused kit components are then returned to regular inventory.

Kit Entry Workflow



Entering Wire Cuts on Orders

The Wire Cut Wizard automatically launches anytime you enter a wire cut product in Sales Order Entry. The wire cut products you enter are actually placeholder products, similar to kit products, that your company sets up in order to launch the wizard and enter cuts. For example, your company might set up a placeholder product called "Electrical Wire Cuts." When you enter this product on an order, the Wire Cut Wizard launches, allowing you to enter the actual electrical wire you are selling and in what form you are selling it.

Once you escape from the wizard, the placeholder wire cut product and its components are added to the order as a kit. Its components are made up of the actual product cuts you specified using the wizard. An attached comment is also added, which shows the components of the product, as well as the number of cuts and their lengths.

To enter a wire cut on an order:

1. Create or open a sales order and display the Body screen.
2. Enter a placeholder wire cut product.

   The Modified Product Wire-Cut Wizard screen displays.
3. In the **Wire is Cut (Y/N)** field, specify if the wire is to be cut.
4. In the **Wire is Reeled (Y/N)** field, specify if each cut of wire is to be reeled.
5. In the **Wire is Paralleled (Y/N)** field, specify if each cut of wire is to be paralleled.

   Note: The default charges for cutting, reeling, and paralleling are specified in the **Charge...** fields to the right of each type of work. You can change these charges if authorized.
6. For each type of wire you are selling on this order, enter the following information:
   - **Cuts** – Enter the number of individual cuts you are selling.
   - **Length –** Enter the length of each cut.
   - **Product Description –** Enter the product from which the cuts are being made.

   Note: The system automatically enters a value in the **UM** column after you enter the preceding information. This value is based on the default unit of measure in which this product is sold.
7. After you are finished entering products, press **Esc** to return to the Sales Order Entry Body screen.

   The placeholder wire cut product is added to the order as a kit. Its components are made up of the actual product cuts you specified using the wizard. An attached comment is also added, which shows the components of the product, as well as the number of cuts and their lengths.

Note: Wire cut placeholder products and their components are similar to kits. If you enter more than a quantity of 1 of a wire cut placeholder product, the number of components and their associated charges are multiplied by that value.

8. After the wire cut product is on the order, if you need to reopen the wizard to make changes, press **Alt** + /.
9. Finish processing the order as usual.

Entering Pipe Cuts on Orders

The Pipe Cut Wizard automatically launches anytime you enter a pipe cut product in Sales Order Entry. The pipe cut products you enter are actually placeholder products, similar to kit products, that your company sets up in order to launch the wizard and enter cuts. For example, your company might set up a placeholder product called "Copper Pipe Cuts." When you enter this product on an order, the Pipe Cut Wizard launches, allowing you to enter the actual pipe you are selling and in what form you are selling it.

Once you escape from the wizard, the placeholder pipe cut product and its components are added to the order as a kit. Its components are made up of the actual product cuts you specified using the wizard. An attached comment is also added, which shows the components of the product, as well as the number of cuts and their lengths.

To enter a pipe cut on an order:

1. Create or open a sales order and display the Body screen.
2. Enter a placeholder pipe cut product.

   The Modified Product Pipe-Cut Wizard screen displays.
3. In the **Pipe Has** field, press **F10** and specify one of the following:
   - **PE – Plain Ends**
   - TOE – Threaded One End
   - TBE – Threaded Both Ends
4. In the **Pipe is Cut (Y/N)** field, specify if the pipe is cut and press **Enter**.

   Note: The default charges for threading and cutting are specified in the **Charge...** fields to the right of each type of work. You can change these charges if authorized.
5. For each type of pipe you are selling on this order, enter the following information:
   - **Cuts** – Enter the number of individual cuts you are selling.
   - **Length** – Enter the length of each cut.
   - **Product Description** – Enter the product from which the cuts are being made.

   Note: The system automatically enters a value in the **UM** column after you enter the preceding information. This value is based on the default unit of measure in which this product is sold.
6. After you are finished entering products, press **Esc** to return to the Sales Order Entry Body screen.

   The placeholder pipe cut product is added to the order as a kit. Its components are made up of the actual product cuts you specified using the wizard. An attached comment is also added, which shows the components of the product, as well as the number of cuts and their lengths.

Note: Pipe cut placeholder products and their components are similar to kits. If you enter more than a quantity of 1 of a pipe cut placeholder product, the number of components and their associated charges are multiplied by that value.

7. Once the pipe cut product is on the order, if you need to reopen the wizard to make changes, press **Alt** + **/**.
8. Finish processing the order as usual.

Entering Laminate Cuts on Orders

The same laminate product is often sold in more than one size. When a smaller-sized piece is out of stock, you can sometimes create a *laminate cut* from a larger piece of the product to fill an order. The system determines when a cut is possible based on the authorized cuts that are set up in Laminate Cut Maintenance. If a cut is possible, Sales Order Entry automatically launches the Laminate Cuts screen when you enter an out-of-stock laminate product on the order.

To enter a laminate cut:

1. Create or open a sales order and display the Body screen.
2. Enter a laminate product.

   If the size you want is out of stock and the system determines that a cut is possible, the Laminate Cuts screen displays.
3. Examine the cuts that are possible, based on the information shown. If more than one cut is possible, each potential cut is listed on a separate line. Determine which cut will give you the remnants you want.

Column	Description
Qty	Enter a quantity *only* on the line for the cut you want to make.
Prf*	The preference for this cut, compared to other cuts you could make. Cuts are listed in order of preference.
Avail*	The number of larger-sized pieces from which cuts can be made.
Cut From*	The dimensions of the larger-sized pieces from which cuts can be made.
Rem 1, 2, 3, 4, and 5*	The resulting remnants for each possible cut.

   * These fields are view-only.

4. Enter a cut quantity *only* on the line for the cut you want to make. If more than one cut is possible, leave this field blank for the cuts you *do not* want to make.
5. Use the **Create** hot key to add the desired remnant to the current order. The system does the following:
   - Reduces the available quantity of the larger piece from which the cut was made.
   - Adds an available quantity for any remnants not committed to the current order.
6. Complete the order as usual.

Entering Gutter Cuts on Orders

The Gutter Cut Wizard automatically launches anytime you enter a gutter cut product in Sales Order Entry, as long as the product you enter has been set up as a gutter cut product in Product Wizard Maintenance.

Use the wizard to specify the number of cuts and the length of each cut in feet and inches. When you escape from the wizard, the gutter product is added to the sales order. Below the product, comment lines display the quantities for each cut length.

To enter a gutter cut on an order:

1. Create or open a sales order and display the Body screen.
2. Enter a gutter cut product.

   The Gutter Cut Requirements screen displays.
3. In the **Qty of Cuts** column, enter the number of pieces needed for the first length. For example, if the customer needs five separate pieces that are 10 feet long each, enter **5**.
4. In the **Feet** and **Inches** columns, enter the length of the piece in feet and inches.
5. Repeat steps 2 and 3 for each length that is needed.
6. Once you are finished enter cuts, press **Esc** to exit the Gutter Cut Requirements screen and return to the Sales Order Entry Body screen.

   The gutter product is added to the sales order, along with comment lines that display the quantities for each cut length.

   Note: If there is not enough product available to make the cuts your entered, a Product Availability screen will display the current availability.
7. If you need to make adjustments to the gutter cut lengths once they are on an order, place the cursor on the line item for that product and press **Alt** + **/** to reopen the Gut Cut Requirements screen.
8. Finish processing the order as usual.

Adding Comments to Sales Orders

You can add two types of comments to an order, as follows:

Comment Type	How Used
Line item-level	Using a line item-specific comment, you might alert the customer to a special order requirement or important product information. Comments print on forms such as acknowledgments, pick tickets, and invoices. Depending on your company's setup, you can choose from different types of comments, such as a general comment or replacement description. Authorized users can add comment types in Order Entry Comment Type Maintenance and use the Line Item Standard Comments control maintenance record to add standard comments.
Order-level	Adding a comment from a blank line attaches it to the order as a whole, not to a specific line item on the order. An order-level comment prints on all sales documents with all order generations.

To add a comment to a product:

1. Create or open a sales order and display the order's Body screen.
2. With the cursor on the line item, use the **Comment** hot key to display the Comments screen.
3. Do one of the following things:

If you want to...	Then...
add a free-form comment to an existing description	type the comment in the text field.
add a standard comment to an existing description	use the **Standard Cmts** hot key, select a comment from the list, and press Enter to add the comment to the text field. Edit the information, as needed. **Note:** Authorized users can create additional standard comments using the Line Item Standard Comments control maintenance record.
replace or embellish the product description	use the **Replace Desc** hot key to change the **Comment Type** field to **Replacement Description** and add the current description to the text field. Add or edit information, as needed.

4. To change the current comment type and remove all text currently in the text field, use the **Change Type** hot key. At the prompt, select the new comment type and press **Enter**. Type the new comment.

   If you replaced the description but did not press **Esc** before changing the type, the description returns to the previous product description.

   Note: Only general comments display to users in Web Commerce.

5. Press **Esc** to replace the product description or add the comment to the line beneath the product description. If you replaced the description, a ^ (caret) displays in front of the new one.

To remove a comment from a product:

1. Create or open a sales order and display the order's Body screen.
2. Select the product line item and use the **Comment** hot key to display the Comments screen.
3. Delete the entire comment.
4. Press **Esc** to save your changes.

To add a comment to an order:

1. Create or open a sales order and display the order's Body screen.
2. Select a line item and press **Alt-Insert** to add a line above it, or press **Shift+End** to select the blank line at the end of the order.

   Note: To remove a line, press **Alt-Delete**.

3. Use the **Comment** hot key to display the Comments screen.
4. Use the **Change Type** hot key to select a comment type, if needed.
5. Enter the comment in the text field or add a standard comment.
6. Press **Esc** to add the comment to the order. An order comment is identified by an asterisk (*) and prints on forms for all generations on the order.

To remove a comment from an order:

1. Create or open a sales order and display the order's Body screen.
2. Select the line item comment.
3. Press **Alt-Delete** to remove the line and the comment.

Using Inquiries Within Sales Order Entry

Use the Sales Order Inquiries screen to access many options related to the current order or customer. For example, while in an order, you may need to view the customer's accounts receivable balance, inquire about recent sales, or view product pricing.

To view sales order inquiry information:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Inq** hot key to display the Sales Order Inquiries screen.
3. Use hot keys, as needed:

To...	Use this hot key...
review payments received on the order	**A/R Inquiry** When prompted, indicate whether to view results by the ship-to or bill-to customer and press **Enter** to display the A/R Inquiry screen.
view the transactions posted to the A/R ledger	**A/R Ledger** The A/R Ledger screen displays.
review the customer's order history for the currently selected product	**Cust Inven Hist** The Inventory History Ledger screen displays.
review the customer's record in Customer Maintenance	**Customer Maint** The Customer Maintenance screen displays the customer's record.
review this customer's trackers	**View Cus Actvty** When prompted, indicate whether to view results by the ship-to or bill-to customer and press **Enter** to display the Customer Activity Log Tracker Viewing screen.
review the customer's inventory history	**View Cus Inven** The Customer Inventory History Ledger screen displays.
view all of the customer's part numbers	**Customer Part#** When prompted, indicate whether to view results by the ship-to or bill-to customer and press **Enter** to display the Customer / Vendor Specific Part Numbers screen.
order the currently selected product from a vendor via B2B	**B2B Commerce** The Eclipse B2B Commerce screen displays.
view the junior orders contained within a master job bid	**Job Totals** The Job Bid Totals Summary screen displays.
view or change the currently selected product's maintenance record	**Product Maint** The Product Maintenance screen displays.
review the currently selected product's inventory levels	**Inventory Inq** The Inventory Inquiry screen displays.

To...	Use this hot key...
review the currently selected product's sales/procurement history	**Inven History** The Inventory History Ledger screen displays.
attach notes to the currently selected product	**Product Notes** The notes selection list displays. Select a type of note and press **Enter** to display the standard notes for that type. Press **Enter**.
record customer activity	**Entr Cus Actvt** When prompted, indicate whether to view results by the ship-to or bill-to customer and press **Enter** to display the Call Tracking Entry screen.
view where the currently select product is located in the warehouse	**Product Locns** The Product Location Maintenance screen displays.
view or add substitute products for the currently selected product	**Product Subs** The Product Substitutes screen displays.
view the buy line associated with the currently selected product	**Buyline Maint** The Buy Line Maintenance screen displays.
view the information used to price the currently selected product, along with other possible prices	**Product Pricing** The Product Pricing screen displays.
locate serial numbers associated with the currently selected product	**Serial # Search** The Serialized Search screen displays.
view inventory projections for the currently selected product	**Future Ledger** The Future Ledger screen displays.
view or edit the sell matrix associated with this order	**Matrix Pricing** The Sell Matrix Maintenance screen displays in view-mode or edit-mode, depending on your authorization.
view the order's picking progress (RF warehouses only)	**Inprocess Queue** The Warehouse In Process Queue screen displays.
view or enter order-specific trackers	**Activity Log** The Order Activity Log Viewing screen displays.
view external product catalogs	**Products Xrefs** A selection of product catalogs displays. Choose the desired catalog and press **Enter**.
view data in the PDW catalog	**PDW Data Viewer** The PDW Data Viewer screen displays.
view additional inquiries	**Additional Inqs** The Additional Sales Order Inquiries screen displays.

4. Press **Esc** to return to the Sales Order Entry Body screen.

Viewing Additional Sales Order Inquiries

Use the Additional Sales Order Inquiries screen to review and change additional sales order data. This screen is a continuation of the Sales Order Inquiries screen.

To view additional sales order information:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Inq** hot key, and then the **Additional Inqs** hot key, to display the Additional Sales Order Inquiries screen.
3. Use hot keys, as needed:

To...	Use this hot key...
locate the currently selected product in the vendor's catalog, if available	**Product Catalog** The Product Catalog screen displays.
view any customer-specific notes that exist for the current customer	**Customer Notes** The Notes selection displays. From the list, select the type of notes you want to see.
find out how the system determined pricing for a specific line item on an order	**Audit** A Hold Entry Pre-view screen displays Pricing Audit information for the selected line item.

4. Press **Esc** twice to return to the Sales Order Entry Body screen.

Pricing Overview in Sales Order Entry

This topic explains some basic pricing concepts and terms that all salespeople and managers should be familiar with.

Categorizing Customers

Customers are categorized by *price class* and *customer type*.

Grouping your customers by price class lets you give your best customers your best prices. These customers can be grouped together in a price class, such as class 4, that gives them the best everyday pricing.

Grouping your customers by customer type lets you offer promotional pricing to certain types of customers. Some examples of customer types include large contractor, small contractor, electrical, industrial, and retail. Using the customer type, you can give all electrical customers a discount this month on certain products.

Your company's pricing manager uses the Customer Pricing/Printing screen to specify a customer's type and default price class.

Categorizing Products

Categorize products by sell groups in order to apply similar pricing to similar products. Product sell groups can include all products in a price line, or part of a price line. In the Sylvania price line, for example, the Sylvania miniature lamps might be one sell group, and the basic Sylvania flourescent lamps another. Your pricing manager uses the Price Group Maintenance screen to include a product in a sell group.

Using a Sell Matrix

Selling prices are determined by a sell matrix. As shown in the example below, a sell matrix is made up of rows, columns, and cells, like a spreadsheet.

The columns across the top show the customer categories, such as customer price class, customer type, or a specific customer. The rows down the side show the product categories, such as sell group or individual product.

A pricing formula is specified for each cell in the matrix. The formula is used to calculate the selling price. For example, you can multiply a product's replacement cost by a certain amount.

The system determines a customer's selling price by using the formula in the cell where the categories for the customer and the product intersect. In our example, a Class 2 customer buying cool white lamps gets a price of replacement cost multiplied by 1.9. A Class 3 customer buying the same product pays slightly less.

	Customer Class 1	Customer Class 2	Customer Class 3	Customer Class 4
SYL-MIN Miniature Lamps	REP-COST x 1.8	REP-COST x 1.7	REP-COST x 1.6	REP-COST x 1.5
SYL-FLR Fluorescent Lamps	REP-COST x 1.9	REP-COST x 1.8	REP-COST x 1.7	REP-COST x 1.6
SYL-COOL Cool White Lamps	REP-COST x 2	REP-COST x 1.9	REP-COST x 1.8	REP-COST x 1.7

Sample Sell Matrix

Your pricing manager creates matrix cells using the Quick Sell Matrix Maintenance screen or the Sell Matrix Maintenance screen. In most cases, you can use the Quick Sell Maintenance screen, unless a cell has special requirements, such as quantity breaks.

The vendor's prices and costs are maintained on the Product Price Sheet Maintenance screen. The matrix cell formulas use those amounts in the price calculations.

Pricing and Dates

Each matrix cell has a date when its pricing formula becomes effective, and another date when it expires. This lets the cell coincide with a vendor's price sheet that is good for a specified period of time. If two cells have overlapping dates, the system uses the cell whose start date is closest to the order's price date.

You can force an order to use a price date you specify by entering a different date on the Pricing Override screen. By default, the current date is shown, but if you enter a new date, the system uses the appropriate pricing from that date.

Special Pricing

You can change prices in a number of ways, such as using manual price overrides or changing prices using calculations in numeric fields. You can also apply special pricing using automated features, such as applying quote pricing or contract pricing.

Quote pricing is used for special pricing on one or more products. A quote is in effect for a limited time period, and can be offered to one or more customers. Managers create quotes on the

Quote Maintenance screen. In most cases, your customer is required to ask for the quote pricing. To activate quote pricing, enter the quote name in the **Quote** field on the Pricing Override screen.

Contract pricing lets managers link additional customers to another customer's pricing. In practice, distributors often create a model customer with the appropriate pricing, then link other customers to the model customer's record. Once linked, the contract prices are used — except when the other customers' prices are better. Specify which model customer to use on the additional customers' Contract Pricing screen.

Another way to apply special pricing is by using the **Best Price Chk (Y/N)** field on the Sell Matrix screen. If a manager enables this for a cell, the system also looks at the other cells in the pricing hierarchy. The system uses the best price it finds.

Pricing Formulas in Sales Order Entry

Authorized users can change prices, within sales order entry pricing fields, by editing the formula used to calculate the prices. A formula allows you to add, subtract, multiply, or divide a price basis.

A price basis is used to determine prices and is created in Price Line Maintenance. Examples of basis names include DFLT-LIST, DFLT-COST, COGS-COST, and COMM-COST.

You can use a formula to precisely manipulate the basis you select. For example, enter a formula of +1.123 to add 1.123 to the selected basis. Or, enter *1.123 to multiply the basis by that amount. If you select a basis used for your List prices and then enter a formula that subtracts 10 percent, that discount is applied to the designated items. If no formula is specified, the system uses a default formula of the selected basis *1.

Enter a price formula using these formats:

Formula...	Specifies a...
+n.nnnn	plus percentage of the basis (for example, +1.123).
-n.nnn	minus percentage of the basis (for example, -1.123).
-n.nn/n.nn/...	chain discount (for example, -1.23/2.34/...).
***n.nnn**	multiplier (for example, *1.123).
dn.nn	divisor (for example, d1.123).
gpn.n	formula that produces a price that reflects the gross profit. Instead of using the basis for the calculation, this formula uses the cost of goods sold (gp.12, for example).

For detailed information about changing prices using pricing formulas, see Pricing Basis and Formula Guidelines in the Pricing section of the help.

Changing Sales Order Prices

The system gives you many ways to change prices on a sales order. Authorized users can change prices using a calculation in a numeric field, change prices for a group of products, or change prices on an entire order.

Choose from one of the following topics to learn more:

- Changing Prices Using Calculations
- Changing Prices Using a Price/Cost Override
- Changing Prices Using the Profit Wheel
- Applying Pricing Quotes
- Subtotaling and Repricing Orders
- Subtotaling and Repricing Job Bids

How the System Indicates Price or Cost Changes

The system uses the symbols in the table below to indicate a price or cost override. The symbols appear adjacent to the changed amount.

This symbol...	Means...
*	the price or cost shown was manually overridden.
+	the price shown was based on contract matrix pricing.
#	the price shown was based on customer matrix pricing.
!	the cost shown was based on a customer-specific cost matrix.

Subtotaling and Repricing Orders

Use the Subtotal screen to create and view subtotals for groups of products on an order. This can be useful when working with product families or organizing products by room. The system begins subtotaling products from the first line item on the order. If you do not want to include a product in a subtotal, assign it to a different order generation or re-sort the products. You can also create separate subtotals and nested subtotals.

When working with multiple subtotals, you must enter subtotals in order, from the beginning of the order to the end of the order. If you enter a new subtotal above any existing subtotals, the subtotals below the newly added subtotal must be deleted and re-entered in order to calculate correctly.

To subtotal a group of products:

1. Create or open a sales order and display the Body screen.
2. Position the cursor on a blank line, underneath the items you want to subtotal.

   Note: If items exist below those you want to subtotal, press **Alt-Insert** to create a blank line above the cursor position. Press **Alt-Delete** to remove the blank line, if needed.

3. Use the **Subtotal** hot key to display the Subtotal screen.
4. Edit the following fields, as needed:

   Note: The system identifies edited prices with an asterisk (*****).

Field	Description
Subtotal	The total price of all items included in the subtotal. If you change this price, the system recalculates each of the unit prices in the group.
COGS/Cost	The cost incurred in producing (by unit of measure ordered) the subtotaled line items on the current order. If authorized, you can use the **COGS View** or **Cost View** hot key to toggle between the Cost and COGS fields, and edit these fields.
GP% Weighted/GP% Flat	The gross profit percentage earned on items in the subtotal group. Use the **Flat GP%** or **Weighted GP%** hot key to toggle between these fields. Editing either field recalculates the prices in the subtotal group. **GP% Weighted** - If you change the subtotal amount or percentage, the sales price of each item in the group changes proportionally, so the new dollar amount remains the same percentage of the total amount. **GP% Flat** - If you change the subtotal amount or percentage, each item's price uses the same gross profit percentage.
Show Itm Prc	Indicates whether to print individual item prices, or print a subtotal amount only. **Y** – Print prices for each item and a subtotal price. **N** – Print a subtotal only.

Field	Description
Weight	How heavy the items in the subtotal group are, if specified in their product records.
Load Factor	How many of the items are required to fill the transport vehicle, if specified in the product records.
Back to	Indicates which items to apply the subtotal amount to. Valid values include: **Top of Order** – Subtotal all items from the current cursor position to the top of the order, including any nested subtotals. **Last Subtotal** (default value) – Subtotal only those items between the current cursor position and the last subtotal. **Subtotal --- <stated subtotal>** – Subtotal all items between the current cursor position and the stated subtotal, including any nested subtotals. This option is available only if you have more than one subtotal on the order.
Comment	A brief description of the subtotal, such as **Kitchen Subtotal**.

5. Press **Esc** to apply the subtotals on the Sales Order Entry Body screen. Subtotal comments are preceded by an asterisk (*****).

To create an additional subtotal:

1. Create or open a sales order and display the Body screen.
2. Position the cursor on a blank line, underneath the items you want to subtotal.

   Note: Press **Alt-Insert** to create a blank line above the cursor position, if items exist below those you want to subtotal. Press **Alt-Delete** to remove the blank line, if needed.

3. Use the **Subtotal** hot key to display the Subtotal screen.
4. In the **Back to** field, do one of the following things:

To create...	Enter...	Result
nested subtotals	**Top of Order**	The system includes all previous subtotals in this subtotal.
a separate subtotal	**Last Subtotal**	The system calculates a subtotal for all items since the last subtotal.
a subtotal within an existing subtotal	**<stated subtotal>**	The system calculates a subtotal for all items between the stated subtotal and this one.

5. Edit other fields, as needed.
6. Press **Esc** to apply the subtotals on the Sales Order Entry Body screen. Subtotal comments are preceded by an asterisk (*****).

Applying Pricing Quotes

Apply a pricing quote to quickly override a sales order's prices with special preset pricing for a product or group of products.

Pricing quotes are set up to give certain industries or customer types special pricing for a limited time. For more information, see Quote Pricing Overview.

Pricing quotes are good for any of the following:

- A specified amount (such as quantity, unit weight, load factor, or dollar amount) of one or more products.
- Individual products, as well as price groups.
- A specified length of time.
- One, many, or all customers.

Applying Quotes

When you apply a pricing quote, the system checks each product on the order. The quote pricing is applied to any applicable products.

To apply a pricing quote:

1. Create or open a sales order and display the Body screen.
2. Use the **Pricing** hot key, which opens the Pricing Override screen.
3. In the **Quote** field, press **F10** and specify which pricing quote to apply.
4. Press **Esc** to return to the Body screen.

Verifying Quotes

Once you have applied a pricing quote, you can change screen views to verify that the special pricing was used.

To verify a pricing quote:

1. Create or open a sales order and display the Body screen.
2. Use the **View** hot key.
3. Select a screen view that shows pricing information. For example, choose one of the following screen views:
   - **Audit Pricing –** Displays a Cls/Typ (Class/Type) column, which shows any quote. The Grp/Prod (Group/Product) column indicates *PRD SPEC* for product-specific pricing.
   - **Formula/Unit Price –** Displays the formula used for product pricing.

- **View Pricing –** Displays the list price and net price.

4. Verify that the special pricing quote was applied by examining line item pricing.

Viewing Product Prices

Use the Product Pricing screen to view pricing information for a selected product in a particular location. You can use this information to charge customers a different price than the one assigned to their class. This screen is view-only.

The system displays prices by the classes to which the user has access, as determined by the price class level assigned to the user along with the OE.PRICE.CLASS.LEVEL authorization key. Prices are displayed in order, from the lowest to the highest price class level. The system sorts alphabetic or alphanumeric price classes according to the level assigned to the price class. You can scroll through the list of price classes to view the corresponding information.

To view product prices:

1. Create or open a sales order and display the Body screen.
2. Select the **Inq** hot key, and then the **Product Pricing** hot key, to display the Product Pricing screen.
3. Review the following fields, as needed.

Field	Description
Branch	The branch at which the order is being written, or, if accessed through Inventory Inquiry, the selected branch.
Group	A group of products for which the same pricing formula is used to calculate the selling price.
Price Sheet	The vendor's product price information sheet from which the cost was derived.
Desc	A statement that identifies the item being priced. This description is created in Product Maintenance.
Class	A group of customers with a similar type of business or similar level of buying power.
Price/ea	The selling price per unit of one item. For example, if the unit of measure is **bx** (box), then the unit price is the amount the customer pays for one box of the item.
Basis	The cost or price value to which a pricing formula is applied to calculate the price.
Formula	The calculation used to determine the price basis. For more information, see Pricing Formulas.

4. Press **Esc** to return to the previous screen.

Viewing Customers' Last Price Paid

The Last Price Verification screen shows comparative pricing information for a single product on the current sales order. Using this screen, you can easily compare prices and adjust the current price if you want to. The screen shows:

- The customer's current price for the line item and
- The last price the customer paid for that same line item.

By default, the last price is based on the last price paid at all branches. However, if the Override Basis Name For Last Price Calculation control maintenance record is set, then the basis identified will be used instead of the actual last price.

To view the last price paid for an item:

1. Create or open a sales order and display the Body screen.
2. Select the item for which to compare prices, and use the **Quick Prc** hot key to display the Last Price Verification screen.
3. Review and edit the following fields, as needed:

   Note: Some fields are view-only.

Field	Description
Order #	A letter followed by a unique series of numbers that identifies the order.
Lot Ids	A number that identifies the detail lot to which this item belongs.
Qty	The total quantity of the item ordered.
Price	The selling price per unit. For example, if the unit of measure is bx (box), then the unit price is the amount the customer pays for one box of the item. If authorized, pressing **F10** from this field displays the profit wheel.
COGS/Cost	The cost incurred in producing (by unit of measure ordered) the line item on the current order. If the item was purchased previously, the system displays the cost for the line item on the last order. You can edit this field for the current sales order. Authorized users can use the Cost/COGS hot key to view the cost or the cost of goods sold.
GP%	The percentage of the price your company receives as profit as a result of the sale of the item, based on cost of goods sold.
GP$	The dollar amount your company receives as profit as a result of the sale of one unit of the item, based on cost of goods sold.
Ext GP$	The dollar amount your company receives as profit as a result of the sale of the specified quantity of the item, based on cost of goods sold.
Formula	The calculation used to determine the price basis. For more information, see Pricing Formulas.
PO#	The customer's purchase order number for this sale.
Mfg	The company that manufactures the item.

4. Use hot keys, as needed:

To...	Use this hot key...
review all customer activity for the selected item	**Cust Inv Hist** The Inventory History Ledger screen displays.
review all product activity for the selected item	**Inv Hist** The Inventory History Ledger screen displays.
determine to what detail lot this item is assigned (if any)	**View Detail Lot** The Detail Lot Maintenance screen displays.
review all purchases made for the selected item	**View Purch Hist** The Inventory History Ledger screen displays.
view a list of open orders on which this item has been purchased	**Order Inquiry** The Open Orders screen displays.
add a standard note to the order	**Product Notes** A list of standard notes displays.
customer's last order for the item (in view-only mode)	**View Last Sale** The Sales Order Entry Body screen displays.
toggle between the price information for the ship-to address and the bill-to address.	**Use ST/Use BT**
assign this item to a detail lot	**Select Det Lot** The Detail Lot Selection screen displays.
view all bids on which this product is present	**Future Bid Inq** An inventory type selection list displays. Select a type and press Enter to display the Future Ledger screen.

5. Press **Esc** to update the item price on the Sales Order Entry Body screen.

Overriding Prices on Orders

Authorized users can use the Pricing Override screen to change the prices for selected order items or for an entire order. When you apply a price change, your changes apply to all subsequent items entered, unless you then override *those* prices. You can also reprice the entire order at any time.

You can override an order's prices in several ways. You can specify a customer type or price class or edit a price basis formula. For example, a formula can specify a 10 percent discount from list price.

Use the **Direct COGS Always Vendor Price** control maintenance record if you want to always use the vendor price for direct cost of goods sold on orders.

To override prices:

1. Create or open an order and display the Body screen.
2. Use the **Pricing** hot key to display the Pricing Override screen.
3. In the **Price Date** field, enter the date the pricing override takes effect. This date determines which price sheets will be used for the products on the order.

   By default, the system populates this field with the current order date. This field does not support variable dating.
4. In the **Expiration** field, enter the date the pricing override is no longer valid.
5. To override pricing, do one or more of the following things:
   - Use the **Cust Types** hot key, and enter one or more industries into which this customer could be categorized ("plumbing" and "heating," for example). This information is used for promotional pricing purposes.

     The selection applies to all branches. However, the Best Price Check option, if used, will still be considered for price matrix cells.
   - If a price quotation is associated with this type of customer, in the **Quote** field, enter a special price that has been offered for a price group and/or group of products assigned to the customer. After specifying the quote, press **Esc** to skip the remaining fields and return to the Sales Order Entry Body screen.

     Note: You do not need authorization to override pricing with a valid quote.
   - In the **Class** field, enter a code that represents the group of customers with a similar type of business or similar level of buying power to which this customer belongs.

     Note: This field is not active for purchase orders.
   - In the **Basis** field, enter the monetary value, derived from a formula, upon which the selling price (by line item) is based.
   - If you entered a price basis in the **Basis** field, in the **Formula** field, enter a calculation used to determine the price basis. For example, if you entered DFLT LIST in the

Basis field, and you want to reprice items at 95 percent of DFLT LIST, you would enter *.95 in this field. For more information, see Pricing Basis and Formula Guidelines.

6. In the **Reprice All Items (Y/N)** field, specify whether you want to reprice all items on this sales order according to the price override information you are entering on this screen.
   - **Y** – Reprice all line items on this sales order.
   - **N** – Do not reprice any line items on this sales order.

   Note: The system does not support split quantity pricing when repricing items.

7. If you set the **Reprice All Items (Y/N)** field to **Y**, in the **Reprice Overrides (Y/N)** field, indicate whether you want to re-price any items that were previously overridden on this sales order.
   - **Y –** Override previously overridden prices with this new pricing override.
   - **N –** Leave item prices at their current overrides and do not reprice again.
8. Use other hot keys, as needed:

To...	Use this hot key...
adjust the minimum gross profit percentage and maximum discount from the standard price for either stock items or direct shipments	**GP%Cont** The GP% Control Parameters screen displays.
adjust COGS basis and formula	**COGSOvrd** The Cost of Goods Sold Override screen displays.
adjust the cost basis for a group of products	**Subtot** The Job Bid Subtotal Maintenance screen displays. **Note:** This option is not active for purchase orders or transfer orders.
adjust a price matrix using the price override	**Matrix** The Copy Override Pricing to Matrix screen displays. Subsequent orders for the customer receive the same pricing override established on the current order.

9. Press **Esc** to update the prices based on your selections and return to the Body screen.

Changing Prices Using Calculations

You can perform calculations in numeric fields. This feature is a convenient way to change the price of individual items on an order. For example, you could calculate a five percent discount on a product to clinch a sale.

Once you edit a price, the new price is followed by an asterisk (*). The asterisk alerts everyone that the original price was overridden.

To perform a calculation, enter the formula in a numeric field, preceded by one of the following operators:

This operator...	Is used for...
+	addition.
-	subtraction.
*	multiplication.
/	division.

To change a price using a calculation:

1. Create or open a sales order and display the Body screen.
2. Make sure the selected screen view displays numeric fields. If not, use the **View** hot key to choose a suitable view.
3. In a numeric field, enter the calculation, preceded by the appropriate operator. For example, to calculate a five percent discount from a product's unit price, enter ***.95**. The calculation is applied and the price updates as soon as you press **Enter**.

Changing Prices Using the Profit Wheel

The Profit Wheel screen allows you to quickly compare different selling prices for an item and see how the different prices impact your gross profit. This can be useful when creating bids, where the ability to instantly determine different price and profit combinations is essential. When you select a new selling price using the profit wheel, the price automatically gets updated on the order's Last Price Verification screen.

The top of the Profit Wheel screen displays information about the current item, including its cost to you and its current selling price to your customer. The extended price calculation displays are useful for small items, such as fasteners or fuses, that are normally sold in quantity.

The bottom of the screen displays all of the different selling price and gross profit percentage combinations. The gross profit information is displayed as a percentage, a dollar amount, and as an extended dollar amount for the quantity shown. You can navigate within the profit wheel to see other combinations of prices and percentages.

To change a price using the Profit Wheel:

1. Create or open a sales order and display the Body screen.
2. With the cursor on the desired item, select the **Quick Prc** hot key to display the Last Price Verification screen.
3. In the **Price** field, press **F10** to display the Profit Wheel.
4. To specify a new price, do one of the following things:
   - Navigate to select a new price and gross profit combination.
   - Use the **GP Range** hot key. This hot key allows you to edit the **GP Range** field by entering a new number. Once you do, the cursor and the lower half of the screen scroll to the line corresponding to your entry.
5. When you are satisfied with your settings, press **Esc**. The Last Price Verification screen displays, with the new price applied.
6. Press **Esc** to display the order's Body screen with the new price applied.

Changing COGS Using a Pricing Override

Authorized users use the Cost of Goods Sold Override screen to override pricing on an order. Use this screen to adjust the cost of goods sold (COGS) information, and then apply the adjustment to all items on an order. Any adjustment applies to subsequently entered items.

Use the **Notify User When COGS Is Updated** control maintenance record to make sure the appropriate personnel are notified when COGS has changed.

Use the **Direct COGS Always Vendor Price** control maintenance record if you want to always use the vendor price for direct cost of goods sold on orders.

To override the cost of goods sold:

1. Create or open a sales order and display the Body screen.
2. Use the **Pricing** hot key to open the Pricing Override screen.
3. Select the **COGSOvrd** hot key to display the Cost of Goods Sold Override screen.
4. In the **Cost Date** field, enter the price sheet date used for the item's pricing.
5. In the **Basis** field, enter the global price basis to override, such as COGS-COST or Order COGS. If your entry is not valid, the COGS Selection screen displays a list to select from.
6. With a global basis specified, use the **Formula** field to enter a pricing formula.
7. Specify how to apply the price override to the current order generation:
    - In the **Reprice All Items (Y/N)** field, enter **Y** to reprice all items. Or, enter **N** to apply the override just to the current and subsequent line items.
    - If **Reprice All Items (Y/N)** is set to **Y**, use the **Reprice Overrides** field to specify whether to reprice items that were previously overridden on the current order generation.
8. When you are satisfied with the price override, press **Esc** to return to the Pricing Override screen.

    Note: If the **Prompt For Cost Code On Cost Override In SOE** control maintenance record is set to **Yes** or **Required**, you will be prompted to enter a cost override code.

Changing Prices Using a Price/Cost Override

Use the Price/Cost Override screen to change the price or cost of products in a subtotal group. Subtotal groups are created in Job Bid Subtotal Maintenance. You can use subtotal groups to procure, manipulate, or reprice a group of products.

To change prices using a price or cost override:

1. Create or open a sales order and display the Body screen.
2. Use the **Pricing** hot key to open the Pricing Override screen.
3. Select the **Subtot** hot key to open the Job Bid Subtotal Maintenance screen.
4. Select a group of items, and use the **Change Prc/Cost** hot key.
5. Specify the field information:

Field	Description
Applies To	Specifies whether the override applies to Price, Comm Cost (commission cost), or COGS (cost of good sold). Press **F10** for list.
Price Date	Specifies the date the override takes effect.
Line Items	Specifies which line items to reprice. Press **F10** for Line Item Selection screen.
Basis	Specifies the price basis used to calculate price.
Formula	Specifies the pricing formula used with specified Basis to calculate price.

6. When you are satisfied with your settings, enter **Y** in the **Reprice Overrides (Y/N)** field. This action applies the override and closes the screen. Changed costs are based on the ship date.

   Note: You may be warned about (or prevented from) allowing pricing below a product's minimum specified gross profit percentage.

Taxing Line Items on Orders

The same product can be taxable or not, depending on which customer is buying it, and *why* that customer is buying it. For example, depending on the tax jurisdiction, a product may be taxable if used in the manufacture of another product, but not taxable if used for resale to another customer. Additionally, Canadian distributors may have product line items subject to either GST (Goods and Services Tax) or PST (Provincial Sales Tax).

Using the Line Item Taxable view, order takers can control which line items are taxed, and whether they are taxed at a full or reduced rate. System administrators establish system settings to determine whether order takers are prompted to choose, or able to specify, whether each line item is taxable and at what rate. A reduced rate sometimes applies when the delivery is made outside the tax district. Order takers can be prompted when each product is entered, or just the first time the customer buys the product.

To control a line item's taxability:

1. Create or open a sales order and display the Body screen.
2. If prompted when entering a product, specify how the item is taxed:
   - **Y** – Yes, tax the item.
   - **N** – No, do not tax the item.
   - **R** – Yes, tax the item, but at the reduced rate that is set up.
3. If prompted, enter or edit the tax code. Press **F10** for a list of choices.
4. Use the **View** hot key, and choose the Line Item Taxable View. This view includes columns that display the tax status and tax code for each line item.
5. To edit a line item's taxability, press **F10** and specify one of the following in the **TAX** field. If editing is disabled, asterisks (*) display in the field.
   - **Yes** – Yes, tax the item.
   - **No** – No, do not tax the item.
   - **Red** – Yes, tax the item - but at the reduced rate that is specified or set up.
6. To edit a taxable item's tax rate, press **F10** in the **TaxCo** field and specify a tax code. The tax code you specify here overrides other tax settings.
7. When you are satisfied with each line item's tax settings, press **Esc** to continue to the next screen.

Copying Override Pricing to a Matrix

You can copy the special pricing of items on the current order into the pricing matrix for the customer. Subsequent orders for the customer continue to use the special pricing overrides specified on the Copy Override Pricing to Matrix screen.

This is useful for customers with a purchasing commitment at your company. For example, many companies offer special pricing to customers who commit to purchase a certain quantity of products over a specified period of time. When this occurs, you can change prices using a pricing override when the first order is placed. Then copy the special override pricing to use as the remaining quantity gets purchased.

To copy override prices to a pricing matrix:

1. Create or open an order and display the order's Body screen.
2. Use the **Pricing** hot key, which opens the Pricing Override screen.
3. Use the **Matrix** hot key.
4. Enter the following field information, as needed:

Field	Description
Copy to	Specifies whether to use the customer's Bill-To or Ship-To account in the matrix.
Copy All/Dollar/Formula	Specifies whether to use all overrides in the current order, only the overrides specified in Dollar amounts, or only those in Formula changes.
Force Matrix to	Specifies whether to use overrides As-Is (with a combination of dollar amounts and formulas), Dollar overrides only, or Formula overrides only. Press **F10** for list.
Overwrite Existing	Indicates whether to override the Price/Cost/COGS overrides in the matrix. If **Y** (default value) is selected, the system updates the matrix cell and replaces the existing overrides; otherwise, it creates a new cell and copies the Price/Cost/COGS overrides into it. If **N** is selected, the system creates a new matrix cell and copies the Price/Cost/COGS overrides into it. The overrides information in any existing matrix cells for the branch, customer, and product remains intact.
Copy Costs (Y/N)	Specifies whether to use override costs, as well as override prices. Not usually needed.
Dflt, Br Specific, Terr	Specifies whether to use the overrides for this customer and this product at the current branch, the territory, or as the default for all authorized branches. **Note:** You can enter a territory only if it has the pricing branch as a valid branch.
Expiration Date	Specifies the date when the override expires.
Expiration Qty	Specifies the quantity after which the override expires.
Expiration Qty Type	Specifies the quantity type upon which the expiration quantity is based. Press **F10** and select U-Unit, W-Weight, L-Load Factor, or D-Dflt List.

Field	Description
Vendor	The vendor to which the product and customer override costs in the vendor buy matrix is copied. A field entry is optional; but if a vendor exists, the costs are copied, regardless of **Copy Costs (Y/N)** setting. **Note:** When this screen is accessed from Purchase Order entry, this field is not accessible.

5. Use a hot key to specify how to copy the override prices:
   - Use **Begin** to copy the override to the matrix, without opening the Sell Matrix Maintenance screen, so you can confirm your changes.
   - Use **One Step** to open the Sell Matrix Maintenance screen so you can confirm your changes by stepping through them before the override copy is finalized.

Note: The system will not overwrite an existing matrix cell entry that shares the same date range as the override.

Verifying How Pricing Was Determined for a Line Item

When you need to find out how the system determined pricing for a specific line item on an order, use the Pricing Audit feature. This feature displays a Hold Entry Pre-view report that lists every pricing matrix cell the system checked when determining pricing, along with any pricing-related control maintenance record settings.

To verify how pricing was determined for a line item:

1. Create or open a sales order and display the Body screen.
2. Move the cursor to the line item whose pricing you want to know about, and select the **Inq** hot key. The Sales Order Inquiries screen displays.
3. Select the **Additional Inqs** hot key, and then the **Audit** hot key, to display a Hold Entry Pre-view screen showing Pricing Audit information for the selected line item.
4. Set options, if needed, and generate the report.

Changing Sales Order Currency

You can change the currency for a sales order on the order's Body screen. Changing an order's currency changes the currency in which prices display on the order, as well as the currency that prints on customer documents.

If a customer primarily uses a currency other than your system's base currency, you can designate a new base currency for the customer in Customer Pricing/Printing, so you do not need to change the currency displayed for individual orders.

To change a sales order's currency:

1. Create or open a sales order and display the Body screen.
2. Select the **$** hot key, which displays in the upper-right corner of the screen.
3. In the **Currency** field, select a new currency for the order.

   The **Exchange Rate** field automatically displays the most recent exchange rate entered in Exchange Rate Maintenance. You can enter a new exchange rate now if you need to.
4. In the **Recalculate** field, specify **Base** or **Foreign**, depending on whether you want to change the pricing that posts to your General Ledger, or merely change the currency in which prices display on the order and its documents.
   - **Base —** Select **Base** if you want to use the numeric digits currently displayed, but convert them to a new currency. For example, you would select this option if you wanted to convert $10.00 U.S. to $10.00 Canada. This option affects the actual pricing on the order, and the amounts that post to your company's General Ledger, because a numeric value in one currency almost never matches that same numeric value in another currency.
   - **Foreign —** Select **Foreign** if you want to maintain the same order pricing that would otherwise be in effect, but you want to display pricing in a different currency. For example, you would select this option if you had a customer who wanted prices to display in a different currency on their order documents.
5. Press **Esc** to save your changes and return to the sales order's Body screen. Order pricing now displays in the currency you selected, as denoted by the currency indicator in the upper-right corner next to the **$** hot key.

Entering Sales Order Header Information

When you enter sales orders, you may need to change some of the customer's standard order processing information. Use the Sales Order Entry Header screen to edit information such as the freight information, payment terms, and tax information.

Changing the information on this screen does not affect the customer's default settings. You can change the values permanently in Customer Maintenance.

To change Header Screen information:

1. Create or open a sales order and display the order's Header screen.
2. Review or edit any of the following fields:

   Note: Some fields are view-only. You cannot change the **Bill To** or **Ship To** field if the order has invoiced generations in a closed period.

Field	Description
Bill To	The address to which to send the invoice. This field can be changed only in Customer Maintenance.
Ship To	The address to which the products will ship. **Note:** You can enter a zip code to automatically fill in the city and state. Or, you can enter a city and state (for example, "Terra Alta, WV") to get a list of valid zip codes for that city. **Note:** If you change the zip code that causes the tax exempt status to change, the system prompts you to accept or deny the tax exempt status for the invoiced generation. Open generations are not affected and follow standard Eclipse taxation rules.
Order #	A letter **S** followed by a series of unique numbers that identifies the sales order.
Branch #	A number that identifies the branch from which the sales order is entered.
Date Ordered	The date the sales order was entered into the system. The system assigns this date, but you can override it, if needed. For example, if you have a power outage and are unable to enter an order in the system, you can take it by hand and enter it into the system later, but assign the true order date to it.
Picked By	The login ID of the person who pulled the products on the order from the shelves.
Written By	The login ID of the person who entered the order into the system.
Out Salesperson	The login ID of the person who secured the first order from this customer. Authorized users can change this field.
In Salesperson	The login ID of the person who calls the customer to suggest additional orders. Authorized users can change this field.
Print Style	Indicates the parameters to use when printing a document, such as a ship ticket, acknowledgement, or invoice, for this order. The document can show totals, subtotals, and other information, depending on the style selected. If you use Eclipse Forms, this hot key is not available. Use the **Form Type Override** to set the form type at the order level.

Field	Description
Customer P/O #	The number the customer has assigned to this order for tracking purposes. If the PO/Release #Required field in Customer Maintenance is set to require a PO, you must complete this field. If you enter a purchase order number here, it displays in the Search list when you enter the customer's name in the Ship-To field.
Customer Rel #	A number the customer has assigned to this order for tracking purposes. It is assigned in addition to the PO number. If the PO/Release #Required field in Customer Maintenance is set to require a release number, you must complete this field.
Ordered By	The customer purchasing agent placing the order. If authorized order placers have been established in Customer Maintenance and the **Validate Name In 'Ordered By' Field Against Customer Contacts** control maintenance records is set to **Yes**, this field is required and checked against the list of valid order placers. Press **F10** to display a list of authorized order placers, or type **New** to display Contact Maintenance and enter a new contact on the fly.
Phone Number	The telephone number of the individual who ordered the items. This defaults to the first telephone number from the customer's Contacts/Phones list.
Payment Terms	A code the system uses to calculate when the customer's payment is due. For example, **10N30** indicates that the net payment is due 30 days after the order date, but if the customer pays before that date, they receive a 10 percent discount. Payment terms are defined on the Credit Control Parameters screen under Customer Maintenance. If the Override Inv Terms option is set to **Y**, the system bases service charges for past due invoices on the terms stated in the customer record, regardless of the value set in this field.
Tax Jurisdiction	The limits or territory within which taxation authority may be exercised for this order. If your company uses the National Sales Tax companion product, pressing **F10** displays a list of geocodes.
Tax Exempt ID #	A government-issued number that exempts the customer from having to pay tax on this order. This number is based on the customer's sales tax setup in Customer Maintenance. **Note:** When the system generates invoices, it determines their taxability based on this field.
Tax Exempt Code	A code that identifies the reason the customer is tax exempt. This code is based on the customer's sales tax setup in Customer Maintenance. **Note:** If you change the zip code that causes the tax exempt status to change, the system prompts you to accept or deny the tax exempt status for the invoiced generation. Open generations are not affected and follow standard Eclipse taxation rules.
Sale Source	Identifies which sales division entered the order, such as showroom sales or inside sales. Authorized users can create sales sources in G/L Sales Source Maintenance.

Field	Description
Shipping Instructions	Use this free form field to enter special shipping and handling instructions dictated or arranged by the customer. For example, if the customer has requested that the shipment be delivered to Dock C, you can enter that information here. The system prints this text on the shipping documents. To select from a list of standard shipping instructions, use the **Instr** hot key. To prevent backordered items from printing on ship tickets, enter **!NOBO** on the first line.
Internal Notes	Use this free-form text field to enter confidential information specific to this order. This information does not print on any customer documents. For example, if you have had problems with a particular customer's orders arriving damaged, you may make a note to make sure the items are packed with extra packaging material.

Note: If an invoice has printed for all or part of the order, the first invoice print date also displays as a message if the Display Invoice Print Date In SOE Header control maintenance record is set to Y.

3. Use hot keys, as needed.

To...	Use this hot key...
select additional options	**Add'l** The Additional Sales Order Entry Header Hot Keys screen displays.
view changes made to the order	**Chg Log** The Change Log Viewing screen displays.
view third-party shipping information on a carrier's web site, or view a MapQuest map of the shipping address	**Shipping** When prompted, select a shipping company or **MapQuest** and then press **Esc**.
apply a standard shipping instructions note	**Instr** Select a note from the selection list that displays and press **Enter**.
apply a standard internal note	**Notes** Select a note from the selection list that displays and press **Enter**.
specify whether, and how, you want to copy changes made to this screen to all other open generations on this order	**Copy To All** **On –** The system copies any changes made to the Header of one order generation to the Headers of all of the other order generations. **Off –** The system does not copy the changes made to the Header of one order generation to the Headers of the other order generations. **Prompt –** The system prompts you to select whether to copy Header changes to other order generations. **Note:** Changing this setting overrides the system setting in the Default Copy Mode For OE Header Screen control maintenance record.

Entering Additional Sales Order Header Information

Use the Additional Sales Order Header Hot Keys screen to access screens on which you can enter more administrative information about an order.

To view additional header information:

1. Create or open a sales order and display the order's Header screen.
2. Use the **Add'l** hot key to display the Additional Sales Order Header Hot Keys screen.
3. Use hot keys, as needed:

To...	Use this hot key...
enter or edit additional header information	**Add'l Header Info** The Additional Header Information screen displays. Complete the fields on this screen, as desired. For more information, see Using the Add'l Header Info Hot Key below.
view the customer's current credit standing	**Cust Credit Inquiry** The Customer Credit Inquiry screen displays.
record customer employees who are certified to buy regulated products	**Product Cert Maint** The Product Certification Maintenance screen displays.
convert this order to a master job bid	**Job Maintenance** The Job Maintenance screen displays.
override the form type at the order level if you use Eclipse Forms	**Form Type Override** The Eclipse Forms Types screen displays.
review or edit what percentage of the commission you receive as a result of this sale	**Salesperson %** When prompted, indicate whether to display data for the writer (W), the inside sales representative (I), or outside sales representative (O) to display the Salesperson Split Commission Percentage screen.
enter additional custom EDI data for sales order documents	**Additional EDI Info** The EDI Custom Data screen displays.
add a new shipping address or view the customer's billing address	**Additionl Address** When prompted, select whether to view the Bill-to or Ship-to address and press **Enter** to display the Additional Address screen.
specify commission percentages by collection days	**Comm % by Coll Days** The Commission % by Collection Days screen displays.

4. Press **Esc** to return to the Sales Order Entry Header screen.

Using the Add'l Header Info Hot Key

Use the Additional Header Information screen to change default values from the customer's maintenance record for this order only. To change the values permanently, you must use Customer Maintenance.

To add additional header information for the order:

1. Create or open a sales order and display the order's Header screen.
2. Use the **Add'l** hot key, and then the **Add'l Header Info** hot key, to display the Additional Header Information screen.
3. Complete any of the following fields:

Field	Description
Max Collection Days	The maximum number of days past the invoice due date that your company will attempt to collect on this invoice before sending it to a collections agency. This information is commonly used to deny sales commissions on invoices paid after days specified; for example, after 60 days.
Job Bid Name	The name of the job bid with which this order is associated. Use job bids to track projects on which several customers are bidding.
Exceptional Sales	Identifies whether to exclude the items on this order from demand calculations and the customer's Reorder Pad. Enter **Y** to exclude this order from demand calculations and the Reorder Pad; otherwise, enter **N** (default value).
Freight Out Exempt	Indicates whether the customer on this order is exempt from outgoing freight charges. This information defaults from the value in the Customer Maintenance record.
Freight In Exempt	Indicates whether the customer on this order is exempt from incoming freight charges. This information defaults from the value in the Customer Maintenance record.
Print Style	Indicates the parameters to use when printing a document, such as a ship ticket, acknowledgement, or invoice, for this order. The document can show totals, subtotals, and other information, depending on the style selected. If you use Eclipse Forms, this hot key is not available. Use the **Form Type Override** to set the form type at the order level.
Batch ID	Any identifier your company uses to select sales orders or invoices for batch printing.
Expedite Receiving (Y/N)	Identifies whether to accelerate the receiving process for this order. This field works with the RF Valid Product Loc Recv Statuses and RF Valid Product Loc Pick Statuses control maintenance records. **Note:** This field, and these control maintenance records are specific to picking, receiving, and restocking in the fastener industry and are not used in general RF applications. Contact your Eclipse Installer for specific information.

Field	Description
Product Catalog	A vendor's catalog from which more information about the items on the order can be found. Authorized users can set up catalog information in Product Catalog Maintenance within Product Maintenance. To specify a product catalog (including the page number and column) at the line item level, use the Inq hot key on the Sales Order Entry Body screen and use the Product Catalog option.
Extra Handling Charge	Identifies whether to charge a specific extra handling charge on the entire order. By default, this field uses the value specified in the customer record. When the order is shipped using a third shipping application, such as the Clippership or StarShip companion products, the system applies the handling charge from the Extra Handling Charge For StarShip/Clippership control maintenance record. If a value is set in the Apply Extra Handling For StarShip/Clippership To First Gen Only control maintenance record, the system applies the handling charge only to the first generation.
Commission Plan	The formula used to calculate the sales representative's commission. Although commissions are typically calculated for a salesperson according to the commission plan assigned to that salesperson, you can assign a different commission plan to the sales order using this field. The commission plan assigned here overrides the commission plan specified at the customer level, which overrides the commission plan assigned to a salesperson.
Showroom LIST Discount%	A percentage discount off of the list price that applies to the entire order for your customer's customer.
Customer's Client	The end customer to which *your* customer is selling the products on this order. This field is validated against your customer base, so your customer's client must be set up in Customer Maintenance. Entering a customer's client causes the system to calculate a second set of pricing, based on the customer's client's pricing, for all items on the order. This allows your customer to show different pricing to their own clients. Use the Customer Client Pricing view to view customer client pricing.
ABC Order Extension	Identifies whether to charge the customer for changes, deletions, and returned goods, and if so, how much.
G/L Branch	The branch that will record the general ledger postings for the order. Changing the value of this field on an open sales order overrides the default hierarchy determined by the Branch That Controls Branch That Receives Credit For The Sale and Branch That Receives Credit For The Sale control maintenance records. Only authorized users can change the G/L branch. **Note:** Once an order is invoiced, if changes are made that affect the G/L posting (for example, the pricing branch is changed), the G/L branch must be changed manually. The system will not re-post to a different branch after an order is invoiced.

Field	Description
Invoice Status	A flag that identifies problems that occur during the invoice process. Authorized users can create status codes in the Valid Customer Invoice Status Codes control maintenance record. **Note:** To edit this field, you must be assigned the INV.INV.STAT authorization key and the order must be invoiced. Changes to this field are recorded in Unquality Event Tracking.
Calculate Split Tax At Order Level	Identifies whether the system will apply split tax rules for this order.
Residential Shipping Address	Identifies whether a supported shipping application, such as StarShip, automatically uses residential shipping rates when shipping an order.

4. Press **Esc** twice to return to the Sales Order Entry Header screen.

Adding Customer Contacts to Sales Orders

Use the Customer Contact / Phone Number Maint screen to enter customer contact numbers. When you enter contacts here, they are recorded in the customer's maintenance record.

To add a customer contact:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry Body screen.
2. In the **Ship To** field, enter **New** to display the New Customer Entry screen.
3. Use the **Phone #'s** hot key to display the Customer Contact / Phone Number Maint screen.
4. Complete the following fields for each contact:

Field	Description
Contact Name	The person or device (such as a fax machine) you want to record a telephone number for.
Phone Number	The telephone number of the person or device.

5. Press **Esc** to return to the New Customer Entry screen.

Adding Substitute or Related Products to Sales Orders

When the products your customers order are not available, use the Product Relationships program to suggest substitute or related products. If you can substitute a product similar to the requested product, the customer will not have to wait for a backorder or procurement.

You can also use Product Relationships to suggest other products typically needed when the requested item is ordered. For example, if you are selling an air conditioner, your customer often also needs a thermostat.

Depending on your control maintenance settings, the system may automatically display with a list of all available substitute and related products, including upgrades, when you enter a product. You cannot substitute products that are being procured or those that are tagged to transactions.

When you add substitute or related products, any comments attached to the products are also copied to the order.

You cannot substitute products that are being procured or those that are tagged to transactions. You also cannot substitute a product if a partial quantity of that product has already shipped on another order generation.

For complete information on how to use Product Relationships, see Substitutes, Required, and Related Items Overview.

Choosing an Order's Shipping Options

Shipping options are established on the order's Status screen. When entering sales orders for customers who do not have to pay for their orders upon delivery, this screen is the last screen you complete before processing the order.

To choose order shipping options on the Status screen:

1. Create or open a sales order and display the order's Status screen.
2. Review the **Prc Br** and **Shp Br** fields to make sure the pricing branch and shipping branch are correct for this order.
3. In the **Order Status For** field, identify the desired order status for each order generation:

When...	Use this order status...
the customer is taking possession of the material at the counter or at will call	**Pick Up Now**
you want to ship an entire order generation on a specific date	**Ship When Specified**
you want all items on a generation to ship at the same time	**Ship When Complete**
you want any available items on any order generation to ship as soon as they're available	**Ship When Available**
you want any line item on any generation to ship as soon as its full quantity is available	**Ship Item Complete**
the salesperson wishes to be notified through the Customer Calling Queue when any quantity of any line item becomes available	**Call When Available**
the salesperson wants to be notified through the Customer Calling Queue when all line items within an order generation are available	**Call When Complete**
the salesperson wishes to be notified through the Customer Calling Queue on a specific date, regardless of inventory availability	**Call When Specified**
the salesperson is providing a bid to the customer	**Bid**
the material is being shipped directly from the vendor or is being picked up from the vendor's site	**Direct Shipment**
you want to cancel a specific generation, or cancel the entire sales order (if only one generation)	**Cancel**

4. In the **Prt** field, enter a print status.
5. In the **Ship Date** field, identify the desired shipping date for each order generation.
6. In the **Ship Via** field, identify the desired shipping method for each order generation.
7. Use hot keys, as needed:

To...	Use this hot key...
add or edit administrative details for the order, such as a customer PO number	**Header** The Sales Order Entry Header screen displays.

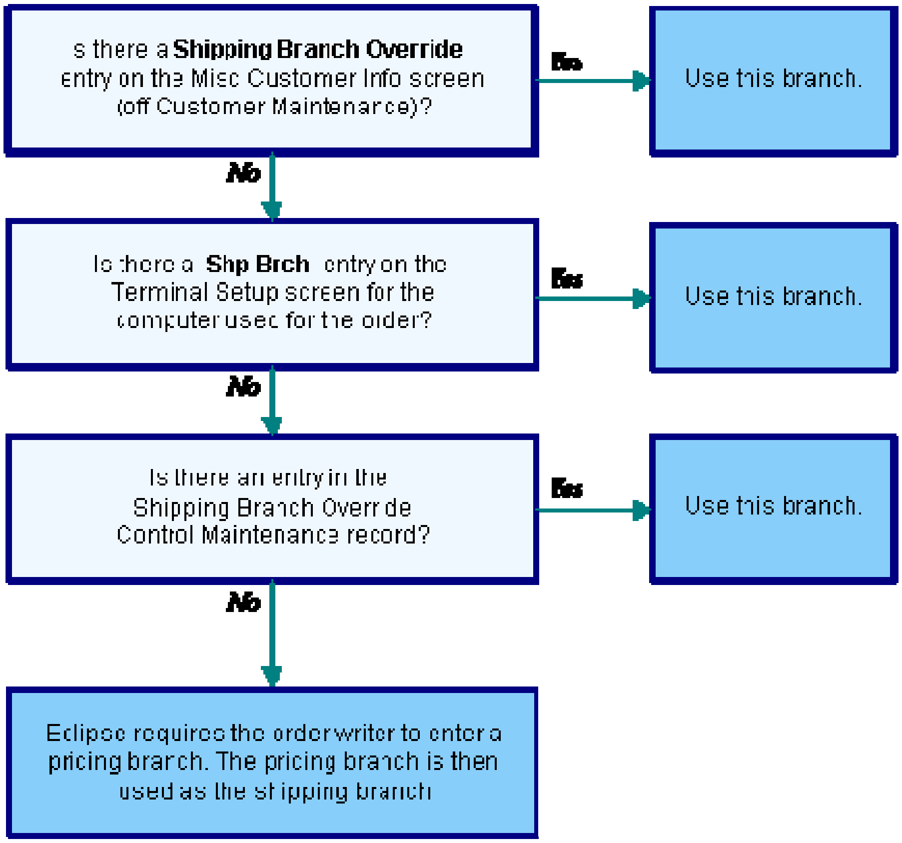
To...	Use this hot key...
edit the order detail information	**Body** The Sales Order Entry Body screen displays.
review order charges or apply payments	**Totals** The Sales Order Entry Totals screen displays.
view additional details about the order generation , such as required and completion dates, or delivery times	**View** A selection list displays. Select a view and press **Enter** to change the columns to display the requested information.
view the order generation's shipping manifest, if applicable	**Manifest Q** The Shipping Manifest Queue screen displays.
schedule ship dates for individual products on backorder	**Detail Scheduling** The Detail Scheduling screen displays.
view all of the items on the order generation	**View Items** Displays the View Order Entry Items screen.
change multiple generations to the same ship date when all items on the order are available	**All Complete**
create a reminder to follow up on a bid (active for bids only)	**Bid Follow Up** The Bid Follow Up screen displays.
ship any available items	**Ship Available** The status of the affected order generation is changed to Pick Up Now.
reprint the shipping ticket or access shipping manifest features	**Print Opt** The Order Reprinting Options screen displays.
procure multiple products	**Procure** The Order Entry Procure Items screen displays.
confirm products for procurement	**Confirm** The Procurement Confirmation screen displays.

8. Press **Esc**. One of the following things happen:

If...	Then...
the customer *is not* required to pay for the material upon taking possession	the order processes.
the customer *is* required to pay for the material upon taking possession	the Totals screen displays.

How the System Determines a Shipping Branch

In a typical warehouse, the shipping branch is the same as the pricing branch used for the order. If the shipping branch is *not* the pricing branch, the system determines the shipping branch as shown in the following illustration.



Sales Order Statuses

The order status determines when and how the order is processed. You can specify whether the customer is picking up the order, you are shipping the order, or calling the customer when the order is ready. You can you can also indicate whether to ship or call when part of the order is available, when the entire order is complete, or on a selected date.

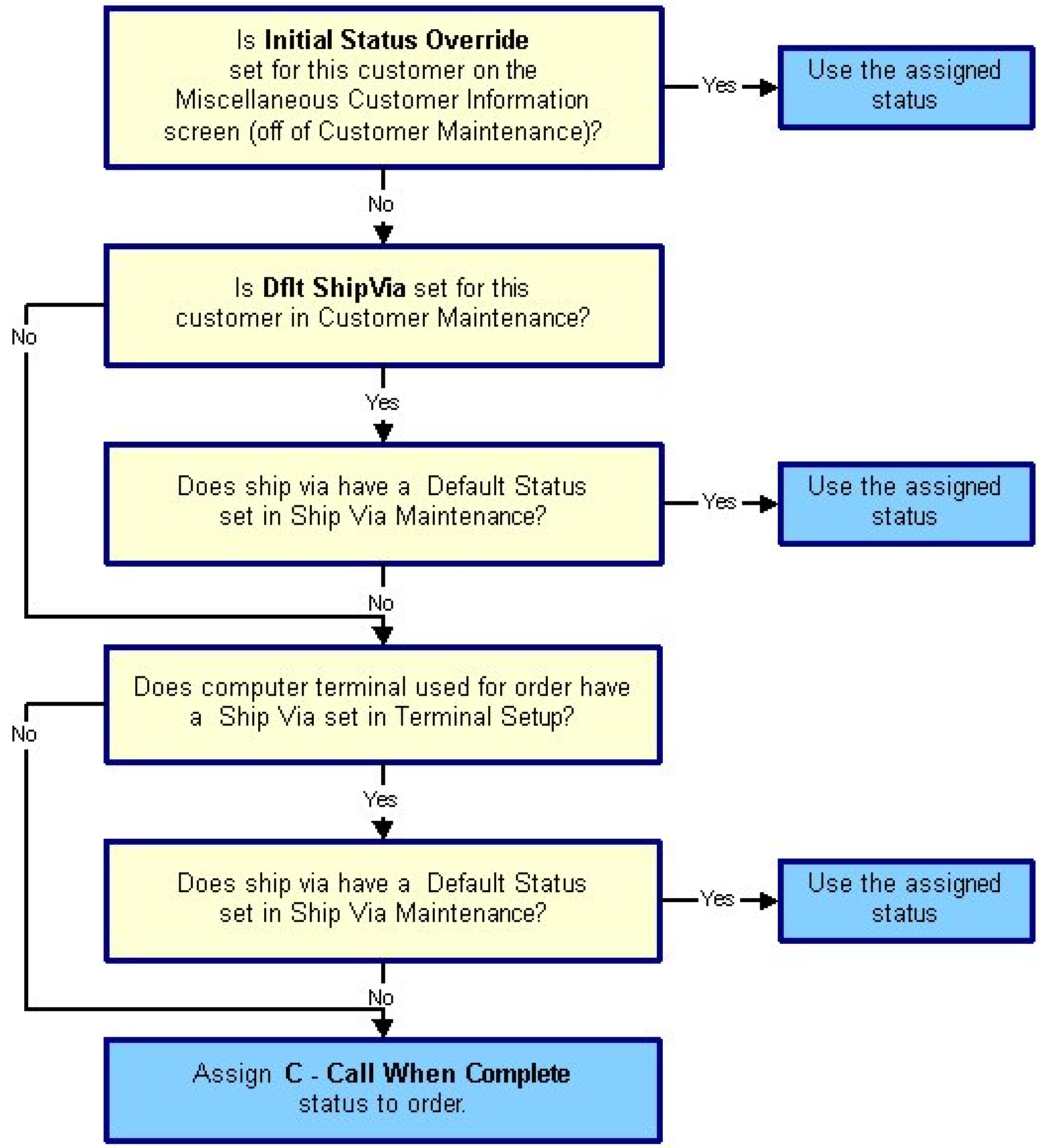
The system assigns the same status to each order generation based on the value entered in the **Initial Status Override** field on the Miscellaneous Customer Information screen in the customer's maintenance record, if any, but you can change the status for individual generations on the Sales Order Entry Status screen. For more information, see How the System Determines the Order Status.

The following is a list of valid status codes for sales orders:

Code	Order Status	Indicates
A	Ship When Available	A shipping ticket prints automatically when any quantity of any item for the ship date generation is available. Inventory is committed immediately.
H	Ship When Complete	A shipping ticket prints automatically when all quantities of all items for the ship date generation are available. Inventory is committed immediately. **Note:** Tagged items must be received before a shipping ticket will print.
S	Ship When Specified	A shipping ticket prints on the specified date, if inventory is available. Inventory is committed immediately only if the ship date is within the restocking period.
M	Ship Item Complete	Ship only when all components of the line item are complete. This is useful for line items with multiple components or multiple quantities. **Note:** Tagged items must be received before a shipping ticket will print.
L	Call When Available	The order appears in the calling queue when any quantity of any item for the ship date generation is available. Inventory is committed immediately.
C	Call When Complete	The order appears in the calling queue when all quantities of all items for the ship date generation are available. Inventory is committed immediately.
W	Call When Specified	The order appears in the calling queue on the specified date, regardless of inventory availability. Inventory commitment is the same as Ship When Specified.

Code	Order Status	Indicates
D	Direct Shipment	A direct shipment from vendor to customer. Authorization is required.
P	Pick Up Now	A customer is taking delivery now. A shipping ticket prints immediately. **Note:** When a generation with this status includes stock items that are not available, those items are canceled.
B	Bid	A sales order bid. No inventory is committed for a bid.
T	Ship Ticket	Print a ship ticket now.
I	Invoice	Invoice now. Use to invoice order — with or without printing actual invoice. To print invoice, also specify an appropriate print status. **Note:** When a sales order status is changed to Invoice, the order is removed from the Open Order Status Review Queue.
X	Cancel	A cancelled order generation. Authorization is required. **Note:** If a tax rate change takes effect between the time when an order is placed and when it is canceled, the tax rate in effect at the time of cancelation is used.
R	Reserve Inventory	An order that reserves the amount of each product on the order for the customer. For example, if you have contract or a service level agreement to carry a specific amount of an item for a specific customer, enter that product and the quantity to reserve on the Body of the order, and then use the Reserve Inventory status to and then use the Reserve Inventory status to reserve the products and quantities for only that customer. This order status is a view-only status. Create reserve orders using Reserve Inventory Order Entry in the Solar Eclipse interface. Note: You must have the SOE.RESERVE.ORDER.EDIT authorization key, to create a reserve inventory order.

How the System Determines Order Status



Required Dates and Shipping Dates Facts

Two different types of dates are used throughout sales order entry:

- A *required date* is the date by which your customer needs the product.
- A *shipping date* is the date the product is actually available. The system calculates the ship date based on your other sales orders and inventory commitments, or by calculating a Plenty Date.

Managing Required Dates, Shipping Dates, and Backorders

When you notice a difference between a required date and a shipping date, as shown above, notify your customer about the situation, then take steps to receive the products sooner. For example, you may be able to ship products directly from an emergency vendor or another branch, so that you can deliver the products by the required date.

When a ship date does not meet your customer's requirements, you can use these methods to get products sooner:

- Shipping orders directly from other branches
- Procuring products
- Substituting products
- Scheduling backorders
- Selling nonstock products

Reporting on Required Dates

View system reports to determine how effectively your company meets your customers' required date needs. Both of these reports are available on the Service Level Reports menu, located on the second End of Month Reports menu.

- Order Service Level Report
- Product Fill Rate Report

Ship Dates and Pricing Matrixes

The system uses an order's ship date when determining if there are any valid matrix cells for *costing* an order.

Splitting Deliveries Across Multiple Ship Dates

Use the Ship Dates feature anytime your customer needs the products on their order to be delivered on different, pre-specified dates. For example, if your customer wants to place a standing order to have an item delivered on the first of every month for the next six months, you can set up the standing order by creating six different ship dates, over the next six months, for each delivery. Or, perhaps your customer wants to pick up some items now and arrange for the delivery of other items later. Each ship date you create becomes its own order generation.

Once you create an order with different ship dates, you can also view the details of each ship date by toggling between them on the order's Body screen. To see shipment details, make sure you are using a view that includes the shipment-specific details you want to see, such as quantity shipped.

To create a shipping date generation:

1. Create or open a sales order and display the order's Body screen.
2. Use the **ShipDates** hot key to display the Ship Dates screen.
3. Select **New** and press **Enter** to display the Create New Order Generation screen.
4. Complete the following fields, as needed:

Field	Description
Enter New Reqr'd Date	The date by which the customer must receive the order.
Enter New Ship Date	The date the product is scheduled for transport to the customer. The system populates this field with the date you entered in the **Enter New Reqr'd Date** field, but you can edit it, as needed.
Enter New Ship Branch	The branch from which the order will ship to the customer. If the selected branch has insufficient inventory to complete the order, you can ship inventory from one or more of your other branches.
Enter New Status	The current status of the selected order generation. The system populates this field, but you can change it, if needed.

5. Press **Enter**, if needed, to return to the Sales Order Entry Body screen.

   The **Stat**, **PrcBr**, **Reqr Date**, and **ShipDate** fields at the bottom of the screen display the new generation information.
6. Continue processing the order.

   Note: When you close the Sales Order Entry Body screen on an order with multiple ship date generations, the system asks whether you want to ship everything on the last date. When you close the Status screen of an order with changed required dates, the system asks if you want to stop and edit the dates.

To select a shipping date:

1. Create or open a sales order and display the order's Body screen.
2. Use the **ShipDates** hot key to display the Ship Dates screen.
3. Review the following fields:

Field	Description
Prc	A number that identifies the branch from which the sales order is entered.
Shp	A number that identifies the branch from which the products will ship.
ReqrDate	The date by which the customer must receive the items.
ShipDate	The date the product is scheduled for transport to the customer.
Status	The current status of the stated order generation. If only one order generation exists, displays **Open**.

4. Select a ship date generation and press **Enter**.

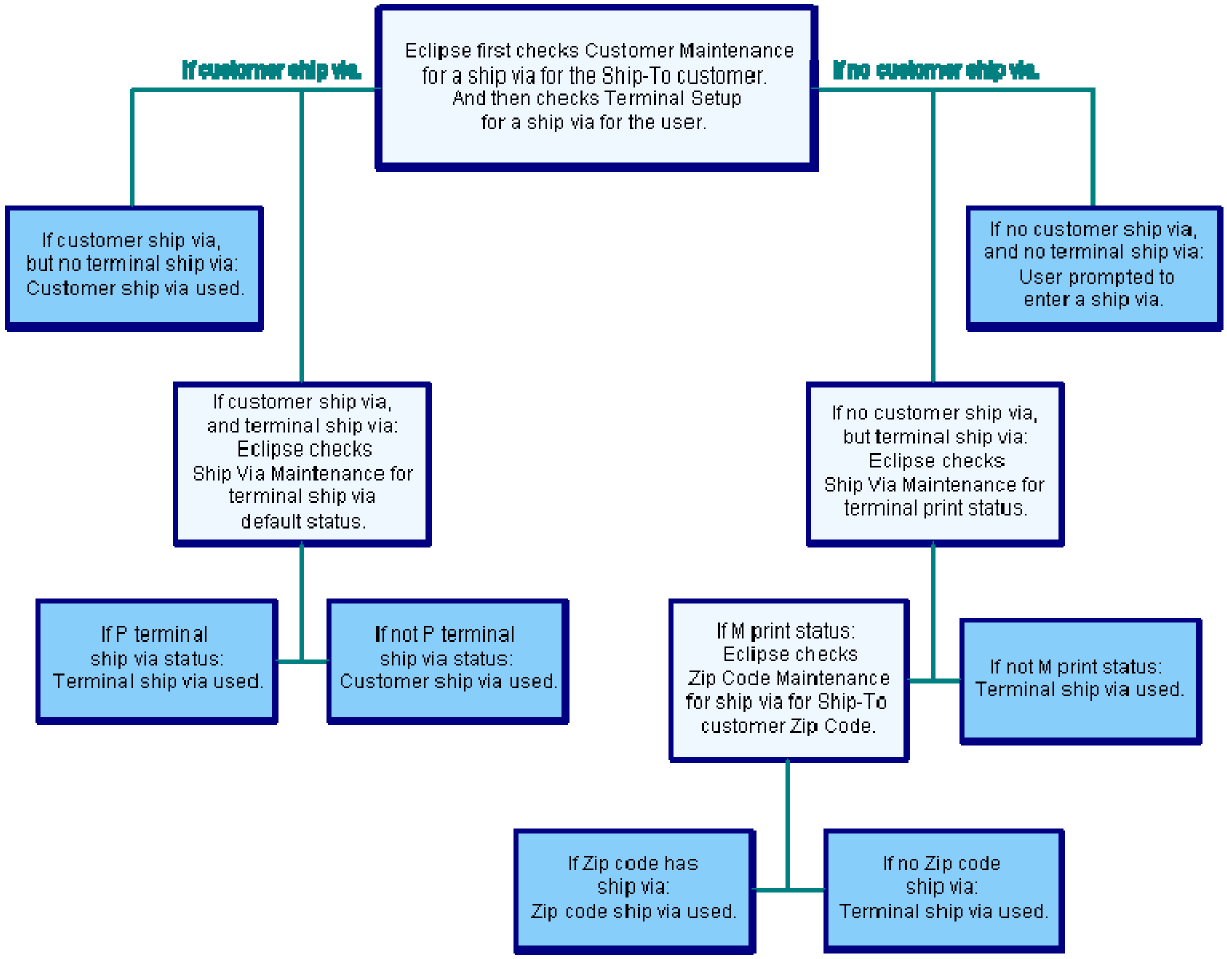
Automatically Displaying the Line Item Scheduling Screen for Each Product Entered

Use the system's Auto-Schedule option to automatically display the Line Item Scheduling screen for every product you enter on a sales order. After scheduling each product, you can then verify shipping details and combine order generations for shipping efficiency on the Status screen.

To automatically display the Line Item Scheduling screen:

1. Create or open a sales order and display the order's Body screen.
2. Select the **Sched-Off** hot key to turn on auto-scheduling. The **Sched-Off** hot key becomes the **Sched-On** hot key, which you can use at any point to turn off auto-scheduling.
3. Enter products on the sales order. The Line Item Scheduling screen displays for each product you enter.
4. Verify shipping details and combine order generations for shipping efficiency on the Status screen, as needed.
5. Complete the order as usual.

How the System Determines Order Ship Via



Shipping Orders Via Different Carriers

To determine how an order generation gets from your location to your customer, specify a choice in the **Ship Via** field. Typical choices include Our Truck, Pick Up, Fedex, or UPS.

Your ship-via choice determines not only the shipping method, but also the freight, cash requirements, invoice processing status, order print status, and tax jurisdiction.

To specify a ship via:

A ship via can be specified in numerous places throughout the system. A ship via entry is required on an order's Status screen, which is used in this example.

1. Create or open a sales order and display the order's Body screen.
2. Enter the desired products, and then press **Esc**. If prompted to enter a purchase order number on the Header screen, do so and then press **Esc**.
3. On the Status screen, navigate to the **Ship Via** field.
4. For each order generation, enter the desired ship via or press **F10** and select one from a list.
5. Press **Esc** to close the Status screen and process the order. If the Totals screen displays, enter the required payment and press **Esc**.

   Note: An order's default ship via choice is based on a hierarchy of settings for the customer, the terminal used for the order, the print status, and the Zip code.

Backorder Statuses for Sales Orders

Some screens display a backorder status. For example, depending on your screen view, an order's Body screen may display a **B/O** column with one or two status codes. The first code indicates how the backorder of the unavailable product will be handled, and the second code indicates whether substitute products are available.

Although similar, a backorder status code is *not* the same as an order status code. A backorder status code applies only to the backordered line item, while the order status code applies to an entire order generation.

Code	B/O Status	Description
A	Ship When Available	A shipping ticket prints when any quantity of the backorder is available. Avoid excessive shipments.
H	Ship When Complete	A shipping ticket prints when all quantities of all items in the backorder are available.
M	Ship Item Complete	Ship only when all components of the backordered line item are available. Use for line items with multiple components or multiple quantities.
L	Call When Available	The order appears in the calling queue when any quantity of the backorder is available.
C	Call When Complete	The order appears in the calling queue when all quantities of all items in the backorder are available.
X	Cancel	A cancelled backorder. Counter terminals with a default **Pick Up Now** order status often default to this status for backorders.
I	Invoice	The item has been invoiced.
T	Ship Ticket	The customer has requested a ship ticket.
Y	Multiple Generations	An item is listed on more than one generation of the order.

Backorder status codes can include two characters. The first character is the customer's default backorder status code, based on their **B/O Status** field setting in Customer Maintenance. If this field is blank, the system looks in turn for a setting in the Customer B/O Action Default control maintenance record, then for a status for the Ship Via. If no status is found, the system uses **Call When Complete**.

A second character in the backorder status indicates that the line item can be substituted or procured.

Code	B/O Status	Description
S	Substitute	One or more substitute products are available.
P	Procurable	The backordered product can be procured from a branch or vendor.
O	Both	The backordered product has substitute products and is procurable.

For example, a backorder status of **XP** indicates the backorder is cancelled, but the item is procurable. You could either procure the item, or use the Sales Order Entry Status screen to change the status.

Backorder Options for Sales Orders

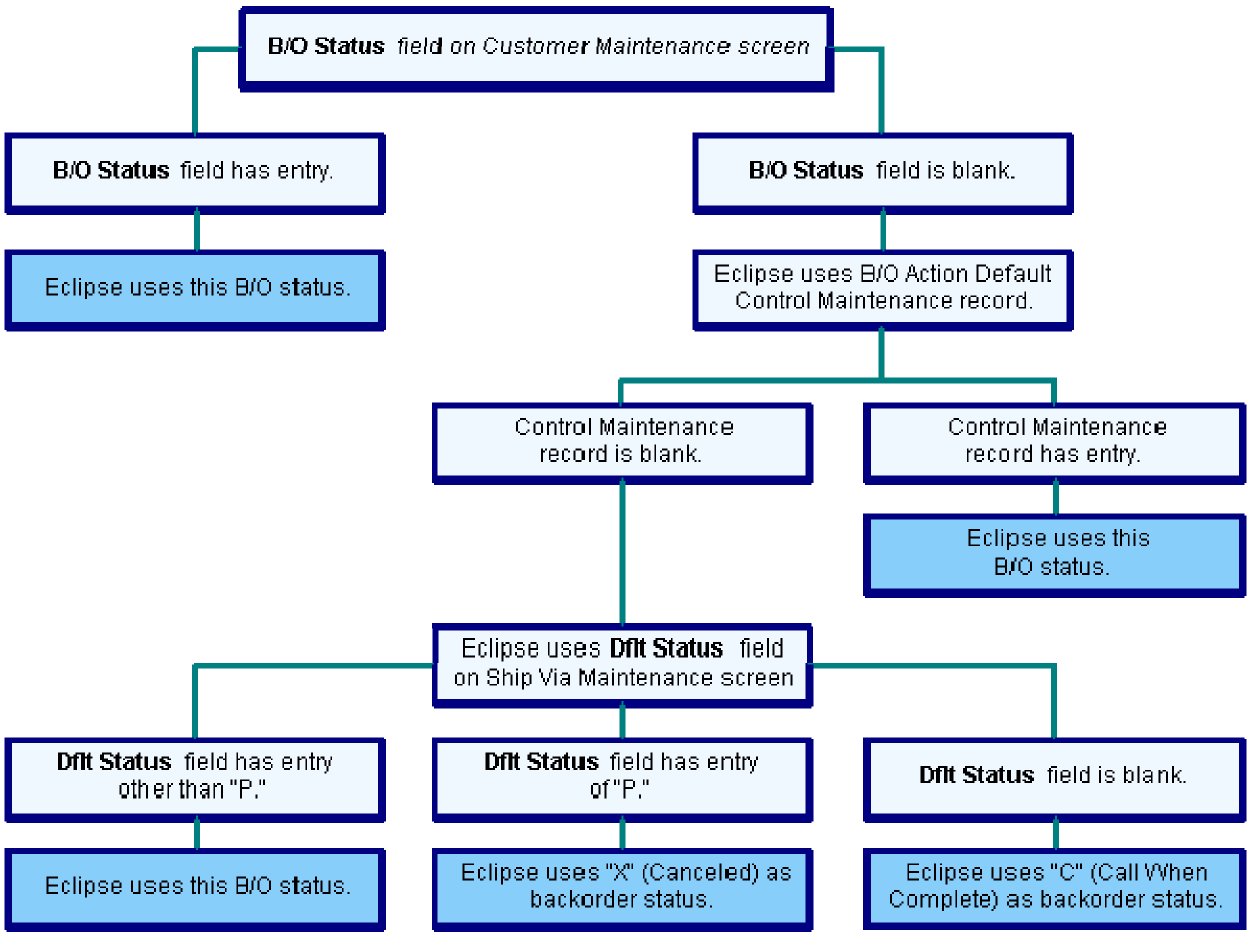
You can fill a backorder in many ways. Use the method that most cost-effectively meets your customer's requirements.

Choose how to manage backorders:

- Backordering single products
- Backordering multiple products
- Shipping products from another branch
- Procuring products
- Substituting products

How the System Determines Backorder Status

This illustration shows how the system determines which backorder status to use on a sales order.



Backordering Single Products

Use the Scheduling screen to edit a backordered product's shipping date, quantity, status, shipping branch, or stock type. This screen shows the dates and details about when more stock is expected, whether from incoming purchase orders, branch transfers, or the calculated plenty date. A single order can include several generations, each with different ship dates and statuses.

Note: This screen may display automatically any time you enter a product that is not available.

To backorder a single product:

1. Create or open a sales order and display the order's Body screen.
2. Locate the line item you want to schedule.

   Depending on your screen view, a backorder can be indicated by a shipment quantity that is less than the order quantity, a **B/O** column status code, or an **Avail** column date that is past the required shipping date.
3. With the cursor on a backordered line item, use the **Sched** hot key to display the Scheduling screen.
4. Use the following hot keys, as needed, to determine the status and location of product inventory:

To...	Use this hot key...
view details about the product's expected purchase orders and existing commitments	**Future Ledger** The Future Ledger screen displays.
view the product's inventory levels in other branches	**Inq** The Inventory Inquiry screen displays.
return a product to a specific location for price adjustment purposes	**Return Loc** The Line Item Selection screen displays.
view the products in a kit	**Kit** The Product Kit Maintenance screen displays.
attach product specifications	**Spec** The Notes screen displays. Select a product specifications note and press **Enter**.
view the transaction to which an item is tagged	**View Tag** The order screen for the tagged item displays.
view future purchasing and order cycle information	**Purch**
enter a product serial number	**Ser# Entry** The Serial Number Entry screen displays.
view a summary of product sales, purchases, transfers, etc.	**Hist** The Inventory History Ledger screen displays.

To...	Use this hot key...
display the required date	**Req Dt** The product's required date is added to the columns. Use again to hide the column.
change the product's unit of measurement	**UM Chg** The Um Quantity list displays. Select a new quantity/unit and press **Enter**.
review returned products flagged as Defective, etc.	**Ret Goods** The Returned Goods Queue screen displays.
select a detail lot for products that belong to detail lots	**Det Lot** The Detail Lot Selection screen displays.
create a work order for products that require manufacture or assembly	**Work** The Work Order Entry screen displays.
split a product between different locations and lots	**Splt Locs** The Split Locations screen displays.

Note: If you change the location or location type on an order that has already been invoiced, no in-process record is created. You must manually notify the warehouse if any action is required on their part.

5. Use any of the following hot keys to schedule the backorder:

To...	Use this hot key...
procure the product from another branch or an emergency vendor	**Proc** The Order Entry Procurement screen displays.
procure the product using the Internet and the Eclipse B2B Commerce companion product	**B2B** The Eclipse B2B Commerce screen displays.
substitute a product that is in stock, if replacement products are available	**Subs** The Substitute / Related Items screen displays.

6. Edit the following fields, as needed:

Field	Description
ShipDate	The date on which you want the product to ship.
ShipQty	The amount of the item scheduled to be sent to the customer. The system assigns the quantity you ordered to the earliest available ship date, based on inventory amounts. If not enough inventory is available to ship on the same day, the system distributes the quantity among two or more ship dates. You can change the quantity shipped on any given ship date, or assign a quantity to a new ship date. Enter the date in the **Ship Date** field and then enter the quantity. **Note:** You must manually adjust any serial numbers between order generations, as required.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Stat</td><td>The current order status of the selected backordered item. The system assigns the item the customer's default order status, but you can change it to reflect the needs of the customer.
If the item quantity is split over multiple ship dates, each ship date can have a different backorder status code. For example, if you ship a quantity today and the customer requests that you call before shipping additional quantities, you set today's shipment status to A (ship when available), and your future date shipments' statuses to C (call when complete).</td></tr>
<tr><td>Ship Br</td><td>The branch from which the product will be shipped.

Note: If you cannot ship products directly out of another branch, you might not have authorization to do so. For more information, see Assigning Branches to Users.</td></tr>
<tr><td>Qty Type</td><td>The disposition of the selected quantity of an item. Valid values include:
• S – Stock (saleable material available for shipment). The item is currently in the product file, whether it is a stock or nonstock item.
• F – Defective. The item is considered flawed. This status does not prevent you from selling the item, if the customer still wants it.
• O – Overshipment. More of the item was shipped or purchased than was required and is tagged for return to the vendor.
• E – Exceptional. The item is purchased or sold in an exceptional situation and this transaction does not affect demand calculations. See the Inventory Management system documentation for details on exceptional sales.
• R – Review. The item has not been assigned a status. The item requires inspection before its disposition can be determined. (If an item is assigned Review and shows a negative quantity, the material is return.)
• L – Display (but available for shipment if requested). The item is on display in the showroom. Display items affect inventory levels. A sales order will indicate that a quantity is available on display only when the quantity requested exceeds the stock quantity available.

Note: All quantity types other than S (Stock) and E (Exceptional) have an associated transaction number in the Location/Tag/Lot column.</td></tr>
<tr><td>Location / Tag / Lot</td><td>A number that identifies the physical location of the item (after invoicing), as set in Product Location Maintenance, or the transaction number associated with the order generation. For example, if an item is procured from another branch, the Transfer transaction number displays.
The system deducts any outgoing inprocess quantities from the location onhand quantities displayed.

Note: If the item is assigned to a detail lot, the Lot ID displays next to the location number (once the order is invoiced, shipped, or received).</td></tr>
</table>

7. Press **Esc** to schedule the shipment and return to the Sales Order Entry Body screen.

Backordering Multiple Products

Use the Detail Scheduling screen to assign multiple ship dates and statuses to several backorders. Edit the details of various order items so that shipment generations are grouped together in the most efficient manner for you and your customer.

Note: To change the status, ship date, ship via, or ship branch for a single backordered product, use the Scheduling screen.

To back-order multiple products:

1. Create or open a sales order and display the order's Body screen.
2. Press **Esc** to display the Sales Order Entry Status screen.

   Note: If prompted to ship everything on the latest shipping date, enter **N**. If prompted to enter a customer P/O number on the Sales Order Entry Header screen, do so and then press **Esc**.

3. Use the **Detail Scheduling** hot key to display the Detail Scheduling screen.
4. Review or edit the following fields, as needed:

Field	Description
Product Description	A statement that identifies the ordered item.
Avail	The earliest date the item will be available to ship.
Shp Qty	The amount of the item scheduled to be sent to the customer. If you schedule less than the order quantity, you must schedule the remaining quantity for another ship date.
Shp Date	The date the product is scheduled for transport to the customer. The system displays the earliest possible shipment date for your item. If the entire quantity of the item is not available for one shipment, the system splits the ship quantity over more than one shipment date. Next to each ship date, the system displays the number of days separating it from the date you entered as your order ship date. If the dates are the same, **TODAY** displays.
Sts	The current order status of the selected backordered generation. If the item quantity is split over multiple ship dates, each ship date can have a different backorder status code. For example, if you ship a quantity today and the customer requests that you call before shipping additional quantities, you set today's shipment status to **A** (ship when available), and your future date shipments statuses to **C** (call when complete).
Via	The method used to transport the item to the customer.
ShpBr	The branch from which the order will ship to the customer. If the selected branch has insufficient inventory to complete the order, you can ship inventory from one or more of your other branches. **Note:** If you cannot ship products out of another branch, you might not have authorization to do so. See Assigning Branches to Users for more information.

5. Use hot keys, as needed:

To...	Use this hot key...
add or edit administrative details for the order, such as a customer PO number	**Header** The Sales Order Entry Header screen displays.
edit the order detail information	**Body** The Sales Order Entry Body screen displays.
schedule a single backorder	**Schedule** The Scheduling screen displays.
change the ship date for all open generations to the earliest date when all items in all generations will be available	**All Complete**
enter payments or extra charges on the order	**Totals** The Sales Order Entry Totals screen displays.
review the product's inventory levels	**Inv Inq** The Inventory Inquiry screen displays.
toggle between the ship via/ship branch column view and the required date column view	**Views** From the selection list that displays, select an option and press **Enter**.
verify order generation statuses, if accessible	**Status** The Sales Order Entry Status screen displays.
schedule lot item materials for shipment	**View Lot Item Mat'l Detail** The Lot Item Material Detail screen displays.

6. Press **Esc** to return to the Sales Order Entry Status screen.
7. Review your changes and press **Esc** to continue processing the order.

Viewing Alternate Shipping Branches by Product

From Sales Order Entry's Schedule screen, access the Suggested Alternate Shipping Branches screen to view all of the alternate shipment branches for a given product. For the selected product, the screen lists branches where the product is available and gives the percentage of the total quantity that each branch can fulfill.

To view alternate shipping branches for a product:

1. Create or open a sales order and display the order's Body screen.
2. Locate the line item you want to schedule.

   Depending on your screen view, a backorder can be indicated by a shipment quantity that is less than the order quantity, a **B/O** column status code, or an **Avail** column date that is past the required shipping date.
3. With the cursor on a backordered line item, use the **Sched** hot key to display the Scheduling screen.
4. Place the cursor on a line that shows a quantity in the **ShipQty** column, and then select the **Alt Brchs** hot key. The Suggested Alternate Shipping Branches screen displays.
5. Review the list of branches and their respective product availability, as shown in the **Avail Qty** and **%Ord** columns. The **Avail Qty** column shows the branch's available quantity; the **%Ord** column shows the percentage of your order's quantity that the branch's quantity could fulfill.
6. In the **Ship Qty** column, enter the quantities you want to ship from one or more branches. If a single branch fulfills 100 percent of your order's needs, you will usually ship the full quantity from that branch. However, you can also split ship quantities among multiple branches to fulfill your order's needs. For example, if you need a quantity of 10 and two other branches have 5 each, you can enter 5 in the **Ship Qty** column for each branch.
7. Once you have distributed order quantities for the product to your satisfaction, press **Esc** to exit the Suggested Alternate Shipping Branches screen and return to the Schedule screen. The Schedule screen reflects the changes you have made.
8. Continue processing the order as usual.

Shipping All Available Items Now

Use the **Ship Available** hot key on an order's Status screen to automatically create an order generation with all the items that your customer can pick up now.

When you use this hot key, the system searches the order for any product quantities that are available now. Then, regardless of the order status for those products, it combines the products into a single new order generation that your customer can have immediately.

For example, let's say your customer is ordering twelve widgets and four widget adapters, along with other items. But only half of the widgets and the adapters are in stock. When you mention this, your customer says, "Give me everything you've got today. I'll get the rest later." Use the **Ship Available** hot key to create an order generation for the six widgets, two adapters, and all the other items that are available now.

To ship all available items now:

1. Create or open a sales order, and display the order's Status screen.
2. Use the **Ship Available** hot key. the system changes the first order generation to an order status of Pick Up Now, and includes on it everything available.
3. Verify that the **Order Status** settings are correct for the other order generations. These settings specify how the remaining items are handled when available.
4. Press **Esc** to process the order.

Waiting to Ship All Items Together

Use the **All Complete** hot key on an order's Status screen to quickly set a multi-generation order to ship when all quantities of all items are available. When a customer doesn't have an immediate need for any of the currently available items, waiting to ship the order complete improves shipping and handling efficiency.

Once you use this hot key, the system changes all order generations to the last shipping date — the date when the entire order is completely available.

When you press **Esc** after entering products on the order's Body screen, the system prompts you to ship multiple generations together on the last date. If you neglect to do this, the **All Complete** hot key lets you later consolidate order generations to ship everything when complete.

To ship all order items together:

1. Create or open a sales order and display the order's Status screen.
2. Use the **All Complete** hot key.
3. In the **Order Status** column, edit the order status fields as needed. For example, change all the order generations so they have the same status, such as Ship When Specified or Call When Complete.
4. Press **Esc** to process the order.

   If prompted that "Ship Dates Have Changed, Edit Required Dates," enter **Y** or **N**. After editing dates, press **Esc**.

Automatically Displaying Line Item Scheduling for Items on Backorder

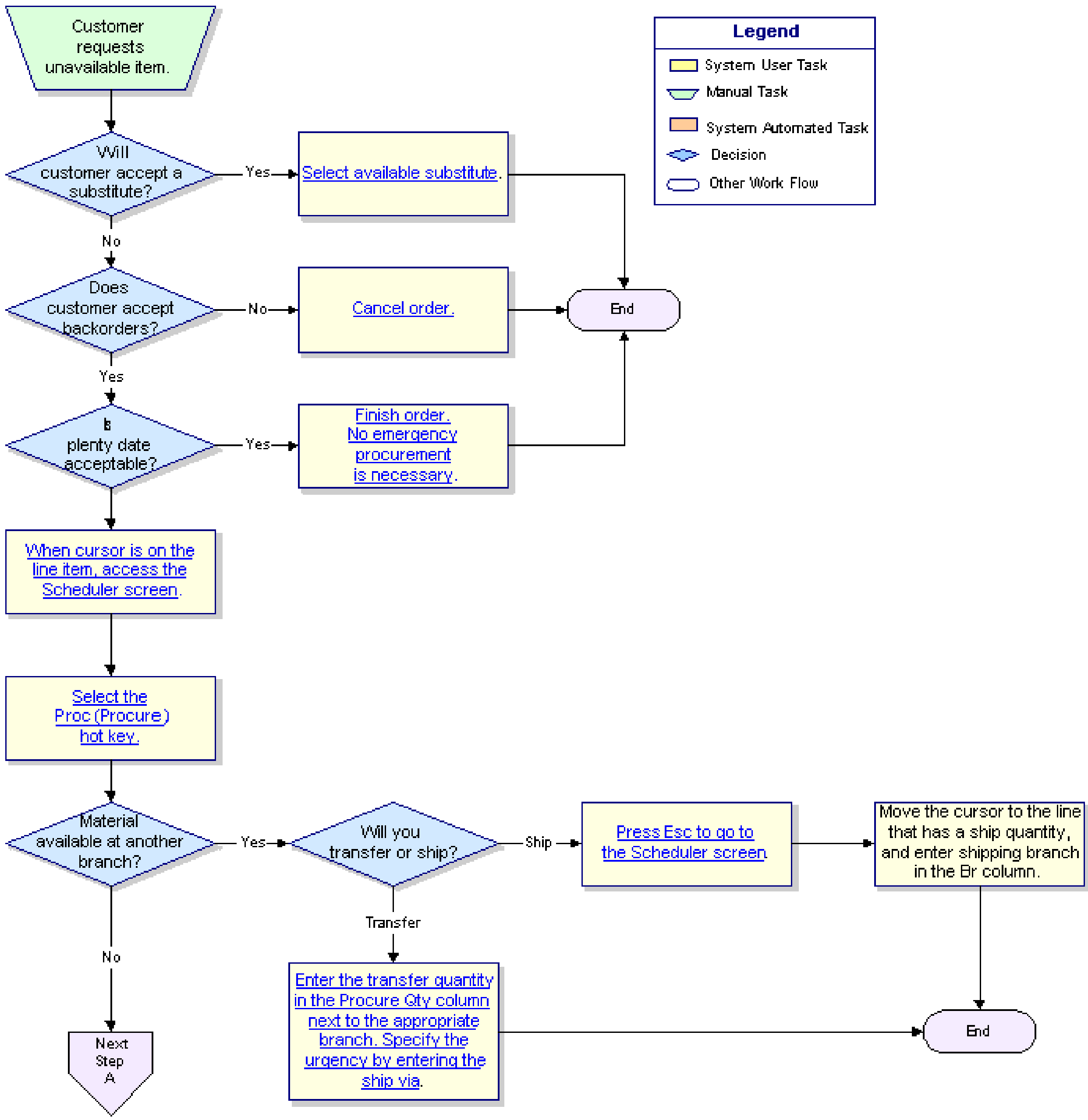
When entering products in sales order entry, you can specify whether you want to automatically display the Line Item Scheduling screen any time a product is not available to ship.

For most salespeople, the Line Item Scheduling screen automatically displays. Use these instructions to turn automatic Line Item Scheduling *on* or *off*.

To specify whether you want to automatically display the Line Item Scheduling screen when a product is not available:

1. Create or open a sales order and display the order's Body screen.
2. Depending on whether Line Item Scheduling is turned on or off by default, do either of the following things:
   - If Line Item Scheduling is turned *off*, the **Sched-Off** hot key displays. Use the **Sched-Off** hot key to turn automatic Line Item Scheduling *on*.
   - If Line Item Scheduling is turned *on*, the **Sched-On** hot key displays. Use the **Sched-On** hot key to turn automatic Line Item Scheduling *off*.
3. Enter products and prices on the sales order as usual.

Backorder Management Workflow



Product Procurement Overview

Procuring special orders for your customers is an essential part of serving your customers. No distributor has every product in stock, every day.

When to Use Procurements

Use procurements from emergency supply sources when your customers cannot wait for a typical backorder. A product backorder status of **P** indicates an out-of-stock product is procurable.

> **Note:** If you do not see product backorder statuses on-screen, you can use the Body screen's **View** hot key to display a different screen view. For example, display the Qty Shipped/Extension view.

How to Use Procurements

You can proactively manage the procurement process with the system. Order takers can specify whether to procure needed products from another branch or an emergency vendor. Some companies also list generic procurement sources, such as Buyer Locate in 2 Days or Emergency Procure Overnight. Selecting this type of procurement source alerts buyers to a procurement's urgency, while letting the buyers use their vendor knowledge to meet the customers' needs.

Once you enter a procurement order, an entry in the Procurement Confirmation queue alerts your purchasing department that prompt action is required. A buyer then decides whether to create a new transfer or purchase order, or add the needed products to an existing transfer or purchase order.

Use the Copy Procure Comments to P/O control maintenance record to ensure that the system copies any comments entered on the sales order to the purchase order when the order is converted.

Choosing a Procurement Method

Choose one of two procurement methods:

- Procuring a single product (from an order's Body or Scheduling screen).
- Procuring multiple products (from an order's Status screen).

Procuring Single Products

Use the Order Entry Procurement screen to procure an item from an emergency supply source when your customers cannot wait for a typical backorder to ship. If you need to procure several items, see Procuring Multiple Products. Because using this method to procure items is more expensive than using normal channels, you cannot procure more than the quantity ordered. To replenish stock, use a more cost-effective method.

> **Note:** If a procurement exists, and the ship branch on the order changes, the procurement is canceled.

To procure a single product:

1. Create or open a sales order and display the order's Body screen.

   Depending on your screen view, a backorder can be indicated by a shipment quantity that is less than the order quantity, a **B/O** column status code, or an **Avail** column date that is past the required shipping date.

2. With a backordered line item selected, use the **Sched** hot key to display the Scheduling screen.
3. Use the **Proc** hot key to display the Order Entry Procurement screen. The **Proc** hot key displays in red only if the product is procurable.
4. Review the following fields:

Field	Description
Procurable Qty	The amount of the item the customer has requested.
Per	The unit of measure of the quantity, including how many individual items are included in the unit.
Procure Source	The vendor or location that has the item in stock. **Note:** If a central warehouse is listed as a procurement source, a "C" will appear next to this source.
Avail Dt	The date the item will be available to ship.
Avail Qty	The amount of the item that will be available to ship on the specified date.

   > **Note:** Some procurement sources listed may have no available product. Sources without product can be listed based on their **Ignore Avail?** setting, as defined on the Procurement Group Branches screen.

5. In the **Proc Qty** field, enter the amount of the item you want to procure from the selected vendor.
6. In the **Ship Via** field, enter the method for transporting the item to the customer's location.

Note: Depending on the product, various locations or suppliers are listed. Some companies also list generic procurement sources, such as "Buyer Locate in 2 Days."

7. Use hot keys, as needed:

To...	Use this hot key...
view the product's inventory levels	**Inv Inq** The Inventory Inquiry screen displays.
view inventory projections for the product	**Future Ledger** The Future Ledger screen displays.
view the product's sales/procurement history	**History ledger** The Inventory History Inquiry screen displays.
display all vendors and branches that stock the item	**All Brchs**

Note: By default when you procure a product on the Order Entry Procurement screen, the system updates the ship date to the available date for the procured product. The Procure Items On Original Ship Date control maintenance record lets you designate order statuses for which the system should not change the original ship date for the procured item.

8. Press **Esc** to return to the Scheduling screen. The screen indicates a **Qty Type** of **P** for procured products, and indicates the procurement source.

   Note: Branch transfer procurements automatically commit the inventory and include the lead time to get the procurements. Procurements indicated as *tagged* are dynamically associated with specific purchase orders; which lets you associate freight to follow and other pricing changes with the procurements.

9. On the Scheduling screen, make any needed changes. For example, you can change the **Stat** field to a status of Call When Available. When you are satisfied, press **Esc** to return to the order's Body screen.

Procuring Multiple Products

Use the Order Entry Procure Items screen to procure items needed immediately from emergency supply sources when the customer can't wait for a backorder. If a product has a backorder status of **P**, it is available at another branch or from a vendor and you can use this screen to order it.

When you use a branch transfer to procure items, the system commits the inventory and includes the procurement lead time. Tagged procurements are dynamically associated with specific purchase orders, so that you can associate freight to follow and other pricing changes with the procurements.

To procure multiple products:

1. Create or open a sales order and display the order's Status screen.
2. Use the **Procure** hot key to display the Order Entry Procure Items screen.
3. In the **Item Type** field, indicate whether to show all items or non-stock items only.
4. In the **Ship Status** field, indicate whether to view all items, only those items currently unavailable, or only those items past their required date.
5. In the **Ship Date** field, indicate whether to display items on all order generations or only the selected generation.
6. Press **Enter** to display a list of items that match your selection criteria.
7. Do one of the following to order the requested items:

To...	Do this...
order items individually	In the **Procure Qty** field for each item, enter the amount of the item to order.
order items individually and select a different shipping method	Use the **Procure Item** hot key to display the Order Entry Procurement screen. Enter the desired procurement quantities and ship vias for each product.
select all products for procurement	Use the **Procure All** hot key to populate all **Procure Qty** fields with the values in the **Open Qty** fields.
select those items for procurement that are needed soonest	Use the **Procure Earliest** hot key to populate the **Procure Qty** fields with the values in the **Open Qty** fields, based on required date.

Note: By default when you procure a product on the Order Entry Procurement screen, the system updates the ship date to the available date for the procured product. The Procure Items On Original Ship Date control maintenance record lets you designate order statuses for which the system should not change the original ship date for the procured item.

8. Use other hot keys, as needed:

To...	Use this hot key...
review the product's current inventory levels	**Inv Inq** The Inventory Inquiry screen displays.
view the product's inventory projections	**Future Ledger** The Future Ledger screen displays.
review the product's sales/procurement history	**History ledger** The Inventory History Ledger screen displays.

9. Press **Esc** to return to the Sales Order Entry Status screen.
10. Continue processing the order.

Procuring Subtotal Groups

Use the Subtotal Group Procurement screen to special order products in a subtotal group. Subtotal groups are created on the Job Bid Subtotal Maintenance screen. You can use subtotal groups to reprice, manipulate, or procure a group of products.

To procure a subtotal group:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Pricing** hot key to open the Pricing Override screen, and then use its **Subtot** hot key.
3. With a group selected on the Job Bid Subtotal Maintenance screen, use the **Procure** hot key. The Subtotal Group Procurement screen opens.
4. Specify the procurement **Vendor**, or choose one from the Procurement Sources screen that automatically lists the vendors set as procurement sources for the items.
5. Verify that the view-only **# of Items** field lists the correct number, and the **P/O Value** field shows the correct purchase order amount.
6. Use the **Procure** hot key to process the procurement. The system displays an acknowledgment screen that lists the number of items processed.
7. Press **Esc** to save and close the screen.

Changing a Sales Order's Shipping Branch

After an order has been entered, or during order entry, you can change the order's shipping branch. You cannot change the shipping branch of an order that has already been invoiced.

To change an order's shipping branch:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Mode** hot key to display a list of options.
3. Select **Ship from Different Branch** and press **Enter** to display the Direct Shipment From Different Branch screen.
4. In the **Enter New Shipping Branch** field, enter the number that identifies the branch from which to ship the order.
5. If your change over-commits inventory in the new shipping branch, the system displays a warning. Enter **Y** if you have the authority and want to continue changing the shipping branch. Otherwise, enter **N** to cancel the change.
6. Press **Esc** to return to the Sales Order Entry Body screen. The **ShpBr** field reflects the new branch.

Direct-Shipping Specific Line Items

When you need to ship *part* of an order direct from a vendor to your customer, create a vendor direct shipment. A single sales order can contain a mixture of products from stock or procurements, as well as direct-shipped products. It can also contain products direct-shipped from different vendors. Each order generation can differ.

You can specify a direct shipment status in many places within the system. Each method is similar, but each has its own advantages. This topic describes using the Scheduling screen to create a direct shipment as you enter the product on the order.

You can also use the following methods, not described in this topic:

- Use the Detail Scheduling screen to group a number of products into a direct shipment.
- Use the Status screen for a product generation already entered.
- Specify a Direct Shipment from Vendor mode for an entire order.

To create a direct shipment using the Scheduling screen:

1. Create or open a sales order and display the order's Body screen.
2. With the cursor on the line item you want to create a vendor-direct shipment for, use the **Sched** hot key to display the Scheduling screen.
3. Move to a line that shows available product, and change the Status field to **D**.
4. On the purchase order Header screen that displays, enter the vendor's **Ship-From** name and address, along with other needed information. A purchase order Header screen displays automatically after you change an order status to a direct shipment.
5. When you are finished entering the purchase order Header screen information, press **Esc**. The screen closes, returning you to the Scheduling screen. Notice that a new generation displays a direct shipment from the vendor's warehouse.
6. When you are finished entering the Scheduling screen information, press **Esc** to return to the order's Body screeen. When you are finished with the Body screen, press **Esc**.

   If the Header screen displays for you to enter a required purchase order number, do so and press **Esc**.
7. On the Status screen, verify that the **Prt** field statuses and other information are correct. For example, you can set the customer's status to print an acknowledgement and set the vendor's status to fax the purchase order. The **ShipDate** and **Ship Via** field settings for a direct shipment generation are primarily for reference, as the vendor determines the actual ship date and method.

   Note: Different order generations for the direct shipment display: the top is the customer's order; the bottom is the vendor's purchase order. Use the **Header** hot key to view whichever generation is selected.

8. Press **Esc** to save and process the order.

Creating Transfer Orders from Sales Orders

When you need to transfer material from another branch in order to fill a customer's order, you can create a transfer order directly from the Body screen of the sales order.

To create a transfer order from a sales order:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Mode** hot key, and select the **Copy to Transfer** option to display the Copy to Transfer screen.
3. In the **Enter Rcv Br** field, enter the branch that will be receiving this transfer order. This will be a branch other than the branch where the order is being written.

   Note: If needed, you can change the pricing branch in the **Enter Prc Br** field. However, this field is not editable until you enter a value in the **Enter Rcv Br** field.

4. In the **Gens to Copy** field, select which generations of the order you want to copy to a transfer order: **Current**, **All**, or **Open**.

   Note: If you select All or Open, you may be prompted to confirm this choice.

5. Select the **Begin** hot key to create a transfer order from the order.
6. When prompted, select one of the following COGS copy options:
   - Recost All Items
   - Keep Manual Overrides
   - Keep All Costs/Overrides
7. When Transfer Order Entry displays, continue entering the transfer order as usual.

Changing a Sales Order's Delivery Address

You can edit a sales order to ship to a different address. This is useful when you need to ship an order to a customer job site, for example.

- If you will be shipping frequently to the different address, you can use the Customer Maintenance screen to create a new Ship-To account for the customer. You can then choose that account when creating new sales orders. All the address and other information is automatically entered on the order.
- To ship an *individual order* to a different address, you can edit the order's Header, as described here.

To ship an order to a different address:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Header** hot key to open the Header screen.
3. In the **Ship To** area, edit the two street address lines as needed.
4. To edit the city, state, or Zip code, in the **City** field enter either a city or Zip code. If more than one city or Zip code meets your criteria, the system displays a selection list.

   Note: The system stores city, state, and Zip code information together. Once you specify an exact city or Zip code, the system fills in the remaining fields automatically.

5. When you have finished editing the address, press **Esc** to save and close the Header, returning you to the Body screen.
6. Complete the order as usual.

Changing a Sales Order's Ship-To Customer

You can edit a sales order's ship-to customer, as needed. Any new ship-to customer you choose must be set up beforehand in Customer Maintenance.

You can also change the delivery address for a single order, as needed. For information on how to do this, see Changing a Sales Order's Delivery Address.

> **Note:** If you change the zip code that causes the tax exempt status to change, the system prompts you to accept or deny the tax exempt status for the invoiced generation. Open generations are not affected and follow standard Eclipse taxation rules.

To change a sale order's ship-to customer:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Header** hot key to open the Header screen.
3. In the **Ship To** area, move the cursor to the line that displays the ship-to customer *name*, and enter a new ship-to customer. If more than one ship-to customer matches the text you enter, select a new ship-to customer from the list that displays.
4. When prompted to change the ship-to (delivery) address to the new customer's, enter either of the following:
   - **Y** — To change the actual delivery address to the address that is on file for the new ship-to customer.
   - **N** — To keep the actual delivery address that currently displays on the order.
5. If prompted to reprice items, choose any of the following options:
   - **Y** — Reprice all items, except for any prices that have been manually overridden, according to the pricing set up for the new ship-to customer.
   - **N** — Leave all item pricing as is.
   - **A** — Reprice all items, regardless of manual overrides, according to the pricing set up for the new ship-to customer.

> **Note:** If your new ship-to customer uses a different primary currency than the current ship-to customer, you are first asked whether to use the new ship-to customer's base currency to display order pricing. If you enter **Y**, the order displays in the new ship-to customer's primary currency, and is also repriced according to the new ship-to customer's pricing matrixes. If you enter **N**, the order continues to display in the same currency, and you are prompted to reprice items.

6. Respond to any other prompts, as needed. For example, you may be prompted to specify whether to use the new customer's default internal notes, whether to use the new customer's default ship via, or whether to copy any tax exemptions.
7. Continue processing the order as usual.

Viewing a MapQuest or Google Map of an Order's Ship-To Address

If you have Internet access on your PC, you can view a MapQuest or Google map of a customer's ship-to address from the Header screen of a sales order.

To view a MapQuest or Google map of an order's ship-to address:

1. Create or open a sales order and display the order's Header screen.
2. Select the **Shipping** hot key to display the Shipping Inquiry prompt.
3. In the **Method** field, press **F10** and select **MapQuest** or **Google Maps**, depending on which map site you want to view.
4. Press **Esc**. Depending on your selection, a MapQuest or Google map of the shipping location displays in your web browser.

Adding Alternate Shipping Addresses

On occasion, customers want their materials delivered to a job site rather than to their warehouse. Use the Additional Address screen to deliver an order to a different address than the one listed in their customer maintenance record.

To add an alternate shipping address for the order:

1. Create or open a sales order and display the order's Header screen.
2. Use the **Add'l** hot key, and then the **Additionl Address** hot key, to display a prompt.
3. Select **Ship-To** to display the Additional Address screen.

   Note: If you select **Bill-To**, the bill-to address displays in view-only mode. To add a new billing address, see Assigning an Alternate Billing Address.

4. In the **Name** field, enter the name of the customer or the job site to which to ship the materials.
5. In the **Address** field, enter the job site or other shipping address.
6. Press **Esc** twice to return to the Sales Order Entry Header screen.

Applying Payments to Sales Orders

Use the Sales Order Entry Totals screen to apply payments or charges to an order generation. The system displays this screen if payment is required with the order, such as a COD or cash only order, or for those customers who have exceeded their credit limit. If a payment is required for an order, you cannot print the ticket for the order until you enter the payment information.

By default, the Sales Order Entry Totals screen displays the earliest available order generation, but you can change the ship date to display the totals for another order generation, or you can include all generations on a single invoice.

> **Note:** If you directly access the Totals screen from another area of the system, such as Warehouse Picking Confirmation, you may not be able to select other order entry screens.

To apply a payment:

1. Create or open a sales order, and display the Totals screen.

   If payment is required up front, the Sales Order Entry Totals screen displays after you verify the order generation statuses. Otherwise, use the **Totals** hot key from either the Sales Order Entry Body or Sales Order Entry Status screen to display it.

2. Verify that the payment's correct ship date generation is displayed. If the **ShipDate** field shows a different date generation, use the **Chnge ShpDate** hot key to select the correct generation from a list.

3. Review and edit the following fields, as needed:

   Note: Some fields are view-only.

Field	Description
Total Freight	The compensation paid for the transportation of all items on the order. You can use this field to override the system-generated freight charges for the entire order. The system prorates the amount for each order generation according to its percentage of the total order amount, excluding any direct shipment generations, and uses a **T** to identify that they were updated. If you change the default freight amount for an order generation [identified with an asterisk (*****)] before changing the total freight amount, the system does not override your change. Instead, it subtracts your freight amount from the total freight amount and prorates the charges over the remaining open generations. Similarly, if you change the total freight amount and then change the freight amount for the current generation, the system changes the **T** to an asterisk (*****), subtracts your freight amount from the total, and prorates the charges over the remaining open generations. If you allocate the total freight over multiple generations, invoice the order, and then return the order to an open status, the system does not reallocate the total freight. You must change the freight amounts manually for each generation.
Total Handling	The compensation paid for the packaging and shipping of items on the order. Handling overrides operate in the same way as freight overrides. See the **Total Freight** comments above.

Field	Description
Subtotal	The sum of the prices of each item on this order ship date, before freight, handling, tax, and other charges are applied.
Freight	The compensation paid for the transportation of the items on the current order generation. Shows the sum of any default ship via and product freight charges. You can manually override the charges, if needed. The system uses an asterisk (*****) to identify that the amount changed. Freight and surcharges are applied to the first invoiced order generation. **Note:** Add freight charges only if they are specific to the current (unprocessed) order generation.
Handling	The compensation paid for the packaging and shipping of items on the current order generation. Handling overrides operate the same way as freight overrides. See the **Freight** comments above.
Sales Tax	A charge the government imposes on items purchased within a defined jurisdiction. Note: *If* a handling charge is on the order - and *if* handling is taxable in the tax jurisdiction - the amount of sales tax shown in this field may not be correct. The tax amount is processed upon invoicing and will be billed correctly. However, if you need to view the correct tax while in this screen, select the **Freight** hot key and then press **Esc**. When you return to the Totals screen, the tax amount is updated.
F.E.T.	The amount of Federal Excise Tax, if any.
Disc Taken	The amount of any discount received for items on this order.
Less Paymt	The amount the customer has paid you.
Unearned	Income not gained by labor, service, or skill. This type of income is posted to an Unearned Revenue general ledger account.
Total	The total amount the customer owes for this ship date.

4. Use one of the following hot keys to navigate to the payments section:

To...	Use this hot key...
apply a cash payment	**Cash**
apply a payment by check	**Check** **Note:** If your company is using Check Authorization, see Authorizing Payments by Check for more information on accepting a check.
apply a credit card payment	**CredtCrd**

5. Enter the payment amount to do one of the following:

If...	Then...
you entered a cash payment	continue with the next step.
you entered a payment by check	continue with the next step. If the customer is not authorized to pay by check and you get an error message, ask the customer for a different type of payment.
you entered a credit card payment	the Credit Card Authorization screen displays. Enter the information and press **Esc** to return to the Sales Order Entry Totals screen. Continue with the next step. **Note:** The system may prompt for a credit card verification (CCV) identification number from the credit card. This is a three-digit number located on the back of the card.

6. To enter additional details about the payment, select the **Cash Recvd** field and press the **Up Arrow** to display the following fields:

Field	Description
Payment Date	The date the customer made the payment. The system populates this field with today's date.
Payment Time	The time the customer made the payment. Press the Down Arrow to populate the field with the current time.
Collected By	The user ID of the person who entered the payment. The system populates this field with the user ID of the person currently logged on to this terminal.
Collect Loca	The site or store location at which payment was made.
Collect Brch	The branch that will receive credit for the sale.

7. Press **Esc** to return to the Sales Order Entry Totals screen.
8. Use the **ApplyPymt** hot key to update the **Less Paymt** and **Total** fields.

   The **Amt Over/Under** field shows any remaining amount due as a positive number, or any overpayment as a negative number. Any unused discount amount displays in the **Available Disc** field, provided payment was made before the payment terms date.
9. Do the following things, as needed:

If...	Then...
the Payment Application screen displays	edit the discount or payment amounts, as needed, and then select the correct order generation. Press **Esc** to return to the Sales Order Entry Totals screen.
prompted to select the branch that will take credit for the payment	select the correct branch and press **Enter**.

10. Use other hot keys, as needed:

To...	Use this hot key...
add or edit administrative details for the order, such as a customer PO number	**Headr** The Sales Order Entry Header screen displays.
view totals for a different order generation	**Chnge ShpDate** A selection list displays. Select the ship date and press **Enter**.
review payment activity	**TotSUm** The Order Totals Summary screen displays.
review a payment on a different order generation	**Pymts** A selection list displays. Select the payment to review and press **Enter**.
enter a payment on a different order generation	**Pymts** A selection list displays. Select **New** and press **Enter**. Follow steps 4-8 above.
enter the customer's default credit card information for pre-authorization purposes	**CC Info** The Credit Card Default Billing Information screen displays.
indicate whether to have the customer pay all, partial, or no freight charges on this order	**Freight** The OE Freight Distribution screen displays.
review or edit the order	**Body** The Sales Order Entry Body screen displays.
review totals for the entire order	**ViewAll Totals** The View All Totals screen displays.
add freight charges to a box of items in an order generation	**Box** The Box screen displays.
redistribute lot order totals	**Lot Tots** The Lot Totals screen displays.
reprint a point of sale receipt	**Receipts** The Payment Viewing screen displays.
capture the customer's signature	**Sig** The Electronic Signature Capture companion product displays.
override a credit hold, if you have authorization	**Credit Override**

11. Press **Esc** to return to the Sales Order Entry Body screen.

    If you have the Point of Sale (POS) companion product, a receipt prints, and, depending on your system setup, your cash drawer opens. If the payment was by credit card, a credit card slip prints for the customer to sign, and the system will ask if you want to print a second receipt for the customer. If **Y** (yes), the receipt prints.

Opening the Cash Drawer

Use the Open Cash Drawer prompt to open the cash drawer without printing a receipt. You would typically use this to remove your cash, checks, credit card receipts, and coupons from the drawer for end-of-day processing.

Only authorized users can open the cash drawer.

To open the cash drawer:

1. From the **System > Custom > Add-On Products** menu, select **Open Cash Drawer** to display a prompt.
2. At the "Are You Sure You Want To Open Cash Drawer (Y/N)?" prompt, type **Y** (Yes) to do one of the following:

If...	Then...
you are authorized to open the cash drawer	the cash drawer opens.
a password prompt displays	contact your manager or press **F12** to exit.

Reprinting Point-of-Sale Receipts

Use the Payment Viewing screen to reprint receipts. This is useful when printer paper does not feed correctly or if the payment has changed in some way.

To reprint a receipt:

1. Open a sales order.
2. If the selection list displays, select the payment and press **Enter** to display the Payment Viewing screen.

   Alternately, use the **Totals** hot key to display the Sales Order Entry Totals screen, then use the **Receipts** hot key.
3. Verify that you are viewing the correct payment by using the **ShipDate** hotkey to display a list of valid ship dates for this order. Select the correct ship date and press **Enter** to return to the Payment Viewing screen.
4. Review information on the Payment Viewing screen, as needed. For more information, see Viewing Sales Order Payments.
5. Use the **Receipt** hot key to reprint the receipt.

   Note: Depending on your system setup, your cash drawer may also open.

Distributing Freight and Handling Charges

Use the OE Freight Distribution screen to override freight and handling charges and distribute them to general ledger accounts. Freight or handling that is not considered directly billable to the customer is included in your company's overhead and added to the order's cost of goods sold (COGS). As a result, a sale in which freight is not directly charged to the customer reduces the sales representative's commission.

To distribute freight and handling charges:

1. Create or open a sales order and display the order's Totals screen.
2. Use the **Freight** hot key to display the OE Freight Distribution screen.
3. Complete the following fields, as needed:

Field	Column	Description
Incoming Freight	**Billable**	The freight charges you pay the vendor when they ship the item to you. You can charge this amount to the customer through A/R. To credit a customer for freight, enter a negative amount. If the customer is freight-in exempt and you enter an incoming billable freight charge, the system issues a warning that the customer is exempt. Press **Enter** to acknowledge the message and either leave the charge as entered, change it, or delete it. The system will tax for freight if either Freight In or Freight Out is selected as the tax code's general ledger ID.
Incoming Freight	**Expense**	The freight charges you pay the vendor when they ship the item to you. You can expense this amount to the item's cost of goods sold (COGS) G/L account. To credit a customer for freight, enter a negative amount. When you expense freight, you can better estimate the gross margin for the item. The system will tax for freight if either Freight In or Freight Out is selected as the tax code's general ledger ID.
Outgoing Freight	**Billable**	The freight charges you pass on to a customer when you ship the item to them. To credit a customer for freight, enter a negative amount. If the customer is freight-out exempt and you enter an outgoing billable freight charge, the system issues a warning that the customer is exempt. Press Enter to acknowledge the message and either leave the charge as entered, change it, or delete it. The system will tax for freight if either Freight In or Freight Out is selected as the tax code's general ledger ID.

Field	Column	Description
Outgoing Freight	**Expense**	The freight charges you absorb when you ship the item to the customer. You can expense this amount to the item's cost of goods sold (COGS) G/L account. To credit a customer for freight, enter a negative amount. When you expense freight, you can better estimate the gross margin for the item. The system will tax for freight if either Freight In or Freight Out is selected as the tax code's general ledger ID.
Incoming Handling Charges	**Billable**	The handling charges you pay the vendor when they ship the item to you. You can charge this amount to the customer through A/R. To credit a customer for handling charges, enter a negative amount. The system will tax for handling if either Handling In or Handling Out is selected as the tax code's general ledger ID.
Incoming Handling Charges	**Expense**	The handling charges you pay the vendor when they ship the item to you. You can expense this amount to the item's cost of goods sold (COGS) G/L account. To credit a customer for handling charges, enter a negative amount. When you expense handling, you can better estimate the gross margin for the item. The system will tax for handling if either Handling In or Handling Out is selected as the tax code's general ledger ID.
Outgoing Handling Charges	**Billable**	The handling charges you pass on to a customer when you ship the item to them. To credit a customer for handling charges, enter a negative amount. The system will tax for handling if either Handling In or Handling Out is selected as the tax code's general ledger ID.
Outgoing Handling Charges	**Expense**	The handling charges you absorb when you ship the item to the customer. You can expense this amount to the item's cost of goods sold (COGS) G/L account. To credit a customer for handling charges, enter a negative amount. When you expense handling, you can better estimate the gross margin for the item. The system will tax for handling if either Handling In or Handling Out is selected as the tax code's general ledger ID.

4. Press **Esc** to return to the Totals screen. Any amounts you overrode are marked with an asterisk **(*)**.

Applying Freight Charges by Box

Use the Box screen to apply freight charges to an entire box of items, rather than to individual products.

To apply freight charges by box:

1. Create or open a sales order and display the order's Totals screen.

   If payment is required up front, the Sales Order Entry Totals screen displays after you verify the order generation statuses. Otherwise, use the **Totals** hot key from either the Sales Order Entry Body or Sales Order Entry Status screen to display it.
2. Use the **Box** hot key to display the Box screen.
3. In the **Freight Amt** field, enter the freight charges for the box of items. The value in the **Total** field changes accordingly.
4. Press **Esc** to return to the Sales Order Entry Totals screen. The system updates the amount in the **Freight** field and indicates the change with an asterisk (*****).

Reviewing Sales Order Totals

Because the Sales Order Totals screen displays the totals for only one generation at a time, you can use the View All Totals screen to display the totals for each generation on the order broken down by category, such as subtotals, sales tax, costs, or profit margin. This gives you a complete picture of all charges on the order.

To review order totals:

1. Create or open a sales order and display the order's Totals screen.

   If payment is required up front, the Sales Order Entry Totals screen displays after you verify the order generation statuses. Otherwise, use the **Totals** hot key from either the Sales Order Entry Body or Sales Order Entry Status screen to display it.

2. Use the **ViewAll Totals** hot key to display the View All Totals screen.

   Note: *Only* lot item totals for master job bids are included on this screen. To schedule lot item materials for shipments, use the **Lot Order Ledger** hot key to display the Lot Order Ledger screen.

3. Use the **View** hot key to display a selection list.
4. Select one of the following column views and press **Enter**:

   Note: Authorization is required to view some columns.

   - Freight / Handling

   Review the following fields:

Field	Description
ShipDate	The date the product is scheduled for transport to the customer.
SubTotal	The sum of part of a series of item prices.
Freight	The compensation paid for the transportation of the items on the current order generation. Shows the sum of any default ship via and product freight charges.
Handling	The compensation paid for the packaging and shipping of items on an order generation. Shows the sum of any default ship via and product handling charges.
Sales Tax	A charge the government imposes on items purchased within a defined jurisdiction.
Total	The total amount of this order generation.
Dep Reqd	A portion of the full price of one item, paid at the time of purchase or delivery, with the balance to be paid later. Enter the deposit amount, if any.

- Cost / Margin $

Review the following columns:

Field	Definition
ShipDate	The date the product is scheduled for transport to the customer.
SubTotal	The sum of part of a series of item prices.
Cost	The total expense incurred during the manufacture or procurement of the product, including administrative and marketing costs.
GM$	The dollar amount your company will receive as profit as a result of the sale of the item, based on the cost.
GP%	The percentage of the total cost your company will receive as profit a result of the sale of the item, based on the cost.
Total	The total amount of this order generation.
Dep Reqd	A portion of the full price of one item, paid at the time of purchase or delivery, with the balance to be paid later. Enter the deposit amount, if any.

- COGS / Margin $

Review the following columns:

Field	Definition
ShipDate	The date the product is scheduled for transport to the customer.
SubTotal	The sum of part of a series of item prices.
COGS Cost	The true expense incurred during the manufacture or procurement of the product, including administrative and marketing costs.
GM$	The dollar amount your company will receive as profit as a result of the sale of the item, based on the cost of goods sold.
GP%	The percentage of the total cost your company will receive as profit a result of the sale of the item, based on the cost of goods sold.
Total	The total amount of this order generation.
Dep Reqd	A portion of the full price of one item, paid at the time of purchase or delivery, with the balance to be paid later. Enter the deposit amount, if any.

- CPlan $ / CPlan %

Review the following columns:

Field	Definition
ShipDate	The date the product is scheduled for transport to the customer.
SubTotal	The sum of part of a series of item prices.
CPlan$	The commission the sales representative will receive per item.
CPlan%	The percentage of the unit price the sales representative receives as a commission.

Field	Definition
COGS GP%	The amount of profit your company will receive as a result of the sale of the item, based on cost of goods sold.
Total	The total amount of this order generation.
Dep Reqd	A portion of the full price of one item, paid at the time of purchase or delivery, with the balance to be paid later. Enter the deposit amount, if any.

5. Press **Esc** to return to the Sales Order Entry Totals screen.

Viewing Sales Order Totals Summaries

Use the Order Totals Summary screen to view a running total of all of the payment activity on an order. The screen works for multiple generations, direct shipment orders, lot items, returns, deposits, and cash payments, and displays past shipments, payments, and future generation totals. For example, you can determine the original amount due on the order generation, how much a customer has paid to date, and how much the customer still owes.

This screen can be particularly helpful in showroom environments, where orders are multi-generation and remain open over long periods of time. The screen shows a running balance due and lets you drill down to view any order generation, or quickly print the summary. You can also access an A/R Inquiry that displays the customer's current account information.

To view the order totals summary:

1. Create or open a sales order and display the order's Totals screen.

   The Totals screen displays automatically after you enter the Status screen information for customers required to pay now. If needed, display the Totals screen using the **Totals** hot key on the order's Body or Status screens.

2. Use the **TotSum** hot key to open the Order Totals Summary screen.
3. Review the following columns of information, as needed:

Column	Displays each generation's...
Order ID	transaction number, whether an order generation, cash receipt, etc.
Br	branch where transaction occured.
Date	transaction date.
Status	order status, or transaction status such as Invoice or Cash Receipt.
Orig Amt	original transaction amount.
Apply Amt	amounts applied to the transaction. Use **Show** hot key to see multiple applied amounts.
Bal Due	current running balance. The final balance displays at the bottom.

4. Use hot keys as needed.
5. Press **Esc** to close the Order Totals Summary screen, and return to the Totals screen.

To...	Use this hot key...
display the selected order in view-only mode	**View** Press Esc to move through order screens.
show the Detail view, which expands rows of transactions nested (and indented) below accompanying transactions	**Show** Choose Summary view to collapse the nested rows.
list all receipts for the selected generation	**Receipts** Authorized users can use the screen's View hot key to open the Cash Receipts screen to view transactions.

To...	Use this hot key...
view order totals	**Totals** The Totals screen displays.
view the customer's current account details	**A/R Inquiry** The A/R Inquiry screen displays.
print summary information	**Print**

Viewing Sales Order Payments

Use the Payment Viewing screen to view a payment on an order, without having to open and navigate to the order's Totals screen. This is handy when you need to quickly answer customer questions about the payment details.

To view a sales order payment:

1. From the **Orders** menu, select **Sales Order Entry**.
2. In the new order's **Ship To** field, enter the name of the customer.
3. In the transaction selection list, select **A/R Items**.
4. In the invoice selection list, select a payment generation. You can identify these by the *Payment* indicator.
5. In the ship date selection list, select the payment generation, and then press **Enter**. This displays the Payment Viewing screen.
6. Review the detail fields, as needed:

Field	Specifies...
Payment #	invoice generation number for the payment.
Post Date	date payment was posted.
Payment Amount	amount of payment.
Open Amount	any open amount for this payment generation (but not for entire order).
User ID	ID of person accepting payment.
Location	location of person accepting payment.
Time	time of payment.
Cash Amount	amount paid by cash.
Check Amount	amount paid by check.
Check #	any check number recorded.
CCard Amount	amount paid by credit card.
CCard #	credit card number.
Gift Cert Amnt	amount paid by gift card or gift certificate.
Gift Cert #	number of the gift card or gift certificate used for the payment.

7. Use hot keys as needed:

To...	Use this hot key...
view the order's change log	**Change Log** Dates and times for all order changes (such as payments) are listed.

To...	Use this hot key...
select another ship date	**ShipDate** Select any other payment generation, which displays on the Payment Viewing screen. Or, select an open generation, which instead opens the order with that generation displayed.

Reviewing Customers' Sales Activity

Perform a sales inquiry to get a quick overview of a customer's account activity. The inquiry shows the customer's order and balance information, along with its contact information. You can list open orders, invoiced orders, or bids. You can also drill down to view or edit an order.

The screen title changes, depending on the inquiry type. In the example below, for instance, the inquiry is about open orders, not A/R items or credits.

To perform a sales inquiry about a customer:

1. From the **Orders > Inquiries** menu, select **Sales Inquiry**.
2. In the **Customer Name** field, specify the customer you are inquiring about.
3. Review the sales inquiry fields, as needed. Fields vary depending on hot key use.

Field	Displays...
Customer Name	customer's name and address.
Contact, Phone #	customer's first three Customer Maintenance contacts and phone numbers.
Order #, Invoice #, or Bid #	order numbers, invoice numbers, or bid numbers. Orders and bids sort by number, while invoices sort by posting date. Use hot keys to change the listing and field name.
Customer PO #	any purchase order numbers.
Br	pricing branch.
Balance	open amount on each order or A/R invoice, or amount of each bid.
Ship Dt	expected shipping date for each order or bid.
Avail Dt	available date (or Now) for each order or bid.
Sts	order status for each order or bid.
Via	ship via selection for each order or bid.
Posting Dt	date each A/R item was posted to the general ledger.
Product	product you specify. Use to list only orders with that product.

4. Use hot keys, as needed.

To...	Use this hot key...
list open (unshipped) orders (the default)	**Open Orders**
list items already invoiced	**A/R Items**
list bids	**Bids**
open the selected transaction for viewing	**View**
open the Detail Scheduling screen for the selected order or bid	**Delivery**
open the selected transaction for editing	**Edit**

To...	Use this hot key...
toggle the display of the **Product** field, which lets you narrow the list of orders to those that contain a specific product	**Product; No Product**
list credit orders, which are used for returns	**Cred**
change the currency in which sales activity displays	**$** **Note:** When you display sales activity in any currency other than the U.S. Dollar, the selected currency displays next to the **$** hot key.

5. Press **Esc** to perform a new inquiry, or press **Esc** again to close the inquiry screen.

Reviewing Customers' Credit Standings

Use the Customer Credit Inquiry screen to view totals of a customer's past due invoices, available credit, and current credit limits. The screen is divided into two rows. The first row shows the limits, and the second row shows the actual amounts.

The credit information shown in this screen may – or may not – take into account open orders, depending on how the Include Open Orders In Credit Balance control maintenance record is set.

To review a customer's credit:

1. Create or open a sales order and display the order's Header screen.
2. Use the **Add'l** hot key, and then the **Cust Credit Inquiry** hot key, to display the Customer Credit Inquiry screen.
3. Review the following fields:

Field	Description
Past Due	The top row shows the customer's total dollar amount on past due invoices. The bottom row shows the past due amount for this order.
Credit Limit	The top row shows the customer's credit limit. The bottom row shows how much credit the customer has used.
Order Limit	The top row shows how much of the credit limit the customer can spend per order. The bottom row shows how much the customer has spent on this order.
Job Limit	The top row shows how much the customer can spend per job or project. The bottom row shows how much the customer has spent on the job for this order.

4. Press **Esc** twice to return to the order's Header screen.

Running the Customer Product Sales History Report

Run the Customer Product Sales History Report to see a history of all the products a customer purchased from you over any year's period. You can limit the report to certain price lines or product statuses, if needed. Because of the thoroughness of the report, it takes considerable time to complete.

The report columns list each product's:

- Part number, and any customer-specific part number.
- Product description, and unit of measure.
- Total number of products ordered.

To run the Customer Product Sales History Report:

1. From the **Orders > Reports** menu, select **Customer Product Sales History**.
2. In the **Br/Tr/All** field, enter the branch or territory for which you want to generate a report. Enter **ALL** to generate reports for all branches and territories.
3. In the **As of Date** field, press **F10** and specify the calendar date that determines which transactions are reported. Transactions with dates within the prior 12 months are reported. You can also specify the date using variable dating.
4. In the **Customer Level** field, press **F10** and specify whether to report on the customer:
   - **Bill-To**
   - Ship-To
5. Specify the customer name:
   - If you specified a Bill-To customer level, enter the customer name in the **Bill-To Customer** field.
   - If you specified a Ship-To customer level, enter the customer name in the **Ship-To Customer** field.
6. In the **Directs (Inc/Exc/Only)** field, press **F10** and specify whether direct vendor shipments are included in the report, or whether to report on directs Only. Choose from:
   - **Include**
   - Exclude
   - Only
7. If you want to limit the report to products with customer-specific part numbers, enter **Y** in the **Select Customer Specific Only (Y/N)** field. The default is **N**.
8. Set options, if needed, and generate the report.

Gift Cards and Gift Certificates Overview

Gift cards and gift certificates are set up as sellable products in your system and sold in Sales Order Entry like other products. Gift cards can be small, plastic cards, or gift certificates that you hand write or print on your computer. The method you choose to use for your gift cards or certificates does not change the way you set the products up or how you sell the products in the system.

To get started selling and accepting gift cards and gift certificates, see the following topics:

- Setting Up Gift Cards and Gift Certificates
- Selling Gift Cards and Gift Certificates
- Accepting Gift Cards and Gift Certificates as Payment

As you sell gift cards and gift certificates, the system posts the amounts to the general ledger liability account you designate for gift cards/certificates. As customers redeem their gifts, the amounts are posted to this account, thus reducing the total account amount. The system deducts from this account rather than the cash box because unredeemed gift cards/certificates are carried as a liability. As gift cards and gift certificates expire, you can clear the expired amounts from your general ledger using Journal Entry so you no longer carry the liability on your books. Use expiration dates for your gift cards/certificates so you do not carry the amount as a liability for an undetermined amount of time.

Setting Up Gift Cards and Gift Certificates

To sell gift cards and gift certificates and to accept them as payment, complete the following setup.

Creating Gift Card/Certificate Products

To sell gift cards/certificates on sales orders, you need to set up a gift card/certificate miscellaneous charge product in Product Maintenance with the following specific settings:

- General ledger account set to an account that is specific for gift cards/certificates.
- Status of **MiscCharg**.
- Sell unit of measure of one each (1 ea).
- Tax exempt. You do not collect tax on gift cards/certificates sales.
- Gift card/certificate maintenance settings described below.

You can set up multiple gift card/certificate products in your system. For example, you might want to set up products for predetermined amounts, such as $25 and $50. You can also set which branches can sell the gift card/certificate products in your system using the accessible branches settings in Product Maintenance.

Important: Once you set a product to be a gift card product, you cannot change it back to a non-gift card product.

To indicate that a miscellaneous charge product is a gift card/certificate:

1. Create or open the miscellaneous charge product you are using for gift cards/certificates.
2. Use the **Add'l** hot key and then the **Gift Card Maint** hot key to display the Gift Card Maintenance screen.
3. Enter the following information for the product and press **Esc** to return back to the Product Maintenance screen:

Field	Description
Gift Card	Enter **Y** to indicate that this product is a gift card/certificate. Setting this field to **Y** tells the system that when this product is added to an order, the order requires complete payment for that product.
Expire Days	Enter the number of days the gift card/certificate is valid after it is placed on a sales order. Use expiration dates for your gift cards/certificates so you do not carry the amount as a liability for an undetermined amount of time.
Verify	Enter **Y** in this field to require the order writer to enter the gift card/certificate number a second time when placing this product on a sales order. Gift card/certificate numbers can be long and cumbersome to enter. Setting this field to **Y** decreases the risk of entering a gift card/certificate number incorrectly on the sales order. Entering a number incorrectly can result in a customer not being able to redeem their gift card/certificate.

4. Press **Esc** to save your changes and exit the screen.
5. Press **Esc** again to save the product record.

For more information about creating miscellaneous charge products, see Creating Miscellaneous Charge Products in the Product Maintenance documentation.

Creating the Gift Card/Certificate General Ledger Account for Posting

To sell and accept gift cards/certificates as payment, you need to set up a miscellaneous charge general ledger account. Set up the account as the following:

- A liability account
- Without the **C/R Adjustment Allowed** option selected. This account cannot be flagged for cash receipts, as all gift cards/certificates must be paid for at the time of purchase.
- **Misc Charge Allowed** option selected.

You can set up multiple general ledger accounts for gift cards/certificates. For example, if you give gift cards/certificates to employees as incentive bonuses, you might track those in an account separate from gift cards/certificates that you sell.

Authorizing Users to Override Expired Gift Cards/Certificates

Assign the GIFT.CERTIFICATE.EDIT authorization key to each user that you want to be able to accept expired gift cards/certificates as payment. If a user is not assigned this authorization key and enters an expired gift card/certificate as payment, the system does not accept the payment. However, an authorized user can override the expiration.

Selling Gift Cards and Gift Certificates

Gift cards/certificates are set up in your system as sellable, miscellaneous charge products, so you can enter them in Sales Order Entry like you would other products. However, gift cards/certificates have the following restrictions:

- When selling more than one gift card/certificate on an order, enter each one as a separate line item.
- All gift card/certificate sales require payment of cash, credit, or check when the customer places an order. You cannot place cards/certificates on a credit account.

To sell a gift card/certificate:

1. Create or open a sales order and display the Body screen.
2. In the **Qty/Unit** column, type **1** and press **Enter**.

   Note: If you are selling more than on gift card/certificate, enter each one as a separate line item on the order.

3. In the **Product Description** column, enter the gift card/certificate product you want to sell.

   Your company might have more than one product set up for gift cards/certificates. For example, you might have separate products set up for predetermined gift card/certificate amounts.

4. At the **Gift Card Number** prompt, type the number on the gift card/certificate you are selling and press **Enter**. If you are prompted to verify the number, type it again. The two entries must match exactly.

   Gift card numbers are typically printed on the back of the card.

   If you have gift cards that you can scan with a barcode reader, scan the card at both prompts to collect the card's number.

   Note: Each gift card/certificate must have a unique number. If you enter a number of a card/certificate that has already been sold, the system alerts you and deletes the line from the order. Re-enter the gift card/certificate using a number that has not been issued.

5. In the **Unit Price** column, enter the gift card/certificate amount, if it does not display for you.

   Gift card/certificate products that have pricing set up, for example, those that are sold in pre-determined denominations, display with a unit price listed.

6. Add additional gift card/certificate products or other products to the order, as necessary.
7. Press **Esc** to display the order's Status screen and change the status of the order generation for the gift cards/certificates to **Pick Up Now**.

8. Press **Esc** to display the order's Totals screen and enter the cash, check, or credit card information for the amount due for the gift card/certificate total.
9. Press **Esc** to exit the Totals screen and process the order as usual.

Accepting Gift Cards and Gift Certificates as Payment

If your company sells gift cards or gift certificates, you can accept them as a form of payment directly in the Sales Order Entry Totals screen.

The system debits the liability general account set up for the gift cards/certificates instead of the cash box for payments made with gift card/certificate balances.

To accept a gift card/certificate as payment for an order through the Totals screen:

1. Create or open a sales order and display the Totals screen.
2. In the **Gift Recvd** field, enter the amount from the gift card/certificate to apply to the order.

   You can enter an amount that is less than the amount due on the order, if that is all that the gift card/certificate has available. You can also enter less than the total available on the gift card/certificate, if the order is for less than what is available on the gift card/certificate.

   If you have gift cards that you can swipe in your card reader, swipe the card. The system applies the amount on the card to the order.
3. In the **Gift#** field, enter the gift card/certificate number.

   If you scanned the barcode of the card in the previous step, the system populates this number for you.
4. If the total amount due for the order is greater than the gift card/certificate amount, apply another form of payment for the remainder of the balance due.

   You can accept multiple gift cards/certificates as payment on the order using the **Pymts** hot key.
5. Press **Esc** to exit the Totals screen, and continue processing the order as usual.

Running the Outstanding Gift Card Report

As you sell gift cards and gift certificates, the system posts the amounts to the general ledger liability account you designate for gift cards/certificates. As customers redeem their gifts, the amounts are posted to this account, thus reducing the total account amount. The system deducts from this account rather than the cash box because unredeemed gift cards/certificates are carried as a liability.

Use the Outstanding Gift Card Report to determine which gift cards/certificates have not been redeemed and are included in the general ledger balance. Using this report, you can also determine which gift cards/certificates have expired. You can then clear the expired amounts from your general ledger using Journal Entry so you no longer carry the liability on your books.

To run the Outstanding Gift Card Report:

1. From the **Reports > End of Month Reports #2** menu, select **Gift Card Report** to display the Outstanding Gift Card Report screen.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories you want to include in the report.
3. In the **Sort By** field, select how you want the contents of the report sorted, for example, by sales order number or by expiration date.
4. In the **Do Not Expire** field, select whether you want to include, exclude, or run the report only for gift cards/certificates that do not have an expiration date.
5. In the **Start Date** and **End Date** fields, enter the date range for which to run the report.

   For example, if you want to see outstanding gift cards for a particular year, enter the first date of the year in the **Start Date** field and the last date of the year in the **End Dat**e field. You can then contact your customers about expiring cards, or use the information to enter journal entries to remove the expired amounts from the general ledger.
6. Set options, if needed, and generate the report.

Index

T

V

W

